

## Kanban – Estimates

The prebuilt *Kanban – Estimates* provides an overview of registered estimates in your NetSuite account, with each Kanban column representing an estimate status. The last column contains two Kanban columns, stacked on top of each other, one representing estimates won this month and the other one estimates lost this month.

The screenshot displays the 'Kanban - Estimates' interface in NetSuite. At the top, there is a search bar and a filter section with 'My Favorites' and feedback status indicators: Negative Feedback (red dot), Medium Feedback (yellow dot), and Positive Feedback (green dot). A dropdown menu shows 'AVNS Kanban - Estimates (All)'. The main area contains several Kanban columns, each with a title, a count in parentheses, and a total value. Each column contains one or more estimate cards. Each card includes a sales representative's name and profile picture, a list of icons, and detailed information about the estimate.

Column	Status	Count	Total
In Discussion		(2)	5060.00
Proposal		(1)	4500.00
In Negotiation		(2)	4961.00
Purchasing		(1)	4950.00
Closed won (This Month)		(0)	0
Closed lost (This Month)		(0)	0

**Estimate Card Details:**

- Card 1 (In Discussion):** 7 New Prospect Inc.1, Sales Rep: Rikard Burman Holmgren, Quote Amount: 4950 SEK, Expires: 4/9/2017, Timing(days): 6 until expiration, Opportunity: Description.
- Card 2 (In Discussion):** 9 Christoffer bilfirma AB, Sales Rep: Christoffer Simeonidis, Quote Amount: 110 SEK, Expires: 4/14/2017, Timing(days): 11 until expiration, Opportunity: Description.
- Card 3 (Proposal):** 10 Christoffer bilfirma AB, Sales Rep: Christoffer Simeonidis, Quote Amount: 4500 SEK, Expires: 4/22/2017, Timing(days): 19 until expiration, Opportunity: 21, Description.
- Card 4 (In Negotiation):** 8 New entity 1, Sales Rep: Rikard Burman Holmgren, Quote Amount: 4950 SEK, Expires: 4/9/2017, Timing(days): 6 until expiration, Opportunity: Description.
- Card 5 (In Negotiation):** 1 Test christoffer, Sales Rep: Rikard Burman Holmgren, Quote Amount: 11 SEK, Expires: 3/24/2017, Timing(days): 79 overdue expiration, Opportunity: Description.
- Card 6 (Purchasing):** 3 IK Fyris Triathlon, Sales Rep: Rikard Burman Holmgren, Quote Amount: 4950 SEK, Expires: 3/24/2017, Timing(days): 79 overdue expiration, Opportunity: Description.

## Kanban – Estimates: Prerequisites

Before using the *Kanban – Estimates* board, please make sure the prerequisites listed below are fulfilled in order for the board to function as expected.

### 1. Customer Status

Since the columns of the prebuilt *Kanban – Estimates* board are based on NetSuite standard Customer status, it is important that the statuses presented in the board are available in your NetSuite account.

Navigate to Setup → Sales → Customer Statuses (Administrator) to find the list of Customer Statuses available in your NetSuite account. Compare the list from your NetSuite account with the Customer Status list which the prebuilt *Kanban – Estimates* board is based on (picture below).

### Customer Status List

<input type="checkbox"/> SHOW INACTIVES			
INTERNAL ID	CUSTOMER STATUS	STAGE	PROBABILITY
7	Qualified	Lead	10
6	Unqualified	Lead	0
14	Closed Lost	Prospect	0
9	Identified Decision Makers	Prospect	30
8	In Discussion	Prospect	20
11	In Negotiation	Prospect	75
10	Proposal	Prospect	50
12	Purchasing	Prospect	90
13	Closed Won	Customer	100
16	Lost Customer	Customer	0
15	Renewal	Customer	100

If the Customer Statuses differ between your NetSuite account and the picture above, you will need to edit the settings of the Kanban Columns for the *Kanban – Estimates* board.

