User Scenario Document

Estimation Tool

Gold

Microsoft Partner

Microsoft

Revision history

Version	Date	Revision Description	Prepared by
1.0	2016-12-09	First Version	The Createch Group
1.1	2018-03-20		The Createch Group

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User Scenario Guide (Estimation Tool)

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Objective User Guide

The objective of this user guide is to present the steps to use the estimation tool for items in Dynamics 365.

The estimation tool allows the creation of an estimation for a customer and create a Sales Quote or Sales Order.

1. Installation of the Extension

Before using the app in Dynamics 365, please make sure that the extension is installed. You can follow these steps:
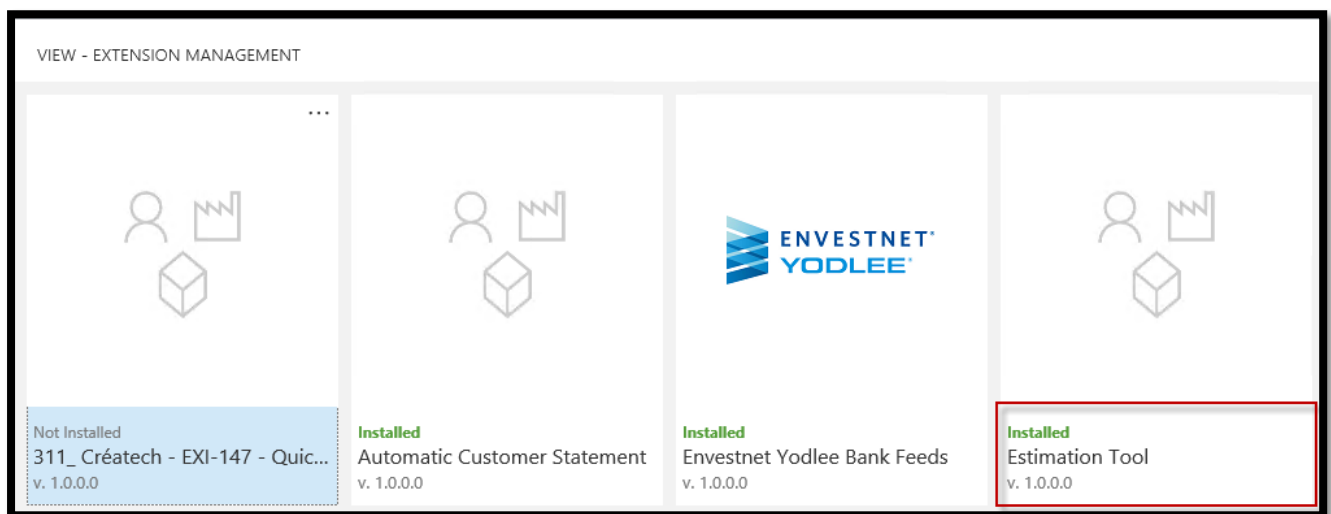
1. Click on the search function from your home page

2. The search page opens:
   1. Enter extension in the search bar.
   2. Select the related item.

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The extension management page opens:

If the status of the related extension is installed, the extension is correctly installed. Alternatively, if the page "View – Installed Extensions" loads and the Estimation Tool is listed, this means the extension is installed.
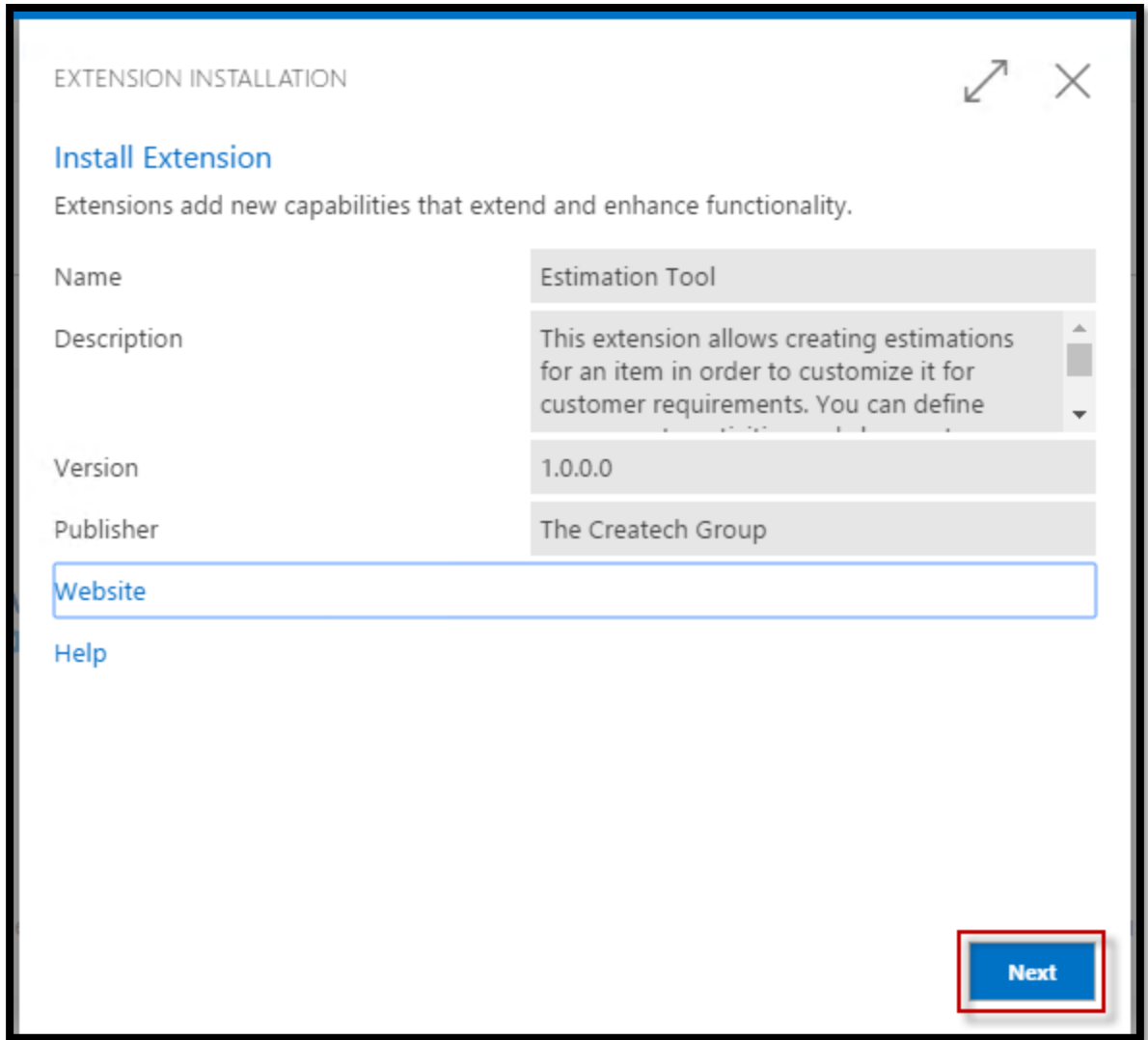
If it is Not Installed, you can:

