

BASIC QUOTING GUIDE

This guide covers the basics of creating a quote in ActionFlow and ensuring that quote gets to your customer.

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Step 1: Create a Customer, Job, and Area/Room

To get started, you will need a **"Customer"** and a **"Job"** and an **"Area/Room"** - this vocabulary differs from our competitors with the benefit being that **you can have multiple jobs per customer**.

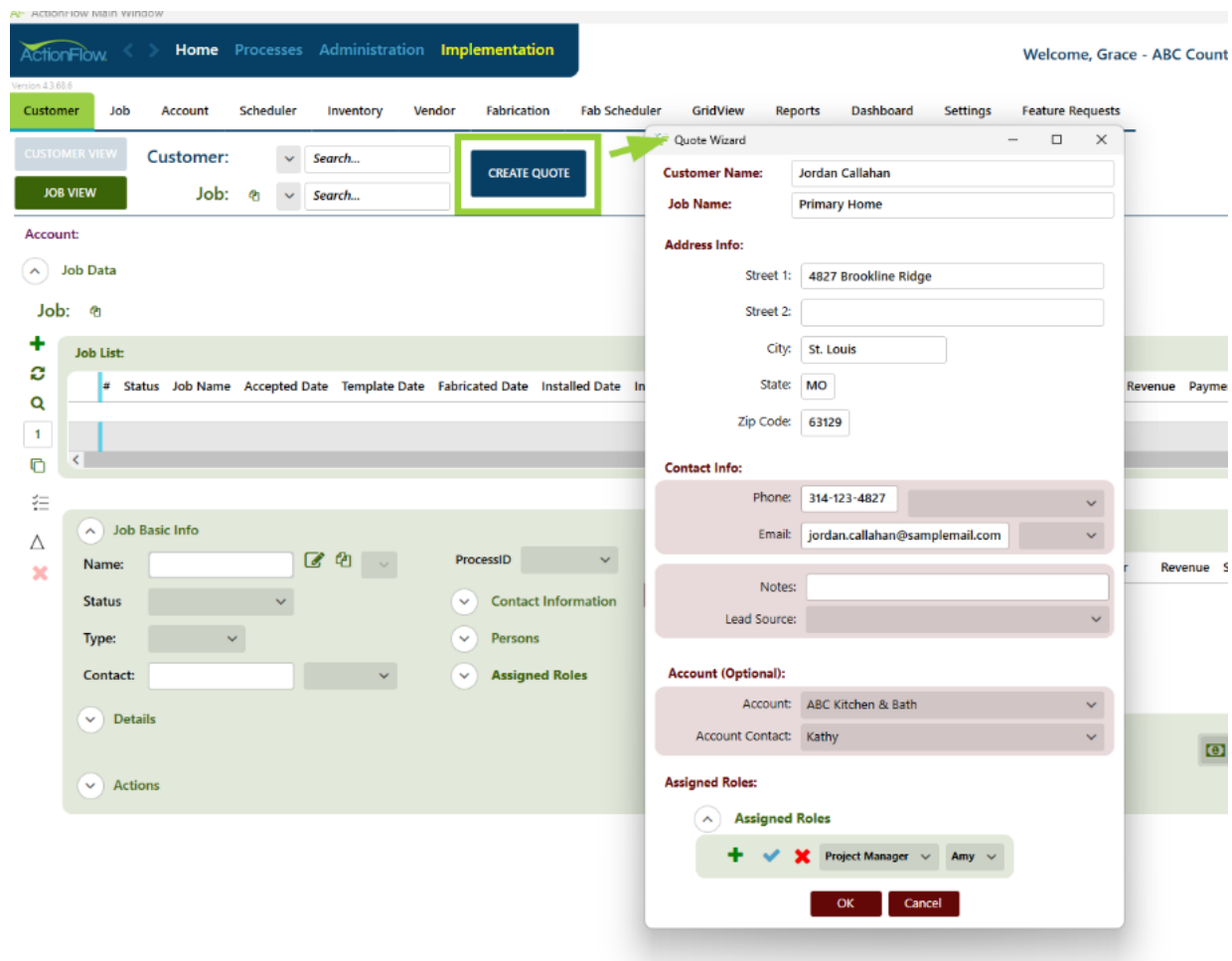
A **job** is typically a **set of rooms or "Areas"** that will be **templated, fabricated, and installed together**.

In a **residential situation**, you may end up working on a **primary home "Job"** and **vacation home "Job"** for the same customer.

In a **commercial situation**, the **"Customer"** could refer to an **apartment complex** and the **"Jobs"** would refer to each unit.

Quote Wizard

The **easiest way** to **create a new customer, job, and area** is the **Quote Wizard**, by clicking the **"Create Quote"** button - this generates a customer, job, and area/room all at once and opens the "Area Module" where you will begin drawing.



The screenshot shows the ActionFlow software interface. The main menu at the top includes 'Home', 'Processes', 'Administration', and 'Implementation'. The 'Implementation' tab is active, showing a 'Customer' view. A 'CREATE QUOTE' button is highlighted in a green box. A 'Quote Wizard' dialog box is open, containing the following fields:

- Customer Name:** Jordan Callahan
- Job Name:** Primary Home
- Address Info:**
 - Street 1: 4827 Brookline Ridge
 - Street 2:
 - City: St. Louis
 - State: MO
 - Zip Code: 63129
- Contact Info:**
 - Phone: 314-123-4827
 - Email: jordan.callahan@samplemail.com
 - Notes:
 - Lead Source:
- Account (Optional):**
 - Account: ABC Kitchen & Bath
 - Account Contact: Kathy
- Assigned Roles:**
 - Project Manager: Amy

The dialog box has 'OK' and 'Cancel' buttons at the bottom.

Figure 1. The easiest way to start a quote from scratch is to click "Create Quote" - this generates a customer, job, and area/room all at once.

Manually Create a New Customer, Job, and Area

1. **Create a New Customer** by clicking the **green plus sign** in the top left of the screen in "Customer View." Edit the customer's name, contact information, and any other relevant data and then click "Save."

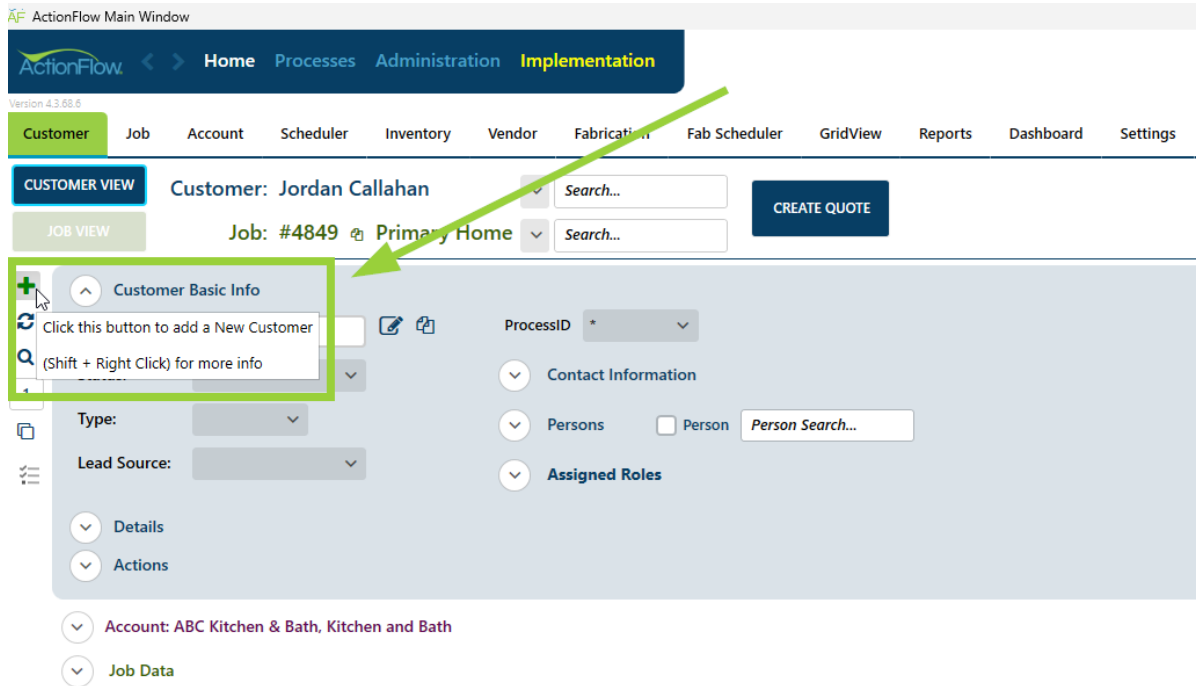


Figure 2. In the Customer View, click the green plus sign to add a new Customer.

