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How to create an estimate

How to create an estimation:

Manually in PlanManager

It is possible to create manual estimates in PlanManager. Open the job in question and click "New Task" at the bottom left of your screen.

The screenshot shows the PlanManager software interface for Job # 150060. The interface includes a navigation bar with tabs for Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below the navigation bar, there are various icons for different functions like Print, Audatex, Log, Documents, Communicati, Plan, Order, Subcontracte, Damage, Merqe, Car Fleet, Custom Field, and Admin. The main form contains fields for Location (Demo Repair Services), Registration (EXAMPLE1), Make, Model, Type, Model year, VIN/Code (E 1), Colour, Mileage Start / Finish, First registration, Vehicle details, and Comments / Damage. There are also fields for Key Tag Number, Incident date, Est Appointment / in, Book in date (07-08-2017 08:00), Vehicle In (checked), Vehicle In date (05-08-2017 15:56), Ready to start, Planning (Unknown -> Unknown), Start / End (Unknown -> Unknown), Est Comp Date (09-08-2017 16:00), Client informed, Off site date, Current Staus (Unknown), and Status (Appointment). On the right side, there are fields for Owner (FleetManager), Driver, Insured Party, Referred By, Insurer, Surveyor, Repairer (REPAIRER 4), Broker, Direct payment, All Parts In, Claim Admin (select a user), and Financial. At the bottom left, there are buttons for 'New Task', 'New Part', and 'New extra item'. A green arrow points to the 'New Task' button.

A new screen will appear. Select the type, time and the price of the job. For example: stripping: 10 UT and 48.5 € / h. You can eventually add a comment which can be referred to on your invoice. Then click "Save and new line" if you want to create a second task for that estimation.

The screenshot shows the PlanManager software interface for Job # 150060. The interface includes a navigation bar with tabs for Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below the navigation bar, there are various icons for different functions like Print, Audatex, Log, Documents, Communicati, Plan, Order, Subcontracte, Damage, Merqe, Car Fleet, Custom Field, and Admin. The main form contains fields for Type (Stripping), Time(Hour) (1), Comment (Stripping rear bumper), Status (Created), Rate labour (€ 48.5), Time(AE) (10), Discount %, Amount (€ 48.50), and Time(min) (60). There are buttons for 'Save' and 'Save and New'.

Follow this procedure until you have your full estimation.

Automatic on PlanManager with standard jobs

It is also possible to create standard jobs in PlanManager and then import them directly into your application without having to encode all the various tasks.

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To create a standard job refer to 'How to create a standard job' under Claims in our FAQ.

To use a standard job, you have to click on the blue arrow on the right in the middle of your screen.

The screenshot shows the 'Job # 150060' form. The top navigation bar includes 'Back', 'Job List', 'Order list', 'Deliveries', 'Offer Requests', 'Stock', 'Scale', 'Vat Book', 'DMS', 'Albatros', 'Carpas', and 'Audatex'. The main form is divided into several sections: 'Location' (Demo Repair Services), 'Registration' (EXAMPLE1), 'Make', 'Model', 'Type', 'Model year', 'VIN/Code' (E.1), 'Colour', 'Mileage Start / Finish', 'First registration', 'Vehicle details', and 'Comments / Damage'. The 'Key Tag Number' section includes 'Incident date', 'Est Appointment / in', 'Book in date' (07-08-2017 08:00), 'Vehicle In' (checked), 'Vehicle In date' (05-08-2017 15:56), 'Ready to start', 'Planning' (Unknown -> Unknown), 'Start / End' (Unknown -> Unknown), 'Est Comp Date' (09-08-2017 16:00), 'Client informed', 'Off site date', 'Current Staus' (Unknown), and 'Status' (Appointment). The 'Owner' section includes 'FleetManager', 'Driver', 'Insured Party', 'Referred By', 'Insurer', 'Surveyor', 'Repairer' (REPAIRER 4), 'Broker', 'Direct payment', 'All Parts In', 'Claim Admin' (select a user), and 'Financial'. A green arrow points to a blue arrow icon in the bottom right corner of the main form area.

Choose one or more standard works of the list you want to import your job and click "Import".