3. Click in the extension called "Estimation Tool".
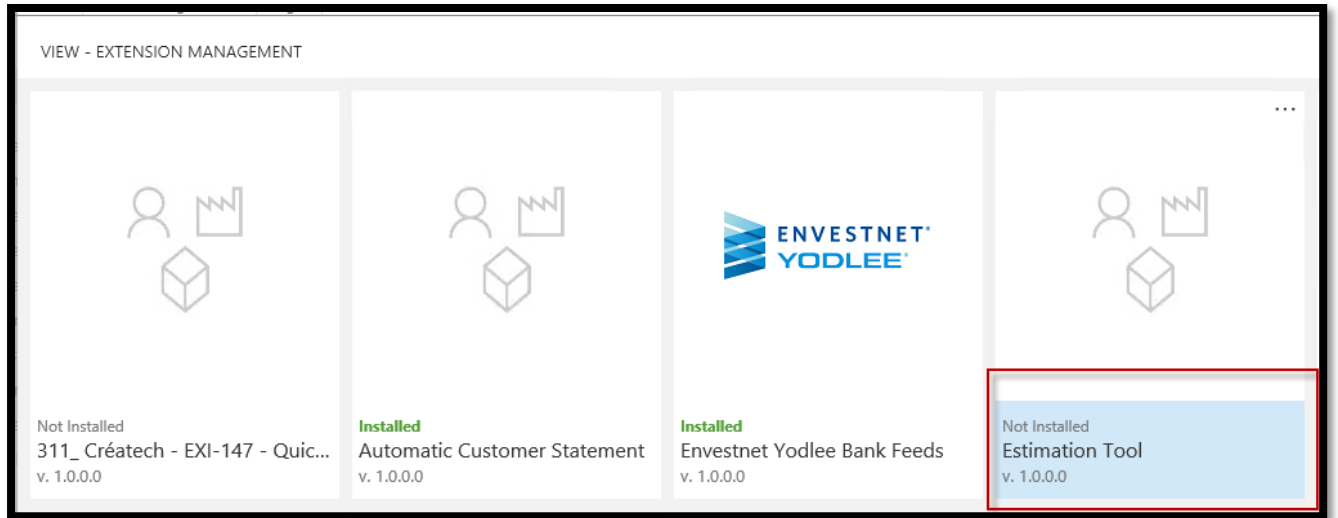
The Extension Installation Wizard opens:

4. Click on **Next.**

EXTENSION INSTALLATION

Install Extension

Extensions add new capabilities that extend and enhance functionality.

Name	Estimation Tool
Description	This extension allows creating estimations for an item in order to customize it for customer requirements. You can define
Version	1.0.0.0
Publisher	The Createch Group
Website	
Help	

Next

The next step of the wizard opens:

5.   Click on **Install.**

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EXTENSION INSTALLATION

Review Extension Information before installation

Name	Estimation Tool
Publisher	The Createch Group

Terms and Conditions

Privacy Statement

I accept the terms and conditions ☑

Back   **Install**

Click on **OK.**

The Estimation Tool extension was successfully installed. All active users must log out and log in again to see the navigation changes.

