



OutSmart

# Feature user guide

## Calculation

# User Guide Calculation

## Licensing

- **Maximize:** no limitations

## Setting up the calculation module

### How do I activate a beta module?

1. Go to the Modules page (bottom-left in the menu).
2. Open the Beta Modules tab. Here, you'll find various beta modules.
3. Enable the module you want to use. You'll be asked to agree to the terms and conditions of the beta program. Be sure to read them carefully and accept them if applicable.
4. After accepting, you'll see a confirmation message.

## 1. Introduction

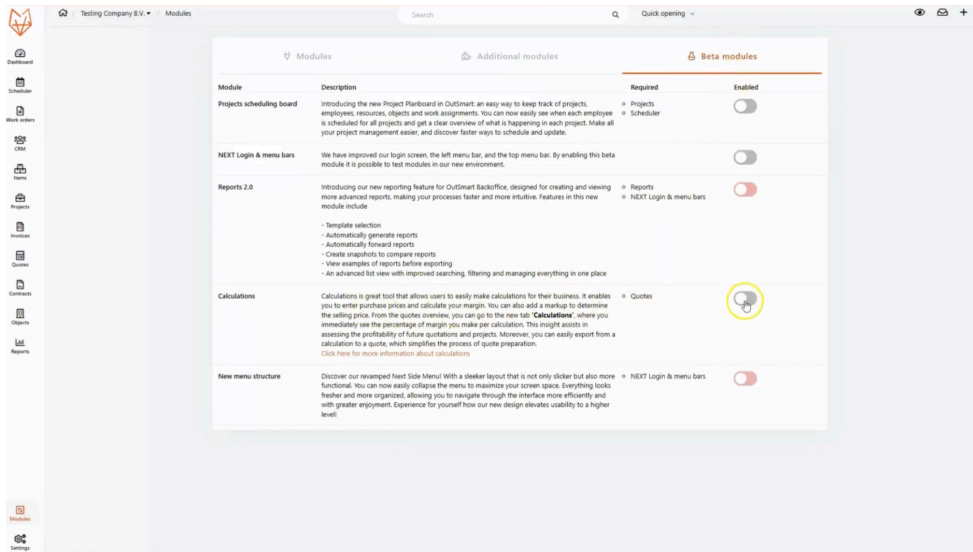
Our Calculation module provides your company with deeper insights into calculating your sum of hours and items. These hours and items also have a sales price. We calculate the actual costs of the service you are going to deliver by determining the difference between the total purchase price and total sales price, which will establish your margin.

Let's get started with this module!

## 2. Activate the Module

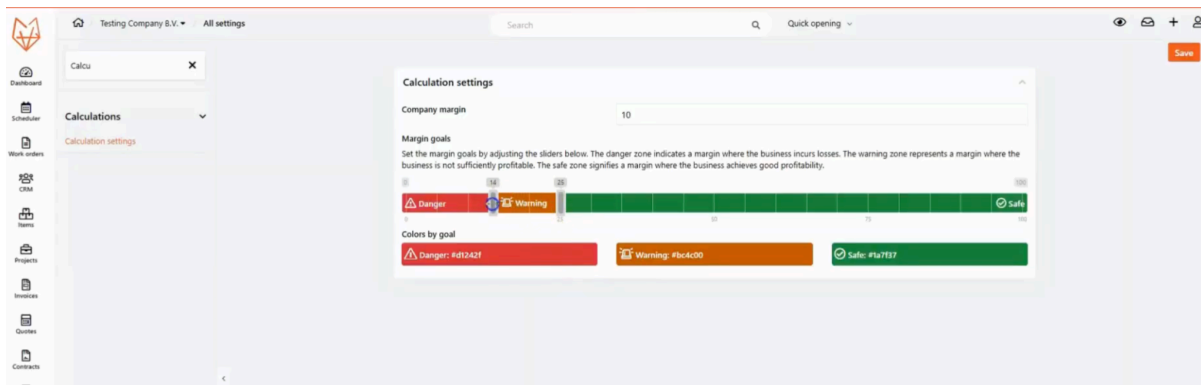
This step can be skipped if the module is already active.

