



USER GUIDE
Microsoft Dynamics NAV
TENDERING &
ESTIMATION



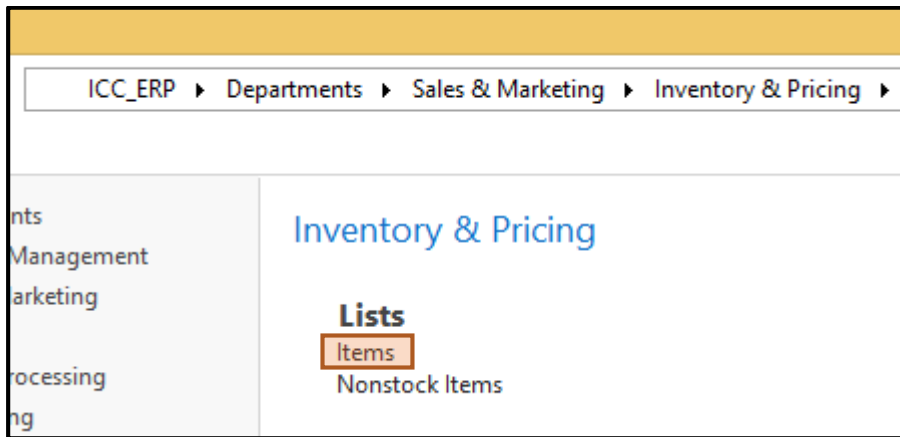
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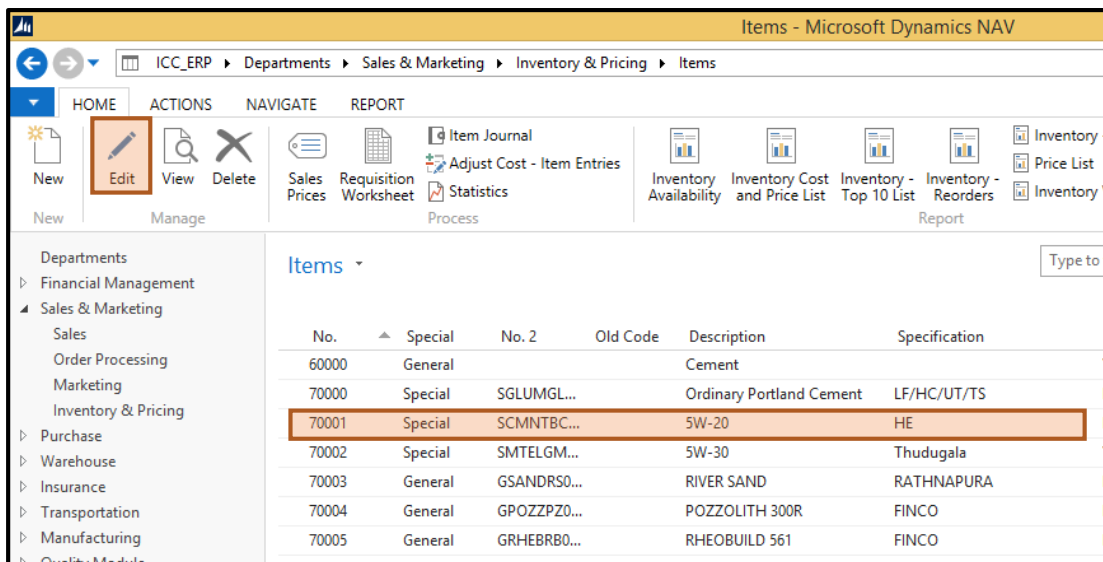
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1 Substitute Items

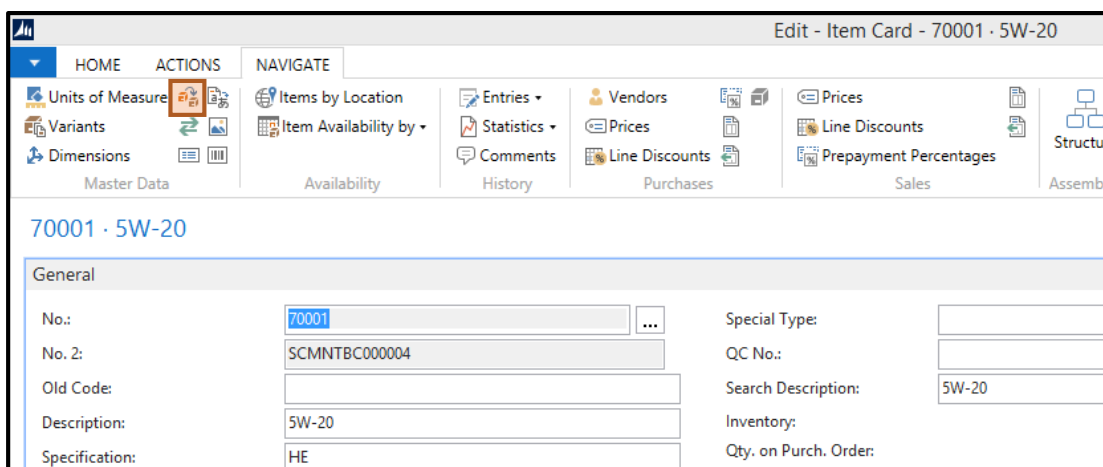
1. Navigate to Departments -> Sales and Marketing -> Inventory & Pricing -> Items



