# **Prices and Estimates**

07/19/2024 2:02 pm EDT

The **Prices & Estimates** feature is designed to provide a detailed pricing estimate for the documentation fees related to a project.

Once the project has been set up with the required information (Doc Codes with Levels and Equipment) and the cards have been created, navigate to the **Prices & Estimates** screen from the project menu to begin creating an estimate.

Packages	(041212021_) ~	🕼 Project Hub 🗸				🖪 🕰 o	Projects 👻	० 😯 🌣 🕩
Project Hub		Project Hub	Outstanding Actions	Index Reports &	Prices & Estimates Prices & Estimates	Custo	ner 🛛 👻 🛛 D7 & OD Wolfe AB	09 👻 🛞 Turn on lenses 🔅
Key Metrics	for Cards	Cards	Cards In/Out	Equipment	Set Up	¢\$ Generate SDI	Report 🛛 🕹 Download SDI Rep	ort
Document	Card Progress	Code List (Requirements) Card List Card to Unit Changes	Incoming Documents Outgoing Submittals	Equipment List Levels	Main Stage Lists Customer Return Statuses			
Incomplete c	ards with us	Obsolete Cards Request Cards from Supplier			Expedite Settings Internal Approval Statuses Distribution Lists	✿ Range Settings Columns for ∞ and beyond: 30 cards [30mg]		
Location					Project Fields Template Package Layout Card States	16 days to ∞	No Due Date	Total
						5	25	30

## **Configuring an estimate**

On the **Prices & Estimates** screen, there are a number of price segments (lines) to choose from in the **Actual Prices** grid.

es & Es	timates					
Actual Pric	es					
Add docum	ent detail					
Price						
Select	Segment †	Price	Quantity	Cost	New Quantity	Apply
	# of pages to be printed	0.40	0		0	
	\$ for CD creation	75.00			0	
	\$ for compilation generation (each book) 0-200 pgs	75.00	0		1	
	\$ for compilation generation (each book) 201-500 pgs	150.00			0	
	\$ for compilation generation (each book) 501 and over	250.00	0		0	
	\$ for compilation index generation	30.00			1	
	\$ for document index generation	10.00	0		1	
	\$ for document index with submission history generation	20.00			1	
	\$ per CD	0.00	0		0	
	\$ per doc (mgmt fee)	15.00			24	
	\$ per doc (technical review)	25.00	0		0	2
	Sub-Supplier Document Charges	0.00	1			

To add a segment to the estimate, (1) select it from the **Actual Prices** grid and (2) select **Save**. Further information may need to be filled out on the **Code List** or **Edit Compilations** screen, depending on the segments being used:

- **# of pages to be printed:** Managed from the Code List in the Est. Pages, Printed for Review (copies) and Printed Final columns (copies)
- \$ for CD creation: Managed from the Edit Compilations screen select CD required and enter the number of CD's

CD Copy			
CD Required	CD Copies Number:	2	

- \$ for compilation generation (each book) 0-200 / 201-500 / 501 and over pgs: Users can enter the estimated pages in the Est Pages column on the Code List for the compilation codes. If the compilation has been created, DocBoss will use the actual page numbers to select the line in the Actual Prices grid that the compilation applies to.
- \$ for compilation index generation: Managed based on Doc Code list codes identified as Compilation TOC's
- \$ for document index generation & \$ for document index with submission history generation: Managed based on Doc Code list codes identified as SDI Reports
- \$ per CD: Enter price and quantity directly on the grid
- \$ per doc (mgmt fee): Automatically calculated based on the total number of cards on the project
- \$ per doc (technical review): Managed based on number of Doc Codes with "Tech Rev" selected on the Code List.
- **Sub-Supplier Document Charges:** Managed in the "Charges" column on the code list. The intended use is to pass on the cost of sub-supplier document charges. This option is only available for codes with the type "Generated (Sub-Supplier)". If the doc code type is changed to anything else, the charges field will clear.
- **Clarifications and exceptions:** This is a text field below the **Actual Prices** grid. Add any additional data about the document requirements here.

If the information in the project has changed since a price segment was added to the estimate, its row will be highlighted in red. To update the estimate to match the current information in the project, check the box in the **Apply** column of the **Actual Prices** grid, and then select **Save**.

#### **Editing prices**

To edit the prices that will appear on the estimate, click within the **Actual Prices** grid to change the values, then select **Save**.

To change the default prices (either globally or per customer), or add additional pricing segments, see here.

### Outputs

There are three formats available for exporting pricing and estimate data. These options are available from the bottom left of the pricing grid.

	\$ per doc (mgmt fee)
	\$ per doc (technical review)
	Sub-Supplier Document Charges
1 hore pages 2	Show on F 3 0 V
PDF	LaTeX 🔒 PO Data

- 1. **PDF** This is the standard output. By default it includes a detailed breakdown of the doc codes. To remove this, uncheck the "Add document detail" option (located above the pricing grid).
- 2. LaTeX This format can be used for integration with 3rd party estimate/quote systems.
- 3. PO Data This document includes any Sub-Supplier Document Charges that have been configured on the

project. It can be included in the purchase order(s) to help ensure all document fees are properly accounted.