Start by navigating to the Modules page. On this page, you will see a tab called BETA Modules. Here you will find Calculations. As you can see, it requires the Quotes module, since Calculations and Quotes are tightly and seamlessly integrated with each other. Enable the BETA module, and you will be prompted to accept the terms and conditions. Read the terms, and if applicable, agree to the terms and conditions of the beta module program. After accepting the terms, you will see a confirmation popup.



### 3. Margin Settings

Navigate to your OutSmart settings. On your settings page, search for Calculations and navigate to the Calculation settings. The first setting is your default Company margin. This percentage can be set to be used globally by a default margin. By default, the margin is set to 15%, but you can change it to the target your company desires. Next up, you have your Margin Goals. We make a distinction between Danger, Warning, and Safe. Each goal has its own icon and color. By adjusting the slider, you can move your goals up and down. By default, the Danger zone ranges from 0% to 15%. When the margin is in the Danger zone, there is a bigger risk of being non-profitable. The Warning zone ranges from 15% to 25%. This is a safer margin with more room for overhead and unexpected costs. If your margin is in the Safe zone, you should feel comfortable and there should not be a lot of risk.

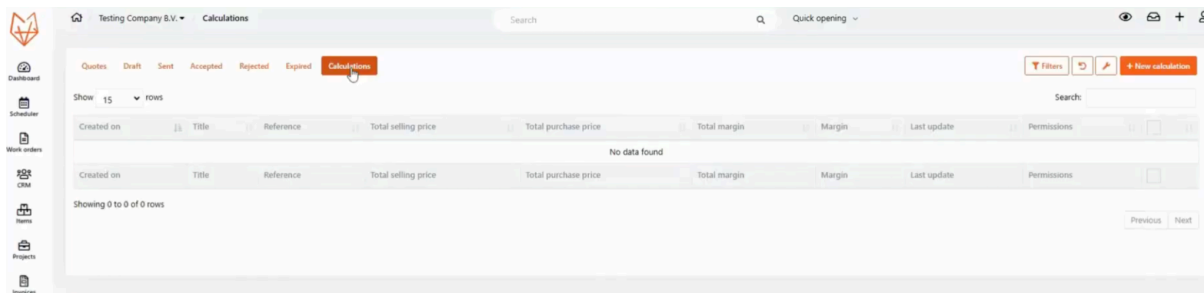


### 4. Calculation Overview

In the Quotes section of your menu, you'll find a new tab titled "Calculations." This tab will open the Calculations view. Initially, this area will appear empty because no calculations have been created

yet. As you add new calculations, they will populate this section, providing a comprehensive overview of all your data entries.

In this view, you have the capability to filter through your calculations, making it easy to manage and locate specific entries. When you need to review or make adjustments to a particular calculation, simply clicking on it will take you to a detailed page of that specific calculation. This functionality ensures that you can efficiently monitor and edit your calculations as your business needs evolve.