OK
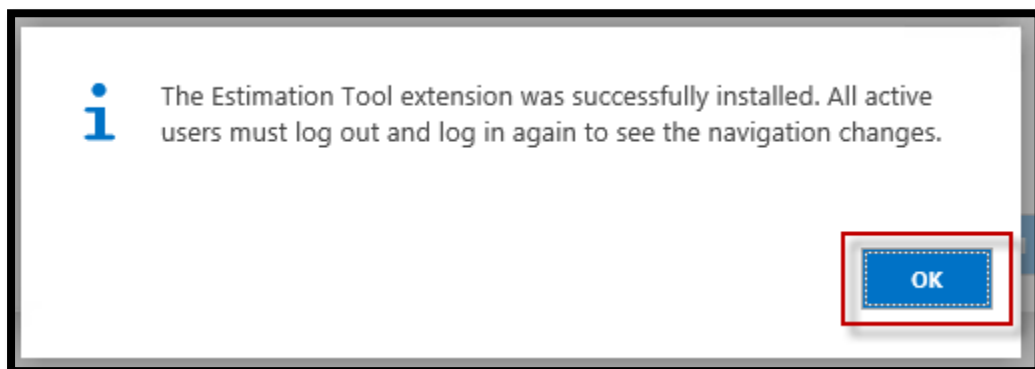
The extension is now correctly installed.

VIEW - EXTENSION MANAGEMENT

Not Installed	Installed	Installed	Installed
311_ Créatech - EXI-147 - Quic...	Automatic Customer Statement	Envestnet Yodlee Bank Feeds	Estimation Tool
v. 1.0.0.0	v. 1.0.0.0	v. 1.0.0.0	v. 1.0.0.0

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2. Create an Item Estimation

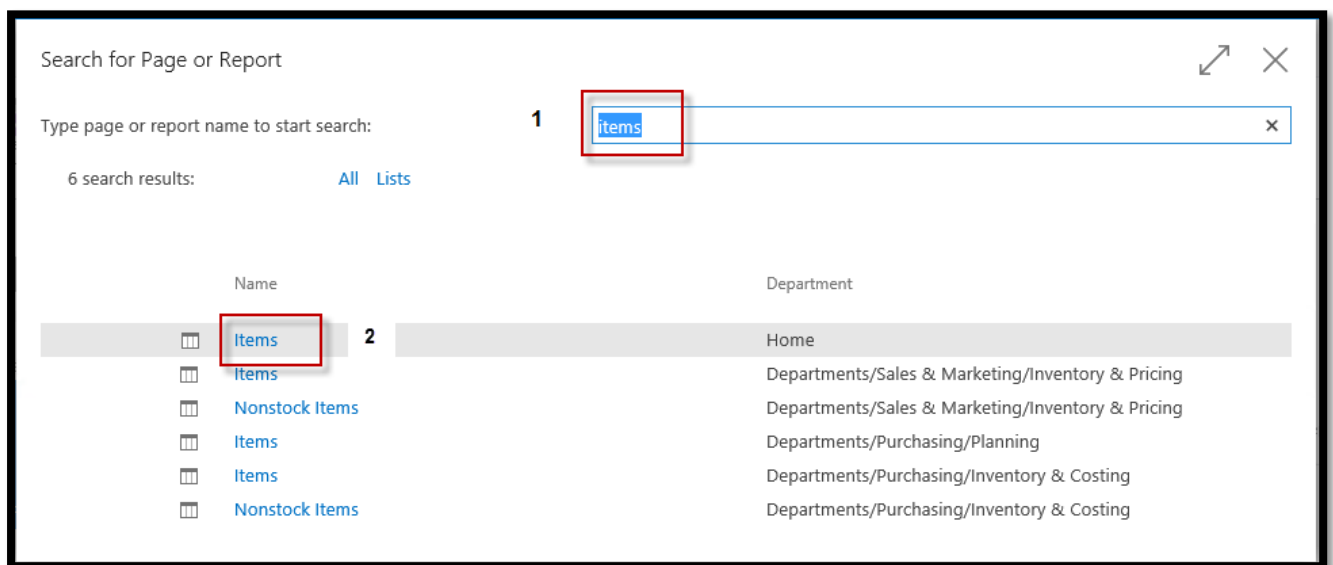This section describes the steps to create an estimation card for an item.

The estimation card is available from the item card.

Follow these steps to go to the item card:

1. Click on the search function.
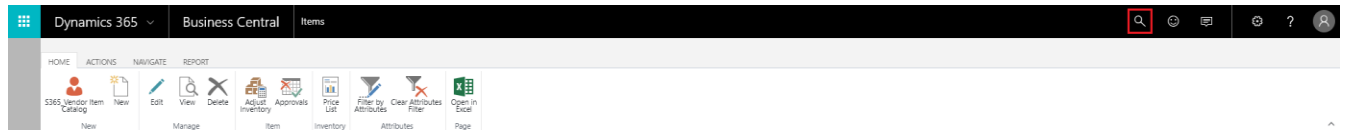
2. The search page opens:
   1. Enter "items" in the search bar.
   2. Select the first result.