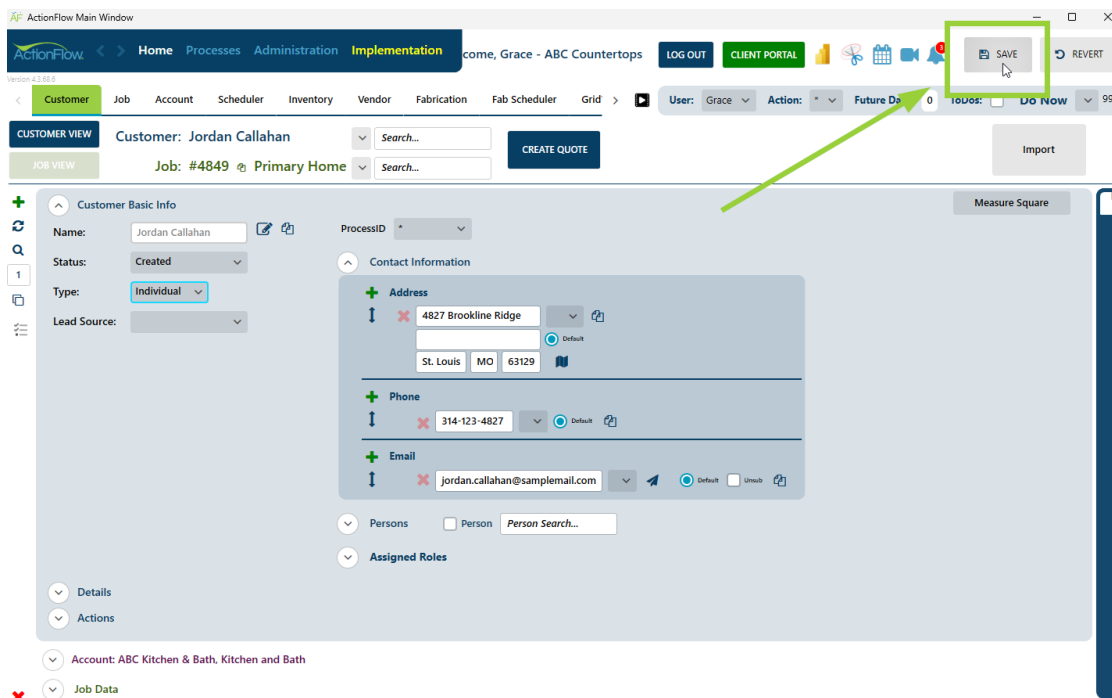
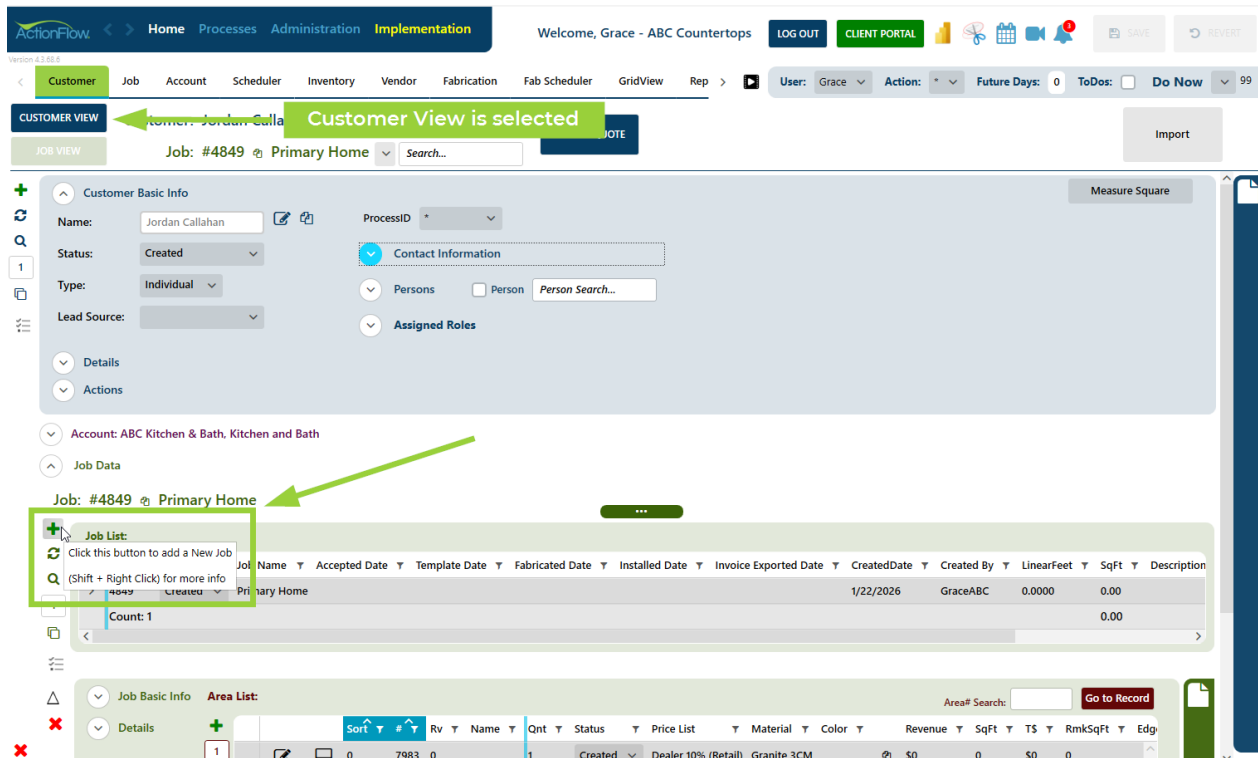


Figure 3. Click the "Customer Basic Info" expander to view and edit the customer's data. Be sure to click "Save". (If the save button is greyed out, ActionFlow autosaved your data.)

2. **Create a New Job** by clicking the **green plus sign** on the left side of the screen **within the Job Expander**.

Customer View



Customer View is selected

Job: #4849 Primary Home

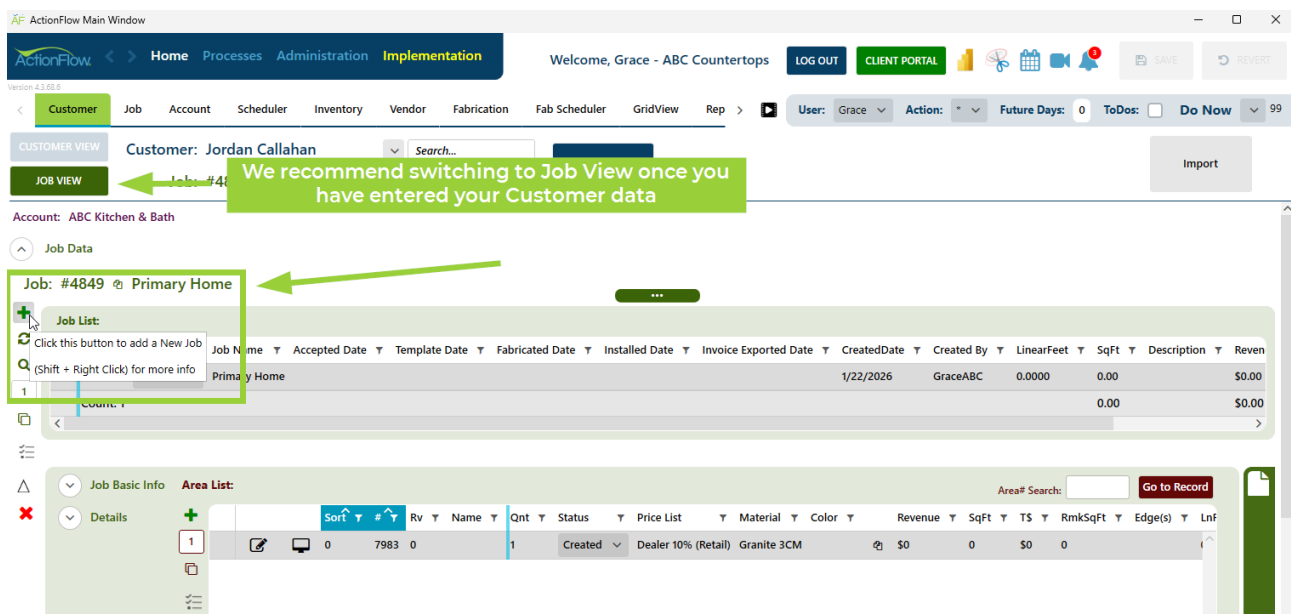
Job List: Click this button to add a New Job (Shift + Right Click) for more info

Job Name	Accepted Date	Template Date	Fabricated Date	Installed Date	Invoice Exported Date	Created Date	Created By	Linear Feet	Sq Ft	Description
Primary Home						1/22/2026	GraceABC	0.0000	0.00	

Count: 1

Figure 4. In the Customer View, click the green plus sign to add a new Customer.

