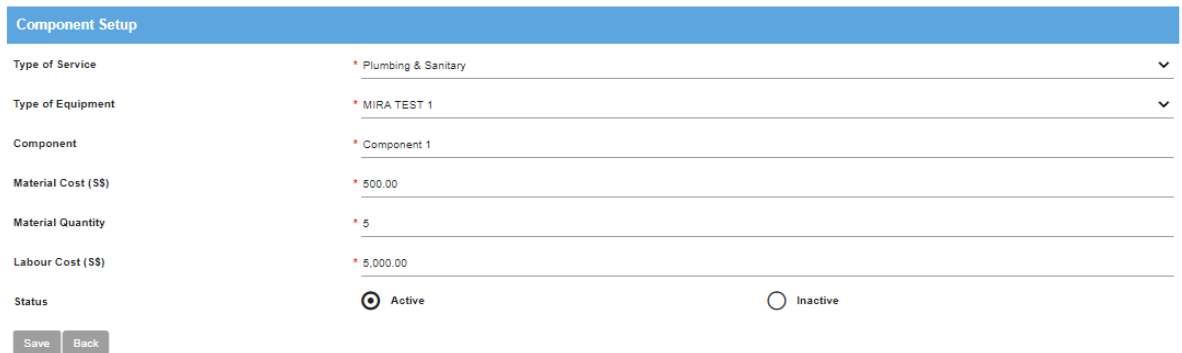# Estimation Module

Notes:
1. This module was developed by iTasoft December last year.
2. Innov8tif has done some minimum changes in the module codes.
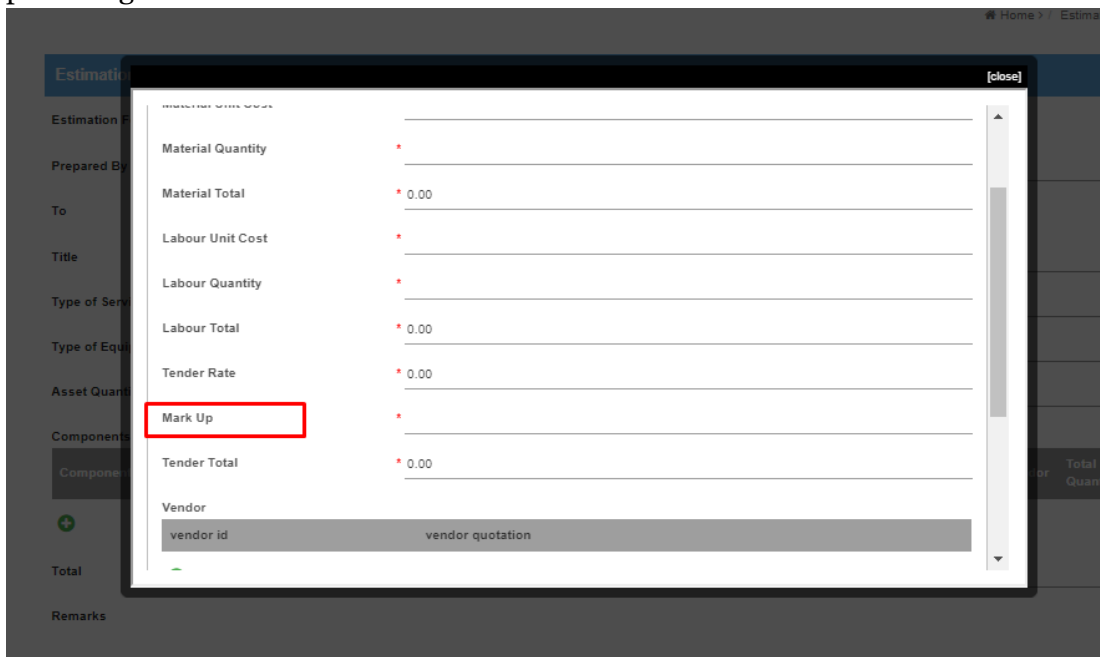3. Client has requested for module changes.

High level Requirements:
1. Design import template for component setup.

2. Rename "Mark Up" to "Discount Factor (%)". If value is filled as "10" display it as percentage 10%.

3. Upload / Download estimation
   Since many data are there. The client wants to download an excel of the form and its grid data, make changes then reupload the form. This should cater for update too.
   Proposal: In the template if the estimation form ID has a value
   - If value exists, update the form.
   - If value doesn't exist, show an error

If the form ID value is left blank, we can assume it is a new estimation and create a new record.

