



# User Scenario Document Estimation Tool

Gold

## Microsoft Partner



## Revision history

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

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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:

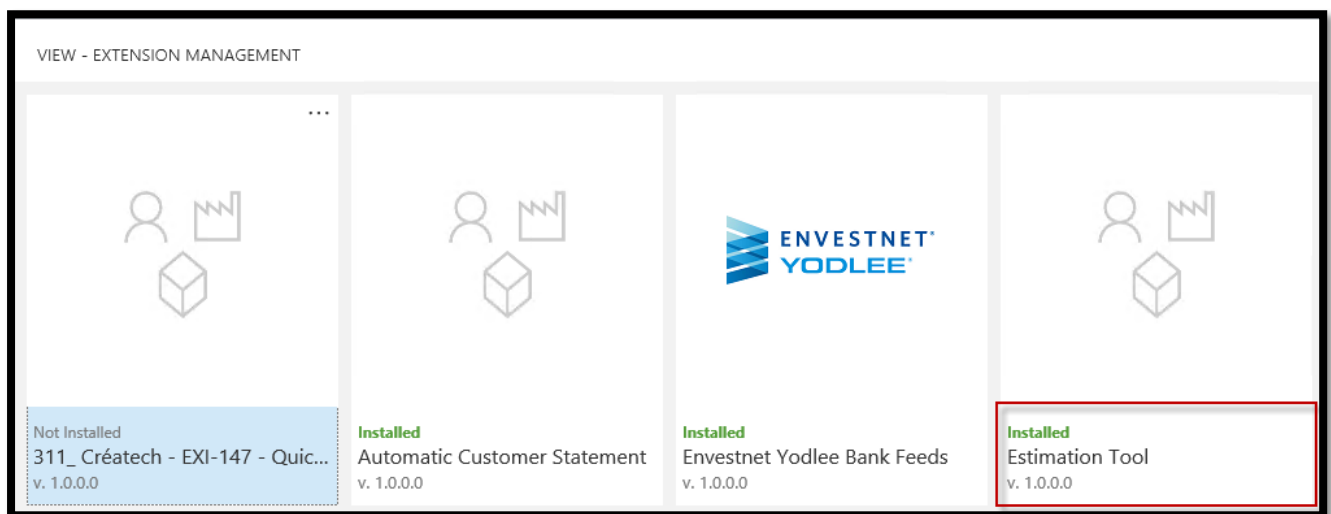
1. Click on the search function from your home page



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



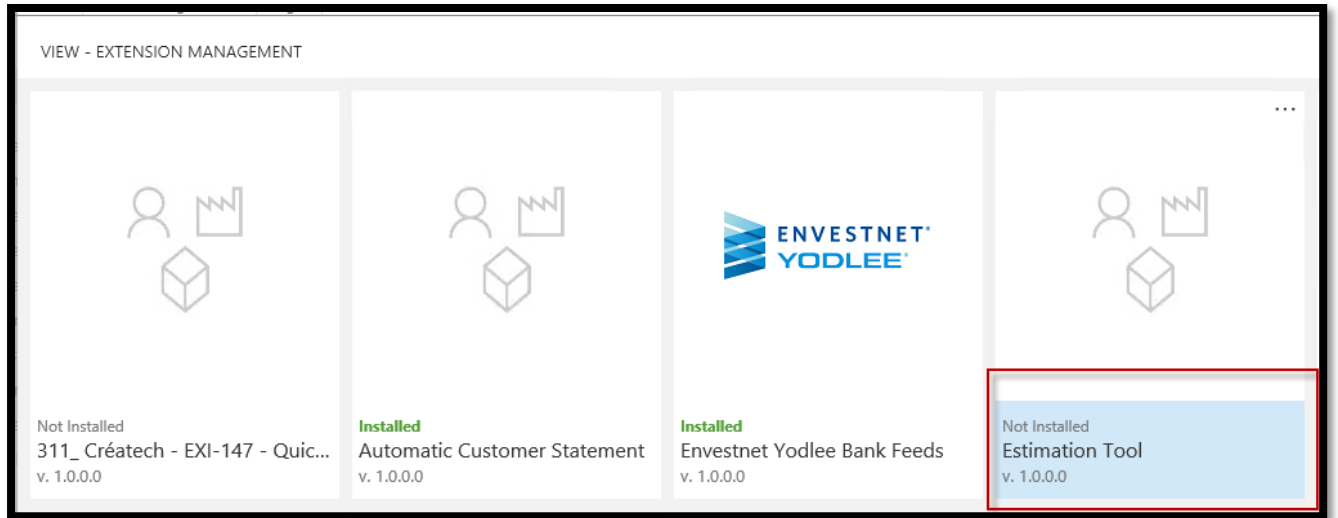
The extension management page opens:



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.