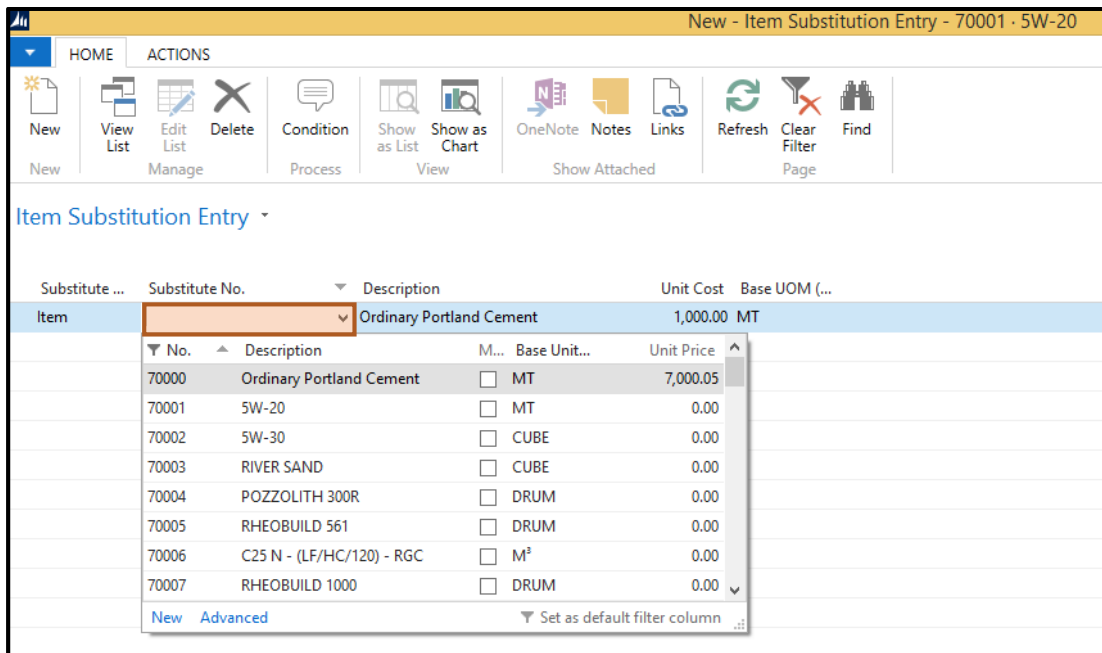
2. Select the Item and click “Edit”



3. In the Navigate Tab of the Ribbon, click “Substitutions”



4. Select an item to add as a substitute

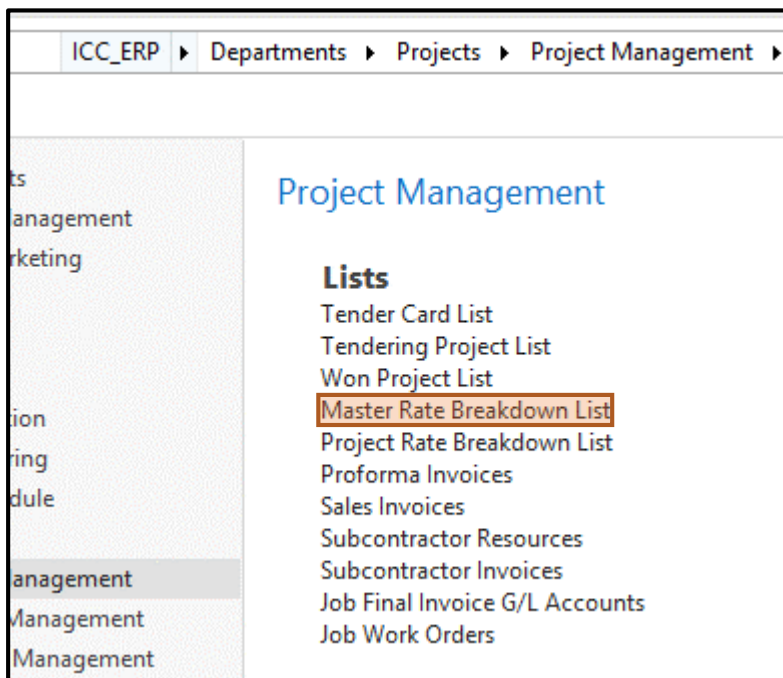


The Best Practice method would be to select Items having the Original Items' Unit of Measure

