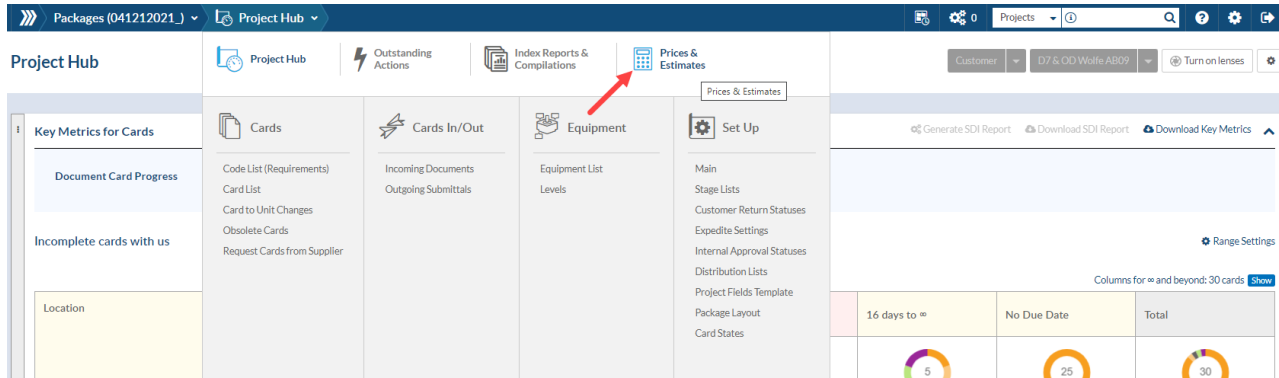


Prices and Estimates

10/01/2025 3:04 pm MDT

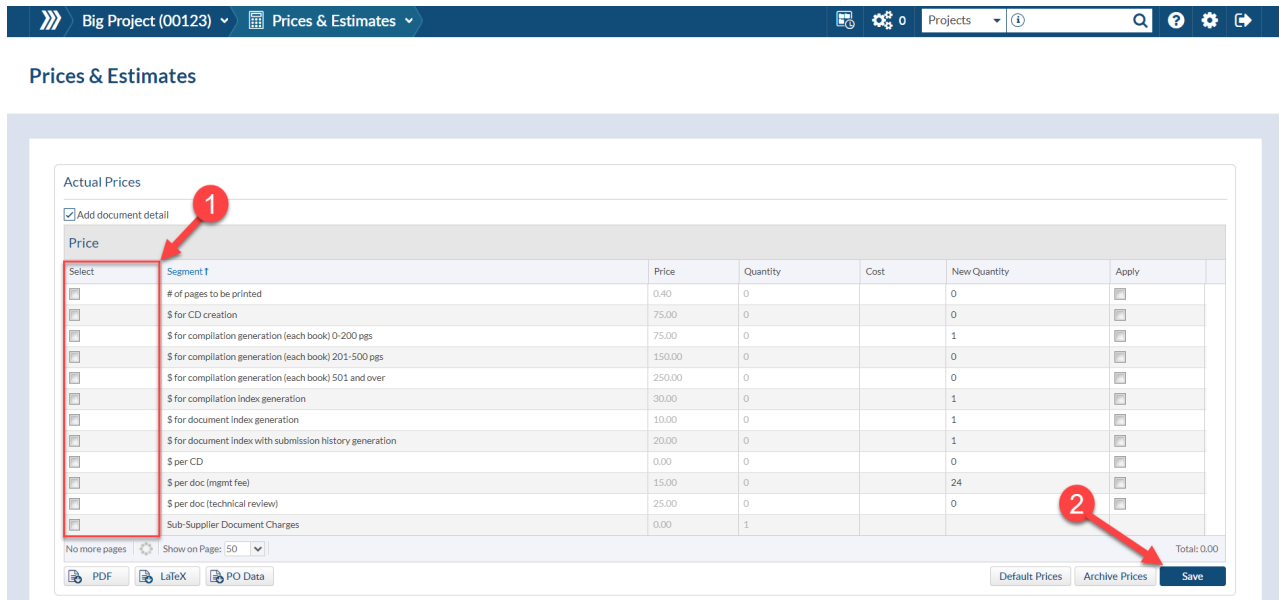
The **Prices & Estimates** feature is designed to provide a detailed pricing estimate for the documentation fees related to a project.

Once the project has been set up with the required information (Doc Codes with Levels and Equipment) and the cards have been created, navigate to the **Prices & Estimates** screen from the project menu to begin creating an estimate.



Configuring an estimate

On the **Prices & Estimates** screen, there are a number of price segments (lines) to choose from in the **Actual Prices** grid.