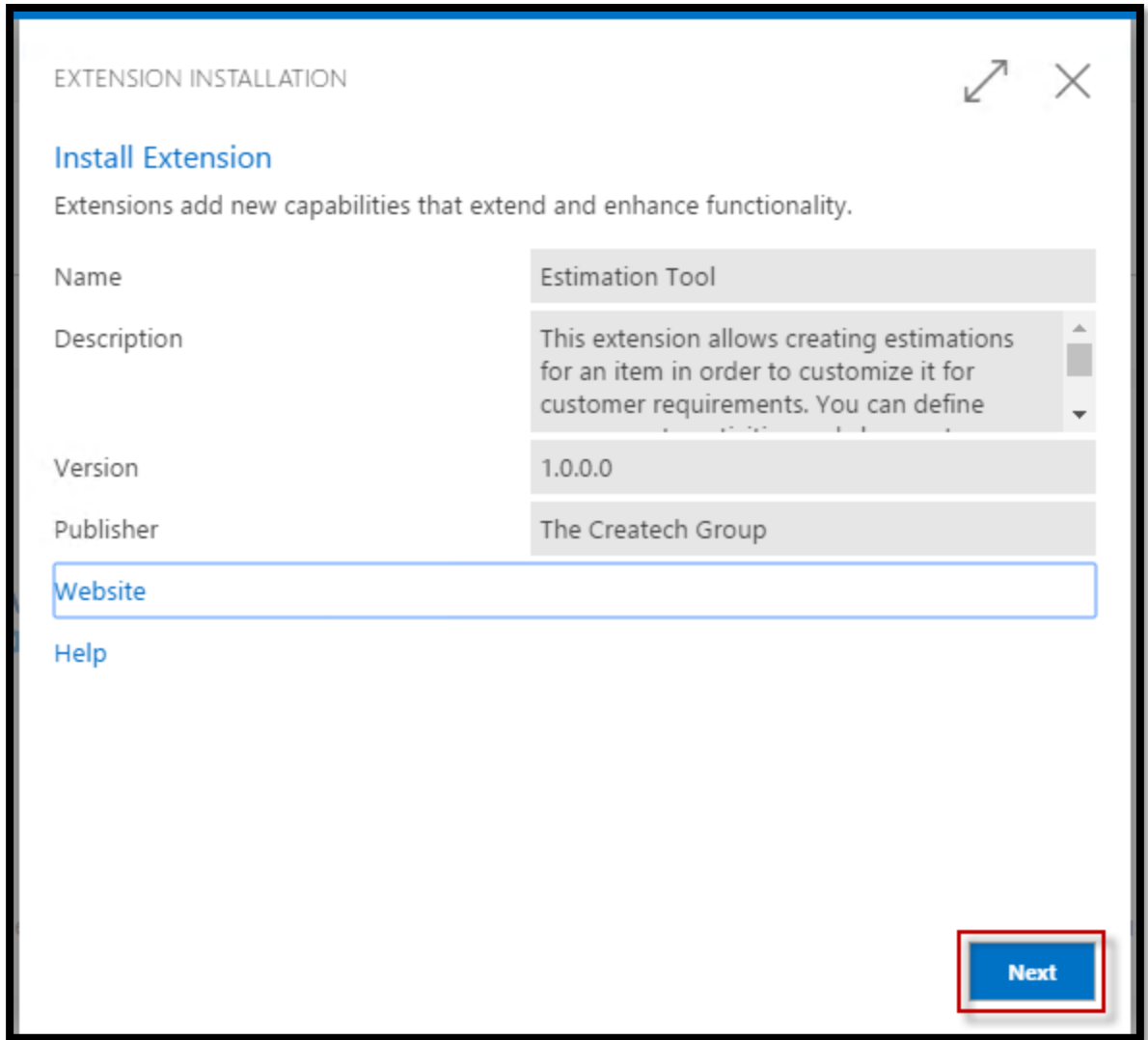
If it is Not Installed, you can:

3. Click in the extension called "Estimation Tool".





The Extension Installation Wizard opens:

4. Click on **Next**.



The next step of the wizard opens:

5. Click on **Install**.

EXTENSION INSTALLATION  

**Review Extension Information before installation**

Name Estimation Tool

Publisher The Createch Group

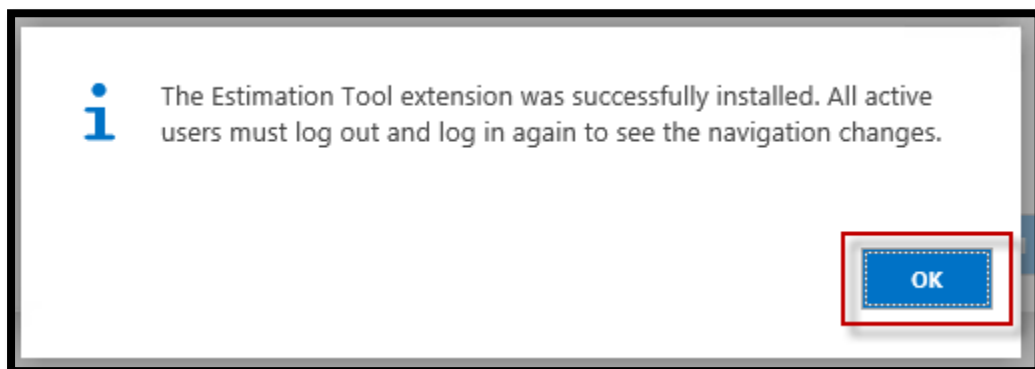
[Terms and Conditions](#)

[Privacy Statement](#)

I accept the terms and conditions ☒

Back **Install**





Click on **OK**.



The extension is now correctly installed.



