

040. Wincar

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 top navigation bar with tabs like Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below this is a sub-navigation bar with icons for various functions. The main form area contains fields for job details such as Location (Demo Repair Services), Registration (EXAMPLE1), Make, Model, Type, Model year, VIN/Code, 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, Vehicle In date (05-08-2017 15:56), Ready to start, Planning (Unknown -> Unknown), Start / End, Est Comp Date (09-08-2017 16:00), Client informed, Off site date, Current Status (Unknown), and Appointment. On the right side, there are fields for Owner, 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 is a 'New Task' button highlighted with a green arrow. Other buttons include 'New Part' and 'New extra item'. The bottom right shows a status bar with currency (£ 0.00) and various icons.

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, specifically the task details form. The form includes fields for Type (Stripping), Status (Created), Time(AE) (10), Time(min) (60), Time(Hour) (1), Rate labour (£ 48.5), Discount %, Amount (£ 48.50), and Comment (Stripping rear bumper). There are buttons for 'Save' and 'Save and New' at the bottom.

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 Wincar software interface for Job # 150060. The 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, 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 Status (Unknown), and Appointment (Appointment) are also visible. The Owner, Driver, Insured Party, Referred By, Insurer, Surveyor, Repairer (REPAIRER 4), Broker, Direct payment, All Parts In, Claim Admin, and Financial fields are on the right. A green arrow points to a blue arrow icon in the bottom right corner of the 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 in the Wincar software. The dialog box has a title bar and a close button. It contains a list of standard jobs with checkboxes: BUMPER REPLACE & PAINT, BUMPER REPLACE & PAINT 2, Front Bumper, GENERAL (checked), Paint Door Handle, and Recovery. The '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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Standard Job Selection

Work £

Paint £

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

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

	Time (AE)	Time	Price
Total	0.00	0.00	0.00

Import Import and plan

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.

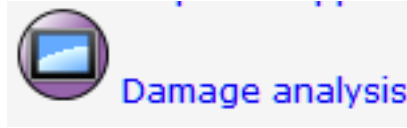
Creating an estimation with the Damage analysis

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 in the job screen, then, in the next screen,



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

Rate labour Insurer		Generate from parts		Generate from paintwork	
Rate labour	Rate lab: £	<input checked="" type="checkbox"/> Utility (2%)	0 £	<input checked="" type="checkbox"/> Paint Product (30%)	0 £
Rate paint labour	Rate lab: £	<input checked="" type="checkbox"/> Environment	£	<input checked="" type="checkbox"/> Anti-rust	£