The Item list opens:

3. Select an item.
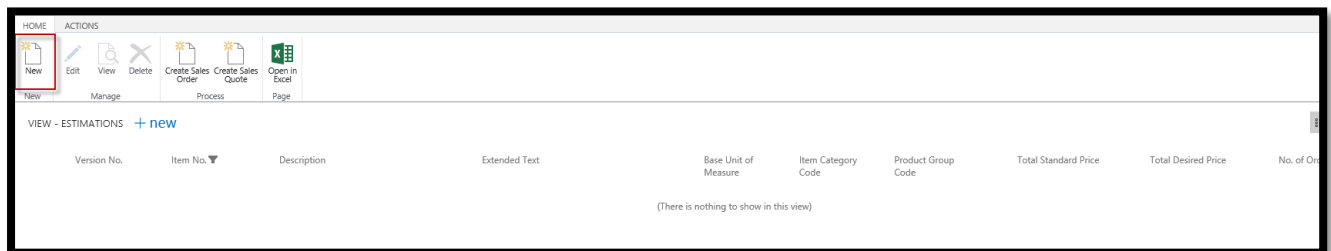4. Click on **Edit** (if clicking does not open the Item Card).
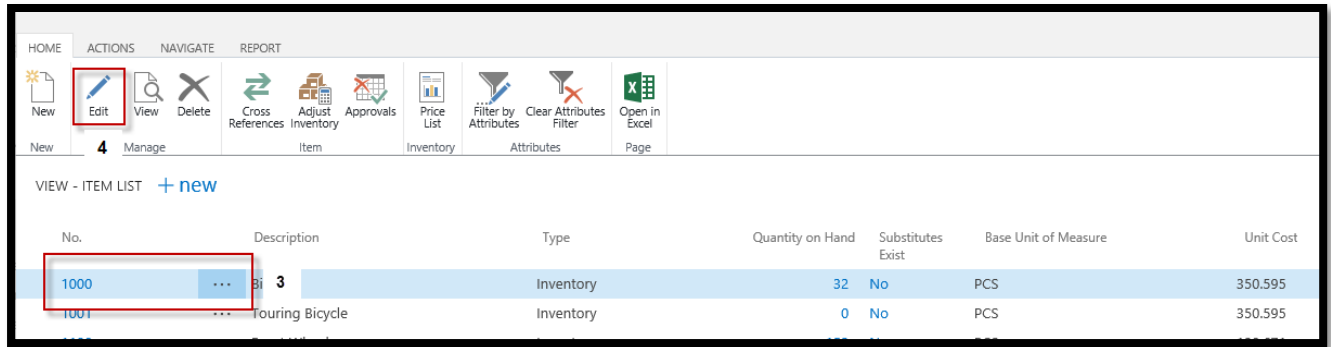
The Item card opens:

5. The estimated field shows the number of estimations related to this item.
6. Click on estimations button in the ribbon to open estimation card.
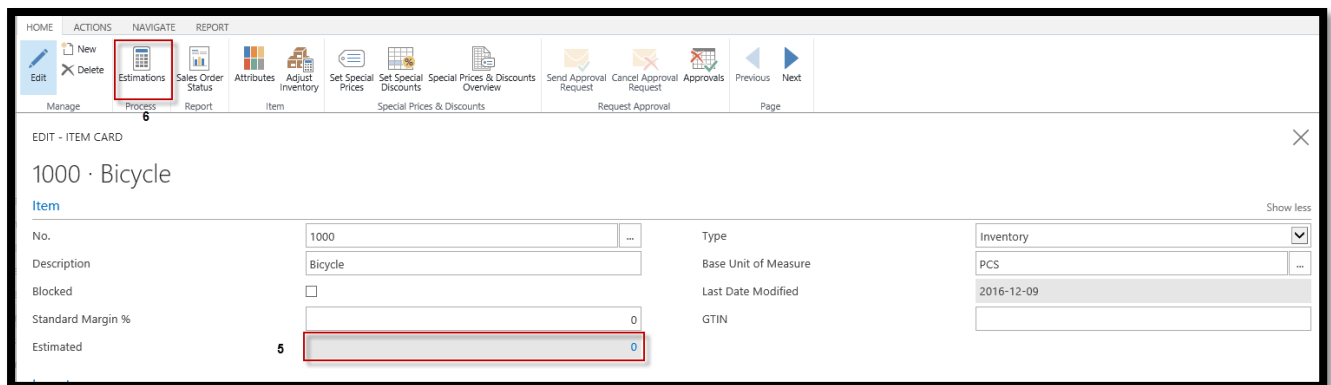
The estimation list opens:

7. Click on **New** to create a new estimation.

The estimation card opens:

Several tabs are available:

3. **General Tab:** The general section is automatically filled (if nothing is filled, click on the description field):

---

1. **Extended Text Tab:** you can enter detailed descriptions for this estimation.

2. **Components tab:**

This tab contains all components to make the item.

Components are related to the item list. Components must exist as an Item before adding them in components tabs.

1. Select the No., and click on the **assist edit** (…). You will then select a component from the list by double-clicking.