Job View



We recommend switching to Job View once you have entered your Customer data

Job: #4849 Primary Home

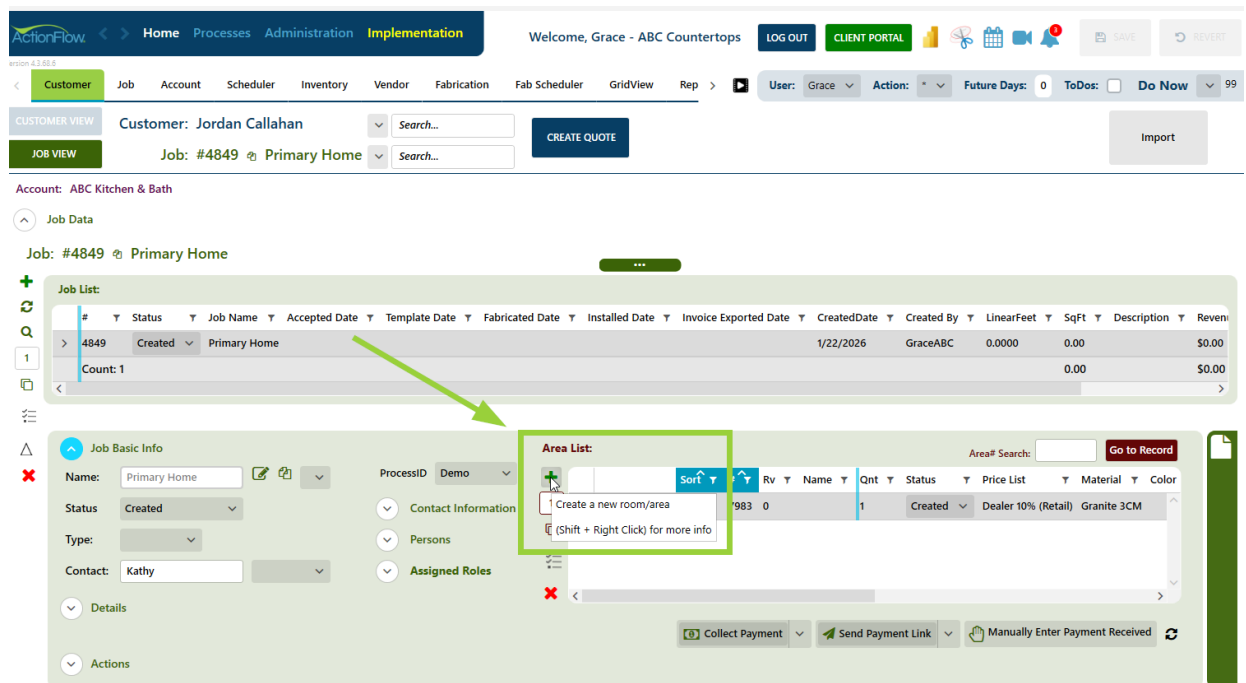
Job List: Click this button to add a New Job (Shift + Right Click) for more info

Job Name	Accepted Date	Template Date	Fabricated Date	Installed Date	Invoice Exported Date	Created Date	Created By	Linear Feet	Sq Ft	Description	Reven
Primary Home						1/22/2026	GraceABC	0.0000	0.00		\$0.00

Count: 1

Figure 5. If you are in the "Job View" (recommended), click the green plus sign underneath the job header.

3. Create an Area in that job by clicking on the **green plus sign in the area section**.



The screenshot shows the ActionFlow software interface. At the top, there's a navigation bar with tabs: Home, Processes, Administration, and Implementation. Below this, a header bar displays 'Welcome, Grace - ABC Countertops' and includes buttons for 'LOG OUT' and 'CLIENT PORTAL'. A secondary bar shows user information: 'User: Grace', 'Action: *', 'Future Days: 0', 'ToDos: 0', and 'Do Now'. Below this, a 'Customer' section shows 'Customer: Jordan Callahan' and 'Job: #4849 Primary Home'. A 'Job List' table is visible, showing a single entry for 'Primary Home' with a status of 'Created'. A green arrow points from this entry to the 'Area List' section below. The 'Area List' section has a green plus sign and a dropdown menu with the option 'Create a new room/area'. The 'Area List' table shows a single entry for 'Primary Home' with a status of 'Created'.

#	Status	Job Name	Accepted Date	Template Date	Fabricated Date	Installed Date	Invoice Exported Date	CreatedDate	Created By	LinearFeet	SqFt	Description	Revenue
4849	Created	Primary Home						1/22/2026	GraceABC	0.0000	0.00		\$0.00

Area#	Name	Qnt	Status	Price List	Material	Color
983	0	1	Created	Dealer 10% (Retail)	Granite 3CM	

Figure 6. Create a new Area by clicking the green plus sign under the text "Area List:"

Step 2: Start a Quote

You are ready to start your quote!

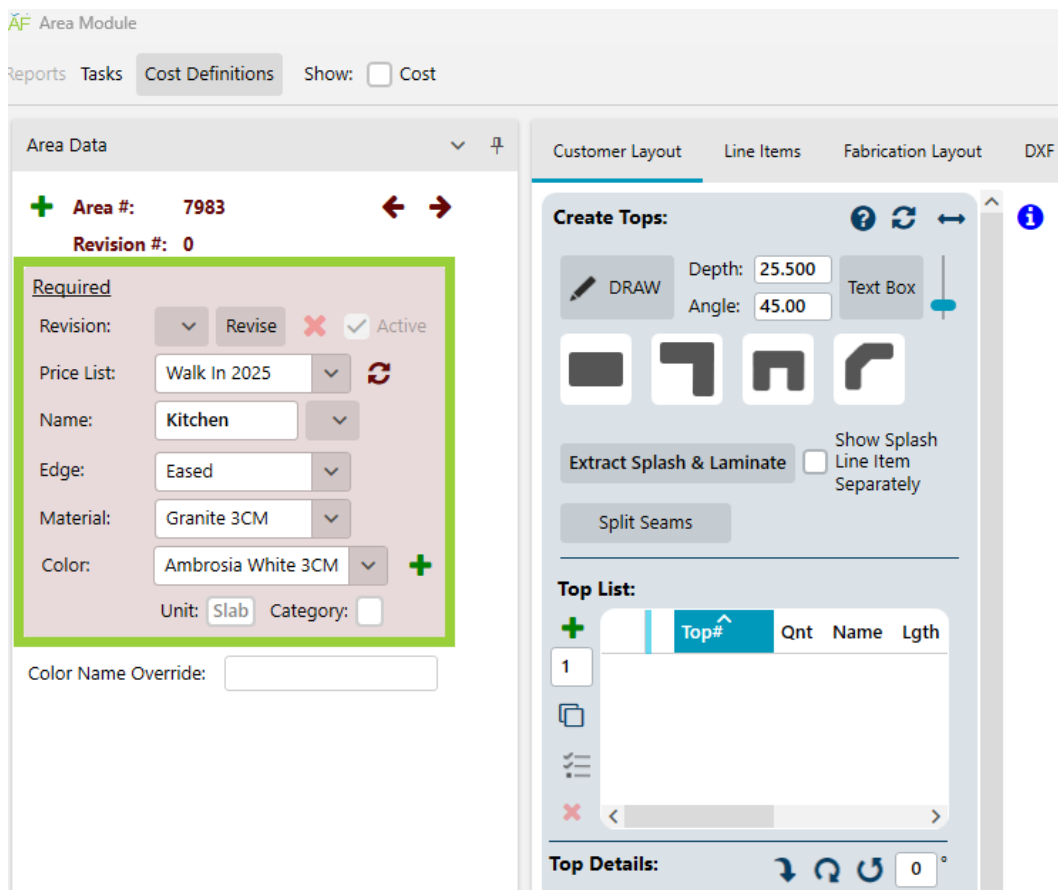
For ActionFlow to **calculate the cost, revenue, and other key metrics** for your quote, **you may need:**

1. **Required area data**
2. **Data for calculating the material and edge cost and revenue**
 - a. Drawing Tops so ActionFlow can calculate the area
 - b. Adding slabs so ActionFlow can calculate the slab cost and revenue
 - c. Manually setting area, linear feet, and other key data to calculate the quote without a drawing
3. **Drawing items added to tops**
4. **Additional line items**

Required Area Data

The items below are required for all quotes:

- Select a Price List
- Select a Name
- Select the Edge
- Select the Material
- Select the Color



The screenshot shows the 'Area Module' interface. The 'Area Data' section is highlighted with a red box, indicating the 'Required' fields for creating a quote. These fields include:

- Area #: 7983
- Revision #: 0
- Revision: [v] Revise [x] Active [v]
- Price List: Walk In 2025 [v]
- Name: Kitchen [v]
- Edge: Eased [v]
- Material: Granite 3CM [v]
- Color: Ambrosia White 3CM [v]
- Unit: Slab
- Category: [v]

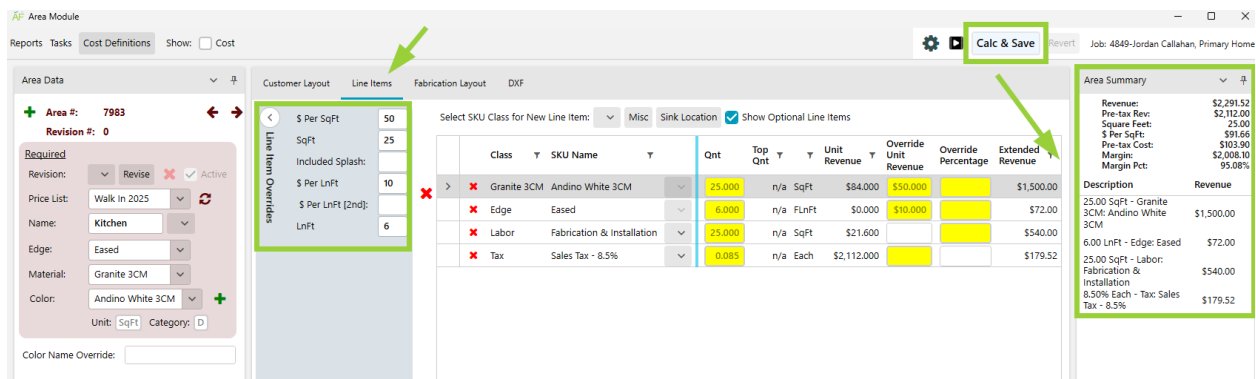
Below the 'Required' fields is a 'Color Name Override' text box. To the right of the 'Area Data' section is the 'Create Tops' section, which includes options for 'Depth', 'Angle', 'Text Box', 'Extract Splash & Laminate', 'Split Seams', and a 'Top List' table.