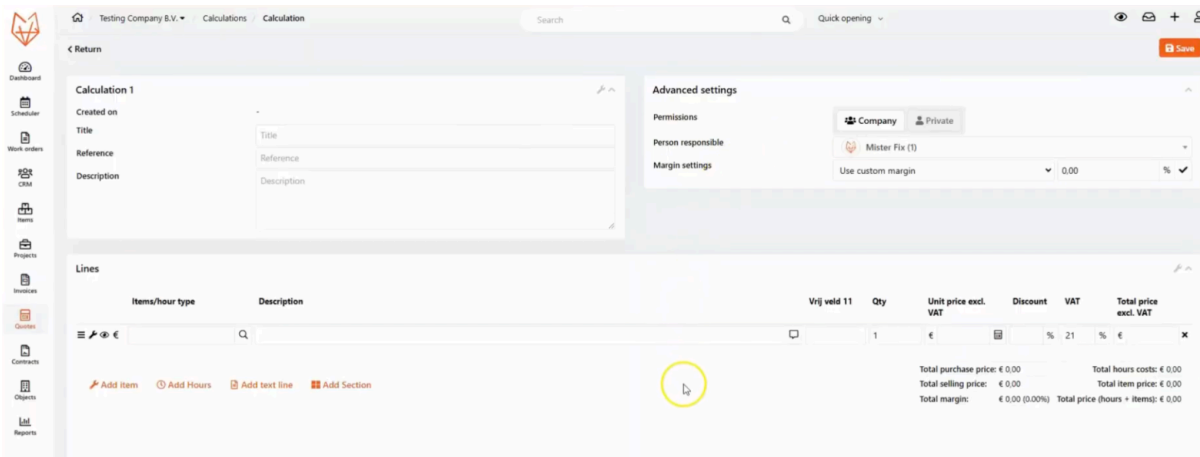


Now that you understand how to navigate the Calculation Overview, it's time to learn how to create your first calculation.

## 5. Creating your first Calculation

To begin creating your first calculation, navigate to the 'Calculations' tab under the Quotes section and click on the 'New Calculation' button. This will take you to a creation page designed with multiple sections for easy data entry.

On the creation page, you'll find the top button section which includes the primary actions like deleting, exporting, and saving the calculation. Below that, the page is divided into General and Advanced sections that allow you to input basic and detailed aspects of the calculation respectively.



You can add multiple line items and have the flexibility to organize these lines by sections for better structure and clarity. At the bottom of the page, the Total section automatically aggregates and displays the totals based on your line item data.

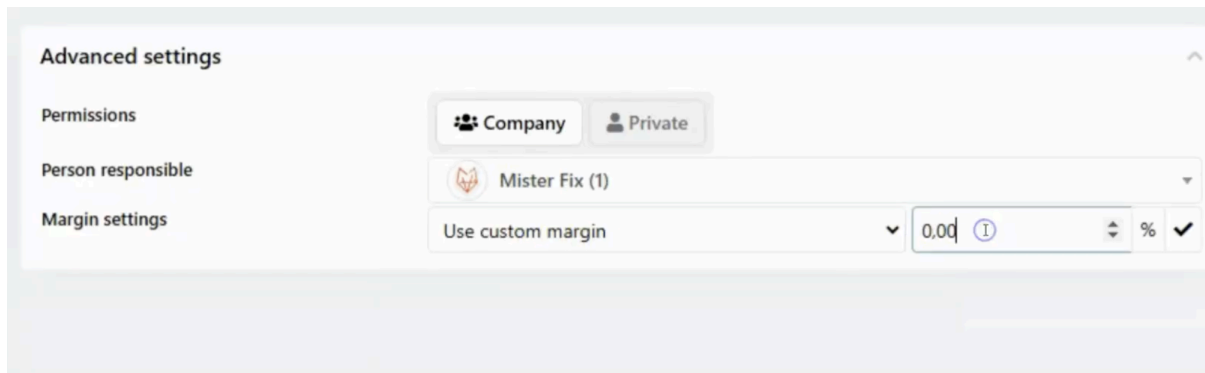
Make sure to check all the information for accuracy before saving your calculation. After saving, it will appear in your Calculations overview, available for future modifications or analysis.

## 6. Calculation Basics

In the Calculation module, each entry is key to organizing and managing your calculations effectively. Key information includes the creation date, title, reference, and a descriptive section. The creation date helps you track and sort calculations, while the title and reference make them easy to identify and refer back to. The description provides a detailed explanation, aiding in understanding and future references. This foundational information ensures calculations are well-documented and accessible when needed.