2. Enter the quantity needed for the related component in the quantity field.
3. Enter a unit cost, this field is automatically filled from the unit cost of the item card.

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4. Enter a standard margin %, this field is automatically filled from the standard margin % of the item card.
5. The desired margin % is initialized with the standard margin % value. You could override the value and enter a new value.

3. Activities tab:

This tab contains all processes to make the item.

Activities are related to the Estimation Activities list. Activities must exist as Estimation Activities before adding them in activities tabs.

To create new estimations activities, follow this step:

1. Click on the **assist edit** (…).
2. Click on the **new** button.

The estimation activities page opens:

3. Enter the No. of the activities.
4. Enter a description for the activities.
5. Enter a % Standard Margin.
6. Enter a unit of measure.

To add estimation activities on the activities tabs, follow these steps:

7. Click on the assist edit (…).
8. Select the appropriate activity.

9. Select No. as described above.
10. Enter the quantity needed to make the item.
11. Enter Unit Cost related to this activity.
12. Standard Margin % is automatically filled from the estimation activities.
13. The desired margin % is initialized with the standard margin % value. You could override the value and enter a new value.

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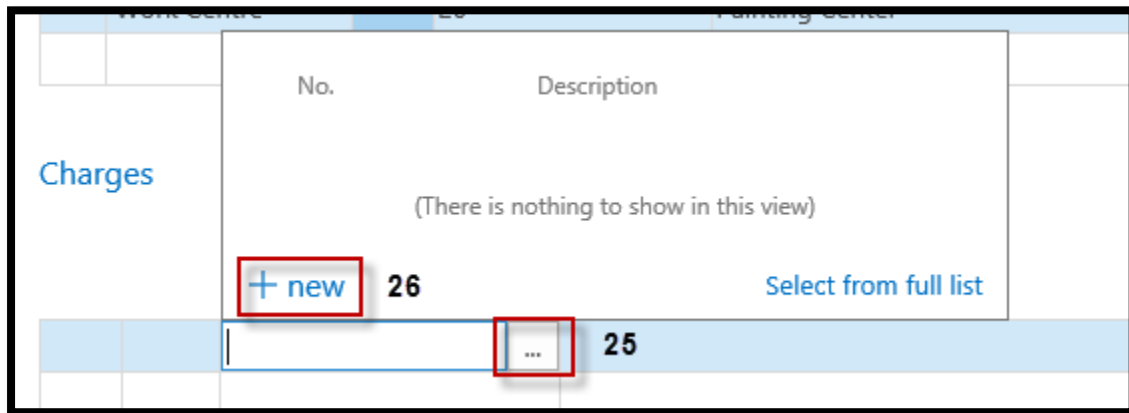
4. Charges tab:

This tab contains all charges to make the item.

Charges are related to the Item Charges (Estimations) list. Charges must exist as Item Charges (Estimations) before adding them in charges tabs.

To create new Item Charges (Estimations), follow these steps:

1. Click on the **assist edit** (…).
2. Click on **new** button.

The Item Charges (Estimations) page opens:

3. Enter a no. for the charge.
4. Enter a description for the charge.
5. Enter a standard margin % for the charge.
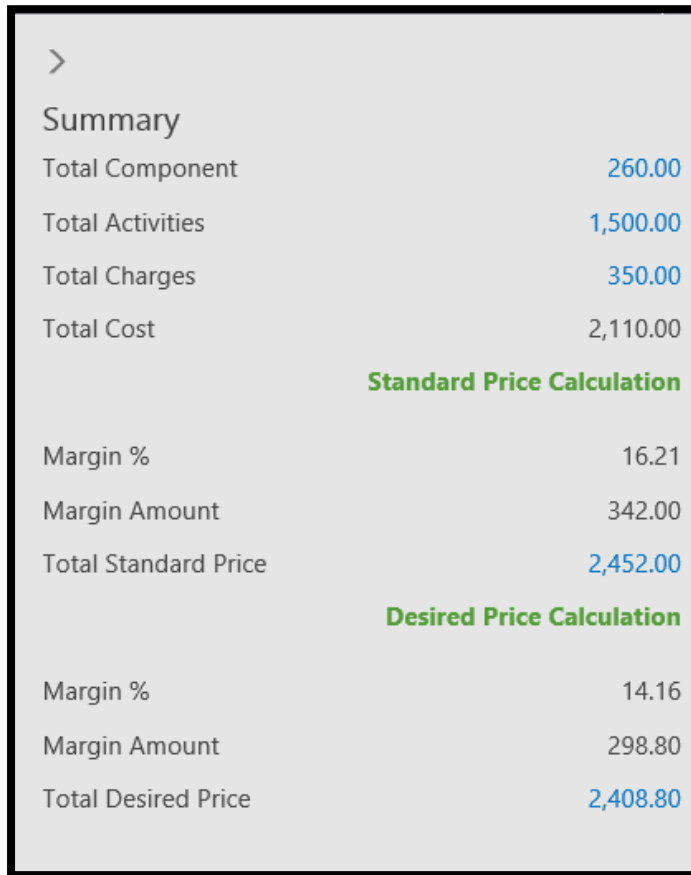
Go back to the estimation card:

6. Enter a Quantity.
7. Enter a Unit Cost.
8. Standard Margin % is automatically filled from the Item Charges (estimations).
9. The desired margin % is initialized with the standard margin % value. You could override the value and enter a new value.