Figure 7. To start the quote, complete all the "Required" fields - these are located in the red box in the Area Data section on the far right of the Area Module.

Create a Quote Without a Drawing

To create a quote without a drawing,

1. Go to the **"Line Items" tab**.
2. Open the **"Line Item Overrides" expander**.
3. Enter **area, linear, and backsplash values**.
4. Click the **"Calc & Save"** button.
5. Confirm the **calculated values in the Area Summary** are correct.



Area Data: Area #: 7983, Revision #: 0

Required: Revision: [Revise] [Active]

Price List: Walk In 2025

Name: Kitchen

Edge: Eased

Material: Granite 3CM

Color: Andino White 3CM

Unit: SqFt Category: D

Color Name Override:

Line Item Overrides: \$ Per SqFt: 50, \$ Per LnFt: 10, \$ Per LnFt (2nd): 6

Class: Granite 3CM Andino White 3CM, Qnt: 25.000, Top Qnt: n/a, Unit: SqFt, Unit Revenue: \$84.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$1,500.00

Class: Edge Eased, Qnt: 6.000, Top Qnt: n/a, Unit: FLnFt, Unit Revenue: \$0.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$72.00

Class: Labor Fabrication & Installation, Qnt: 25.000, Top Qnt: n/a, Unit: SqFt, Unit Revenue: \$21.600, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$540.00

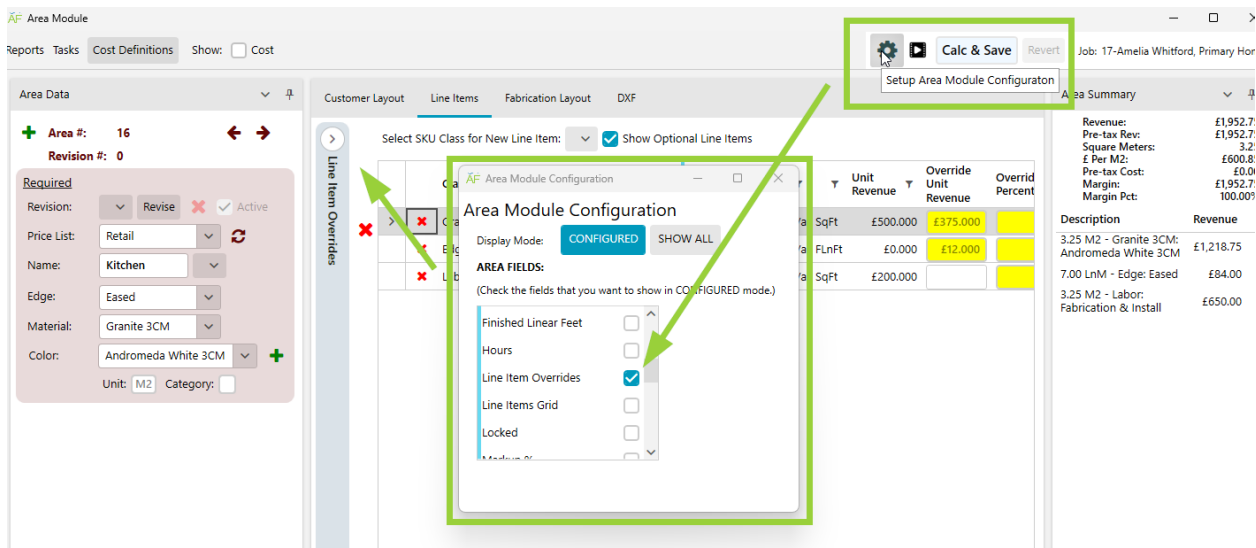
Class: Tax Sales Tax - 8.5%, Qnt: 0.085, Top Qnt: n/a, Unit: Each, Unit Revenue: \$2,112.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$179.52

Area Summary:

Description	Revenue
Revenue:	\$2,291.52
Pre-tax Rev:	\$2,112.00
Square Feet:	25.00
\$ Per SqFt:	\$91.66
Pre-tax Cost:	\$103.90
Margin:	\$2,008.10
Margin Pct:	95.08%

Figure 8. The Line Item Overrides section allows you to override area, linear, and splash values.

If you do not see the Line Item Overrides section, click the gear icon in the top right which will open the Area Module Configuration window. You can select "Show All" which will display ALL area module features. For a cleaner work screen, scroll down and check the box for "Line Item Overrides" and then close the window.



Area Data: Area #: 16, Revision #: 0

Required: Revision: [Revise] [Active]

Price List: Retail

Name: Kitchen

Edge: Eased

Material: Granite 3CM

Color: Andromeda White 3CM

Unit: M2 Category: []

Line Item Overrides: \$ Per SqFt: 50, \$ Per LnFt: 10, \$ Per LnFt (2nd): 6

Class: Granite 3CM Andino White 3CM, Qnt: 25.000, Top Qnt: n/a, Unit: SqFt, Unit Revenue: \$84.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$1,500.00

Class: Edge Eased, Qnt: 6.000, Top Qnt: n/a, Unit: FLnFt, Unit Revenue: \$0.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$72.00

Class: Labor Fabrication & Installation, Qnt: 25.000, Top Qnt: n/a, Unit: SqFt, Unit Revenue: \$21.600, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$540.00

Class: Tax Sales Tax - 8.5%, Qnt: 0.085, Top Qnt: n/a, Unit: Each, Unit Revenue: \$2,112.000, Override Unit Revenue: \$10.000, Override Percentage: 11.9%, Extended Revenue: \$179.52

Area Summary:

Description	Revenue
Revenue:	£1,952.7
Pre-tax Rev:	£1,952.7
Square Meters:	3.2
£ Per M2:	£600.8
Pre-tax Cost:	£0.0
Margin:	£1,952.7
Margin Pct:	100.00%

Area Module Configuration:

Display Mode: CONFIGURED SHOW ALL

AREA FIELDS:

(Check the fields that you want to show in CONFIGURED mode.)

Finished Linear Feet []

Hours []

Line Item Overrides [x]

Line Items Grid []

Locked []

Step 3: Add Tops, Edges, and Drawing Items

Let's get drawing!

Create Tops with Predefined Shapes

The easiest way to add a top is by clicking a predefined shape button.

1. In the Customer Layout tab, **use a predefined shapes button** to **create a top**.
2. Once a top is created, **hover over a dimension** and **click to edit it**
 - **Hit "Tab"** to **edit the next dimension**
 - **"Enter"** to **stop editing** dimensions.

The top length and depth will also be displayed in Top Details.

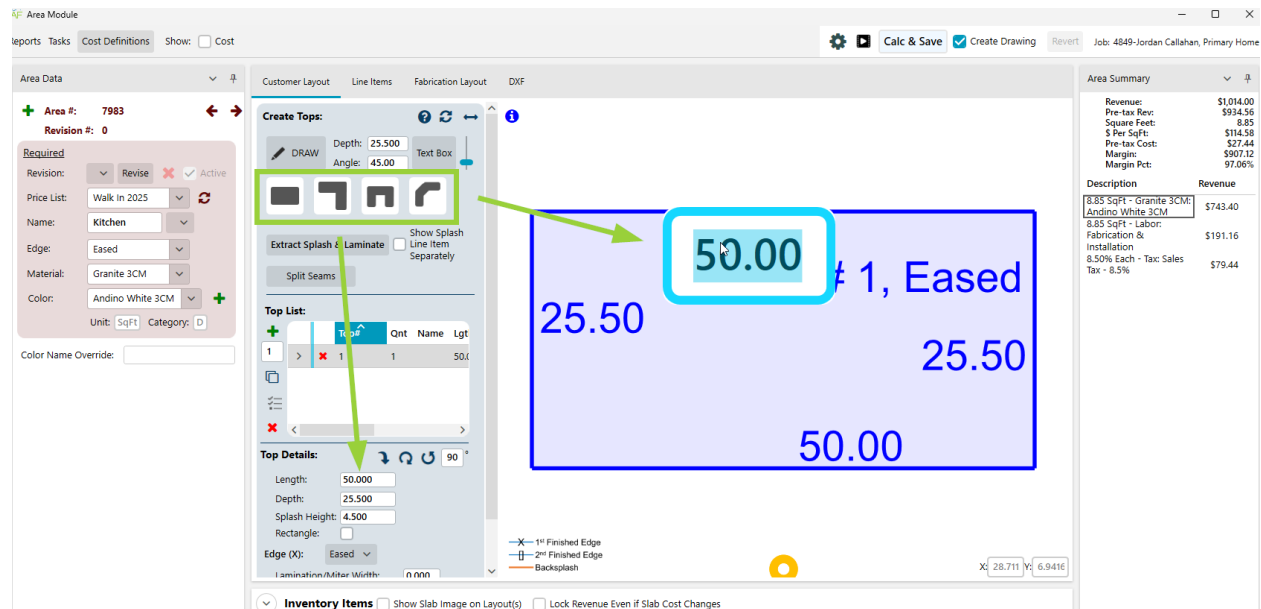


Figure 9. The predefined shapes button will quickly generate a top of that shape. You can then edit the dimensions.