The screenshot shows the 'Standard Job Selection' dialog box. The dialog box has a title bar 'Standard Job Selection' and a close button. It contains a table with the following rows:

Standard Job -	Filter
<input type="checkbox"/>	BUMPER REPLACE & PAINT
<input type="checkbox"/>	BUMPER REPLACE & PAINT 2
<input type="checkbox"/>	Front Bumper
<input checked="" type="checkbox"/>	GENERAL
<input type="checkbox"/>	Paint Door Handle
<input type="checkbox"/>	Recovery

An 'Import' button is located at the bottom right of the dialog box.

The system will show you all tasks and parts found in the standard works.

You can change the data as desired, the hourly rate, the duration of the different tasks, etc.

You can also clear the lines of tasks or parts you do not want to add to the estimation.

When you agree with the data entered, click "Import"

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STB STOCK Scale Vat BOOK DMS Albatros Carpass Audatex

Standard Job Selection

Work

Paint

<input checked="" type="checkbox"/>	Task	AE	Time	Price
<input checked="" type="checkbox"/>	Stripping	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	PANEL WORK	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	PREPARATION	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	PAINT WORK	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/>	Re-assemble	<input type="text"/>	<input type="text"/>	<input type="text"/>

<input checked="" type="checkbox"/>	Part	Repl.	Quant.	Price	Total
<input checked="" type="checkbox"/>	Parts	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text"/>	0.00
<input checked="" type="checkbox"/>	Small Materials	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text"/>	0.00
<input checked="" type="checkbox"/>	Paint Products	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text"/>	0.00
<input checked="" type="checkbox"/>	Miscelaneous	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text"/>	0.00

	Time (AE)	Time	Price
Total	0.00	0.00	0.00

After clicking "Import", the system will add to the estimation all the tasks you've selected.

If the system sees that there is already a task "PANEL WORK" in your basic estimation and you add a new time for the same task PlanManager will add these 2 times.

You can also directly plan this estimation by clicking on "Import and plan". More about the planning in our FAQ under Planning - How to plan a claim / job.

Creating an estimation with the Damage analysis

The damage analysis is a fantastic tool to make an estimation in a very fast and accurate way.

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First click on the damage icon **Damage** in the job screen, then, in the next screen,



Damage analysis

click on the damage analysis icon, you will get the following screen:

PlanManager

Help Workshop Job Planning Report Maintenance System Car Fleet Invoicing

Back Job List Order list Deliveries Offer Requests Stock Scale Vat Book DMS Albatros Carpass Audatex English (United Kingdom)

Job # 150060 Standard Repair New

Make	Model	Registration	Vin	First registration
EXAMPLE1				

Comments

EXAMPLE1

Rate labour Insurer

Rate labour Rate lab: £ Recalculate lines

Rate paint labour Rate lab: £

Generate from parts

Utility (2%) 0 : £

Environment : £

Generate from paintwork

Paint Product (30%) 0 : £

Anti-rust : £

: Remark: this claim does not have an insurer, the amounts can not be calculated automatically.

Add new part

Make Estimation Print

Here you can put in the hourly rate, (you will have to put an insurer in your job screen to make this work, you can eventually link the hourly rate to the insurer, this will transfer this hourly rate to the damage analysis) the amount for environment and anti-rust, paint products are calculated automatically at 30% (from the total of the paint labour) and utility at 2% (from the total of the parts). Now you can add new parts:

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The image shows a screenshot of a software application with a modal dialog box titled "Add Part". The dialog box is centered and has a dark blue header with a close button (X). The background is a blurred view of the application interface, showing a table with columns like "Generate fr" and "Paint F", and a "Generate fr" button. The "Add Part" dialog contains the following fields:

- Zone: A dropdown menu with "Boot" selected.
- Subzone: A dropdown menu with "select a subzone" selected.
- Instruction: A text input field.
- Factor: A text input field with "1" entered.
- Dis/assembly: A text input field.
- Bodywork: A text input field.
- Prep./Paintwork: A text input field.
- Amount: A text input field.
- Part: A text input field.

At the bottom of the dialog is a dark blue button labeled "Add".