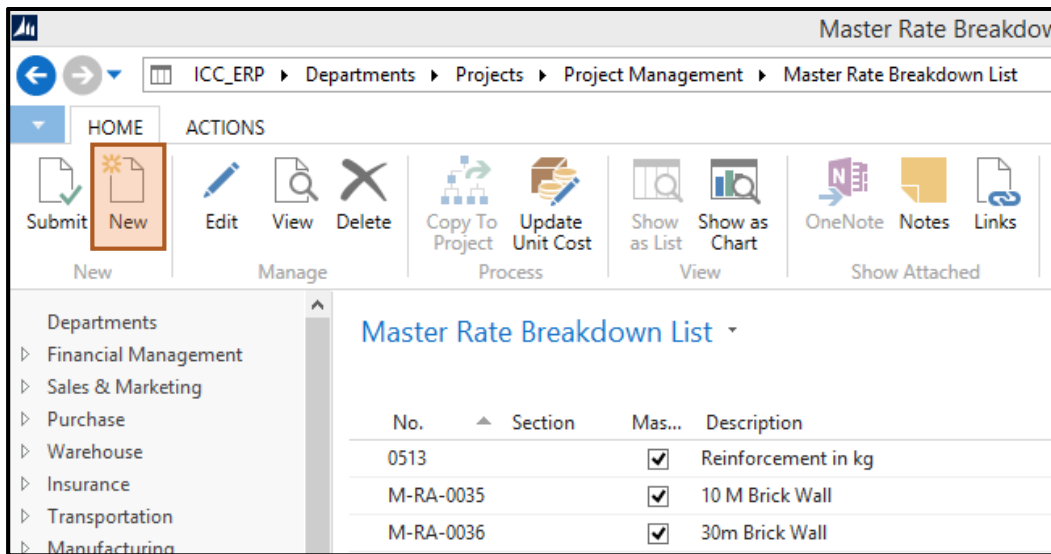
2 Master Rate Cards

2.1 Creating a Master Rate Card

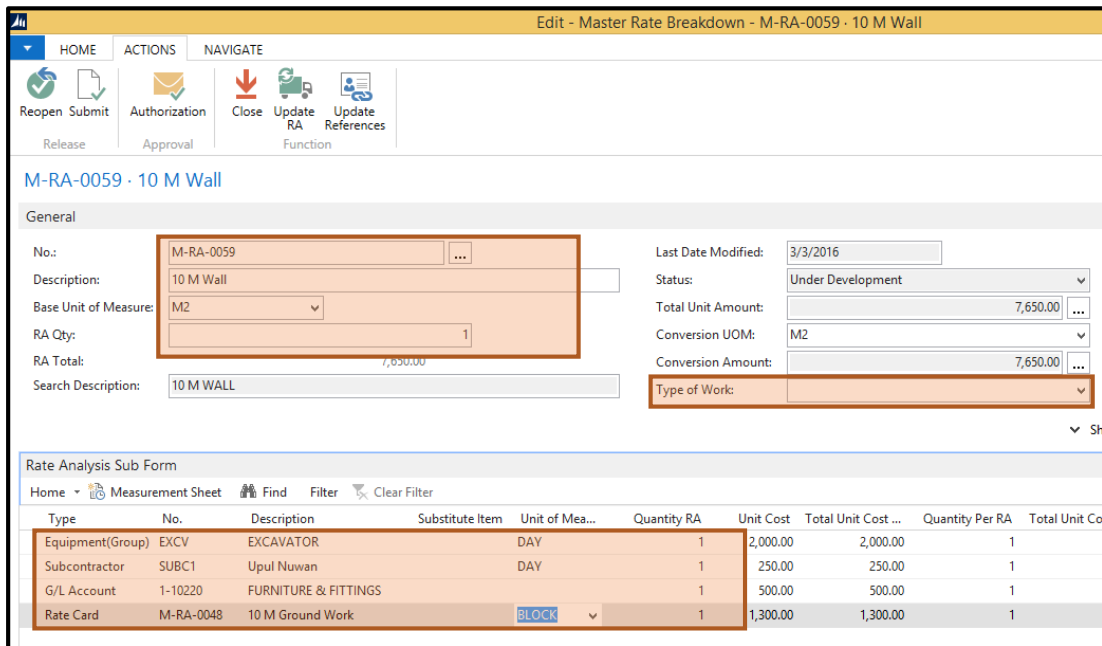
1. Navigate to Department -> Projects -> Project Management -> Master Rate Breakdown List



2. Click “New” in the Master Rate Breakdown List

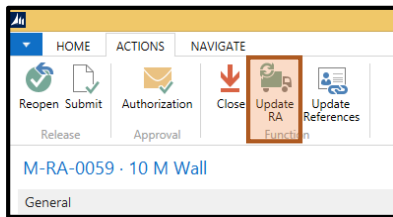


3. Enter all mandatory information in the Master Rate Card



- Type of Work: Select the type of work, this rate card would be used for. Master Rate Cards with the “Type of Work” matching that of the Tendering Project Card would be shown when copying Master Rate Cards.
- RA Qty: Quantity of the Rate Card
- RA Total: Total cost of the components
- Status: Status of the Rate Card. Status can be “New”, “Pending Approval”, “Certified” and “Under Development”
- Quantity RA: Quantity of the component needed
- Type: (Rate Card): Certified Rate Cards will be shown in the “No” drop down

- Click “Update RA” in the Ribbon to include the components of the child rate card in the parent rate card.

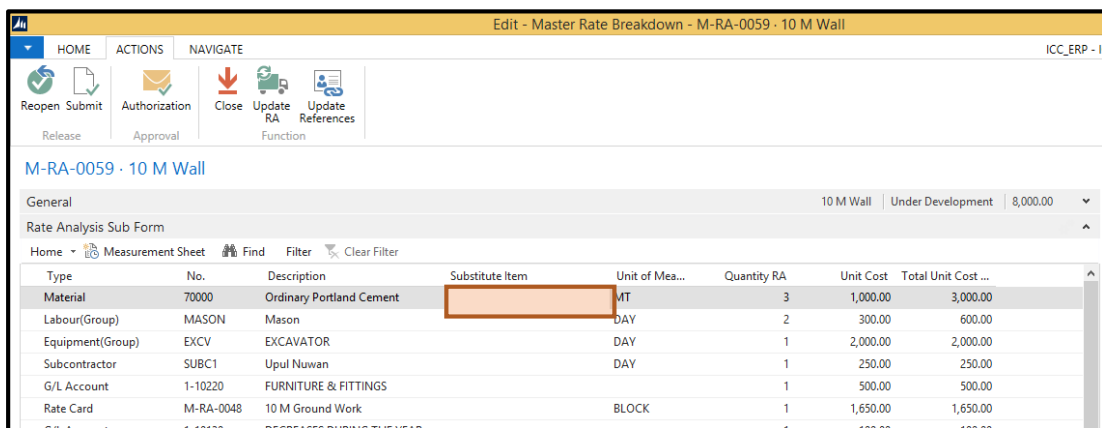


Only click “Update RA” if there is a Rate Card in the component lines

2.2 Selecting Substitute Items in the Master Rate Card

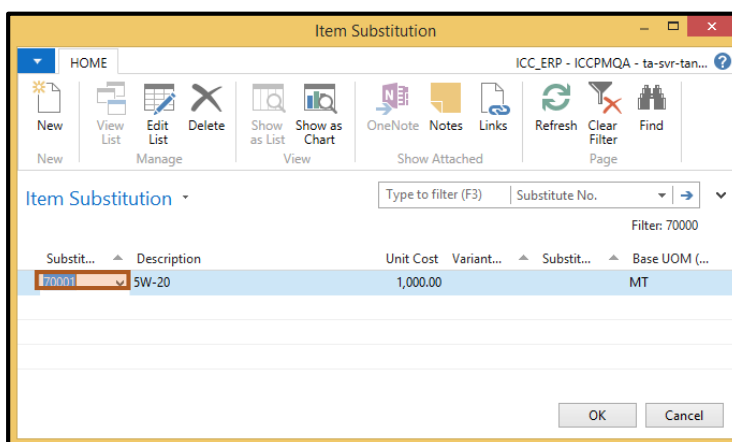
Refer SECTION 1 for a detailed elaboration on adding Substitute Items in the Item Card

- Navigate to the Master Rate Card
- Select an Item and click the “Substitute Item” drop down



Substitute items can only be added for Items

- Select the Substitute Item from the drop down and click OK



Note: The substitute items added in the Item Card will be shown. The Substitute Item should have the Original Items' Unit of Measure