## 7. Advanced Settings

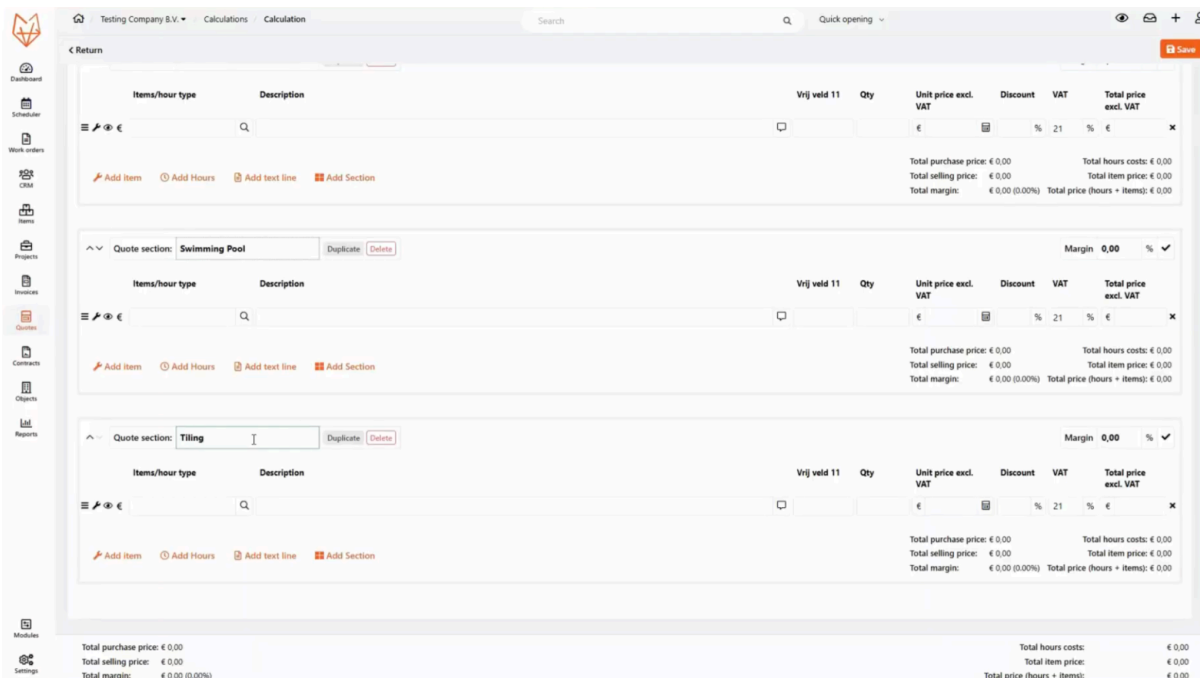
In the Advanced Settings of the Calculation module, you can control permissions, setting them to either 'Company' for wider access or 'Private' for individual access by the creator. This feature ensures that calculations are shared appropriately based on their sensitivity and relevance. Additionally, there's an option to adjust margin settings, which allows for fine-tuning financial controls to better align with business objectives. Detailed explanations of margin settings are provided later in the guide.



## 8. Adding Sections

In the Calculation module, adding sections allows for better organization and clarity within your calculations, especially when dealing with complex projects. By dividing a calculation into sections, you can group related items and tasks, making the calculation easier to manage and understand.

Take the example of a calculation for constructing a small swimming pool, which might include sections like Ground Preparations, Foundation, Swimming Pool, and Tiling. Each section can be dedicated to specific tasks and resources necessary for that phase of the project. This structured approach not only helps in organizing the workflow but also provides clearer visibility into costs and resources for each part of the project.



Adding sections is straightforward: within your calculation setup, you can define and name new sections as needed and then categorize your items and hours under the appropriate section. This

modular setup enhances your ability to monitor and control various aspects of the project efficiently.

## **9. Adding Hours**

In the Calculation module, adding hours to each section allows for detailed tracking and management of labor costs associated with different parts of a project. When specifying hours for a specific section, you'll have the option to select the appropriate hour type based on the work being performed. This flexibility is crucial for accurate cost estimation.

For instance, different sections of a project, such as Ground Preparations or Tiling, may require different types of labor, each with its own associated costs. The Tiling section, for instance, might need a specialized type of labor that has a different tariff due to the specialized skills required. By selecting the correct hour type, you ensure that the estimation reflects the true cost of labor for each section of the project.