Create Tops using the Draw Button

If you have a **shape that is not predefined** (a batwing with non-45° angles), **use the "Draw" button**.

Click once in the drawing window **to begin the top**. (Click and release after initial click)

Left-Click to **change direction**.

Right-Click to **finish the top**.

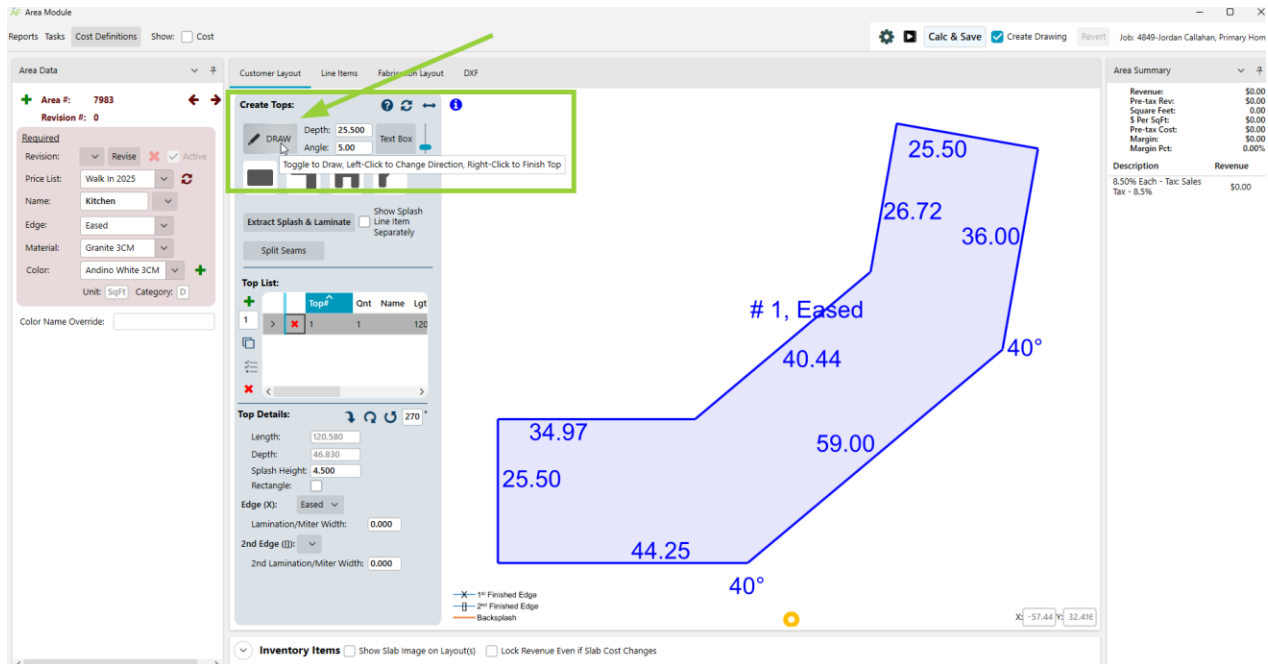


Figure 10. Use the "Draw" button for tops with non-45 degree angles

Add Edges

There are **three options for each edge on a top**:

1. Unfinished
2. Finished
3. Backsplash

To **change the edge** on a top,

1. **Select the top** by clicking on it (it will **be highlighted in blue** to indicate it is selected).
2. **Hover over the top** and **move your mouse close to the edge of the top** - notice the mouse turns to a hand.
 - a. Click 1x for unfinished
 - b. Click 2x for finished
 - c. Click 3x for backsplash

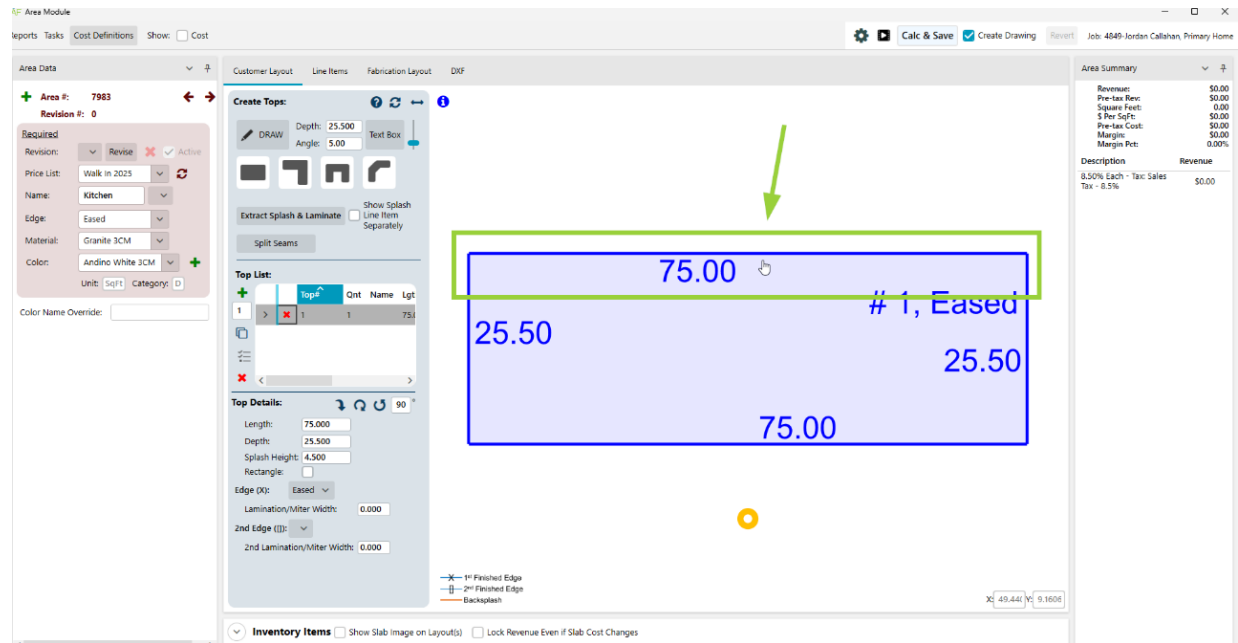
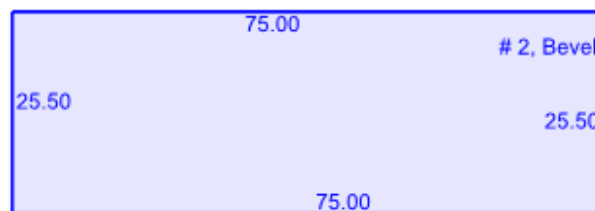


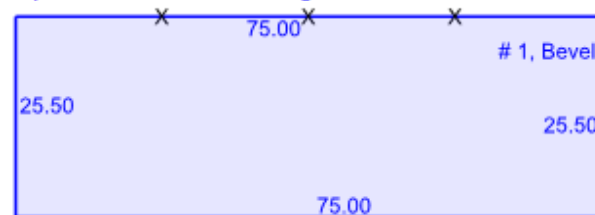
Figure 11. To change the edge, hover and click near the edge of a top when the mouse turns to a hand.

As you continue to click on the top, it will cycle through the Unfinished, Finished and Backsplash options:

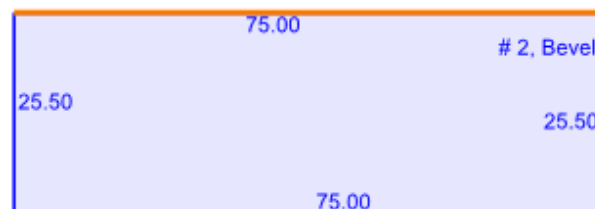
Option One- Unfinished Edge



Option Two- Finished Edge



Option Three- Backsplash



For negative edges, second edges, or extracting backsplash, [check out this article](#).

Add Drawing Items

Add drawing items by **right clicking on a top** and **selecting the item**.

Then **move the drawing item** to where you would like it and **left click to place it**.

To **remove the drawing item**, **hover over** the item until an "Eraser" appears and then **left click**.

Some drawing items can be moved again after they have been placed - left click to grab the item and left click again to place it elsewhere.