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5. Summary factbox:

>
Summary

Total Component	260.00
Total Activities	1,500.00
Total Charges	350.00
Total Cost	2,110.00
Standard Price Calculation	
Margin %	16.21
Margin Amount	342.00
Total Standard Price	2,452.00
Desired Price Calculation	
Margin %	14.16
Margin Amount	298.80
Total Desired Price	2,408.80

This screen allows viewing total cost of the produced items and profit margin. Totals are automatically calculated.

This summary factbox displays the following information:

1. Total component: sum of total cost of the components.
2. Total activities: sum of total cost of the activities.
3. Total charges: sum of total cost of the charges.
4. Total cost: sum of the total component, activities and charges.
5. Standard Price Calculation
   a. Margin %: ratio margin amount/total cost.
   b. Margin Amount: difference between total standard price and total cost.
   c. Total Standard Price: total cost of the estimation where the standard margin of each component, activity and charge is applied.
6. Desired Price Calculation
   a. Margin %: ratio margin amount/total cost.
   b. Margin Amount: difference between total desired price and total cost.
   c. Total Desired Price: total cost of the estimation where the desired margin of each component, activity and charge is applied.

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3. Create Sales Quote and Sales Order

You can create a sales quote or a sales order from the estimation card.

3.1. Create Sales Quote

This option exists from the estimation card on the ribbon: click the **Create Sales Quote** button.
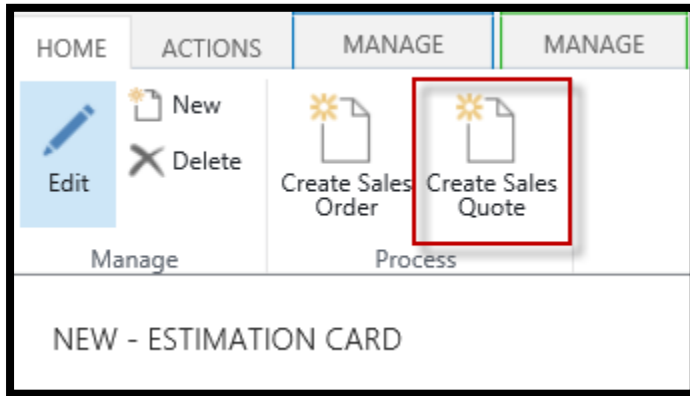
A checkbox appears, you must choose if you want to apply the standard or the desired price in the sales quote:

The contact list appears:

1. Select the appropriate contact.
2. Click **OK**.

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The related sales quote appears:

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3.2. Create Sales Order

This option exists from the estimation card on the ribbon: click the **Create Sales Order** button.
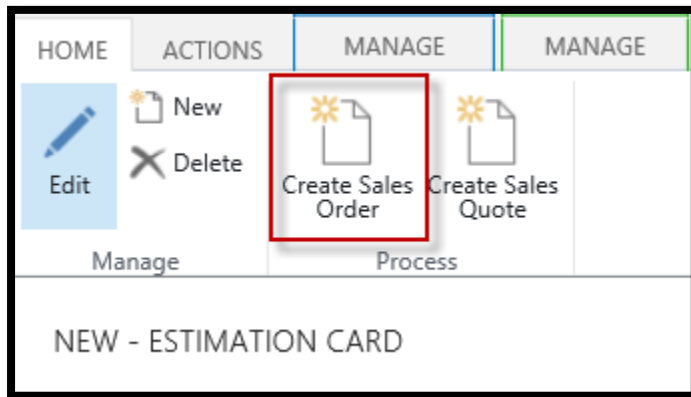
A checkbox appears, you must choose if you want to apply the standard or the desired price in the sales order:

The customer list appears:

1. Select the appropriate customer.
2. Click **OK**.

The related sales order appears, please ensure the quantity field is filled for each item.
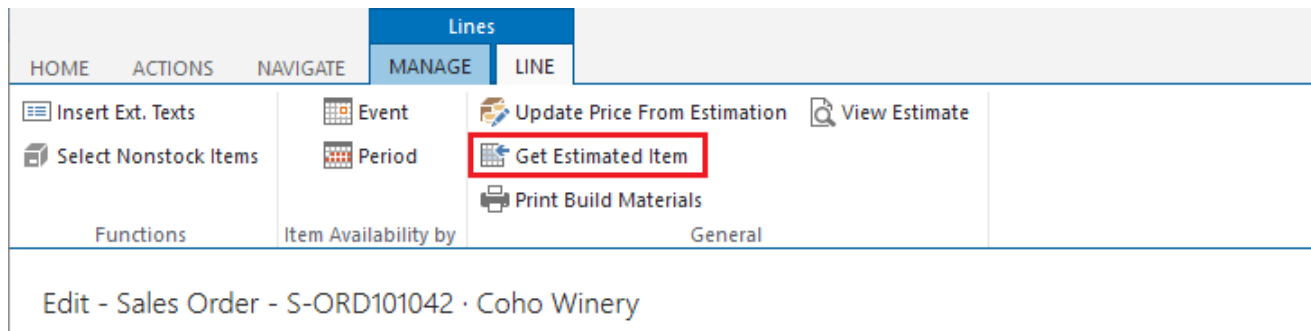
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3.3. Additional Estimation Items