This functionality aids in creating more accurate and granular financial overviews, ensuring that each element of the project is budgeted correctly based on the labor type and hours required.

## **10. Adding Items**

In the Calculation module, adding items to each section is crucial for detailing the materials and equipment needed to complete the work. Within each project section, you can specify which items are required along with their quantities.

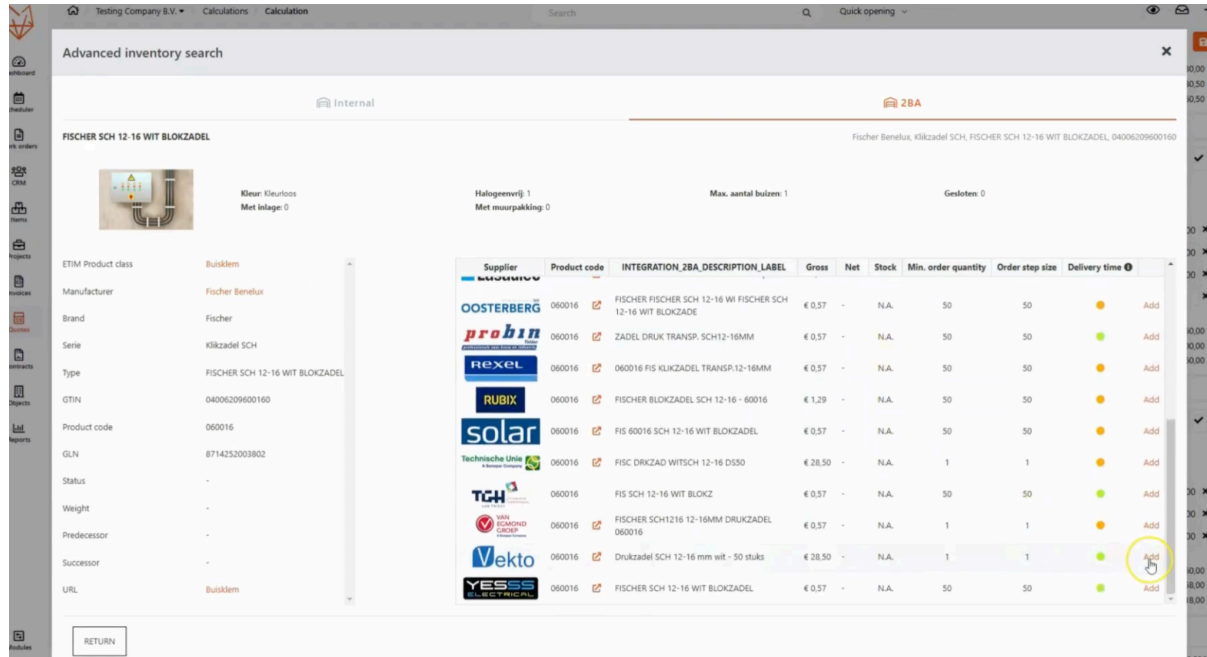
Each item incorporated into the calculation pulls its selling price from a predefined materials list, ensuring consistency and accuracy in pricing. Moreover, you have the ability to specify or update the purchase price for each item within the purchase price settings. This function is essential for maintaining accurate cost management and ensuring profitability by calculating the margin between the purchase price and the selling price of items used in the project.

This structured approach not only ensures that all necessary materials are accounted for but also allows for precise financial planning and control within each section of the project.

## **11. Searching external Items**

When adding items to your calculation, you might encounter situations where the required item is not currently listed in your OutSmart database. To address this, you can utilize an external search provider like 2BA for sourcing the item. This feature allows you to seamlessly search for and identify articles that are not already part of your internal inventory.

During the search process, after you input the desired article into the search interface, 2BA will display a list of available suppliers along with their pricing for the item. This provides a comprehensive view that helps you compare different options based on cost and supplier reliability.



