SERVICES-365

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
1.2	2019-10-29		Createch
1.3	2020-02-27		Createch

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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.
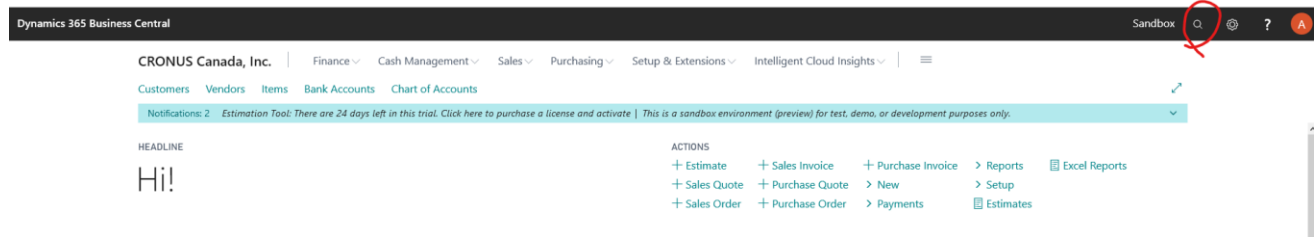
1. Create an Item Estimation

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.

User Scenario Guide (Estimation Tool)

TELL ME WHAT YOU WANT TO DO

items

On current page (Business Manager)

📑 Sales Quote
Offer items or services to a customer.

📑 Sales Order
Create a new sales order for items or services.

📑 Sales Invoice
Create a new invoice for the sales of items or services. Invoice quantities cannot be posted ...

Go to Pages and Tasks   Show all (25)

> Items   Lists   🔖

> Catalog Items   Lists

> Teams   Lists

Go to Reports and Analysis   Show all (16)

📄 Items per Job   Reports and Analysis

📄 Assembly BOM - End Items   Reports and Analysis

📄 Item Registers   Archive

Didn't find what you were looking for? Try exploring

RCHASE | ONGOING PUR... | PURCH. INVOI... | REQUESTS TO | UNPROCESSED

The Item list opens:

   3. Select an item.

The Item card opens:

   4. The estimated field shows the number of estimations related to this item.
   5. Click on the estimated number to open the Estimates card.

User Scenario Guide (Estimation Tool)

1896-S · ATHENS Desk

✕ If you want, we can assign attributes based on the images you import for items and contacts.   Enable | Don't ask again
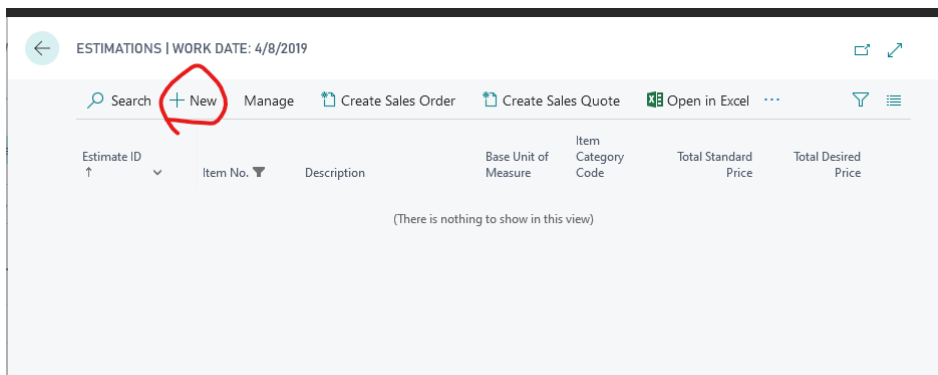
Process   Item   History   Special Sales P...ces & Discounts   Request Approval   More options

Item   Show more

No. · · · · · · · · · · · ·	1896-S · · ·	Estimated · · · · · · · · ·	0
Description · · · · · · ·	ATHENS Desk	Type · · · · · · · · · · · ·	Inventory
Blocked · · · · · · · · · ·	(toggle)	Base Unit of Measure · · · · · · · ·	PCS
Standard Margin % · · · · · · · · · · ·	0	Item Category Code · · · · · · · · · · ·	TABLE

The estimation list opens:

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

ESTIMATIONS | WORK DATE: 4/8/2019

🔍 Search   + New   Manage   📄 Create Sales Order   📄 Create Sales Quote   📗 Open in Excel   · · ·

Estimate ID ↑	Item No. ▼	Description	Base Unit of Measure	Item Category Code	Total Standard Price	Total Desired Price
		(There is nothing to show in this view)				

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):

General

Item No. · · · · · · · · ·	Z-EST	No. of Orders · · · · · · · · ·	0
Description · · · · · · · · ·	Office Desk Setup	No. of Quotations · · · · · · · · ·	0
Base Unit of Measure · · · · · · · ·	PCS	Fixed Price · · · · · · · · ·	
Item Category Code · · · · · · · · ·	MISC		

1. **Instructions Tab:** you can enter detailed descriptions/instructions for this estimation.

