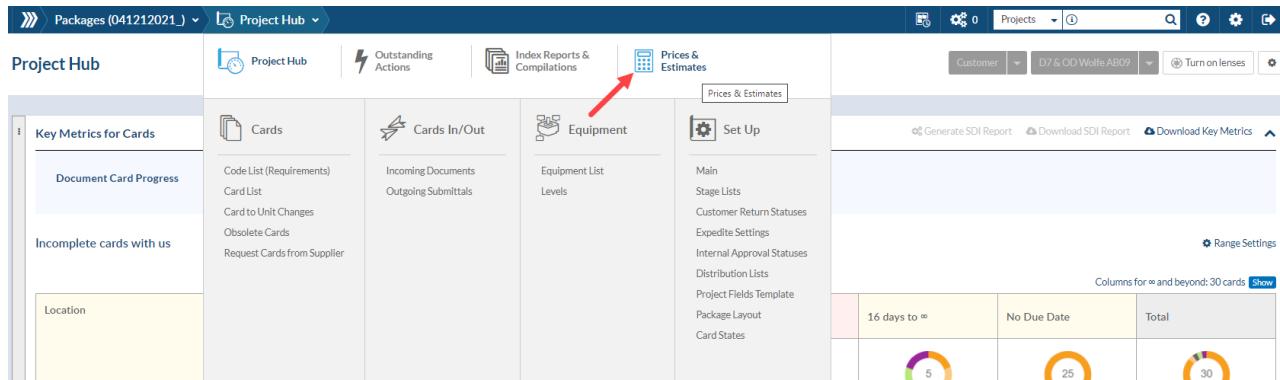


# Prices and Estimates

01/02/2026 4:51 pm MST

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

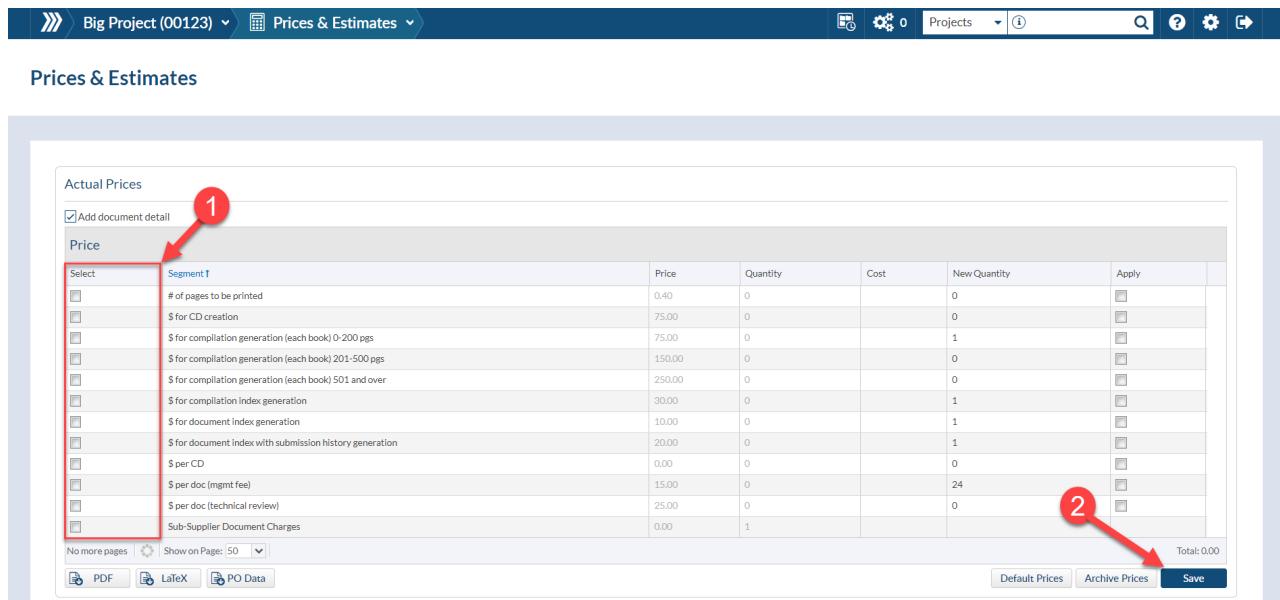
Once the project has been set up with the required information (Doc Codes with Levels and Equipment) and the cards have been created, navigate to the **Prices & Estimates** screen from the project menu to begin creating an estimate.