VIEW - EXTENSION MANAGEMENT

 <div>Not Installed 311_ Créatech - EXI-147 - Quic... v. 1.0.0.0</div>	 <div>Installed Automatic Customer Statement v. 1.0.0.0</div>	 <div>Installed Investnet Yodlee Bank Feeds v. 1.0.0.0</div>	 <div>Installed Estimation Tool v. 1.0.0.0</div>
--	---	---	--

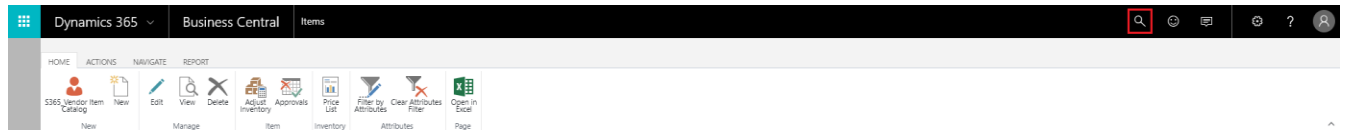
## 2. Create an Item Estimation

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

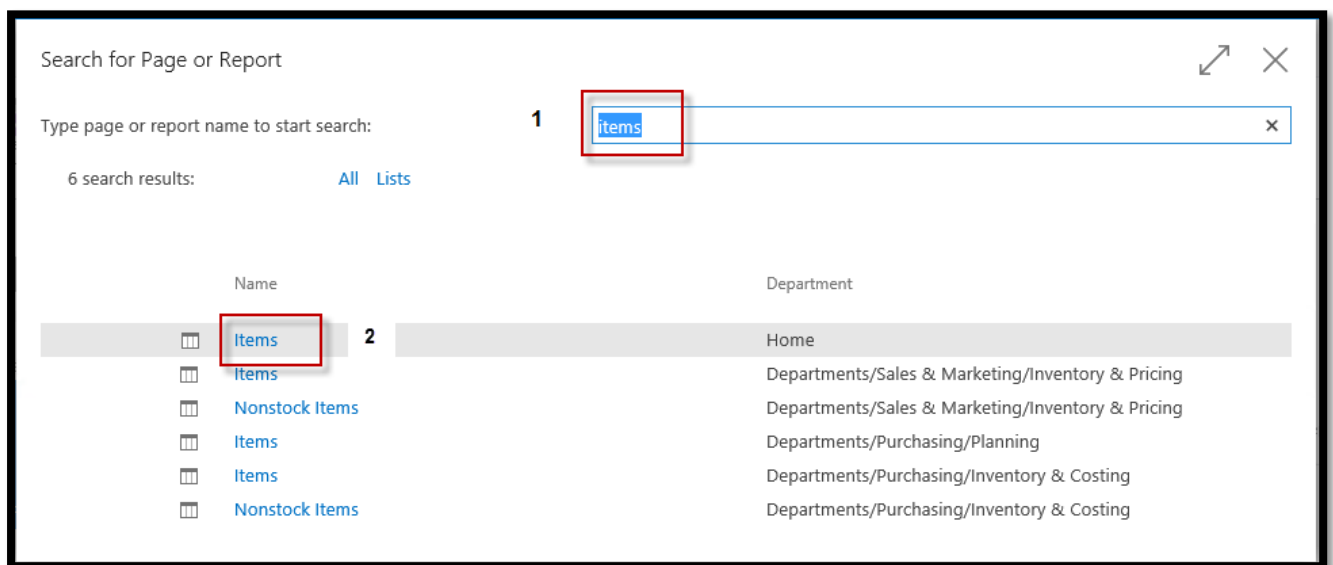
The estimation card is available from the item card.

Follow these steps to go to the item card:

1. Click on the search function.

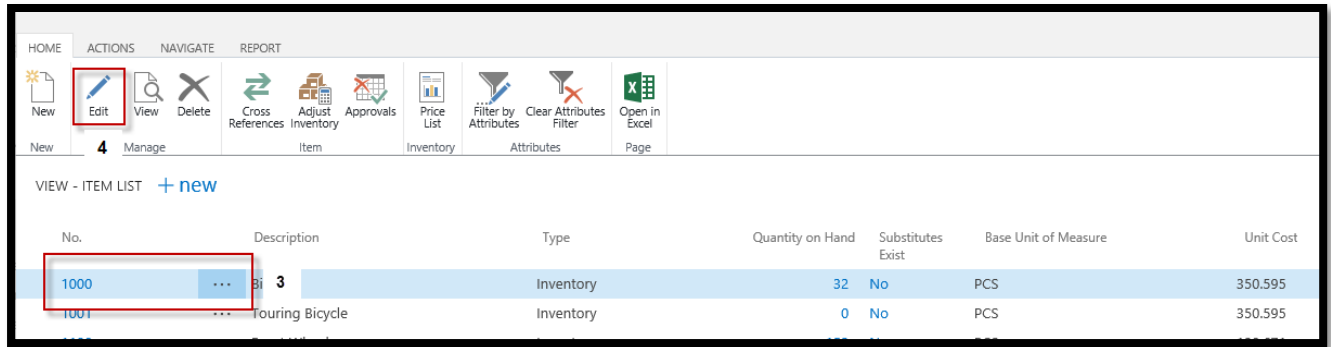


2. The search page opens:
  1. Enter "items" in the search bar.
  2. Select the first result.



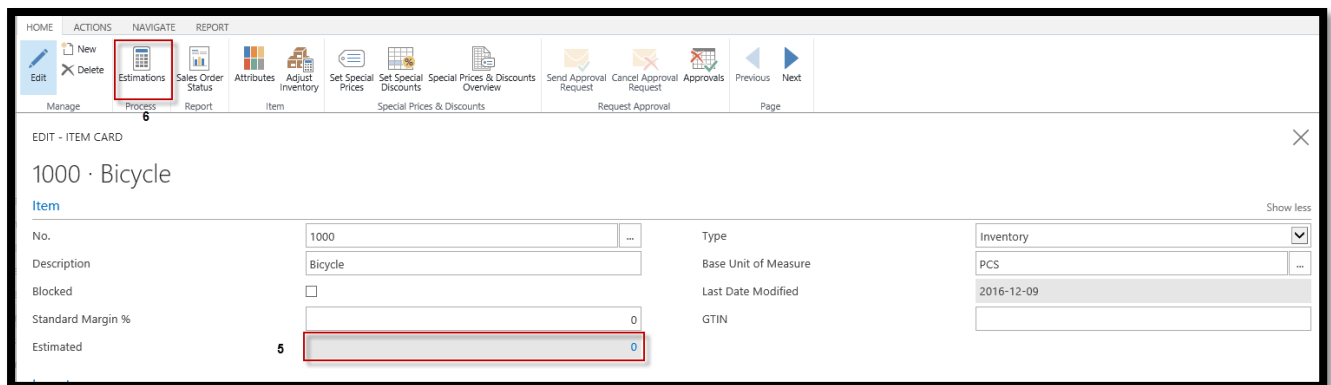
The Item list opens:

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



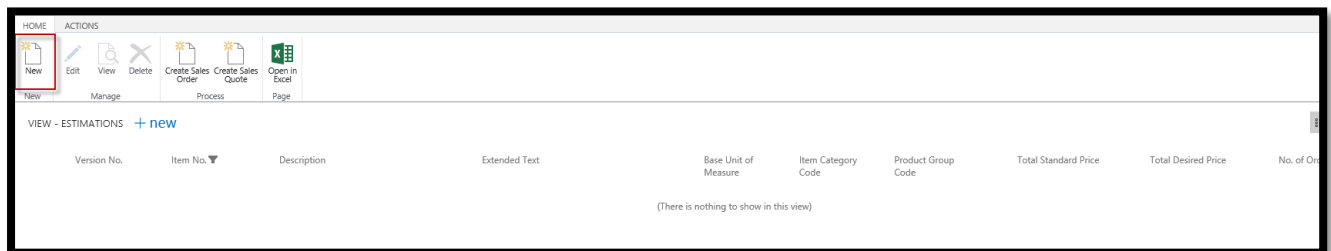
The Item card opens:

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):

1000 · Bicycle

**General**

Item No.	1000	Product Group Code	
Description	Bicycle	No. of Orders	0
Base Unit of Measure	PCS	No. of Quotations	0
Item Category Code	FURNITURE		

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

**Extended Text**

Text

24 inches
luggage rack

## 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.

No.	Description	Base Unit of Measure	Unit Price
1000	Bicycle	PCS	4,000.00
1001	Touring Bicycle	PCS	4,000.00
1100	Front Wheel	PCS	1,000.00
1110	Rim	PCS	0.00
1120	Spokes	PCS	0.00
1150	Front Hub	PCS	500.00

... + new Select from full list

... 1110 X ... Rim

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.

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.

Components									
	No.	Description	Quantity	Unit of Measure	Waste	Unit Cost	Total Cost	Standard Margin %	Desired Margin %
7	1001	Touring Bicycle	8	1 PCS	0.00	150.00	150.00	10	8
...	1100	Front Wheel	2	PCS	0.00	50.00	100.00	15	12
...	1110	Rim	1	PCS	0.00	10.00	10.00	20	18

### 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.

### Activities

Type	No.	Description	Quantity	U
Work Centre	12			

### Charges

No.	Description	Quantity
13	(There is nothing to show in this view)	

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.

Select - Estimation Activities
+ new

Type	No.	Description	% Standard Margin	Unit of Measure
Work Centre	10	Assembly Center	15	HOUR
Work Centre	20	Painting Center	20	HOUR

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

- Click on the assist edit (...).
- Select the appropriate activity.

Activities

Type	No.	Description
Work Centre		

Charges

Type	No.	Description
Work Centre	10	Assembly Center
Work Centre	20	Painting Center

+ new
Select from full list

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

Activities

Type	No.	Description	Quantity	Unit of Measure	Unit Cost	Total Cost	Standard Margin %	Desired Margin %
Work Centre	10	Assembly Center	10	HOUR	60.00	600.00	15	10
Work Centre	20	Painting Center	12	HOUR	75.00	900.00	20	

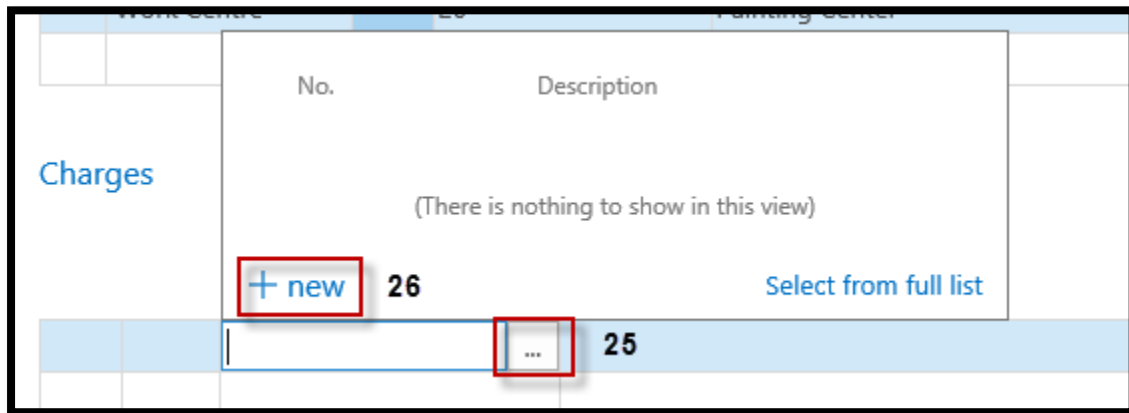
#### 4. Charges tab:

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.