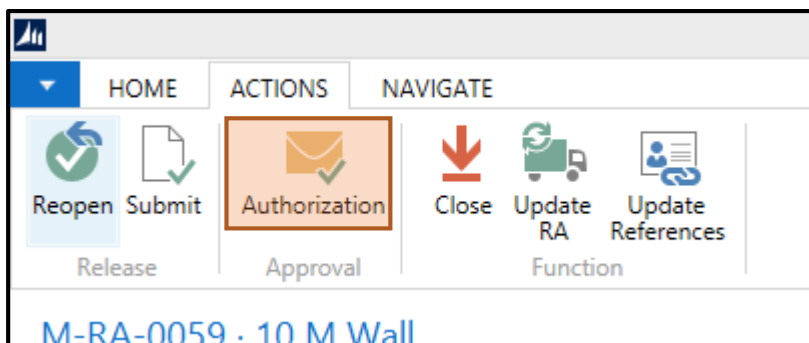
- The substitute item will be added to the component line as shown below

M-RA-0059 · 10 M Wall				
General				
Rate Analysis Sub Form				
Home Measurement Sheet Find Filter Clear Filter				
Type	No.	Description	Substitute Item	Unit of Mea...
Material	70000	Ordinary Portland Cement	70001	MT
Labour(Group)	MASON	Mason		DAY
Subcontractor	SUBC1	Upul Nuwan		DAY

Note: An error message will be displayed if the Unit of Measures do not match

2.3 Sending Master Rate Card for Approval

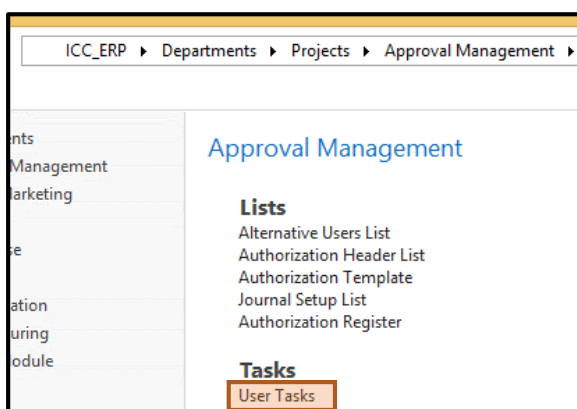
- Navigate to the Master Rate Card
- Click “Authorization” in the Ribbon to send the Master Rate Card for Approval



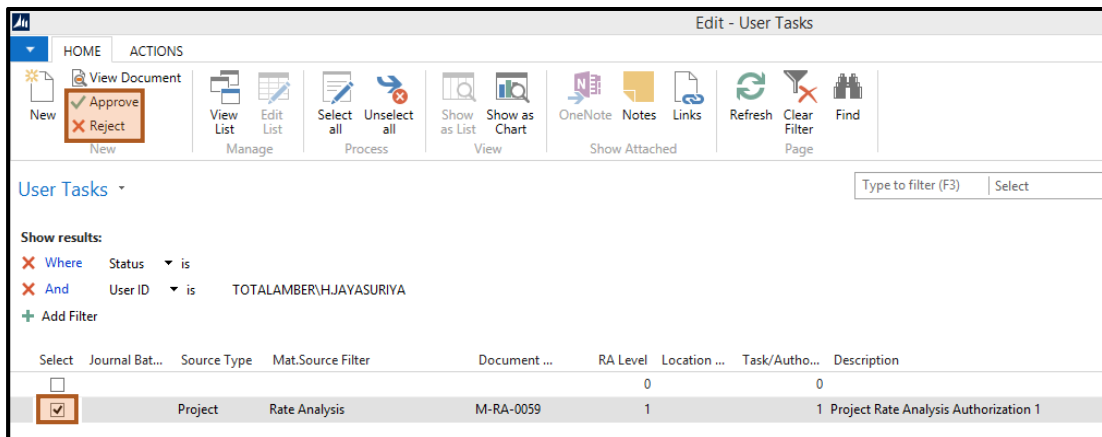
Note: Status of Master Rate Card would change to “Pending Approval”

2.4 Approving Master Rate Cards

- Navigate to Departments -> Projects -> Approval Management -> User Tasks



2. Tick the “Select” checkbox in the approval entry line and click Approve/Reject



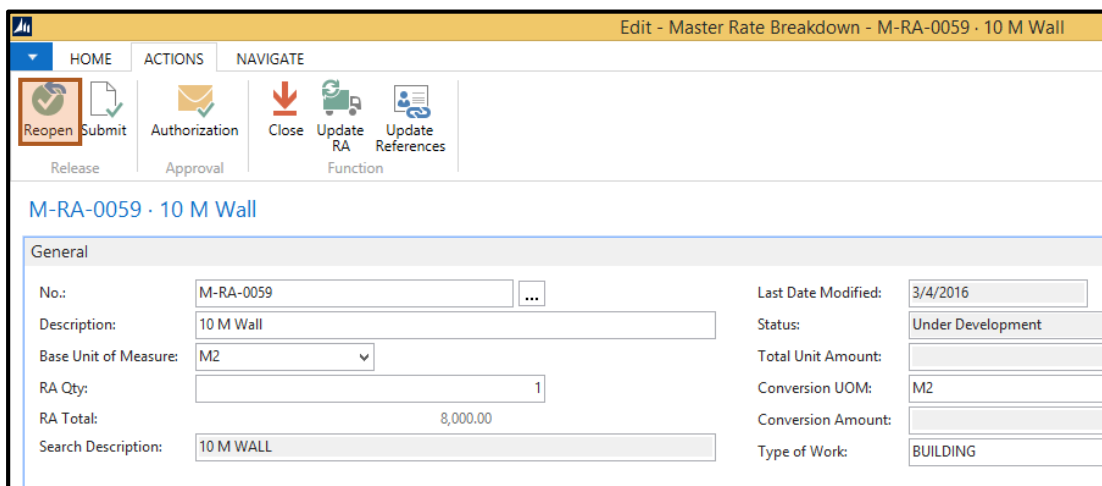
Note: Click “View Document” to view the Master Rate Card. User can approve multiple Rate Cards with the same “RA Level” instantly

Approve: Status of Master Rate Card would change to “Certified”

