

020. General

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 interface for Job # 150060. The form is divided into several sections. On the left, there are input fields for 'Location' (Demo Repair Services), 'Registration' (EXAMPLE1), 'Make', 'Model', 'Type', 'Model year', 'VIN/Code', 'Colour', 'Mileage Start / Finish', 'First registration', 'Vehicle details', and 'Comments / Damage'. In the middle, there are 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 Status' (Unknown), and 'Appointment'. On the right, 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 three buttons: 'New Task', 'New Part', and 'New extra item'. A green arrow points to the 'New Task' button. At the bottom right, there is 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 interface for Job # 150060, specifically the 'New Task' screen. The form has fields for 'Type' (Stripping), 'Status' (Created), 'Time(AE)' (10), 'Time(min)' (60), 'Rate labour' (£ 48.5), 'Discount %', '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.

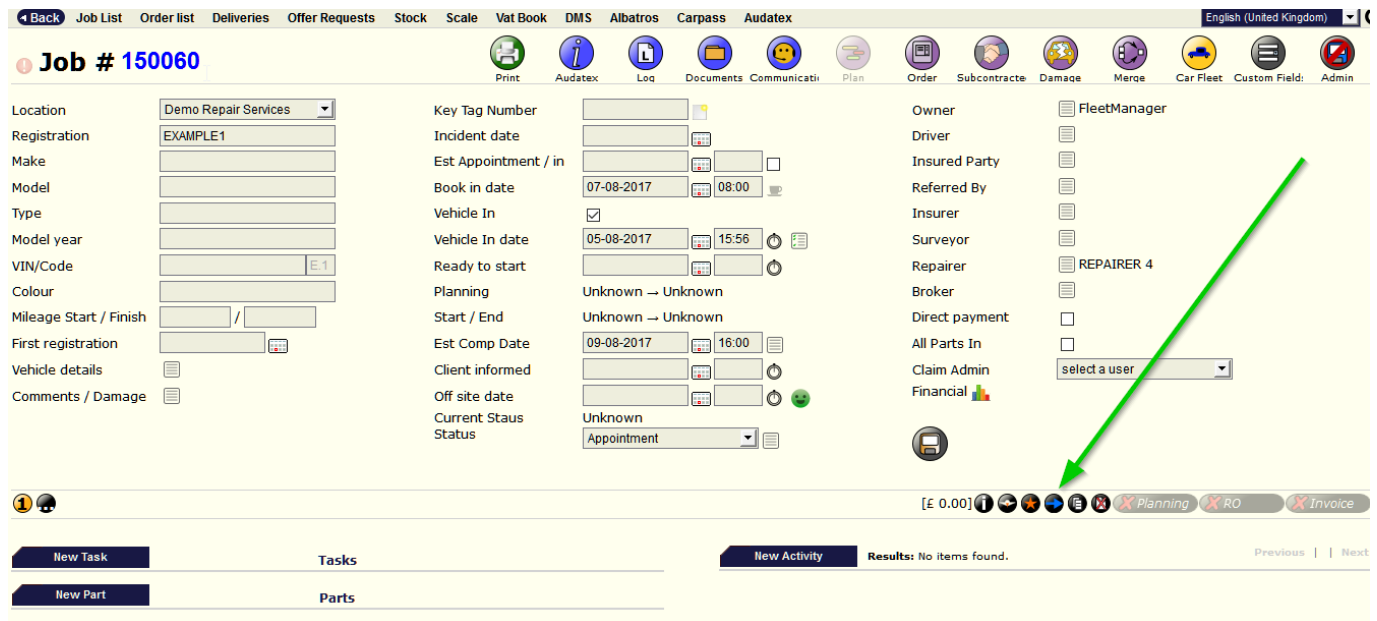
Automatic on PlanManager with standard jobs

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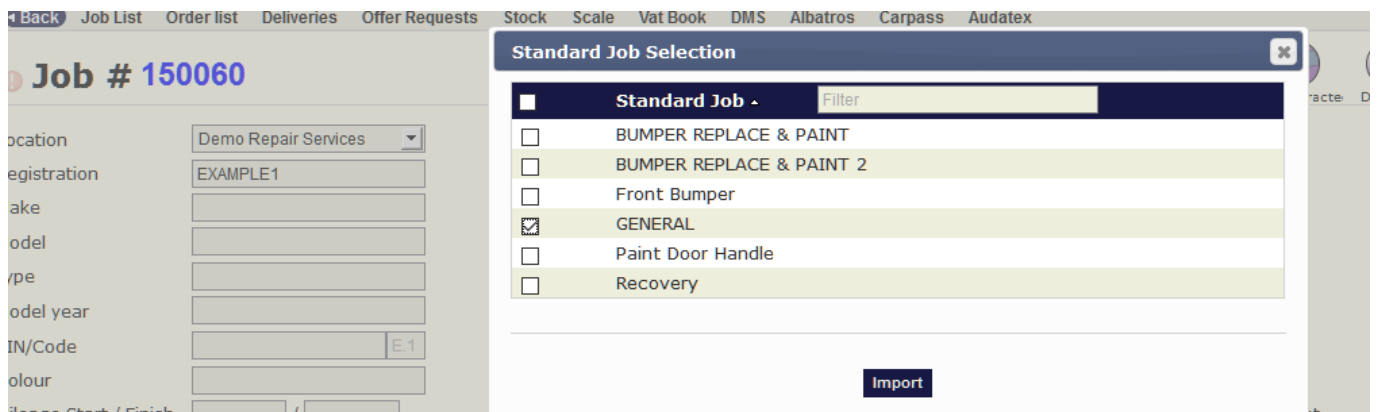
To create a standard job refer to 'How to create a standard job' under Claims in our FAQ.