No.	Description
(There is nothing to show in this view)	
26	<a href="#">+ new</a>
<a href="#">Select from full list</a>	
25	...

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.

HOME

Select - Item Charges (Estimations) [+ new](#)

No. 27

Description 28

Standard Marge %

TRANSPORT	...	Transport Fee	×	29	10
CUSTOMS	...	Customs Fee			12

OK

Cancel

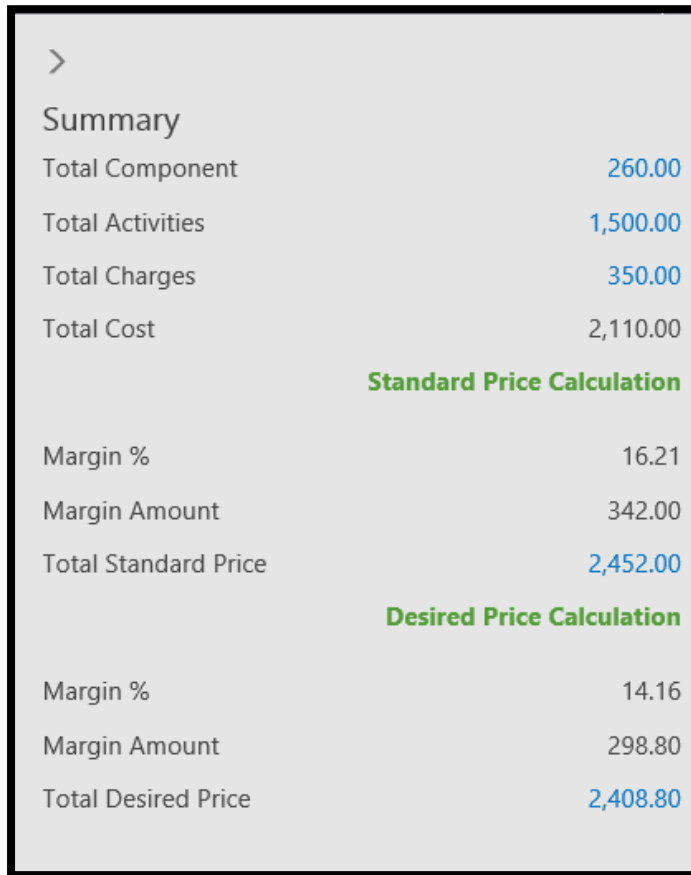
Go back to the estimation card:

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

Charges												
No.	Description	Quantity	Unit Cost	Total Cost	Standard Margin %	Desired Margin %						
...	TRANSPORT	Transport Fee	30	1	31	100.00	×	100.00	32	10	33	8
...	CUSTOMS	Customs Fee	1		250.00			250.00	12		10	



## 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:

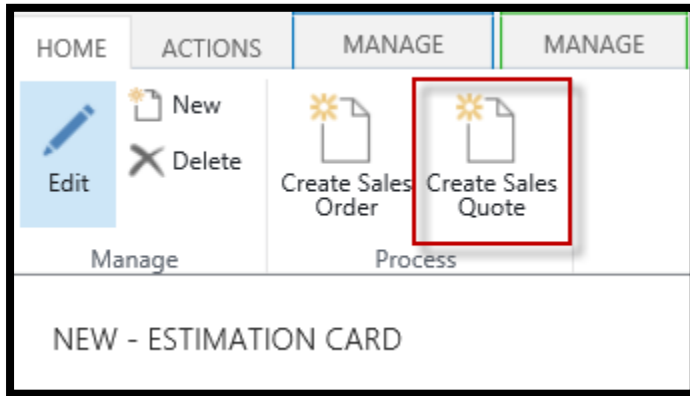
1. Total component: sum of total cost of the components.
2. Total activities: sum of total cost of the activities.
3. Total charges: sum of total cost of the charges.
4. Total cost: sum of the total component, activities and charges.
5. Standard Price Calculation
  - a. Margin %: ratio margin amount/total 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.