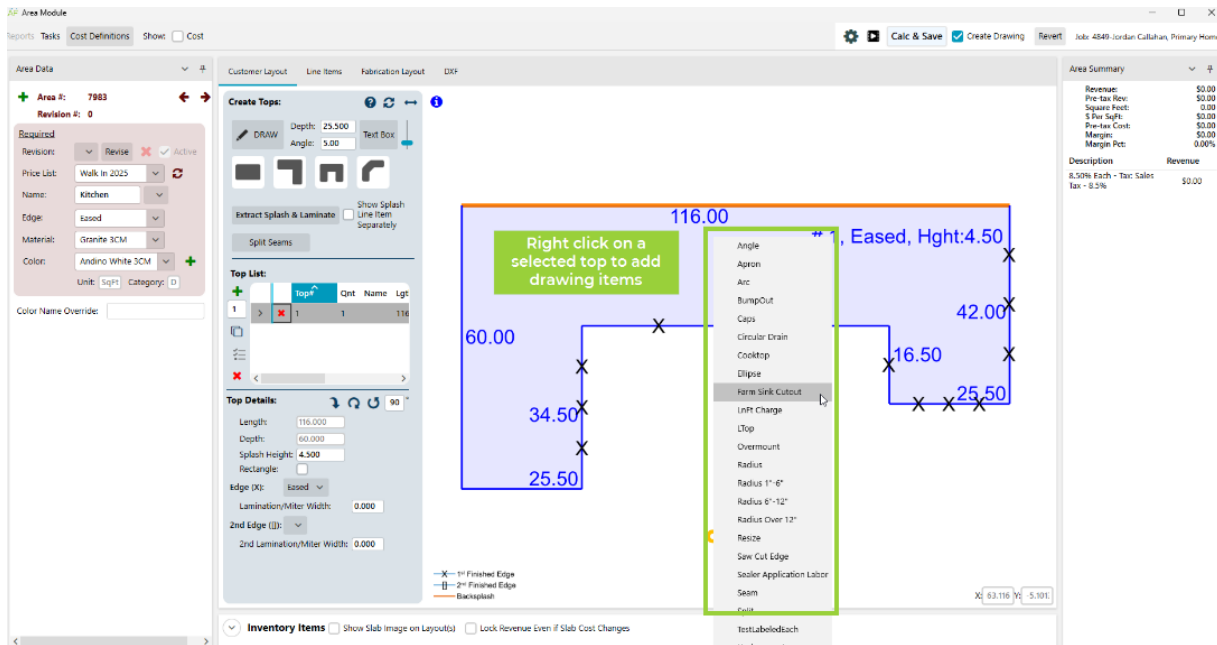


Figure 12. Access drawing items by right clicking on a top.

For additional drawing instruction: [Beyond the Basics - Drawing in ActionFlow](#)

Step 4: Add and/or Adjust Line Items

The "Line Items" tab which provides greater insight into how each line item is calculated and is also where you will adjust line items and manually add line items that can't go on the drawing (ie. Tearout).

To add those line items or adjust existing line items:

1. **Go to the Line Items tab** on the Area Module

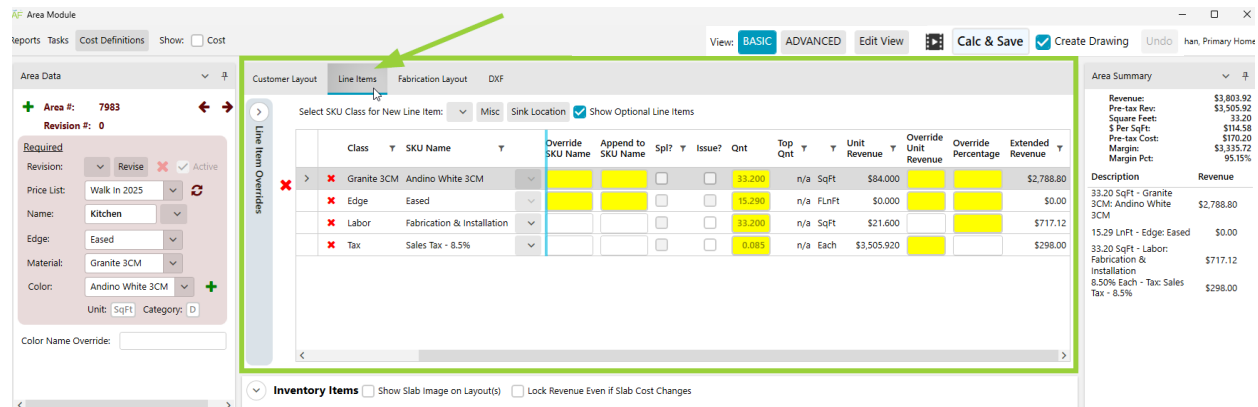


Figure 13. The Line Items tab is located to the right of the Customer Layout tab.

2. Each Line Item has a Class and a SKU. First, **select the Class in the drop down**, which will add the Line Item to the list.

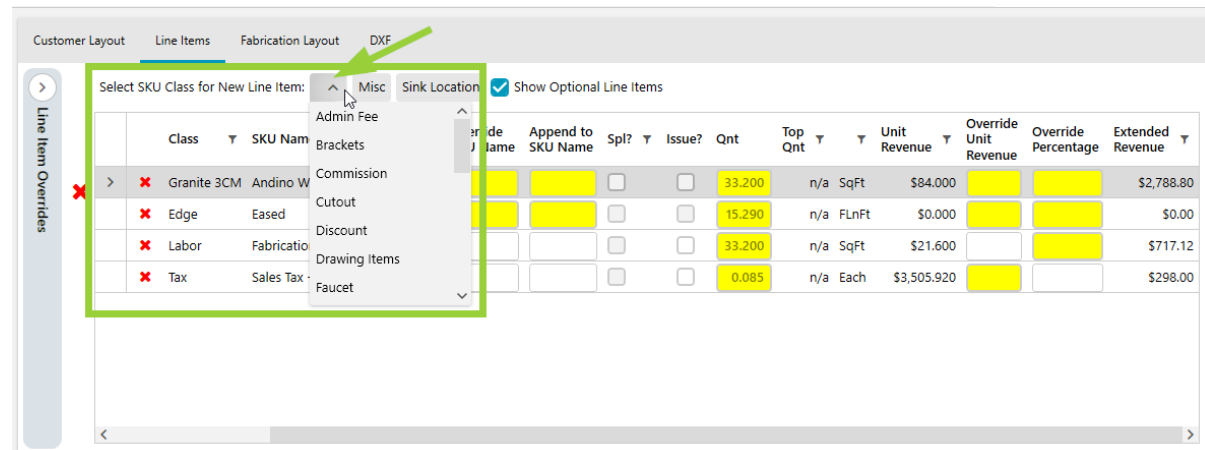
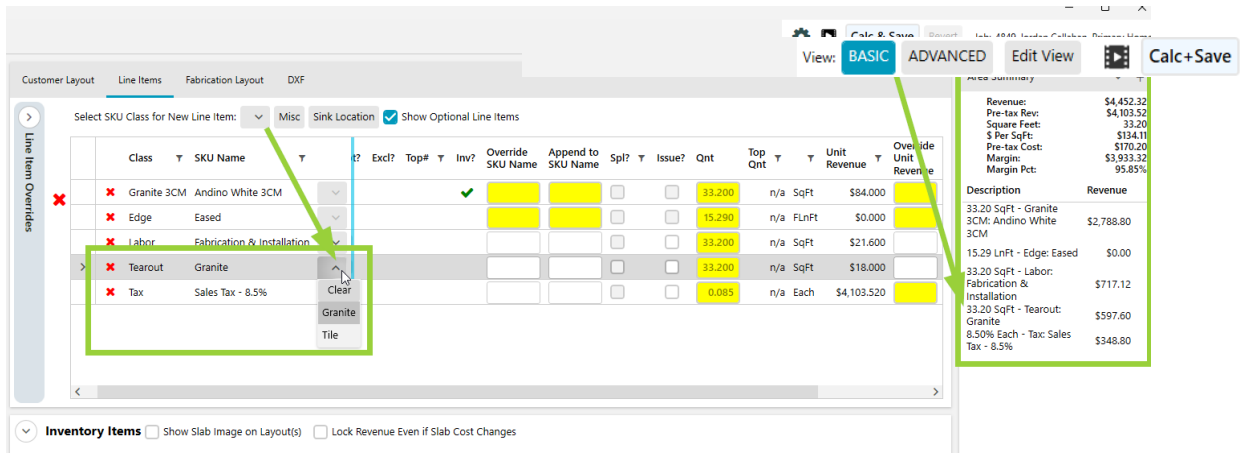


Figure 14. Use the dropdown to the right of, "Select SKU Class for New Line Item:", to select the class of the new line item you wish to add.

3. Find the new line item, and using the drop down, **select the specific SKU** within the class.
4. **Click "Calc & Save"** to recalculate the quote.



