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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 top navigation bar with tabs for Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below the navigation bar is a toolbar with various icons for actions like Print, Audatex, Log, Documents, Communicati, Plan, Order, Subcontracte, Damage, Merge, Car Fleet, Custom Field, and Admin. The main area contains a form for job details, including 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 Appointment (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 is a 'New Task' button highlighted with a green arrow, along with 'New Part' and 'New extra item' buttons. The bottom right shows a 'New Activity' button and a 'Results: No items found.' message.

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 top navigation bar with tabs for Help, Workshop, Job, Planning, Report, Maintenance, System, Car Fleet, and Invoicing. Below the navigation bar is a toolbar with various icons for actions like Print, Audatex, Log, Documents, Communicati, Plan, Order, Subcontracte, Damage, Merge, Car Fleet, Custom Field, and Admin. The main area contains a form for job details, including fields for Type (Stripping), Time (Hour) (1), Rate labour (€ 48.5), Status (Created), Time (AE) (10), Discount %, Time (min) (60), Amount (€ 48.50), and Comment (Stripping rear bumper). There are 'Save' and 'Save and New' buttons 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 displays 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 lists '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 has a title bar 'Standard Job Selection' and a close button. Below the title bar is a search filter field. The main area contains a list of standard jobs with checkboxes:

- BUMPER REPLACE & PAINT
- BUMPER REPLACE & PAINT 2
- Front Bumper
- GENERAL
- Paint Door Handle
- Recovery

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

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:

The screenshot shows the PlanManager software interface for job # 150060. The top navigation bar includes 'PlanManager' and various menu items: 'Help', 'Workshop', 'Job', 'Planning', 'Report', 'Maintenance', 'System', 'Car Fleet', and 'Invoicing'. Below the navigation bar, there are tabs for 'Job List', 'Order list', 'Deliveries', 'Offer Requests', 'Stock', 'Scale', 'Vat Book', 'DMS', 'Albatros', 'Carpas', and 'Audatex'. The main content area displays job details for 'Job # 150060', including 'Make', 'Model', 'Registration', 'Vin', and 'First registration'. A 'Comments' section is visible below the job details. The interface also features a 'Rate labour Insurer' section with input fields for 'Rate lab: £' and a 'Recalculate lines' button. There are two sections for generating estimates: 'Generate from parts' and 'Generate from paintwork'. The 'Generate from parts' section includes checkboxes for 'Utility (2%)' and 'Environment', with corresponding input fields for amounts in £. The 'Generate from paintwork' section includes checkboxes for 'Paint Product (30%)' and 'Anti-rust', with corresponding input fields for amounts in £. A yellow warning box states: ': Remark: this claim does not have an insurer, the amounts can not be calculated automatically.' At the bottom of the interface, there are buttons for 'Add new part', 'Make Estimation', and '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 software interface 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 screenshot of a software application with various checkboxes and labels like "Paint F" and "Anti-r".

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.

An "Add" button is located at the bottom center of the dialog box.

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 ×, Paint ×, Replace ×

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

Rate labour: 50 :£

Rate paint labour: 50 :£

Generate from parts

Utility (2%): 7.08 :£

Environment: :£

Generate from paintwork

Paint Product (30%): 37.5 :£

Anti-rust: :£

Zone 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 :£

Comments:

Tasks	£ 215
Parts	£ 354
Utility	£ 7.08
Environment	£
Paint Product	£ 37.5
Anti-rust	£
Total	£ 613.58

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

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

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 | Time(Hour): 2 (02:00) | Comment:

Status: Planned | Rate labour: £ 50

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

Time(min): 120

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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