Once you find a suitable supplier with an acceptable price, you can directly add this externally sourced item to your calculation. This integration ensures that even items not initially present in your database can be included in your project calculations effortlessly.

## 12. Validating and editing purchase prices

In your Calculation module, the addition of items automatically updates the prices and margins for each section, as well as the totals for the entire calculation. To fine-tune these numbers, each line item features a calculator icon.

Clicking on this calculator icon opens a detailed pricing window. This window is organized into three main sections:

Left: Displays the purchase price of the item.

Center: Shows the markup or margin applied.

Right: Indicates the sales price resulting from these calculations.

Markup is a percentage added on top of the purchase price, where, for example, a 100% markup means doubling the original cost. Margin, on the other hand, represents the percentage of the selling price that constitutes the profit.



Within this calculator, adjusting the markup or margin percentage will automatically recalibrate the sales price accordingly. You also have the flexibility to lock these percentages and manually adjust the sales price, after which the system recalculates the percentages to align with the new sales figure.

Vrij veld 11	Qty	Unit price excl. VAT	Discount
	12	€ 55,00	9
<div style="border: 1px solid #ccc; padding: 5px;"> <p><b>Calculator</b></p> <p>Purchase price: € 30,00 + Markup: 83,33333% = Sales price: € 55,00</p> <p>Marge: 45,45454% =</p> <p>Total selling price: € 220,00</p> <p>Total margin: € 95,40 (41.75%)</p> </div>			

This functionality ensures that you maintain accurate financial control over your calculations, allowing for precise adjustments to ensure profitability and competitive pricing.

### 13. Setting Global Margin

In the advanced section of your Calculation module, you have the option to configure margin settings, which can be set to either company-wide or custom. If set to company-wide, the margin will automatically apply the predefined percentage from your general settings across all calculations. This ensures consistency in profitability across various projects and calculations.

If you opt for a custom margin, the settings adjust based on the specific details and line items within each section of the calculation. This allows for more tailored financial management, accommodating unique aspects of different projects or sections.

To modify the global margin, simply change the percentage and check the appropriate checkbox. This action triggers an automatic adjustment of all sales prices in the calculation. The system recalculates to align with the new margin setting, either increasing or decreasing sales prices to meet the desired profitability level.

### 14. Setting Section Margin

Within your Calculation module, you have the capability to adjust margins at a section-specific level. This feature allows for more precise financial control over different parts of a project, accommodating the varying costs and pricing strategies associated with each section.

Total purchase price: € 1261,50		Total hours costs: € 544,92	
Total selling price: € 1785,60		Total item price: € 1240,68	
Total margin: € 524,10 (29.35%)		Total price (hours + items): € 1785,60	

						Margin	20	%	<input checked="" type="checkbox"/>
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Vrij veld 11	Qty	Unit price excl. VAT	Discount	VAT	Total price excl. VAT
<input type="checkbox"/>	16	€ 67,79	%	9,00 %	€ 1084,64
<input type="checkbox"/>	3	€ 30,82	%	21,00 %	€ 92,46
<input type="checkbox"/>	1	€ 6,80	%	21,00 %	€ 6,80

Total purchase price: € 528,30		Total hours costs: € 1084,64	
Total selling price: € 1183,90		Total item price: € 99,26	
Total margin: € 655,60 (55.38%)		Total price (hours + items): € 1183,90	

To set or modify the margin for a particular section, simply change the percentage in the margin field for that section. When you confirm the adjustment by clicking the associated checkbox, the change will only apply to the items within that specific section. This targeted adjustment ensures that the margin recalibration does not impact other sections of the calculation, allowing for customized profitability management tailored to the unique requirements of each section.

## 15. Margin Goals Visibility and Feedback

In the Calculation module, margin goals set in the settings are prominently displayed alongside the margin percentages on the calculation page. These goals are color-coded, enhancing visibility and understanding of financial health at a glance. Typically, you aim for a green checkbox, which indicates that the margin is within the desired, safe range.