Reject: Status of the Master Rate Card would change to “Under Development”

2.5 Re-Open an Approved Master Rate Card

1. Navigate to the Master Rate Card
2. Click “Re-Open” in the Ribbon

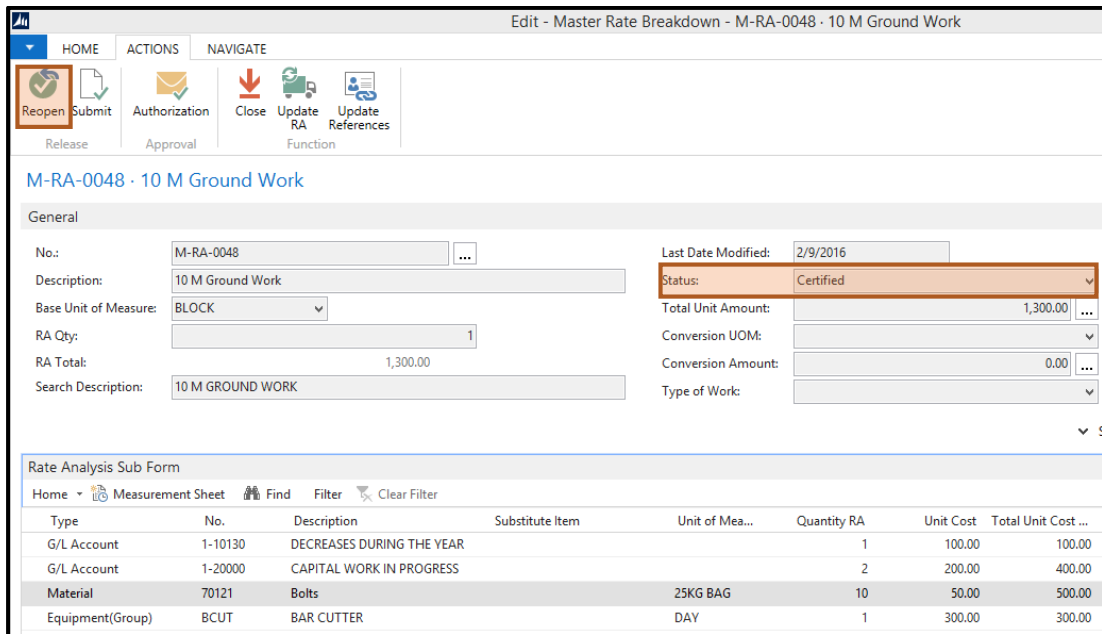


2.6 Update References

Scenario

The User finds out that the child master rate card was missing the Labour(Group) component and it needs to be changed and sent for approval.

1. Navigate to the Child Master Rate Card
2. Click “Re-Open” in the Ribbon to Re-open the certified Master Rate Card



Edit - Master Rate Breakdown - M-RA-0048 - 10 M Ground Work

HOME ACTIONS NAVIGATE

Reopen Submit Authorization Close Update RA Update References

Release Approval Function

M-RA-0048 - 10 M Ground Work

General

No.: M-RA-0048 Last Date Modified: 2/9/2016

Description: 10 M Ground Work Status: Certified

Base Unit of Measure: BLOCK Total Unit Amount: 1,300.00

RA Qty: 1 Conversion UOM:

RA Total: 1,300.00 Conversion Amount: 0.00

Search Description: 10 M GROUND WORK Type of Work:

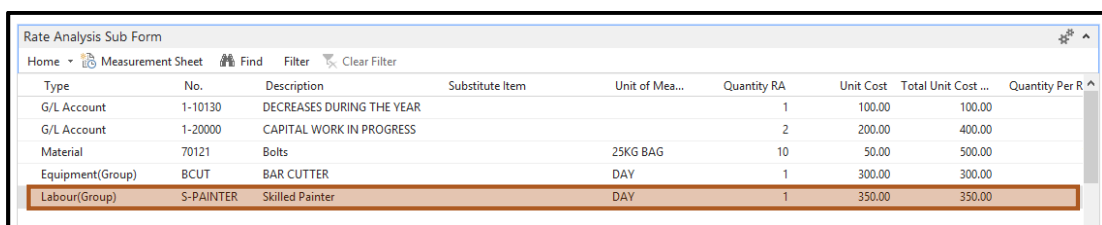
Rate Analysis Sub Form

Home Measurement Sheet Find Filter Clear Filter

Type	No.	Description	Substitute Item	Unit of Mea...	Quantity RA	Unit Cost	Total Unit Cost ...
G/L Account	1-10130	DECREASES DURING THE YEAR			1	100.00	100.00
G/L Account	1-20000	CAPITAL WORK IN PROGRESS			2	200.00	400.00
Material	70121	Bolts		25KG BAG	10	50.00	500.00
Equipment(Group)	BCUT	BAR CUTTER		DAY	1	300.00	300.00

Note: Status of the Master Rate Card would change to “Under Development” when Re-opened.