***Please refer to the section ‘Kanban Columns’ in the ‘Kanban User Guide’***

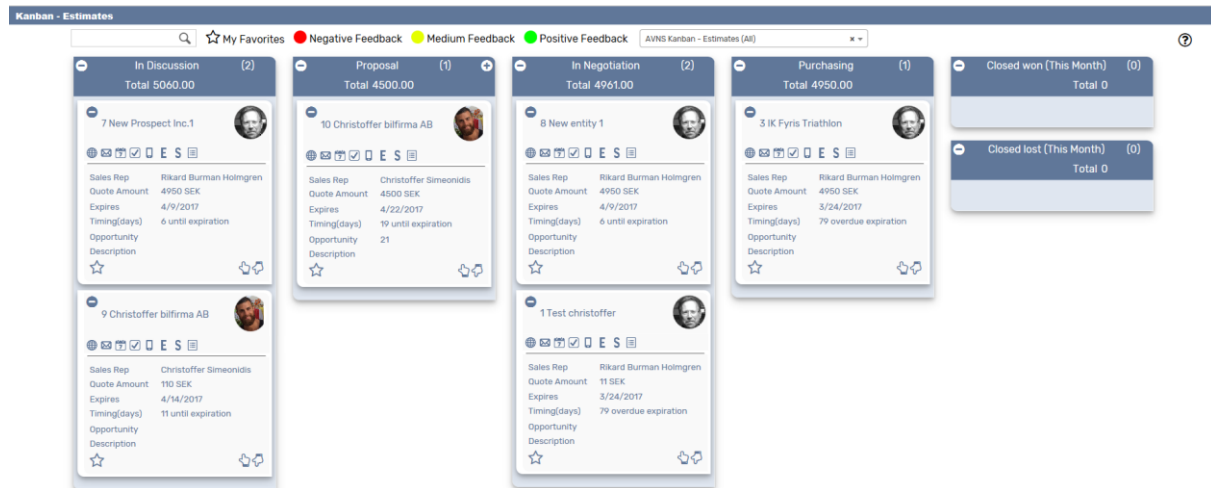
### 2. Sales Rep & Sales Rep Image

Make sure to mark the checkbox ‘Sales Rep’ on the Employee record for all available Sales Reps.

If an image has been uploaded to the *Image* field on the Employee record, this image will be displayed on the Kanban card. If no image is available, a predefined profile icon will be displayed instead.

## Kanban – Estimates: Card Moves & Column Actions

The *Kanban – Estimates* board contains five Kanban Columns. Each column has been configured with one or several Column Actions. Double clicking on any card in the *Kanban – Estimates* board will open the estimate record in edit mode.



### 1. In Discussion

- Card Moves** – Kanban cards in the column *In Discussion* can be moved to all other columns in the Kanban board, except *Closed Won (This Month)*.
- Column Actions** – when moving a Kanban card to the column *In Discussion* the status of the record represented in the Kanban card will be updated to *Estimate – In Discussion*.

### 2. Proposal

- Card Moves** – Kanban cards in the column *Proposal* can be moved to all other columns in the Kanban board, except *Closed Won (This Month)*.
- Column Actions** – when moving a Kanban card to the column *Proposal* the status of the record represented in the Kanban card will be updated to *Estimate - Proposal*

### 3. In Negotiation

- Card Moves** – Kanban cards in the column *In Negotiation* can be moved to all other columns in the Kanban board, except *Closed Won (This Month)*.
- Column Actions** – when moving a Kanban card to the column *In Negotiation* the status of the record represented in the Kanban card will be updated to *Estimate – In Negotiation*.

### 4. Purchasing

- Card Moves** – Kanban cards in the column *Purchasing* can be moved to all other columns in the Kanban board, except *Closed Won (This Month)*.
- Column Actions** – when moving a Kanban card to the column *purchasing* the status of the record represented in the Kanban card will be updated to *Estimate – Purchasing*.

### 5. Closed Won (This Month)

- Card Moves** – Kanban cards in the column *Closed Won (This Month)* can be moved to all other columns in the Kanban board. To move card here a Sales Order needs to be created.
- Column Actions** – when moving a Kanban card to the column *Closed Won (This Month)* the status of the record represented in the Kanban card will be updated to *Closed Won*.