Quotes Draft Sent Accepted Rejected Expired <b>Calculations</b>										Filters	+	New calculation
Show 15 rows	Search:											
Created on	Title	Reference	Total selling price	Total purchase price	Total margin	Margin	Last update	Permissions				
27-11-2024 13:01	Swimming Pool	POOLXS	€ 7760,64	€ 4777,70	€ 2982,94	38,44%	27-11-2024 13:01	Company	<input checked="" type="checkbox"/>			
Created on	Title	Reference	Total selling price	Total purchase price	Total margin	Margin	Last update	Permissions				
Show 1 to 1 of 1 rows												
										Previous	1	Next

This visual feedback system serves as a quick reference to assess whether a specific calculation or section falls into the danger, warning, or safe zones based on predefined margin goals. This can significantly aid decision-making, helping you quickly identify areas that may require financial adjustments to meet target profitability levels. The color-coded system simplifies monitoring and allows for immediate corrective actions when necessary, ensuring that financial outcomes align with business objectives.

## 16. Complete and Lock

At the top of the calculation page in the Calculation module, you'll find a button labeled "Complete & Lock." This feature allows you to finalize your calculation, signifying that it is fully prepared and accurate, ready for implementation or further processing. By clicking this button, you effectively lock the calculation, preventing any further modifications that could alter the finalized data. This step is crucial for maintaining the integrity of the data as it moves to application phases like billing or reporting, ensuring that all figures are correct and approved.

## 17. Calculation Overview

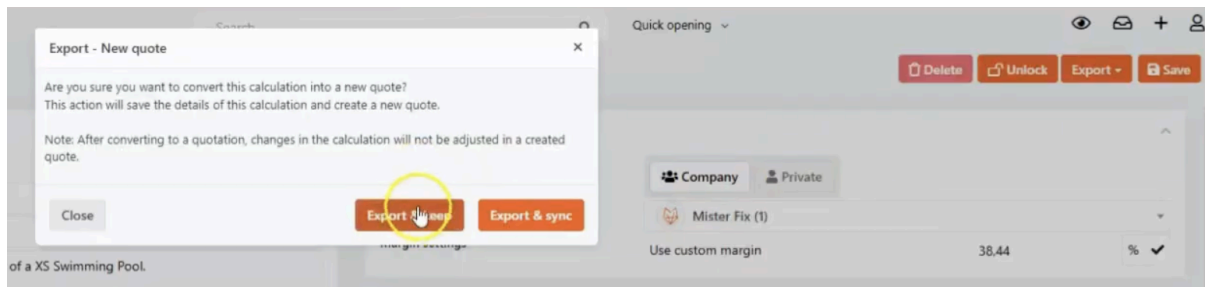
Once you have saved and completed your calculation, it will appear in the Calculations overview with all relevant details displayed, including its current locked or unlocked status. The overview will also present key financial metrics such as the margin percentage, alongside a visual indicator that reflects whether the calculation meets your predefined margin goals based on your settings.

This review feature allows you to quickly assess the financial health and status of each calculation at a glance, ensuring that you can easily monitor performance and compliance with financial targets. The locked status indication is especially useful for distinguishing between calculations that are finalized and those that may still be under review or modification.

## 18. Export Calculation to New Quote

Once you are in the details view of a calculation within the Calculation module, you'll find an 'Export' button. Upon clicking this, select the first option, "Export to New Quote." This action triggers a confirmation modal with two distinct choices: "Export & keep" and "Export & sync."

Choosing "Export & keep" will export the calculation lines exactly as they are currently entered in your calculation. The "Export & sync" option, on the other hand, refreshes the lines to reflect the latest purchase prices, ensuring that your quote is up-to-date with the most recent cost data.