### 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**.

HOME

ACTIONS

NAVIGATE

New

New Sales Quote

Edit

View

Delete

Alternative Address

Open in Excel

New

Manage

Contact

Page

Contact List

+ new

No.	Name	Phone No.	Email	Salesperson Code	Territory Code
CT000087	3.. Afrifield Corporation		afrifield.corporation@cronuscorp...	JR	FOREIGN
CT000031	... Antarcticopy		antarcticopy@cronuscorp.net	JR	FOREIGN
CT000084	... Autohaus Mielberg KG		autohaus.mielberg.kg@cronusco...	JR	FOREIGN
CT000082	... Beef House		beef.house@cronuscorp.net	JR	FOREIGN
CT000041	... Bilabankinn		bilabankinn@cronuscorp.net	JR	FOREIGN
CT000251	... Blanemark Hifi Shop			JR	
CT000053	... BYT-KOMPLET s.r.o.		byt-komplet.sro@cronuscorp.net	JR	FOREIGN
CT000099	... Candoxy Canada Inc.		candoxy.canada.inc@cronuscorp....	JR	FOREIGN
CT000065	... Candoxy Kontor A/S		candoxy.kontor.as@cronuscorp.n...	JR	FOREIGN
CT000027	... Candoxy Nederland BV		candoxy.nederland.bv@cronusco...	JR	FOREIGN
CT000067	... Carl Anthony		carl.anthony@cronuscorp.net	JR	FOREIGN
CT000051	... Centromerkur d.o.o.		centromerkur.doo@cronuscorp.n...	JR	FOREIGN
CT000035	... Corporación Beta		corporacion.beta@cronuscorp.net	JR	FOREIGN
CT000247	... Cronus Cardoxy Procure...		cronus.cardoxy.procurement@cr...	JR	FOREIGN
CT000248	... Cronus Cardoxy Sales		cronus.cardoxy.sales@cronuscor...	JR	FOREIGN
CT000013	... Deerfield Graphics Comp...		deerfield.graphics.company@cro...	PS	W
CT000050	... Designstudio Scandinavia		designstudio.scandinavia@cronus...	JR	FOREIGN

4

OK

Cancel

The related sales quote appears:

HOME

ACTIONS

REPORT

MANAGE

LINE

FUNCTIONS

Edit

New

Delete

Send by Email

Make Order

Make Invoice

Dimensions

Customer

Contact

Approvals

Send Approval Request

Cancel Approval Request

Manage

Process

Quote

Request Approval

Edit - Sales Quote - 1007 · Afrifield Corporation

Show less

General

Customer

Afrifield Corporation

Contact

Mrs. Ariane Peeters

SELL-TO

Address

100 Maidstone Ave.

No. of Archived Versions

0

Address 2

Order Date

2018-01-25

City

Maidstone

Document Date

2018-01-25

Province/State

Due Date

2018-02-25

Postal/ZIP Code

GB-ME5 6RL

Requested Delivery Date

Salesperson Code

JR

Contact No.

CT000087

Status

Open

Authorised Transaction

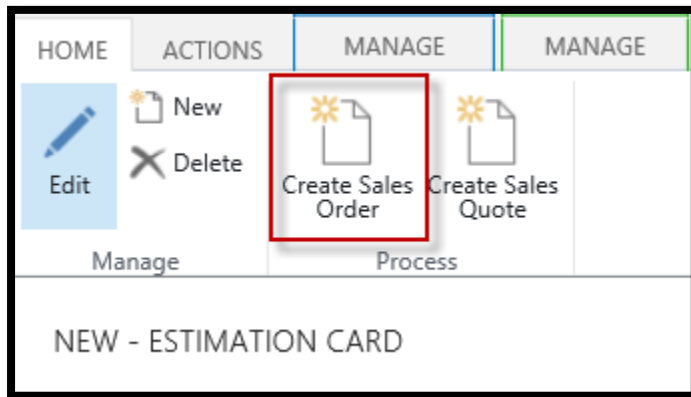
Lines

Item	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax
1000	... Bicycle	*	PCS	2,408.80	*	
	... 24 inches					
	... Luggage rack					

Close

### 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**.

HOME ACTIONS REPORT

New Edit View Delete Sales Quote Sales Invoice Sales Order Sales Credit Memo Contact Approvals Open in Excel

New Manage New Document Customer Page

Customer List + new

No.	Name	Phone No.	Contact	Balance (\$)	Balance Due (\$)
01121212	Spotsmeyer's Furnishings		Mr. Mike Nash	0.00	0.00
01445544	Progressive Home Furnishin...		Mr. Scott Mitchell	2,461.00	2,461.00
01454545	New Concepts Furniture		Ms. Tammy L. McDonald	0.00	0.00
01905893	Candoxy Canada Inc.		Mr. Rob Young	0.00	0.00
01905899	Elkhorn Airport		Mr. Ryan Danner	0.00	0.00
01905902	London Candoxy Storage C...		Mr. John Kane	0.00	0.00
10000	The Cannon Group PLC		Mr. Andy Teal	255,797.35	255,797.35
20000	Selangorian Ltd.		Mr. Mark McArthur	147,258.97	147,258.97
20309920	Metatorad Malaysia Sdn Bhd		Mrs. Azleen Samat	0.00	0.00
20312912	Highlights Electronics Sdn B...		Mr. Mark Darrell Boland	0.00	0.00
20339921	TraxTonic Sdn Bhd		Mrs. Rubina Usman	0.00	0.00
21233572	Somadis		M. Syed ABBAS	0.00	0.00
21245278	Maronegoce		Mme. Fadoua AIT MOUSSA	0.00	0.00
21252947	ElectroMAROC			0.00	0.00
27090917	Zanlan Corp.		Mr. Derik Stenerson	0.00	0.00
27321782	Karoo Supermarkets		Mr. Pieter Wycoff	0.00	0.00

4 OK Cancel

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

Edit - Sales Order - 1012 - Spotsmeyer's Furnishings

General Show more

No.	1012	Due Date	2018-02-08
Customer	Spotsmeyer's Furnishings	Requested Delivery Date	
Contact	Mr. Mike Nash	External Document No.	
Posting Date	2018-01-25	Authorised Transaction	<input type="checkbox"/>
Order Date	2018-01-25		