3. Make necessary changes to the Master Rate Card



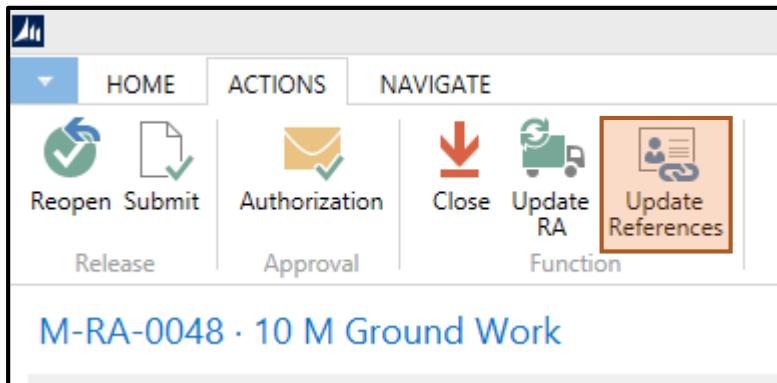
Rate Analysis Sub Form

Home Measurement Sheet Find Filter Clear Filter

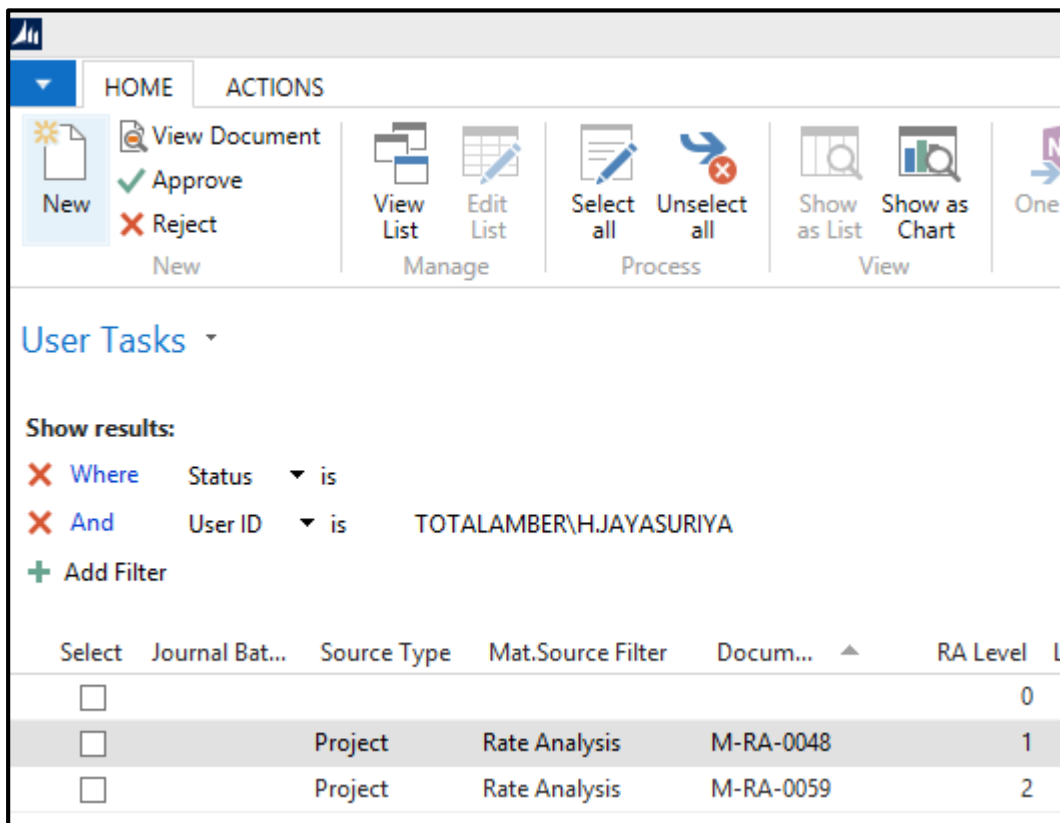
Type	No.	Description	Substitute Item	Unit of Mea...	Quantity RA	Unit Cost	Total Unit Cost ...	Quantity Per R ^
G/L Account	1-10130	DECREASES DURING THE YEAR			1	100.00	100.00	
G/L Account	1-20000	CAPITAL WORK IN PROGRESS			2	200.00	400.00	
Material	70121	Bolts		25KG BAG	10	50.00	500.00	
Equipment(Group)	BCUT	BAR CUTTER		DAY	1	300.00	300.00	
Labour(Group)	S-PAINTER	Skilled Painter		DAY	1	350.00	350.00	

When the Child Master Rate Card is changed, the status of any Parent Master Rate Card using it would change to “Under Development”

- Click “Update References” to include the change in Rate Cards utilizing the selected rate card.

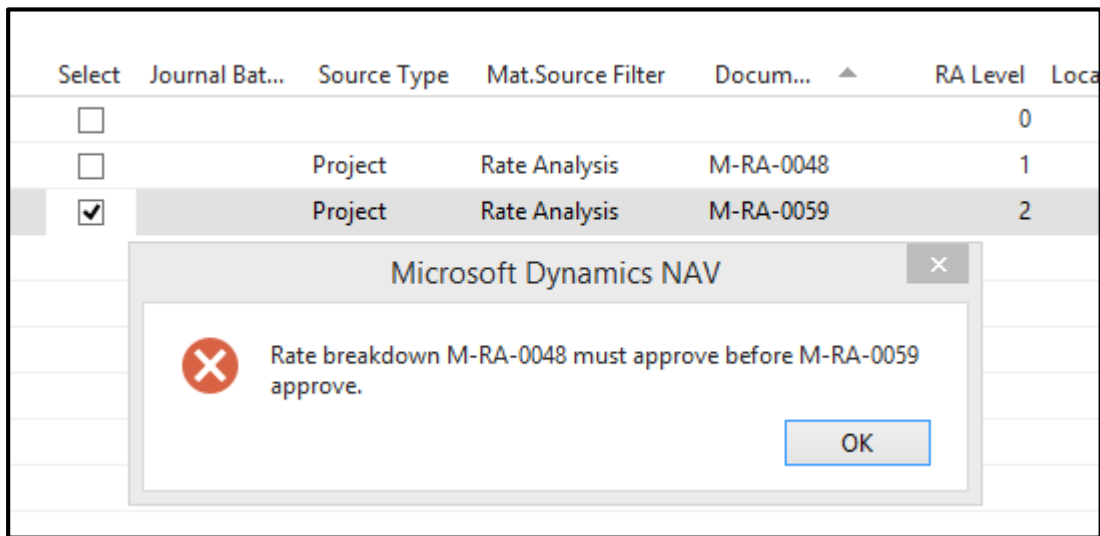


- Click “Authorization” in the Ribbon to send the Rate Card for Approval. This would send the child rate card and any other rate card using the child rate for approval.
- Navigate to the User Task Page to Approve the Master Rate Card(s)



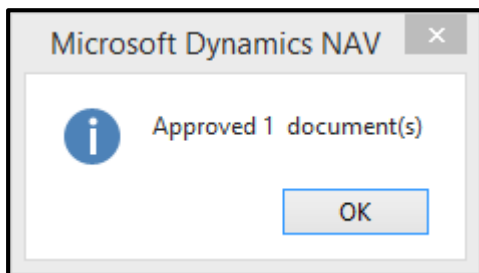
Note: In this example, both the rate cards will be sent for approval. The child rate (RA Level -1) card needs to be approved before approving the parent rate card (RA Level -2).