Customer Layout Line Items Fabrication Layout DXF

Select SKU Class for New Line Item: Misc Sink Location Show Optional Line Items

Class	SKU Name	?	Excl?	Top#	Inv?	Override SKU Name	Append to SKU Name	Spl?	Issue?	Qnt	Top Qnt	Unit	Revenue	Override Unit Revenue
Granite 3CM	Andino White 3CM									33.200	n/a	SqFt	\$84.000	
Edge	Eased									15.290	n/a	FLnFt	\$0.000	
Labor	Fabrication & Installation									33.200	n/a	SqFt	\$21.600	
Tearout	Granite									33.200	n/a	SqFt	\$18.000	
Tax	Sales Tax - 8.5%									0.085	n/a	Each	\$4,103.520	

Inventory Items Show Slab Image on Layout(s) Lock Revenue Even if Slab Cost Changes

View: BASIC ADVANCED Edit View Calc+Save

Revenue: \$4,452.32
Pre-tax Rev: \$4,103.52
Square Feet: 33.20
\$ Per SqFt: \$134.11
Pre-tax Cost: \$170.20
Margin: \$3,933.32
Margin Pct: 95.85%

Description Revenue

33.20 SqFt - Granite 3CM: Andino White 3CM \$2,788.80
15.29 LnFt - Edge: Eased \$0.00
33.20 SqFt - Labor: Fabrication & Installation \$717.12
33.20 SqFt - Tearout: Granite \$597.60
8.50% Each - Tax: Sales Tax - 8.5% \$348.80

Figure 15. Select the SKU class for that line item and then click "Calc & Save" to recalculate the quote with the new line item.

Price by the Slab

For **material cost and revenue**, if you are **pricing by the slab** and **not the area** of the tops, you will now need to **add the necessary number of inventory items/slabs** to the quote.

To charge based on the number of slabs instead of the area of the tops

1. **Select a color that has a "Slab" unit.** ([Override the unit](#) if you have permission)
2. **Open the "Inventory Items" section** at the bottom of the Area Module.

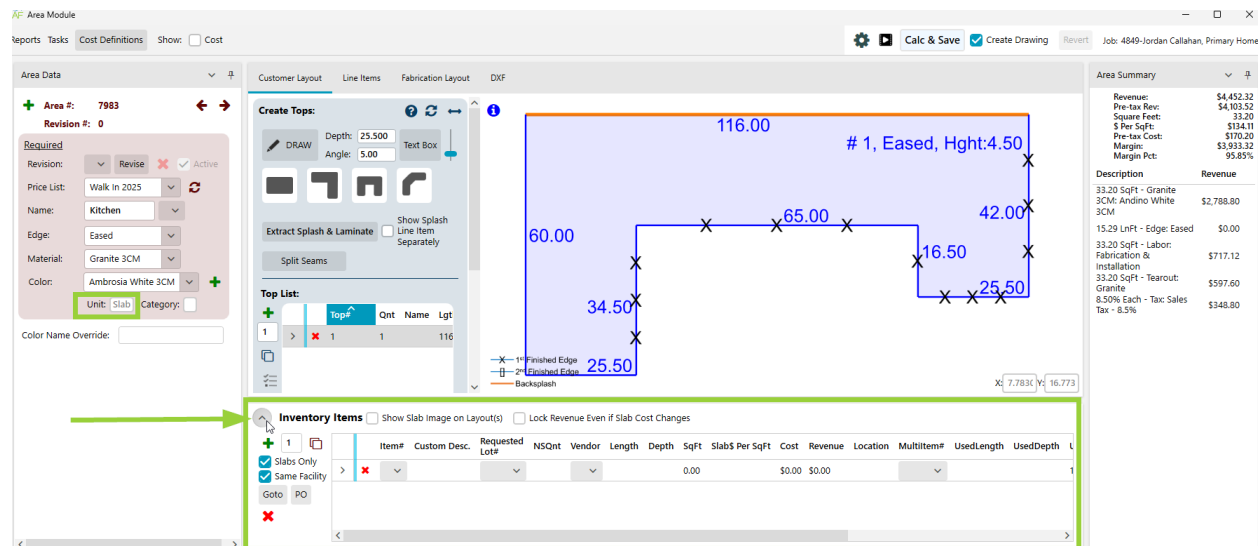


Figure 16. Select a color with a "Slab" unit, then click the arrow next to Inventory Items to open the inventory expander.

3. **Add the number of slabs** needed by clicking the **green plus**. To **determine the number of slabs**, you can place your tops on the slab(s) in the **"Fabrication Layout" tab** where you can try different seam placements.

For fabrication layout and slab imaging instruction: [Fabrication Layout and Slab Imaging](#)

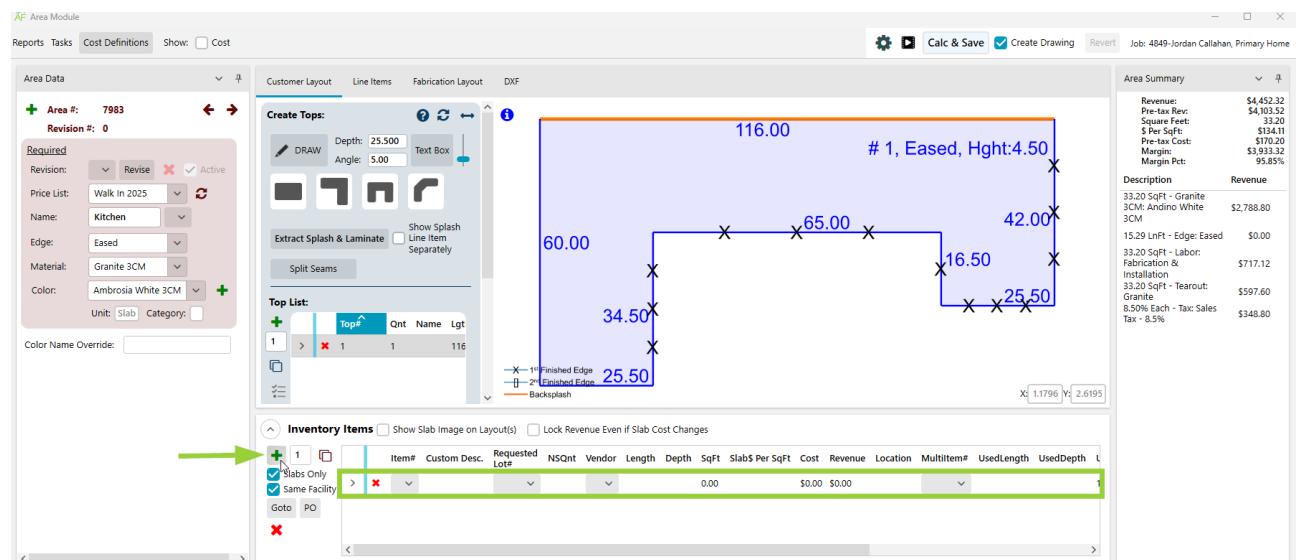
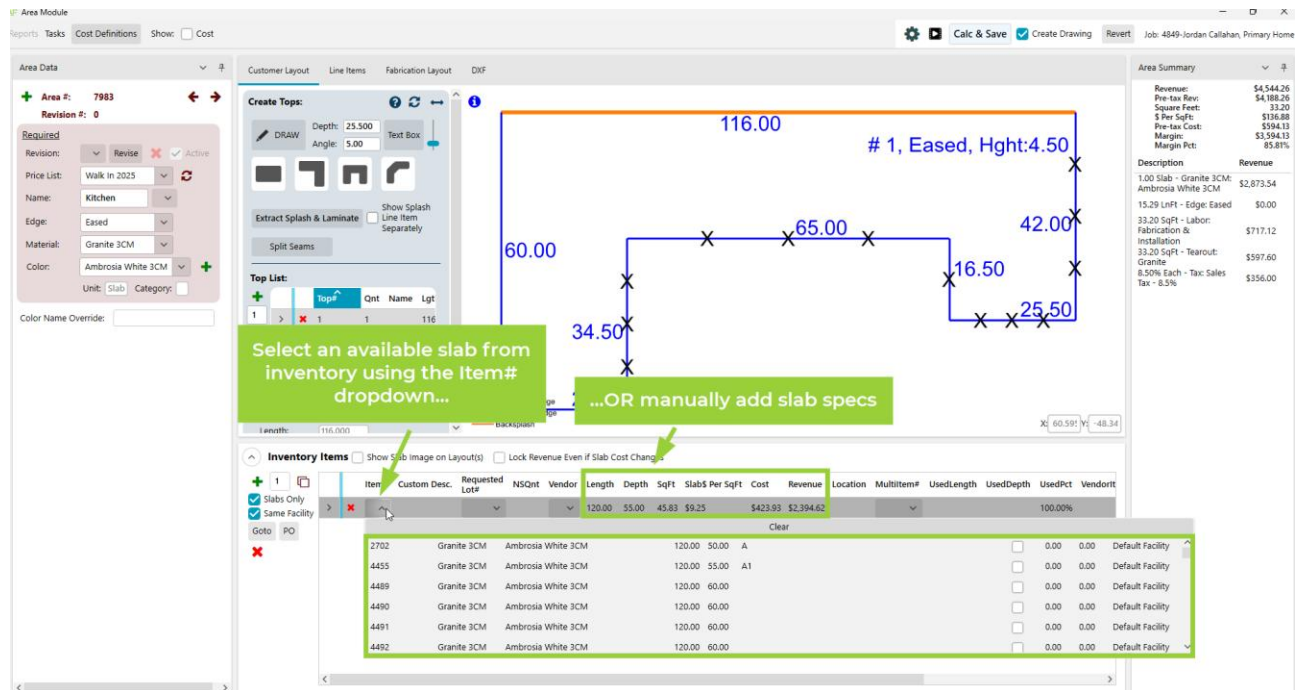


Figure 17. Click the green plus to add slabs to the quote.