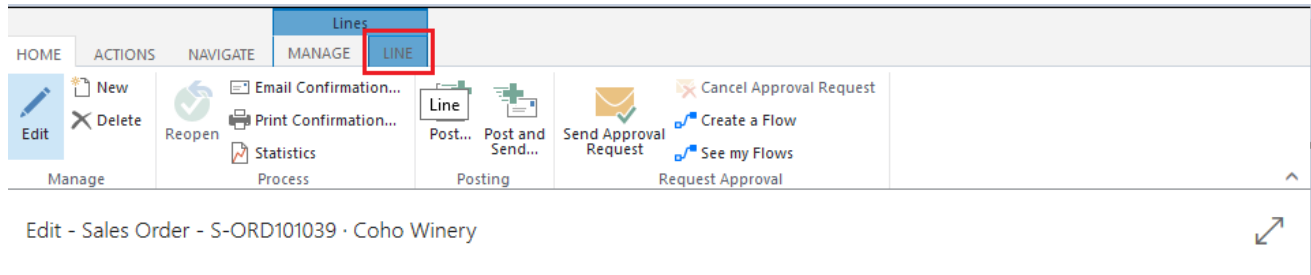
Lines

Item	Description	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Group Code	Line Amount Excl. Tax
1000	Bicycle		PCS	2,452.00		
	24 inches					
	Luggage rack					

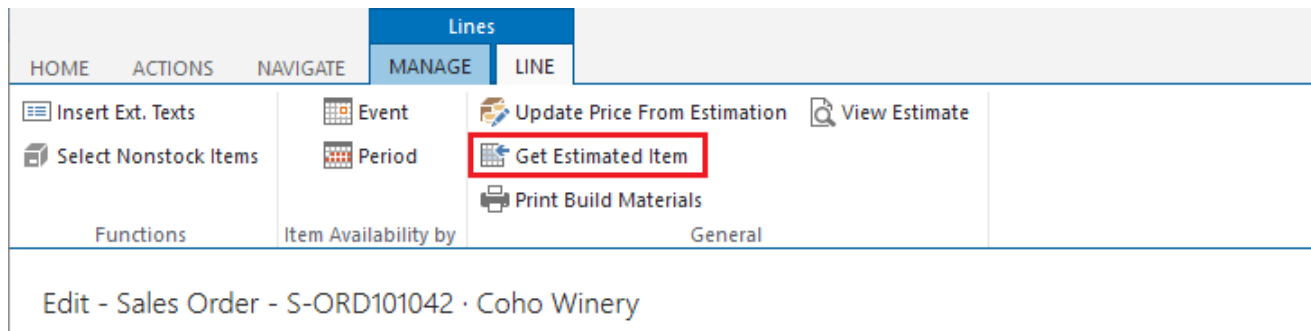
### 3.3. Additional Estimation Items

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;

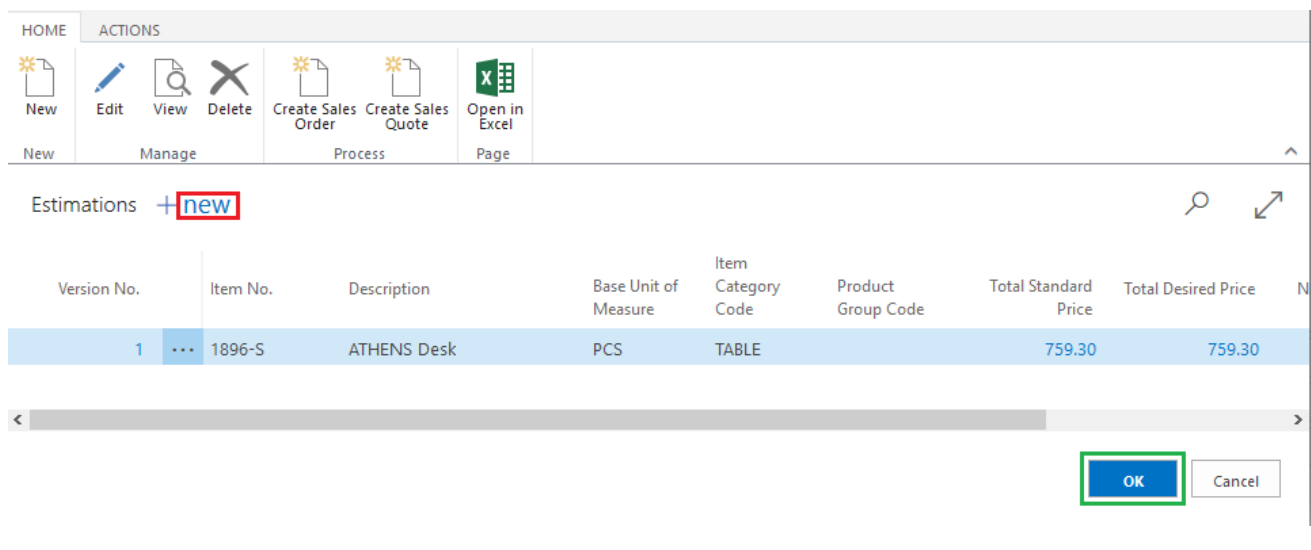
1. Click the **Line** tab at the top of the page.