**Note:** In order to produce an estimate document, the Estimation template must be selected in the project. On the **Main** project settings screen, select the template to be used under **Output Settings** > **Other** > **Estimation**.

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Set Up		
Main		
Save Project Copy Project 🕫 Hide Proj	ect Complete Project	
Profile		Output Settings
Project Type	Order      Quote	Stamp
Customer	* Acme Chemical 🔲 🔻 🕂 🇨	Acme Stamp XLS: Default Stamp Template (XLS) (system)
Customer Address	* Edmonton Office *	
Project Name	• ICC	Cover Pages
Project Description		Acme Cover Page PDF: [Default Cover Page (system)
	1	CSV/XLS: Default CSV Cover Page (CSV) (system)
Job	- Select Job - 🔹 🕈	Create excel cover page for Excel files only
Wolfe AB09 Sales Order	752021	Embed excel cover page as worksheet on XLS(x) files
Package Number		
PO Number	* 7521	
PO Rev Number	0	Sub-Supplier Cover Page PDF: [Default Sub-Supplier Cover Page (system)
End User	- Select End User - 🔹 🔸	Submittals
End User Address	- Select Address -	Batching   Normal  Separate submittal per file
End User Reference		Acme Transmittal pDF: Default Transmittal Template (sy:  CSV/XLS: Default CSV Transmittal Template
Order Date	2021-07-05	Sub-Supplier Transmittal PDF: Default Sub-Supplier Transmittal *
Initial Guess for Drawing Approvals	2021-08-02	Internal / 3rd Party Transmittal Uses the Sub-Supplier transmittal templates
		Delivery Medium Email Charles Constraints
		Require Name for Doc Access Yes
Default Users/Lists		Add Comment: Page to Document on Submittal Z Position of comment/markup pages (on submittal) End Y
Wolfe AB09 Doc Control User*	Kirstie Reid 🔹 🕈 🥔	Submittal Numbering Format 🖋
Wolfe AB09 Project Engineer User*	Kirstie Reid 🔹 + 🖌	Type of Format Pattern per Target
Wolfe AB09 Drafting User	- Select User - 👻 🕈	Acme Submittal Pattern T- <sequence###></sequence###>
Wolfe AB09 Project Manager User *	Kirstie Reid 🔹 + 🖌	Sub-Supplier Submittal Pattern T(5)- <sequence###></sequence###>
Acme/End User Engineer	- No Contact Selected - 🔹 🕈	Internal / 3rd Party Submittal Pattern T(I)- <sequence###></sequence###>
Acme/End User Expediter	- No Contact Selected - 🔹 🕈	Ad-Hoc Submittal Pattern T(A)- <sequence###></sequence###>
Acme/End User Doc Controller	- No Contact Selected - 🔹 🕈	Submittal Notification Emails
Use Code Lists from Doc Code List	Acme Lists      Wolfe AB09 Internal Lists      End User Lists	
Doc Code List Use Status Lists from	• INST • +	Costonica admittantification (2.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1.1
Use Status Lists from Acme Return Status List	Acme Lists	Sub-Supplier Sub-Supplier submittal notification • Internal / 3rd Party Internal submittal notification (sys •
Status for Stage Auto Completion	Customer Final Status	Email FROM Address
	Customer Finiti Status	Caedonocrepy@dobbascom V Contact mo Ose osei cinali Address V
		Default to send notification to customer     Include hyperlink into email
Settings		a include ryperink into email Include files in email
		Include transmittal in email PDF
Enable Grid Search for Large Project 📀	Card Name Suffix:	Attachments size limit (Mb) 9 15
Delivery output Ø	Acme Turn Around 10 (working days)	Please set this value to 50% of your customer size limit. Files
Doc No. Override (Sub-Supplier)	Instance Turn Around 10 (working days)	attached to emails grow in size by about 40% []
Enable mapping to Internal codes	Action Turn Around 5 (working days)	Other
	Date format yyyy-mm-dd V	Estimation Default Estimate Template (systen +
Document Auto-Numbering Format	How it works?	Formats
	<b>Rev. • 1 1 1</b>	
Acme Chemical Customer	Make Doc No. (Acme) required	Outgoing File Name Format 🌶

### Archiving price history

Different versions of pricing can be stored using the **Archive** function. To save a record of the current pricing setup, (1) select **Archive Prices** (on the bottom right of the pricing information grid). To view pricing information which was previously archived for the project, (2) select the name of the desired history entry. This will open a page containing the details of the archived pricing.



#### **Document Requirements additional definitions**

- Approval Required: On the proposal Doc Code grid, a check in this column will put the word "yes" in the approval column for the Doc Code.
- **Highlight Delivery:** If using the quote module, this column can be checked to highlight delivery discrepancies b/w customer request, and actual delivery expectation. Attention can be called to the discrepancy by the highlight on the output.
- **Charges:** If you or your sub-suppliers charge for documents, this feature allows you to group all of you document billing in one location. You can add model numbers, and create pricing. DocBoss automatically determines how many documents should be billed, based on the card and the manufacturer, and adds these prices to the process and estimates output. This option is only available for doc codes using the sub-supplier type.

For further information, click to see our video here.