There should be a download feature in the existing record. For example, if the user has an estimation form that was created before and he wishes to make some changes, he can click on download link then an excel will be exported. User can make changes to the excel and reupload the template. The system should be able to find the record and update its details given the form ID is inserted correctly.

Estimation form:

Estimation Form

Estimation Form ID	AUTO
Prepared By	admin
To	* ◯ Project ◯ Tender
Title	*
Type of Service	* --Select--
Type of Equipment	* -- Select --
Asset Quantity	*
Components	*

Components	Material Unit Cost	Material Quantity	Material Total	Labour Unit Cost	Labour Quantity	Labour Total	Tender Rate	Mark Up	Tender Total	Vendor	Total Quantity	Total

➕

Total	* 0.00
Remarks	
Attachment (max 5)	Drop files here or click to upload.
Submission Timestamp	2020-07-29 11:27:17

Save   Cancel

4. In vendor grid, add a new indicator field labelled as "Selected Vendor" the field type is a checkbox. This is for the user to select a specific/chosen vendor.

   Please note, for every grid, only one vendor can have this checkbox checked.

Add a column in the vendor grid to show the selected vendor.

In the "Estimation Listing", only show the selected vendor

Same goes for the export listing, only selected vendor should be showing.

5. Add location field, from the estimation form if for the field "To" the user selects
   - Project: populate site address in the location field
     Location new field to be added under project site field. Innov8tif, has a project listing, each project has a list of sites. Each site has its address. The new location field will populate from this site address field.

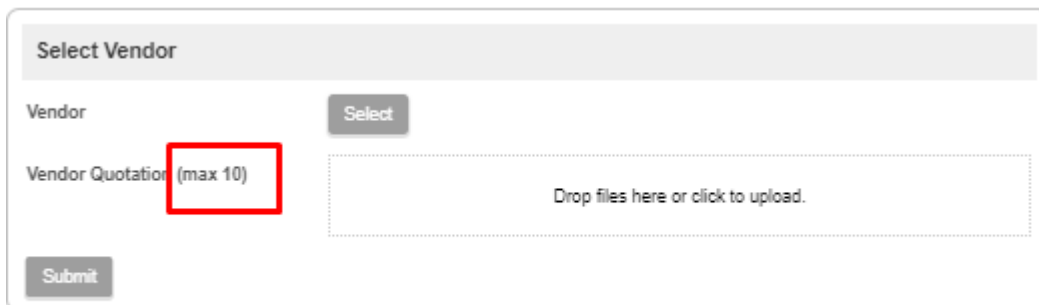- Tender code, add a new location field in the tender form (this is under Innov8tif) and when the tender is selected auto-populate the location. This list is existing in our system, so we have to add a location field for every tender. For iTasoft just need to add a new field and auto-populate its value. The field is before the "Title" field.

Edit Estimation Form	
Estimation Form ID	EF-000013
Prepared By	admin
To	⦿ Project ⦿ Tender
Tender	Select TENDER-000021
Title	123
Type of Service	Koyo TOS

6. In main form, if "To" field is to "Tender", Add "Due Date" and "client name" fields. These two fields should be under the "Tender" field and above "Location field" mentioned in step 5.
   Please note that currently, these two fields are exiting in the tender list (developed by Innov8tif before). Therefore, we just need to show those fields and auto-populate their value in the estimation module when a tenderer is selected.

7. Under "Title" field, add two new fields regardless of project/tender selection. The fields are "Client" and "Consultant". Both fields are edit text that are manually entered.

8. Vendor quotation - remove limitation on max upload (user can upload as much as needed).

Select Vendor	
Vendor	Select
Vendor Quotation (max 10)	Drop files here or click to upload.
Submit	

9. Auto populate "Labour quantity" from material quantity however make the field editable. Please note, currently labour quantity is manually entered.
   When a component is selected, auto-populate its value from the material quantity.

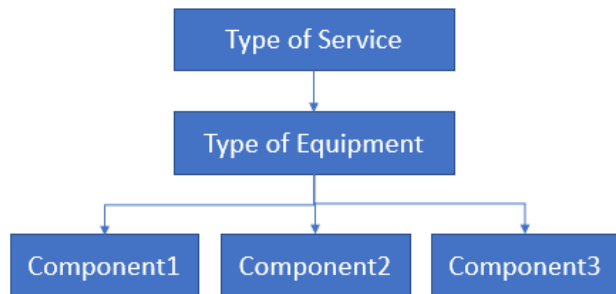| Component	
Component	* Select
	❌ Testing Component
Material Unit Cost	* 20.00
Material Quantity	* 2
Material Total	* 40.00
Labour Unit Cost	* 30.00
Labour Quantity	* 4
Labour Total	* 120.00
Tender Rate	* 160.00
Mark Up	* 0