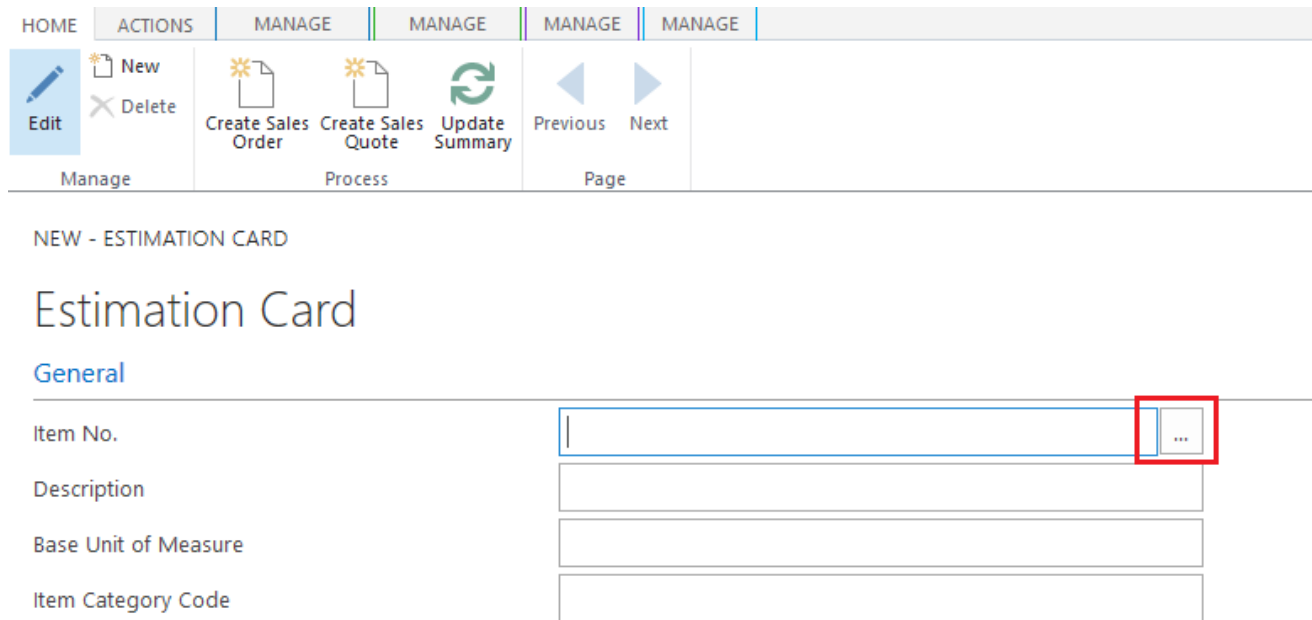
2. Click the **Get Estimated Item** button.



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.



HOME ACTIONS MANAGE MANAGE MANAGE MANAGE

Edit New Delete Create Sales Order Create Sales Quote Update Summary Previous Next

Manage Process Page

NEW - ESTIMATION CARD

## Estimation Card

General

Item No. [Assist Edit Button]

Description

Base Unit of Measure

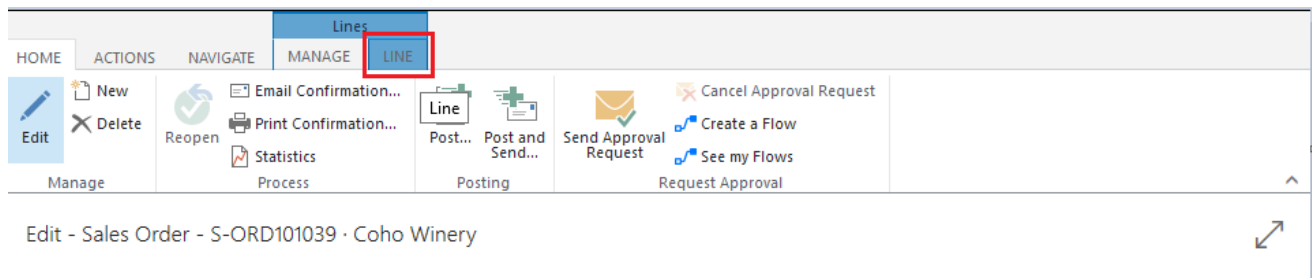
Item Category Code

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.



HOME ACTIONS NAVIGATE MANAGE LINE

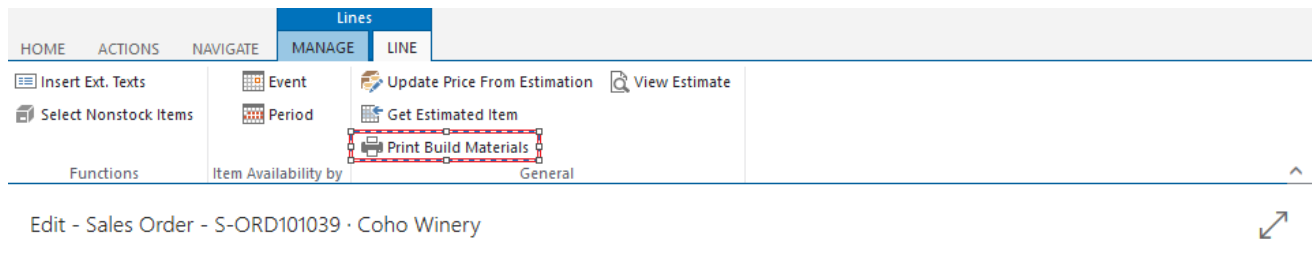
Edit New Delete Reopen Email Confirmation... Print Confirmation... Statistics Line Post... Post and Send... Send Approval Request Cancel Approval Request Create a Flow See my Flows

Manage Process Posting Request Approval

Edit - Sales Order - S-ORD101039 - Coho Winery



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



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

Edit - Build Materials

### Pricing Options

Show Prices ☐

### Sales Header

Show results:

Where: No.  is: S-ORD101040

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](mailto:support@createch365.com). Thank you for using our Estimation Tool extension!