After making your selection and confirming the export, the system will automatically direct you to the newly created quote. You can proceed to finalize this quote by adding the customer details and any other necessary information, effectively turning your detailed calculation into a ready-to-use

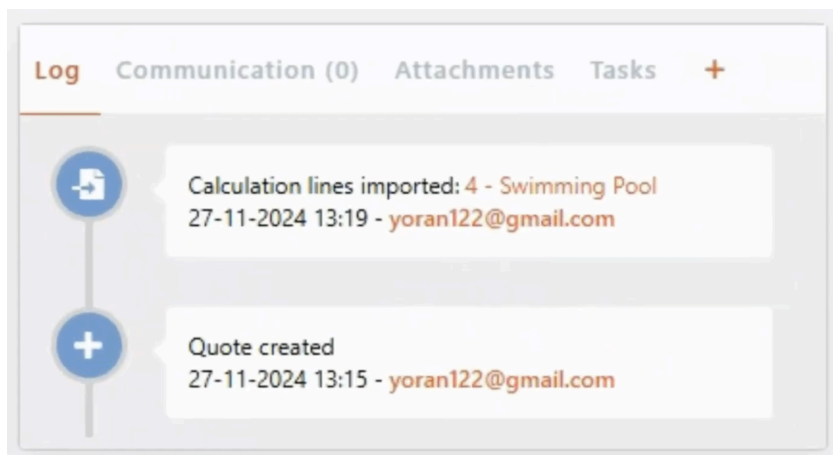
quote. This streamlined process ensures efficiency and accuracy in generating new quotes directly from your calculations.

### 19. Export Calculation to Existing Quote

When you need to incorporate a calculation into an existing quote, begin by navigating to the detailed view of your calculation in the Calculation module. Click the 'Export' button and select "Export to Existing Quote." This action triggers a modal where you can locate and choose an existing quote. It's important to note that only quotes in the concept phase will appear in your search, preventing changes to quotes that have already been sent or finalized.

Within this modal, you're presented with two options for exporting your data. You can choose to export the calculation lines just as they are, maintaining their current configurations. Alternatively, you can opt to refresh these lines to reflect the latest purchase prices, ensuring that your quote is updated with the most accurate financial data.

After selecting your preferred method and confirming the export, the system directs you automatically to the existing quote you have chosen. Here, you'll see your calculation seamlessly integrated, with the added lines and sections ready for final adjustments or approval. The logs will show that an export has been done. This process efficiently updates existing quotes, making sure they are precise and up-to-date.



### 20. Import Calculation to Existing Quote

When working within an existing quote, you also have the facility to import calculations directly into it. Simply open the quote, navigate to the lines and sections area, and you'll find the "import from calculations" button, provided that calculations are enabled.

Clicking this button brings up a modal where you can select a calculation that you wish to import. You're offered two methods for importing: "Import & keep" and "Import & sync." The "Import &

keep" option imports the calculation lines as they currently are, maintaining their existing details and figures. On the other hand, "Import & sync" refreshes these lines to include the latest purchase price, ensuring your financial data remains current.

After you've made your selection and completed the import, you will be redirected to the quote, where you can now see the newly imported lines and sections integrated. The system also logs each import activity, providing a clear trail that calculations have been added. This is especially helpful when you import multiple calculations to the same quote; if you're using named sections, the system automatically makes these names unique by appending a sequence like (1), (2), etc., to avoid any overlap and confusion.

This import functionality empowers you to seamlessly integrate comprehensive calculation data into existing quotes, enhancing accuracy and efficiency in your quoting process.

## **21. Final**

In conclusion, the Calculation module is designed to enhance your quoting and financial planning process. Starting with creating your first calculation, you can navigate through setting up detailed breakdowns with specific margin goals and advanced settings to ensure accuracy and profitability. You've learned how to add individual hours and items, manage these elements through sections, and adjust financial specifics with both global and section-specific margins.

We also covered the dynamic capabilities of exporting calculations to both new and existing quotes, along with the import functionality which allows calculations to be seamlessly integrated into existing quotes. Each function is designed to maintain precision in documentation and flexibility in financial management.

The module's robust framework ensures that you can handle a variety of financial scenarios, making it an invaluable tool for accurate and efficient business operations. This streamlined approach not only saves time but also enhances the reliability of financial data across the board.