If you need to add more estimate items to the order, **do not** add them in manually in the Lines section. The following steps will successfully add additional estimate items to the order;
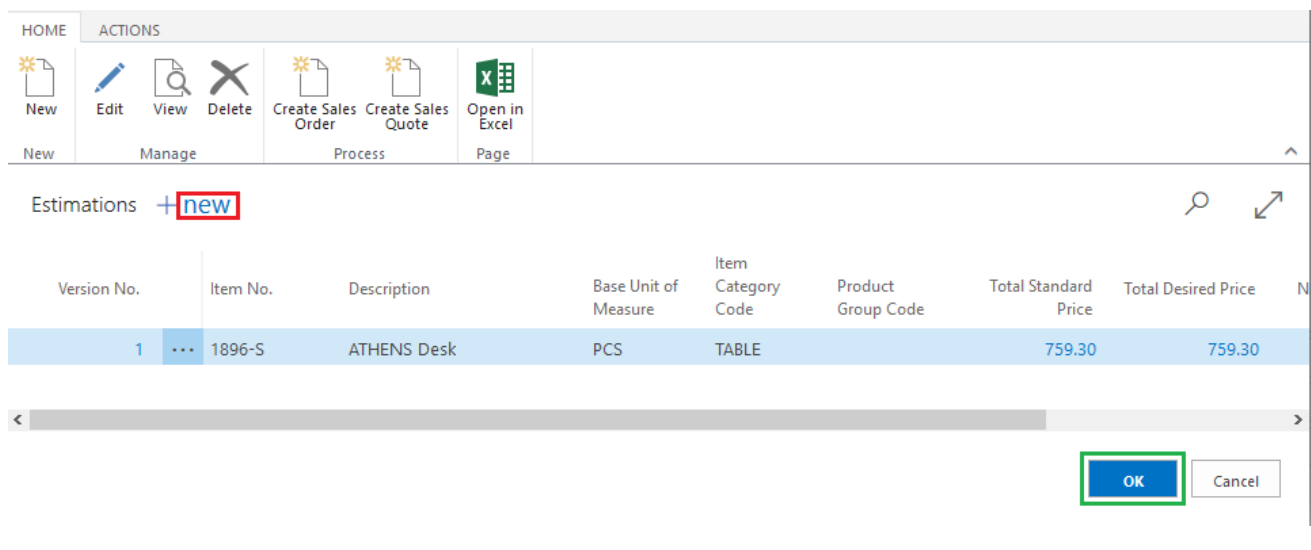
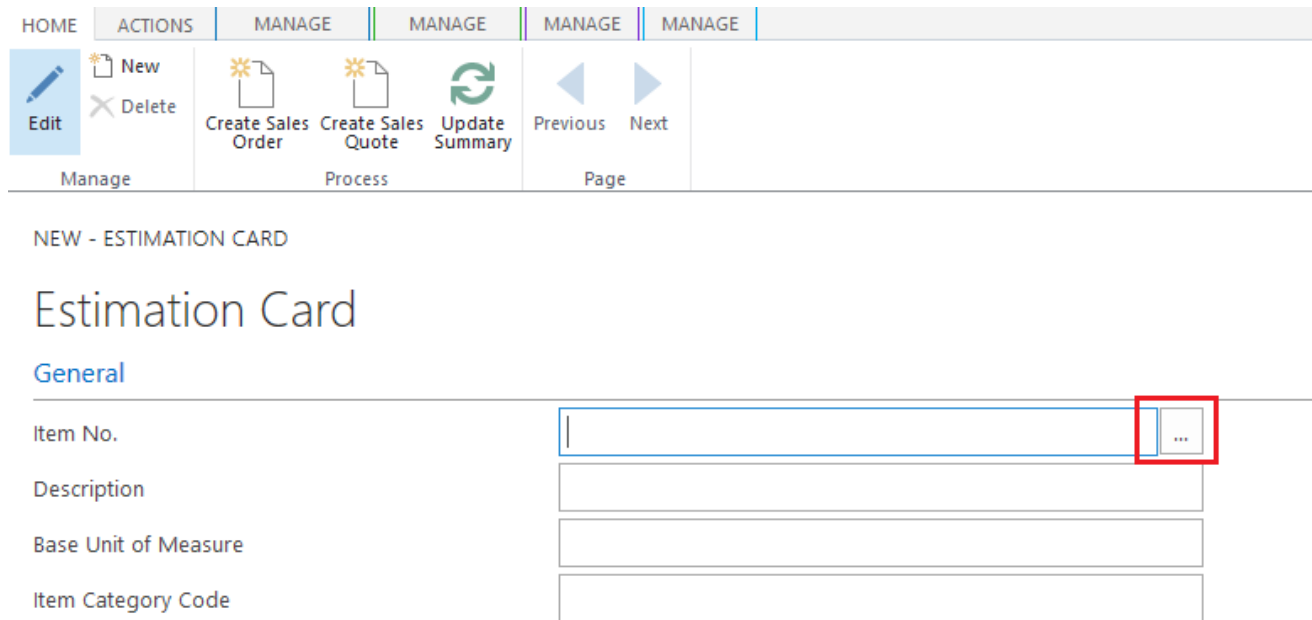1. Click the **Line** tab at the top of the page.
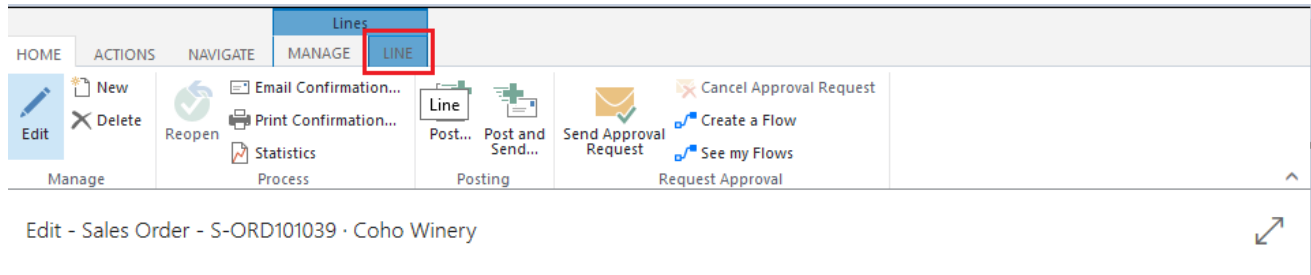
2. Click the **Get Estimated Item** button.