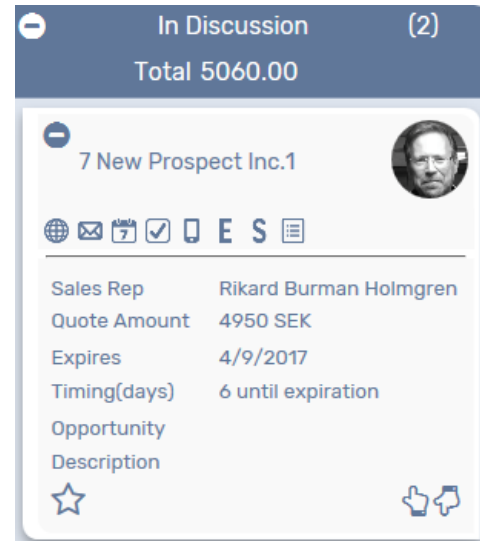
### 6. Closed Lost (This Month)

- Card Moves** – Kanban cards in the column *Closed Lost (This Month)* can be moved to all other columns in the Kanban board, except *Closed Won (This month)*.
- Column Actions** – when moving a Kanban card to the column *Closed Lost (This Month)* the status of the record represented in the Kanban card will be updated to *Closed Lost*.

## Kanban – Estimates: Available Card Actions

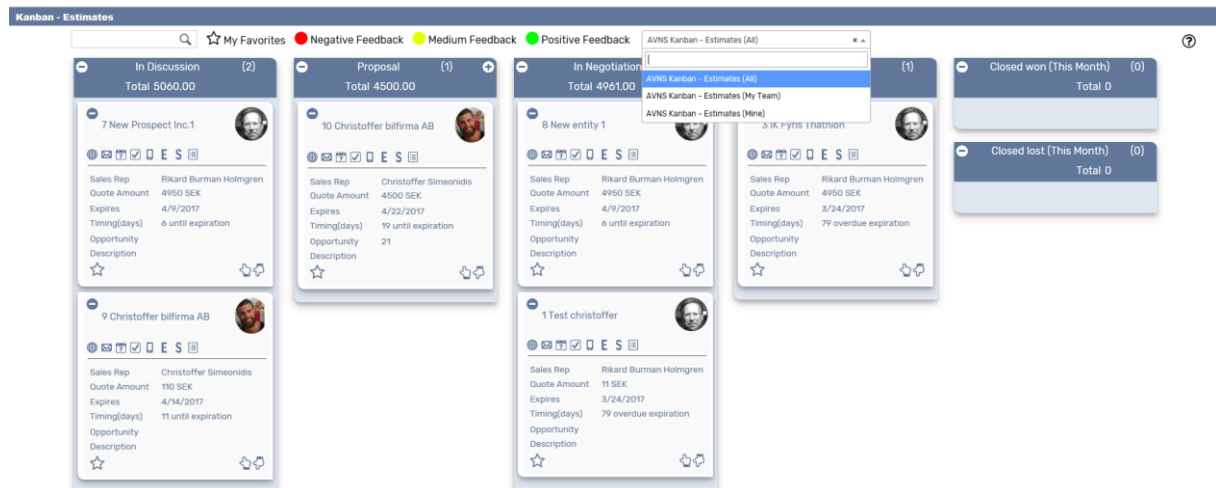
The Kanban cards in the *Kanban – Estimates* board each contains eight Card Actions.

1. **Show Customer 360**  
Run the customer 360 report.
2. **New Email**  
Add a new email.
3. **New Event**  
Add a new event.
4. **New Task**  
Add a new task.
5. **New Phone Call**  
Add a new phone call.
6. **Copy Estimate**  
Copy existing estimate.
7. **New Sales Order**  
Create a sales order from the estimate.
8. **Show Activity**  
Show a list of all activities related to the estimate.



## Kanban – Estimate: Alternative Searches

There are three alternative searches for the *Kanban – Estimate* board.



1. **AVNS Kanban Estimate**  
Display all estimates.
2. **AVNS Kanban Prospect – My Team**  
Display estimates with sales rep any of my team.
3. **AVNS Kanban Prospect - Mine**  
Display estimates with you as a sales rep.

## Kanban – Estimates: Available Colors

There are three colors available for the *Kanban – Estimates* board, which can be used to highlight and filter the Kanban cards (Negative / Medium / Positive feedback). These are defined in the *Color* subtab of the Kanban configuration record.

☆ My Favorites   ● Negative Feedback   ● Medium Feedback   ● Positive Feedback