Instructions	Manage

	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 dropdown arrow. You will then select a component from the list.

No. ↑	Description	Base Unit of Measure	Unit Price
→ 1896-S	ATHENS Desk	PCS	1,503.40
1900-S	PARIS Guest Chair, black	PCS	289.60
1906-S	ATHENS Mobile Pedestal	PCS	651.40
1908-S	LONDON Swivel Chair, blue	PCS	285.50
1920-S	ANTWERP Conference Table	PCS	973.20

+ New   Select from full list

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	Manage								
No.	Description		Quantity	Unit of Measure	Waste	Unit Cost	Total Cost	Standard Margin %	Desired Margin %
1900-S	PARIS Guest Chair, black		1	PCS	0.00	225.80	225.80	0	10
→ 1896-S	⋮ ATHENS Desk		1	PCS	0.00	1,172.70	1,172.70	0	10

User Scenario Guide (Estimation Tool)

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 **No.** field.
2. Click on the **new** button (if you have no values here).

No.		Description	Quantity	Unit of Mea
10	⌄	Assembly Center		HOUR

	Type ↑ ▼	No. ↑	Description
→	Work Center	10	Assembly Center
⁐	+ New		Select from full list

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 No field.
8. Select the appropriate activity.

→	20 ⌄	Painting Center		HOUR

Look up value

	Type ↑ ▼	No. ↑	Description
	Work Center	10	Assembly Center
→	Work Center	20	Painting Center
Char	+ New		Select from full list

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.

User Scenario Guide (Estimation Tool)

13. The desired margin % is initialized with the standard margin % value. You could override the value and enter a new value.

Activities	Manage								

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

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 **No.** field.
2. Click on **new** button.
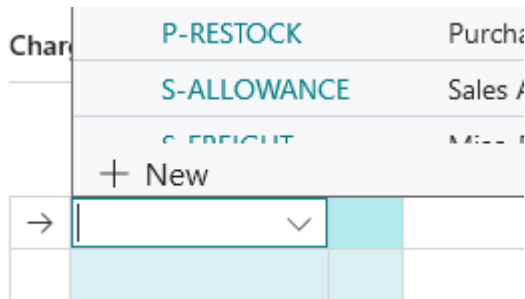
The Item Charges (Estimations) page opens:

3. Enter a no. for the charge.
4. Enter a description for the charge.
5. Enter a standard margin % for the charge, as well as fill out the group codes.

User Scenario Guide (Estimation Tool)

No. ↑		Description	Standard Margin %	Gen. Prod. Posting Group	Tax Group Code	Search Description
→ CUSTOMS	⋮	Customs Fee	12	SERVICES	TAXABLE	CUSTOMS FEE
TRANSPORT		Transport Fee	10	SERVICES	TAXABLE	TRANSPORT FEE
JB-FREIGHT		Freight Charge (JB-Spedition)	0	SERVICES	TAXABLE	FREIGHT CHAR...
P-ALLOWANCE		Purchase Allowance	0	SERVICES	TAXABLE	PURCHASE ALL...
P-FREIGHT		Misc. Freight Charge (Purch.)	0	SERVICES	TAXABLE	MISC. FREIGHT ...
P-RESTOCK		Purchase Restock Charge	0	SERVICES	TAXABLE	PURCHASE RES...
S-ALLOWANCE		Sales Allowance	0	SERVICES	TAXABLE	SALES ALLOWA...
S-FREIGHT		Misc. Freight Charges (Sales)	0	SERVICES	TAXABLE	MISC. FREIGHT ...
S-RESTOCK		Sales Restock Charge	0	SERVICES	TAXABLE	SALES RESTOCK...

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.