- Approve the Child Rate Card before approving the Parent Rate Card. If the Parent Rate Card is selected and “Approved” clicked before approving the child master rate card, a message as shown below will be displayed.

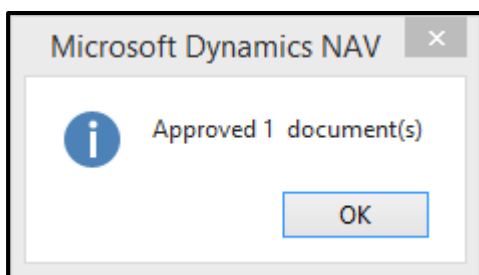


Note: Level 1 Rate Cards (Child Rate Cards) needs to be approved before approving Level 2 Rate Cards (Parent Rate Cards).

- A message will be shown when the child rate card is approved.

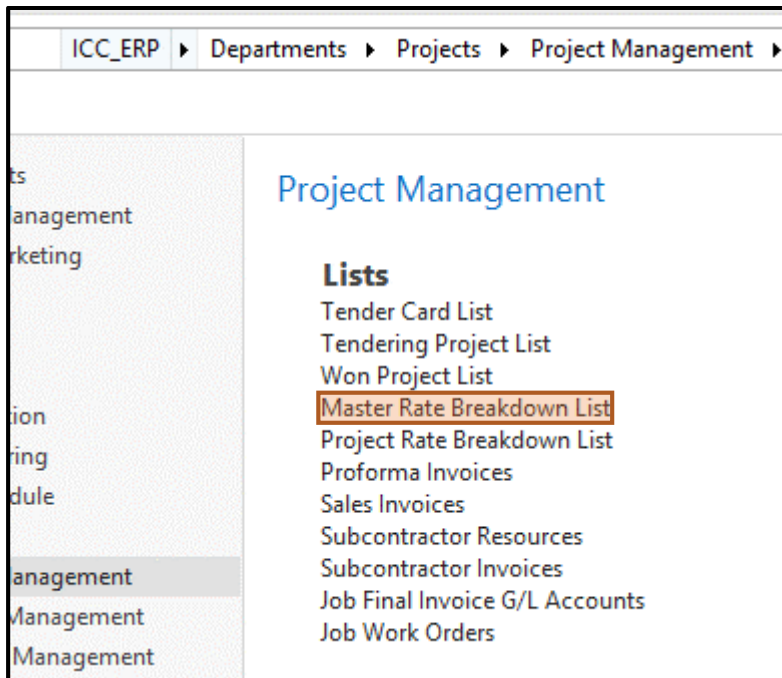


- Then select the Parent Rate card and click “Approve”. A message as shown below will be displayed.

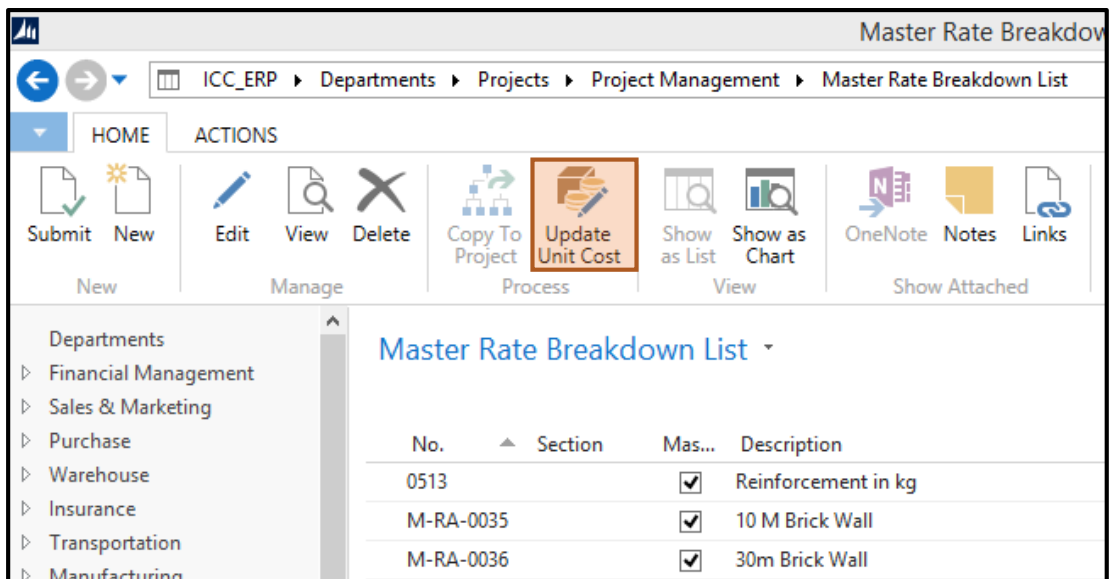


2.7 Bulk Unit Cost Update

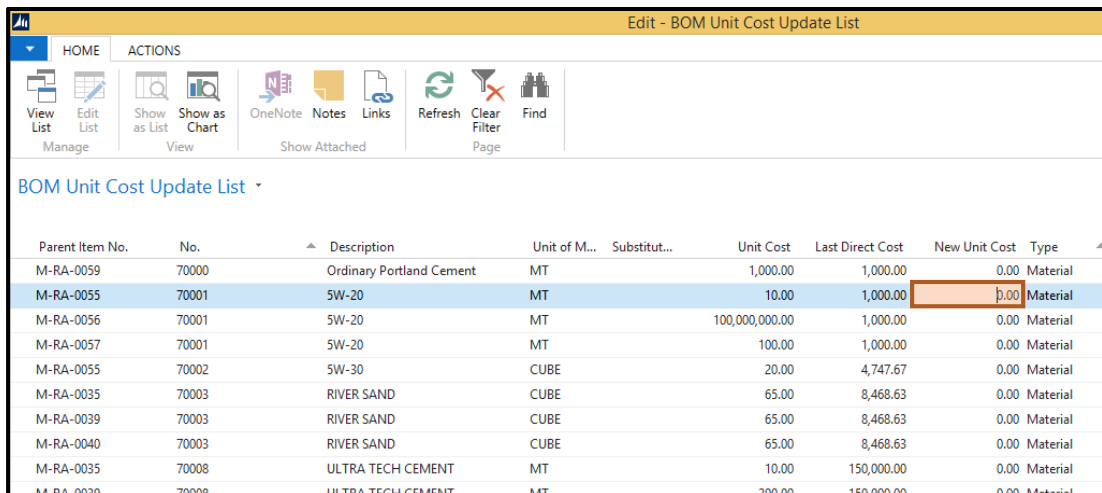
1. Navigate to Department -> Projects -> Project Management -> Master Rate Breakdown List