You will have to select a zone, and then a subzone (optional). Then you can add an instruction, times for the different tasks or a total amount and the price of the part:

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Add Part
✕

Zone

Subzone

Instruction

Factor

Dis/assembly

Bodywork

Prep./Paintwork

Amount

Part

You click add and now you either can add another part or end the calculation:

Rate labour Insurer		Generate from parts		Generate from paintwork	
Rate labour	<input type="text" value="50"/> :£	<input checked="" type="checkbox"/> Utility (2%)	<input type="text" value="7.08"/> :£	<input checked="" type="checkbox"/> Paint Product (30%)	<input type="text" value="37.5"/> :£
Rate paint labour	<input type="text" value="50"/> :£	<input checked="" type="checkbox"/> Environment	<input type="text" value=""/>	<input checked="" type="checkbox"/> Anti-rust	<input type="text" value=""/>

Zone		Damage						
1 : Rear Panel								
Part	Instruction	Factor	Dis/assembly	Bodywork	Prep./Paintwork	Amount	Part	
<input checked="" type="checkbox"/> achterbumper compleet	replace,paint,disassembly	<input type="text" value="1"/>	<input type="text" value="18"/> :AE	<input type="text" value=""/>	<input type="text" value="25"/> :AE	<input type="text" value="215"/> :£	<input type="text" value="354"/> :£	
<div style="border: 1px solid #ccc; padding: 5px; min-height: 20px;">Comments</div>								
						Tasks £ 215 Parts £ 354 Utility £ 7.08 Environment £ Paint Product £ 37.5 Anti-rust £ Total £ 613.58		

Click 'make estimation' to add the estimation to your job or print to print the

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estimation.

The claim estimation can also be started from our inspector app, to do this check our FAQ - Mobile/Tablet.

How to add a discount on an estimation

There is an additional field "Discount" (1) on the new task and new part page. Click on the Edit icon (2) in the tasks or parts table on the job screen.

The image shows two screenshots from a mobile application. The top screenshot is titled 'New Task' and displays a table of tasks. The bottom screenshot is titled 'New Part' and displays a table of parts. In both, a green box highlights a 'Discount' field (labeled '1') and an edit icon (labeled '2').

Type	Time Units	Minutes	Rate	Amount	Status
✕ Stripping	20.0 AE	120 min	£ 50.00	£ 90.00 (10%)	Planned
✕ PANEL WORK	50.0 AE	300 min	£ 50.00	£ 225.00 (10%)	Planned
✕ PREPARATION	60.0 AE	360 min	£ 50.00	£ 255.00 (15%)	Planned
✕ PAINT WORK	30.0 AE	180 min	£ 50.00	£ 150.00	Planned
✕ Re-assemble	40.0 AE	240 min	£ 50.00	£ 200.00	Planned
✕ POLISHING	10.0 AE	60 min	£ 50.00	£ 50.00	Planned
✕ Quality check	5.0 AE	30 min	£ 50.00	£ 25.00	Planned
Total	215.0 AE	21h30		£ 995.00	

Number	Name	Price	Quant.	Used quant.	Total	Replace	Status
✕ 123456789	FRONT BUMPER	£ 265.00	1		£ 238.50 (10%)	Yes	Ordered
✕ 456765676	REAR BUMPER	£ 44.52	1		£ 44.52	Yes	Ordered

This allows you to add a discount (1 & 2) in the estimate. This discount is transferred to the invoice lines when you create an invoice.

The image shows a form for 'Job # 150085' with various input fields and a table below. A green box highlights the 'Discount %' field (labeled '1') and the 'Amount' field. Below the form is a table of tasks with a green box highlighting the 'Amount' column (labeled '2').

Job # 150085

Type: Stripping | Time(Hour): 2 (02:00) | Comment: []

Status: Planned | Rate labour: £ 50

Time(AE): 20 | Discount %: 10 (1) | Amount: £ 90

Time(min): 120

Buttons: Save, Save and New, Remove

Type	Time Units	Minutes	Rate	Amount
✕ Stripping	20.0 AE	120 min	£ 50.00	£ 90.00 (10%) (2)
✕ PANEL WORK	50.0 AE	300 min	£ 50.00	£ 225.00 (10%)
✕ PREPARATION	60.0 AE	360 min	£ 50.00	£ 255.00 (15%)
✕ PAINT WORK	30.0 AE	180 min	£ 50.00	£ 150.00

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