10. Client has requested for a new form/structure design as attached below:

asset Quality

| | | Tender / Project Code Title Person In-charge Date Due | | | | | | | | | | | | | | |

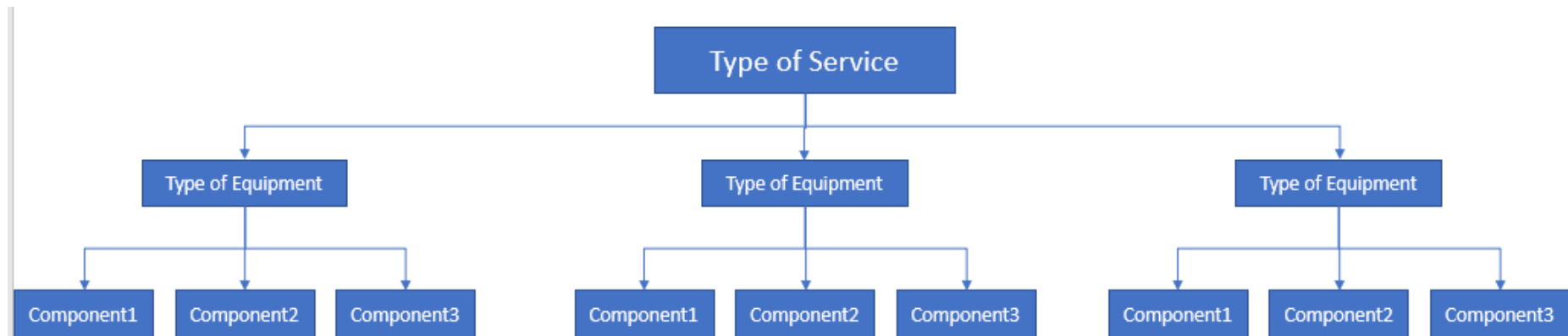|	S/No.	Location	Description	Size / Capacity	Unit	System Quantity	Material Quantity for 1 system	Total Material Quantity	Material Unit Cost (S$)	Total Material Cost (S$)	Labour Unit Cost (S$)	Total Labour Cost (S$)	Tender Rate (S$)	Mark Up (%)	Discounted Tender Total (S$)	Selected Vendor	Remarks
Service	A		ACMV														
Equipment	1	Roof	Pump System			30											
Component	1 - 1		Pumpset				1	30	$ 2,500.00	$ 75,000.00	$ 800.00	$ 24,000.00	$ 99,000.00	70%	$ 69,300.00		
Component	1.1		Spring Isolator	2 (300kg)	inch		4	120	$ 20.00	$ 2,400.00	$ 30.00	$ 3,600.00	$ 6,000.00	70%	$ 4,200.00	Innov8tif Solutions	
Component	1.2		Initial Block	100	mm		1	30	$ 1,200.00	$ 36,000.00	$ 250.00	$ 7,500.00	$ 43,500.00	70%	$ 30,450.00		
Component	1.3		Gate Valve	200	mm		2	60	$ 350.00	$ 21,000.00	$ 80.00	$ 4,800.00	$ 25,800.00	70%	$ 18,060.00		
Service	B		ELECTRICAL														
Equipment		Level 1	Generator System			2											
Component	1		Generator Set		kW		1	2	$ 125,000.00	$ 250,000.00	$ 12,000.00	$ 24,000.00	$ 274,000.00	100%	$ 274,000.00		
Component	1.1		FR cable + CPC	4C125	mmsq		50	100	$ 80.00	$ 8,000.00	$ 45.00	$ 4,500.00	$ 12,500.00	50%	$ 6,250.00		
Service	C		Plumbing & Sanitary														
Equipment	1		MIRA TEST 1			50											
Component	1.1		Component 1				5	250	1,000.00	$ 250,000.00	5,000.00	$ 1,250,000.00	$ 1,500,000.00	100%	$ 1,500,000.00		
Component	1.2		Component 1				5	250	1,000.00	$ 250,000.00	5,000.00	$ 1,250,000.00	$ 1,500,000.00	85%	$ 1,275,000.00	Company	

Total $ 3,177,260.00

Current structure

Per estimation form -> user will select one type of service and one type of equipment. List of components based on the selected type of service and type of equipment.

New structure

Per estimation form -> user will select one type of service. The grid will allow the user to select list of type of equipment and their components.

In here there is a structure change, in this document we will not get into the details of every form and layout. The focus here is on the new structure and listing changes in the screenshot attached above.