To add a segment to the estimate, (1) select it from the **Actual Prices** grid and (2) select **Save**. Further information may need to be filled out on the **Code List** or **Edit Compilations** screen, depending on the segments being used:

- **# of pages to be printed:** Managed from the Code List in the Est. Pages, Printed for Review (copies) and Printed Final columns (copies)
- **\$ for CD creation:** Managed from the Edit Compilations screen - select CD required and enter the number of CD's

o

CD Copy

☒ CD Required

CD Copies Number: 2

- **\$ for compilation generation (each book) 0-200 / 201-500 / 501 and over pgs:** Users can enter the estimated pages in the Est Pages column on the Code List for the compilation codes. If the compilation has been created, DocBoss will use the actual page numbers to select the line in the **Actual Prices** grid that the compilation applies to.
- **\$ for compilation index generation:** Managed based on Doc Code list codes identified as Compilation TOC's
- **\$ for document index generation & \$ for document index with submission history generation:** Managed based on Doc Code list codes identified as SDI Reports
- **\$ per CD:** Enter price and quantity directly on the grid
- **\$ per doc (mgmt fee):** Automatically calculated based on the total number of cards on the project
- **\$ per doc (technical review):** Managed based on number of Doc Codes with "Tech Rev" selected on the Code List.
- **Sub-Supplier Document Charges:** Managed in the "Charges" column on the code list. The intended use is to pass on the cost of sub-supplier document charges. This option is only available for codes with the type "Generated (Sub-Supplier)". If the doc code type is changed to anything else, the charges field will clear.
- **Clarifications and exceptions:** This is a text field below the **Actual Prices** grid. Add any additional data about the document requirements here.

If the information in the project has changed since a price segment was added to the estimate, its row will be highlighted in red. To update the estimate to match the current information in the project, check the box in the **Apply** column of the **Actual Prices** grid, and then select **Save**.

Editing prices

To edit the prices that will appear on the estimate, click within the **Actual Prices** grid to change the values, then select **Save**.

To change the default prices (either globally or per customer), or add additional pricing segments, see [here](#).

Outputs

There are three formats available for exporting pricing and estimate data. These options are available from the bottom left of the pricing grid.

<input type="checkbox"/>	\$ per doc (mgmt fee)
<input type="checkbox"/>	\$ per doc (technical review)
<input type="checkbox"/>	Sub-Supplier Document Charges

1 more pages

2 Show on P 50

3

PDF

LaTeX

PO Data

1. **PDF** - This is the standard output. By default it includes a detailed breakdown of the doc codes. To remove this, uncheck the "Add document detail" option (located above the pricing grid).
2. **LaTeX** - This format can be used for integration with 3rd party estimate/quote systems.

3. **PO Data** - This document includes any Sub-Supplier Document Charges that have been configured on the project. It can be included in the purchase order(s) to help ensure all document fees are properly accounted.

Note: In order to produce an estimate document, the Estimation template must be selected in the project. From the "Main" tab of the **Project Configuration** page, select the template to be used under the "Prices and Estimates" section.

Valve Project (0001234) Project Configuration

Set Up Project Configuration

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

Project Profile

- Project Profile
- Doc Code and Status Lists
- Users and Key Contacts

Card Settings

- Turn Around Days Using defaults
- Auto-Numbering Format
- Other Settings Using defaults
- Revision Numbering

Other Data

Templates

- Cover Pages and Stamps
- Transmittal
- Prices and Estimates Using defaults
 - ☒ Delivery output
 - Estimation template
 - Default Estimate Template (system)
- Submittal Defaults
 - Numbering Using defaults
 - File Naming Pattern Using defaults
 - Headers and Footers Using defaults

Archiving price history

Different versions of pricing can be stored using the **Archive** function. To save a record of the current pricing setup, (1) select **Archive Prices** (on the bottom right of the pricing information grid). To view pricing information which was previously archived for the project, (2) select the name of the desired history entry. This will open a page containing the details of the archived pricing.

\$ per doc (technical review) 25.00 0 0

Sub-Supplier Document Charges 0.00 1

No more pages Show on Page: 50

PDF LaTeX PO Data

Default Price Archive Prices Save

Clarifications and Exceptions

Please note, you have to regenerate PDF document to update 'Clarifications and Exceptions' section in it by saving pricelist

Archive

Price Archive

Name	Created	Total	Tools
Archive (2023-02-10)	2023-02-10 13:49:48	0.00	

No more pages Show on Page: 20

Document Requirements additional definitions

- **Approval Required:** On the proposal Doc Code grid, a check in this column will put the word "yes" in the approval column for the Doc Code.

- **Highlight Delivery:** If using the quote module, this column can be checked to highlight delivery discrepancies b/w customer request, and actual delivery expectation. Attention can be called to the discrepancy by the highlight on the output.
- **Charges:** If you or your sub-suppliers charge for documents, this feature allows you to group all of your document billing in one location. You can add model numbers, and create pricing. DocBoss automatically determines how many documents should be billed, based on the card and the manufacturer, and adds these prices to the process and estimates output. This option is only available for doc codes using the sub-supplier type.

For further information, click to see our video [here](#).