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



The screenshot shows the 'Job # 150060' form. 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 Status (Appointment) are also visible. The Owner is FleetManager, Driver is REPAIRER 4, Insured Party is select a user, Referred By is select a user, Insurer is select a user, Surveyor is select a user, Broker is select a user, Direct payment is unchecked, All Parts In is unchecked, Claim Admin is select a user, and Financial is unchecked. A green arrow points to a blue arrow icon in the bottom right corner of the form area, which is used to import standard jobs.

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. Below the title bar is a search bar labeled 'Standard Job -' with a 'Filter' button. The list of standard jobs is as follows:

| | Standard Job - |
|-------------------------------------|--------------------------|
| <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 |

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.

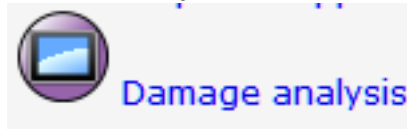
Creating an estimation with the Damage analysis

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 | £ |

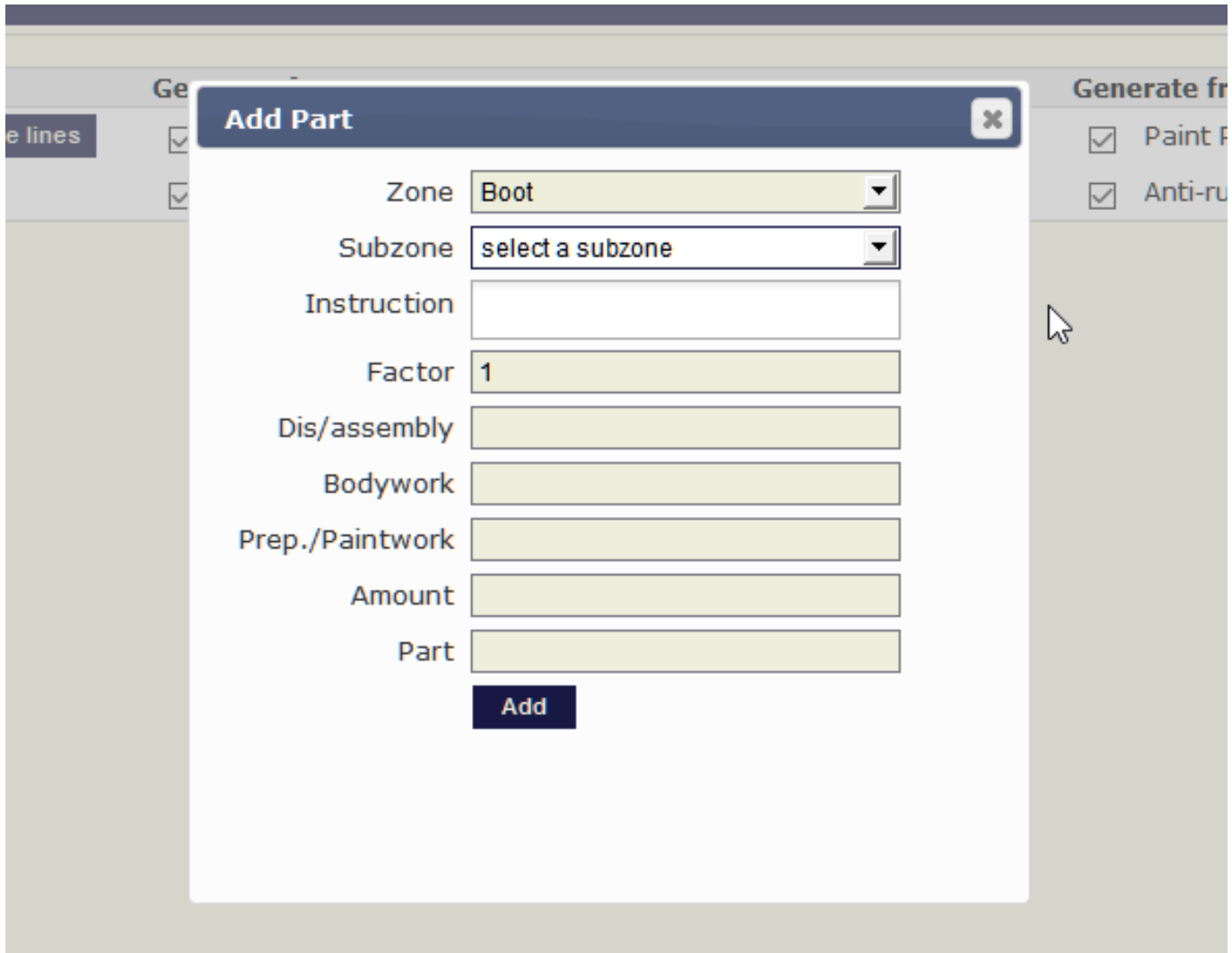
! Remark: this claim does not have an insurer, the amounts can not be calculated automatically.

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 image shows a screenshot of a software application with a modal dialog box titled "Add Part". The dialog box has a dark blue header bar with the title and a close button (X). The main area of the dialog is white and contains several input fields and a button. The fields are labeled as follows:

- 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 the value "1".
- 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 box is a dark blue button labeled "Add". In the background, parts of the application's interface are visible, including a "Generate fr" button and a list of checkboxes with labels like "Paint P" and "Anti-ru".

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

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

Damage

| Part | Instruction | Factor | Dis/assembly | Bodywork | Prep./Paintwork | Amount | Part |
|-------------------------|---------------------------|--------|--------------|----------|-----------------|--------|------|
| ⊗ achterbumper compleet | replace,paint,disassembly | 1 | 18 | AE | 25 | 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

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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