Charges | Manage ⬓

No.		Description	Quantity	Unit Cost	Total Cost	Standard Margin %	Desired Margin %
TRANSPORT		Transport Fee	1	100.00	100.00	10	8
→ CUSTOMS	⋮	Customs Fee	1	250.00	250.00	12	10

User Scenario Guide (Estimation Tool)

5. Summary factbox:

Summary

Total Component	1,398.50
Total Activities	1,500.00
Total Charges	350.00
Total Cost	3,248.50

STANDARD PRICE CALCULATION

Margin %	9.54
Margin Amount	310.00
Total Standard Price	3,558.50

DESIRED PRICE CALCULATION

Margin %	11.32
Margin Amount	367.85
Total Desired Price	3,616.35

FIXED PRICE CALCULATION

Margin %	6.20
Margin Amount	201.50
Fixed Price	3,450.00

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.

7. The fixed price calculation is based on the fixed price value set in the General tab of the page.
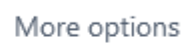
2. Create Sales Quote and Sales Order
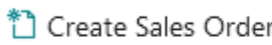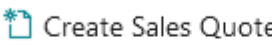
You can create a sales quote or a sales order from the estimation card.

2.1. Create Sales Quote

This option exists from the estimation card on the ribbon: click the **Create Sales Quote** button.
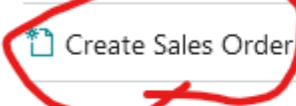
ESTIMATION CARD | WORK DATE: 4/8/2019

E-00001

📄 Create Sales Order   📄 Create Sales Quote   📎 Attachments | More options

General

Item No.	Z-EST	∨	No. of C
Description	Office Desk Setup		No. of Q
Base Unit of Measure	PCS		Fixed Pri
Item Category Code	MISC		

A checkbox appears, you must choose if you want to apply the standard, desired or fixed price in the sales quote:

The contact list appears after clicking ok:

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

The related sales quote appears:

Manage   Process   Quote   Request Approval   Print/Send   Release   Navigate | More options

EDIT – SALES QUOTE – S-QUO1004 · ADATUM CORPORATION   ⤢

General   Show more

Customer Name · · · · · · · ·	Adatum Corporation ▾	Due Date · · · · · · · · · · ·	5/8/2019 📅
External Document No. · · · ·		Requested Delivery Date · ·	📅
Contact · · · · · · · · · · ·	Robert Townes · · ·		

Lines | Manage   More options

Type		No.	Description	Location Code	Quantity	Qty. to Assemble to Order	Unit of Measu
→ Item	⋮	Z-EST	Office Desk Setup		*	0	
Comment			24 inches			0	
Comment			luggage rack			0	

←			→

Subtotal Excl. VAT (CAD)	0.00	Total Excl. VAT (CAD) · · · · ·	0.00
Inv. Discount Amount E...	0.00	Total VAT (CAD) · · · · · · · ·	0.00
Invoice Discount % · · · · ·	0	Total Incl. VAT (CAD) · · · · ·	0.00

Invoice Details   Show more

Currency Code · · · · · · · ·	▾ · · ·	Payment Service · · · · · · · ·	No payment service is made available

Close

2.2.   Create Sales Order

This option exists from the estimation card on the ribbon: click the **Create Sales Order** button.

ESTIMATION CARD | WORK DATE: 4/8/2019

E-00001

🗋 Create Sales Order   🗋 Create Sales Quote   📎 Attachments | More options

General

Item No. · · · · · · · · · · · · · · · · ·	Z-EST
Description · · · · · · · · · · · · · · ·	Office Desk Setup
Base Unit of Measure · · · · · · · · · ·	PCS
Item Category Code · · · · · · · · · · ·	MISC

A checkbox appears, you must choose if you want to apply the standard, desired or fixed price in the sales order:

ⓘ ○ Use Standard Price

● Use Desired Price

○ Use Fixed Price

| OK | Cancel |
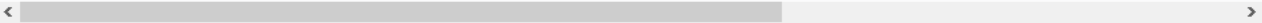
The customer list appears:

1. Select the appropriate customer.

2. Click **OK**.

No. ↑	Name	Responsibility Center	Location Code	Phone No.	Contact
→ 10000	Adatum Corporation				Robert Townes
20000	Trey Research				Helen Ray
30000	School of Fine Art				Meagan Bond
40000	Alpine Ski House				Ian Deberry
50000	Relecloud				Jesse Homer

CUSTOMERS

OK   Cancel

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

2.3. 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 in the Lines part and click **Get Estimated Item**.

User Scenario Guide (Estimation Tool)

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

3. If you selected **new** in the previous step, you will be brought to the Estimation Card to create a new estimation.

4. 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 in the List part menu and click **Print Build Materials**.

2. 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@services-365.com. Thank you for using our Estimation Tool extension!