3. Select an estimation from the Estimations list that appears and click **OK** (green). You can optionally create a new estimation by clicking **new** (red).

4. If you selected **new** in the previous step, you will be brought to the Estimation Card to create a new estimation. Click on the assist edit button (…) in the Item No. field and select an item.
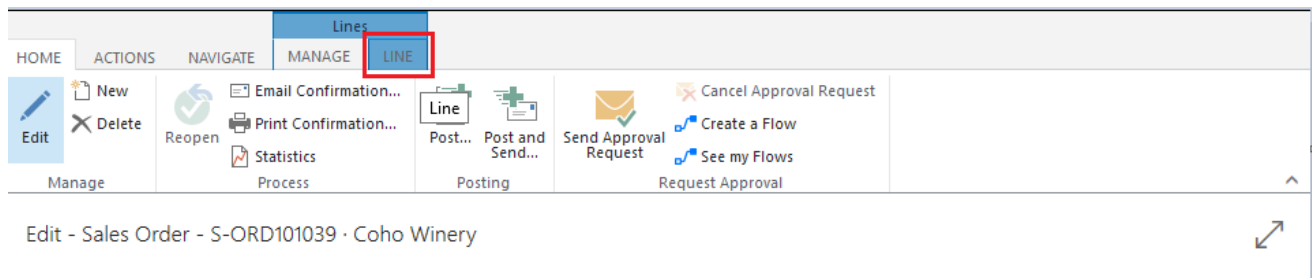

5. Go to step 3 (General Tabs) on page 10 to continue creating the estimation.

4. Building Materials Report

The **Build Materials** report allows the user to print all the items and their costs within the estimation.
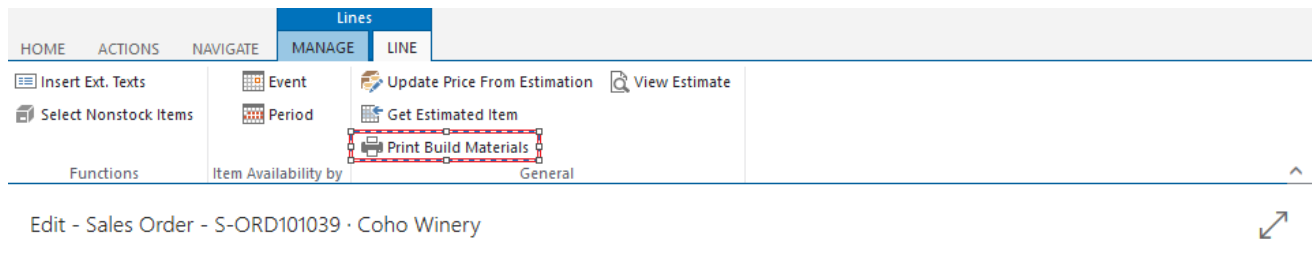
1. Click the **Line** tab at the top of the page.

2. Click the **Print Build Materials** button.

3. You have the choice to show prices or not by checking the **Show Prices** checkbox.

From here you can do three things;

1. Preview the document to ensure all the information is correct.
2. Print the document.
3. Export the document to PDF, Word or Excel by clicking the **Send to...** button.

If you have any further questions, please contact us at support@createch365.com. Thank you for using our Estimation Tool extension!