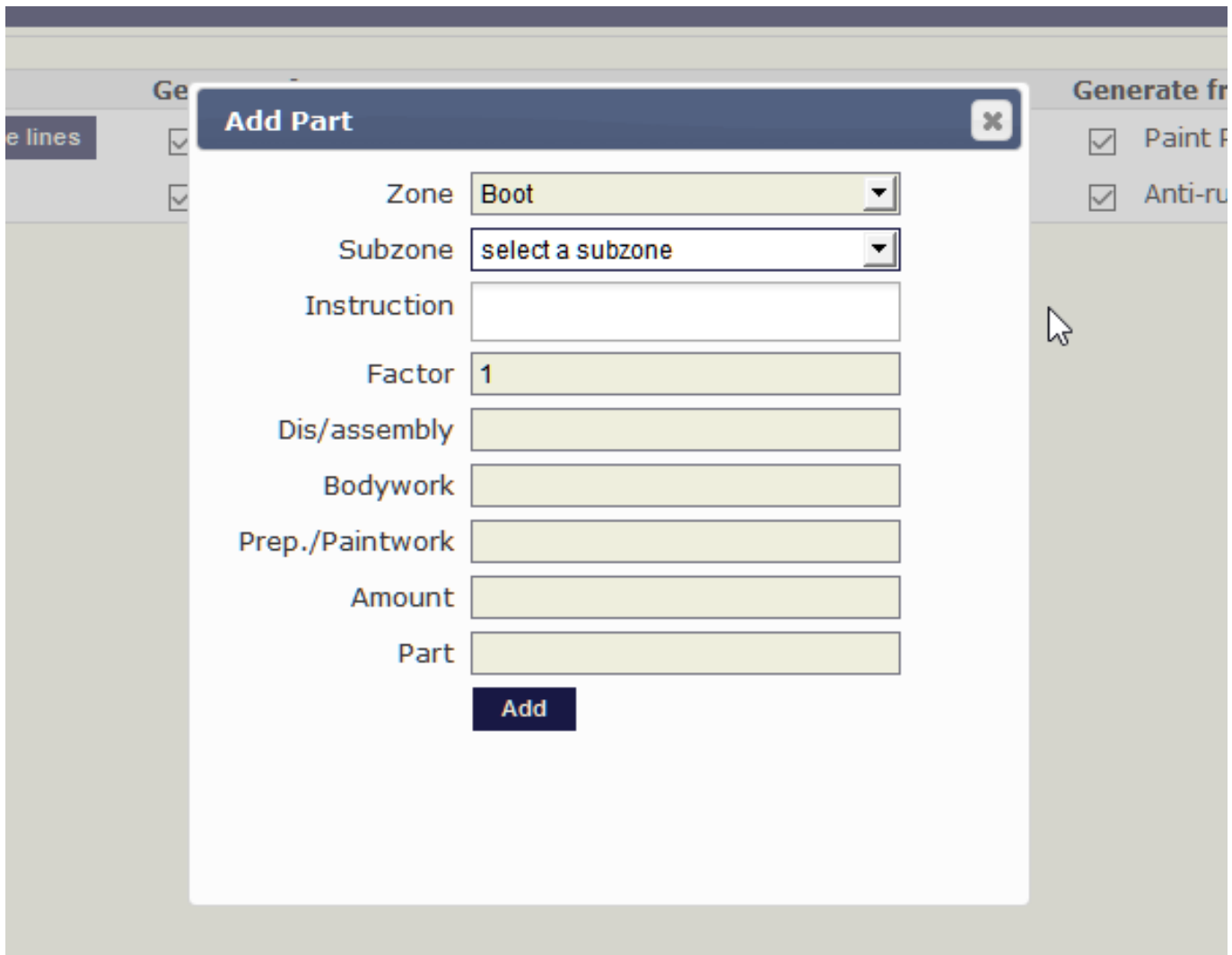
! Remark: this claim does not have an insurer, the amounts can not be calculated automatically.

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 screenshot shows a web-based software interface with a modal dialog box titled "Add Part". The dialog box has a dark blue header with a close button (X). Inside the dialog, there are several input fields and a button. The background interface is partially visible, showing a table with checkboxes and labels like "Paint" and "Anti-r".

Field	Value
Zone	Boot
Subzone	select a subzone
Instruction	
Factor	1
Dis/assembly	
Bodywork	
Prep./Paintwork	
Amount	
Part	

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: Rear Panel

Subzone: achterbumper compleet

Instruction: Disassembly x, Paint x, Replace x

Factor: 1

Disassembly: 18

Bodywork:

Prep./Paintwork: 25

Amount:

Part: 354

Add

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

[Recalculate lines](#)

Zone		Damage							
1 : Rear Panel									
Part	Instruction	Factor	Dis/assembly	Bodywork	Prep./Paintwork	Amount	Part		
⊗ achterbumper compleet	replace,paint,disassembly	1	18 AE	Bodywork AE	25 AE	215	£ 354		
<div>Comments</div>									
<div>Tasks £ 215 Parts £ 354 Utility £ 7.08 Environment £ Paint Product £ 37.5 Anti-rust £ Total £ 613.58</div>									

[Add new part](#)

[Make Estimation](#) [Print](#)

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.

New Task








2

Tasks

1

Previous | 1 | Next



New A

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	

New Part

Parts

Previous | 1 | Next

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.

Job # 150085
Type: Stripping
Status: Planned
Time(AE): 20
Time(min): 120
Time(Hour): 2 (02:00)
Rate labour: £ 50
Discount %: 10
Amount: £ 90
Comment:

Save Save and New Remove

Type	Time Units	Minutes	Rate	Amount	2
	Stripping	20.0 AE	120 min	£ 50.00	£ 90.00 (10%)
	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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Unique solution ID: #1536

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