4. **Select an available slab of that color using the "Item#" dropdown.** In that case, the slab specs will be added automatically. **You can also manually enter the length, depth, cost, and revenue** to calculate the quote now if your team will be selecting a specific slab later in the process.



Area Data

Area #: 7983
Revision #: 0
Required: ☐ Revise: ☒ Active: ☐
Price List: Walk in 2025
Name: Kitchen
Edge: Eased
Material: Granite 3CM
Color: Ambrosia White 3CM
Unit: Slab
Category:
Color Name Override:

Create Tops:
Depth: 25.500
Angle: 5.00
Text Box:
Extract Splash & Laminate: ☐ Show Splash Line Item Separately: ☐
Split Seams:

Top List:
1 1 1 116

Inventory Items
☒ Slabs Only
☒ Same Facility
Gold PO

Item	Custom Desc.	Requested Qty	Vendor	Length	Depth	SqFt	Slab \$ Per SqFt	Cost	Revenue	Location	Multilitem#	Used Length	Used Depth	Used Pct	Vendor
2702	Granite 3CM Ambrosia White 3CM	120.00	50.00	A								0.00	0.00		Default Facility
4455	Granite 3CM Ambrosia White 3CM	120.00	55.00	A1								0.00	0.00		Default Facility
4489	Granite 3CM Ambrosia White 3CM	120.00	60.00									0.00	0.00		Default Facility
4490	Granite 3CM Ambrosia White 3CM	120.00	60.00									0.00	0.00		Default Facility
4491	Granite 3CM Ambrosia White 3CM	120.00	60.00									0.00	0.00		Default Facility
4492	Granite 3CM Ambrosia White 3CM	120.00	60.00									0.00	0.00		Default Facility

Area Summary

Description	Revenue
Revenue:	\$4,544.26
Pre-tax Rev:	\$4,188.26
Square Feet:	33.20
\$ Per SqFt:	\$136.88
Pre-tax Cost:	\$594.13
Margin:	\$3,594.13
Margin Pct:	85.81%
1.00 Slab - Granite 3CM Ambrosia White 3CM	\$2,873.54
15.29 LinFt - Edge: Eased	\$0.00
33.20 SqFt - Labor: Fabrication & Installation	\$717.12
33.20 SqFt - Tearout: Granite	\$597.60
8.50% Each - Tax: Sales Tax - 8.5%	\$356.00

Figure 18. Select an available slab or manually add the Length, Depth, Cost and Revenue.

Step 5: Run and Email the Estimate

Before you run the estimate, click "Calc & Save" which does a final calculation and captures the drawing image for the estimate.

We can now run the estimate and send it to our customer!

To run the estimate, **click the "Reports" button** in the top left of the area module. **Find the version of the estimate** you want to generate.

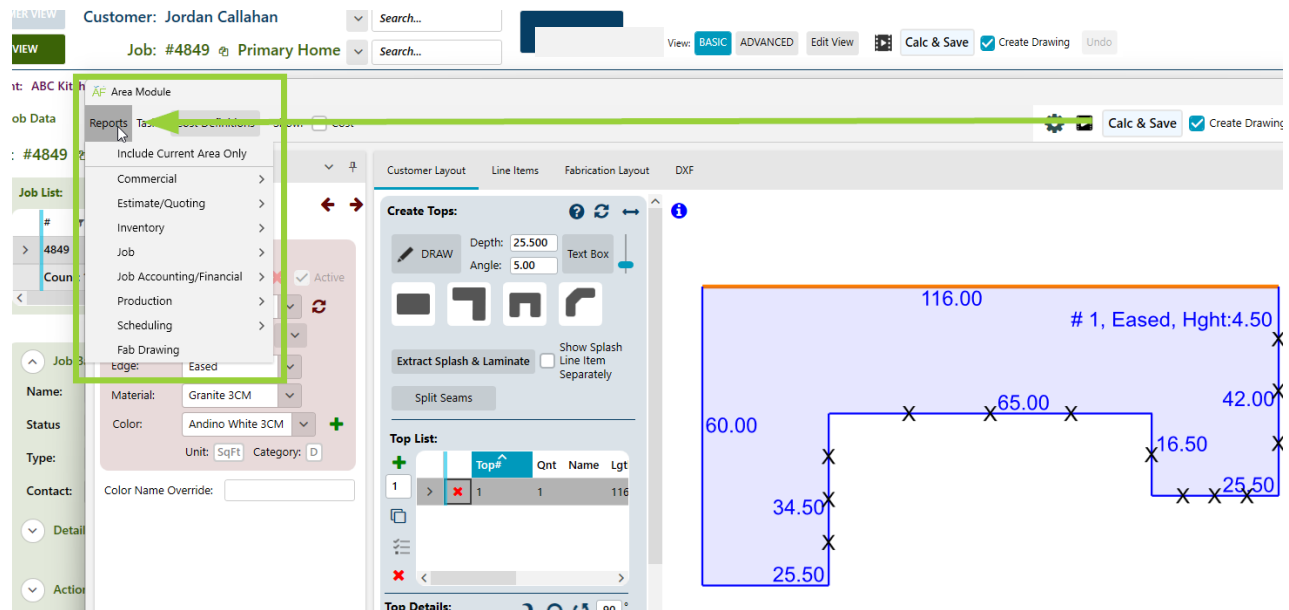


Figure 19. Select the estimate report from the "Report" menu in the top left of the Area Module.

There are a few options for how you can deliver the quote to your customer:

- **Print** a hard copy of the Estimate
- **Email quote** from within ActionFlow to your client
- **Save estimate to the job files**
- Open quote in **Adobe Reader**
- **Export estimate** as a PDF, CSV File, EMF Description, Excel, Rich Text Format, TIFF file, Web Archive
 - The **exported document** could then be **attached to an email external** of ActionFlow.

AF Area Reports

1 of 1

Email

ABC COUNTERTOPS

Estimate 123 alternate address

Date: 1/22/2026

Customer: Jordan Callahan
Account: ABC Kitchen & Bath
Kathy: (111) 111-1113
Billing Address: 123 Elm Street
St. Louis, MO 63111
444-4455
billing@abckitchens.com

Job: #4849-Primary Home
Project Manager: Amy
Job Site: 4827 Brookline Ridge
St. Louis, MO 63129
314-123-4827
jordan.callahan@samplemail.com

Kitchen (#7983,0) \$4,452.32

Includes template and installation of countertops

33.20 SqFt - Granite 3CM: Andino White 3CM (Cat. D)	\$2,788.80
15.29 LnFt - Edge: Eased	\$0.00
33.20 SqFt - Labor: Fabrication & Installation	\$717.12
33.20 SqFt - Tearout: Granite	\$597.60
8.50% Each - Tax: Sales Tax - 8.5%	\$348.80

Without Backsplash: \$3,965.51

Alternative Materials:

	A	B	C	D
Granite 3CM	\$3,328.43	\$3,587.79	\$4,020.06	\$4,452.32

Price Difference for Alternative Edges:

	Bevel	Bullnose	Miter
	\$0.00	\$398.15	\$796.30

Kitchen (#7983,0)

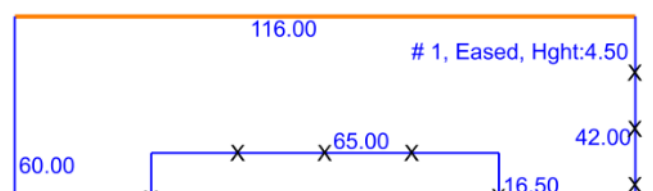


Figure 20. Use the icons at the top of the estimate to select your preferred method of providing the quote to your customer.

AF Area Reports

1 of 1

Email

ABC COUNTERTOPS

Estimate 123 alternate address

Date: 1/22/2026

Customer: Jordan Callahan
Account: ABC Kitchen & Bath
Kathy: (111) 111-1113
Billing Address: 123 Elm Street
St. Louis, MO 63111
444-4455
billing@abckitchens.com

Job: #4849-Primary Home
Project Manager: Amy
Job Site: 4827 Brookline Ridge
St. Louis, MO 63129
314-123-4827
jordan.callahan@samplemail.com

Kitchen (#7983,0) \$4,452.32

Includes template and installation of countertops

33.20 SqFt - Granite 3CM: Andino White 3CM (Cat. D)	\$2,788.80
15.29 LnFt - Edge: Eased	\$0.00
33.20 SqFt - Labor: Fabrication & Installation	\$717.12
33.20 SqFt - Tearout: Granite	\$597.60
8.50% Each - Tax: Sales Tax - 8.5%	\$348.80

Acrobat (PDF) file
CSV (comma delimited)
EMF Description
Excel 97-2003
Rich Text Format
TIFF file
Web Archive

Figure 21. Use the dropdown on the right to export the estimate