The screenshot shows the Project Hub interface with the 'Prices & Estimates' menu item highlighted by a red arrow. The menu is expanded, showing sub-options like 'Main', 'Stage Lists', 'Customer Return Statuses', etc. The interface includes a sidebar with 'Key Metrics for Cards' and a main area with 'Cards', 'Equipment', and 'Set Up' sections.

## Configuring an estimate

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



The screenshot shows the 'Prices & Estimates' screen with the 'Actual Prices' grid. The 'Select' column is highlighted with a red box and arrow (1). The 'Save' button at the bottom right is highlighted with a red box and arrow (2). The grid shows various price segments with columns for Price, Quantity, Cost, New Quantity, and Apply.

Select	Segment 1	Price	Quantity	Cost	New Quantity	Apply
<input type="checkbox"/>	# of pages to be printed	0.40	0	0	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for CD creation	75.00	0	0	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for compilation generation (each book) 0-200 pgs	75.00	0	1	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for compilation generation (each book) 201-500 pgs	150.00	0	0	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for compilation generation (each book) 501 and over	250.00	0	0	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for compilation index generation	30.00	0	1	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for document index generation	10.00	0	1	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ for document index with submission history generation	20.00	0	1	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ per CD	0.00	0	0	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ per doc (mgmt fee)	15.00	0	24	0	<input type="checkbox"/>
<input type="checkbox"/>	\$ per doc (technical review)	25.00	0	0	0	<input type="checkbox"/>
	Sub-Supplier Document Charges	0.00	1			

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	
<input checked="" type="checkbox"/> CD Required	CD Copies Number: <input type="text" value="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**.

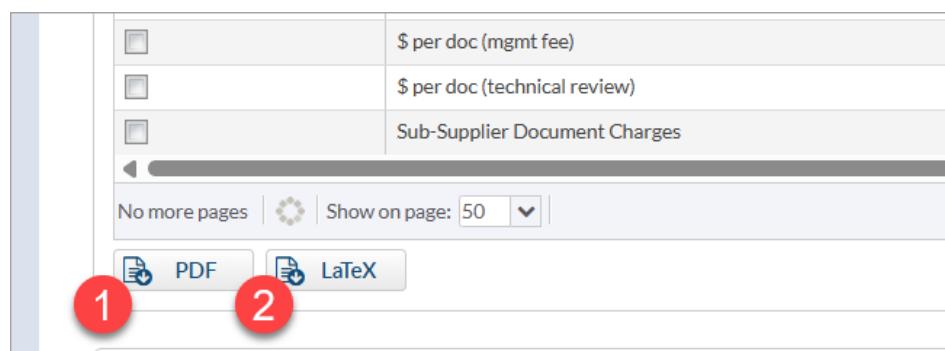
## Editing prices

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.



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

**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.

The screenshot shows the 'Project Configuration' page for the 'Valve Project (0001234)'. The 'Main' tab is selected. In the 'Templates' section, the 'Prices and Estimates' section is highlighted with a red box. Within this section, the 'Estimation template' dropdown is also highlighted with a red box and a red arrow points to it. The dropdown contains the text 'Default Estimate Template (system)'.

## 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.

The composite screenshot shows the pricing grid and the archive details. In the grid, a red arrow labeled '1' points to the 'Archive Prices' button. In the archive details, a red arrow labeled '2' points to the 'Price Archive' table, where a row for 'Archive (2023-02-10)' is highlighted.

## 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](#).

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