2. Click "Update Unit Cost"



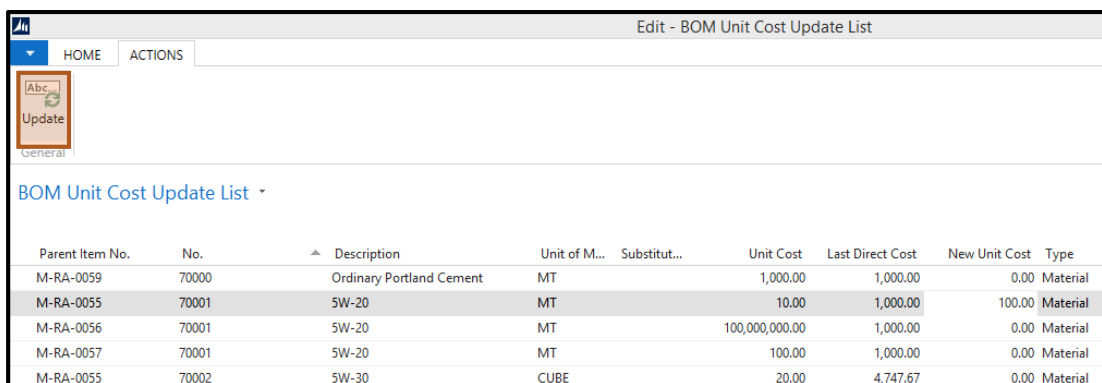
3. Enter the new Unit cost in the screen shown below



Parent Item No.	No.	Description	Unit of M...	Substitut...	Unit Cost	Last Direct Cost	New Unit Cost	Type
M-RA-0059	70000	Ordinary Portland Cement	MT		1,000.00	1,000.00	0.00	Material
M-RA-0055	70001	5W-20	MT		10.00	1,000.00	10.00	Material
M-RA-0056	70001	5W-20	MT		100,000,000.00	1,000.00	0.00	Material
M-RA-0057	70001	5W-20	MT		100.00	1,000.00	0.00	Material
M-RA-0055	70002	5W-30	CUBE		20.00	4,747.67	0.00	Material
M-RA-0035	70003	RIVER SAND	CUBE		65.00	8,468.63	0.00	Material
M-RA-0039	70003	RIVER SAND	CUBE		65.00	8,468.63	0.00	Material
M-RA-0040	70003	RIVER SAND	CUBE		65.00	8,468.63	0.00	Material
M-RA-0035	70008	ULTRA TECH CEMENT	MT		10.00	150,000.00	0.00	Material
M-RA-0030	70008	ULTRA TECH CEMENT	MT		200.00	150,000.00	0.00	Material

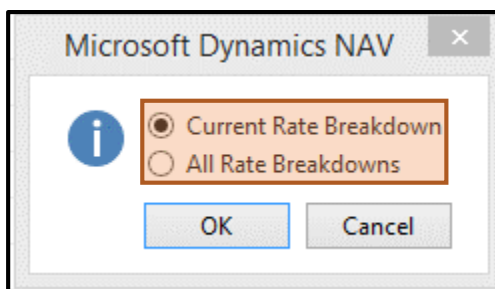
User can update the costs of Items, Labour (Groups), Equipment(Groups) and Subcontractor Groups

4. Click “Update” in the Ribbon



Parent Item No.	No.	Description	Unit of M...	Substitut...	Unit Cost	Last Direct Cost	New Unit Cost	Type
M-RA-0059	70000	Ordinary Portland Cement	MT		1,000.00	1,000.00	0.00	Material
M-RA-0055	70001	5W-20	MT		10.00	1,000.00	100.00	Material
M-RA-0056	70001	5W-20	MT		100,000,000.00	1,000.00	0.00	Material
M-RA-0057	70001	5W-20	MT		100.00	1,000.00	0.00	Material
M-RA-0055	70002	5W-30	CUBE		20.00	4,747.67	0.00	Material

5. Select the Update method in the message shown below and click “OK”



Current Breakdown: Update the cost of the components in the selected Master Rate Card only

All Rate Breakdowns: Update the cost of the component in all Master Rate Cards using it.

- The components in the Rate card will be updated to the new unit cost according the selected method

BOM Unit Cost Update List

Parent Item No.	No.	Description	Unit of M...	Substitut...	Unit Cost	Last Direct Cost	New Unit Cost	Type
M-RA-0059	70000	Ordinary Portland Cement	MT		1,000.00	1,000.00	0.00	Material
M-RA-0055	70001	5W-20	MT		100.00	1,000.00	0.00	Material
M-RA-0056	70001	5W-20	MT		100,000,000.00	1,000.00	0.00	Material
M-RA-0057	70001	5W-20	MT		100.00	1,000.00	0.00	Material

Note: If Current Rate Break down method was selected

Parent Item No.	No.	Description	Unit of M...	Substitut...	Unit Cost	Last Direct Cost	New Unit Cost	Type
M-RA-0059	70000	Ordinary Portland Cement	MT		1,000.00	1,000.00	0.00	Material
M-RA-0055	70001	5W-20	MT		200.00	1,000.00	0.00	Material
M-RA-0056	70001	5W-20	MT		200.00	1,000.00	0.00	Material
M-RA-0057	70001	5W-20	MT		200.00	1,000.00	0.00	Material
M-RA-0055	70002	5W-30	CUBE		20.00	4,747.67	0.00	Material

Note: If All Rate Breakdowns method was selected

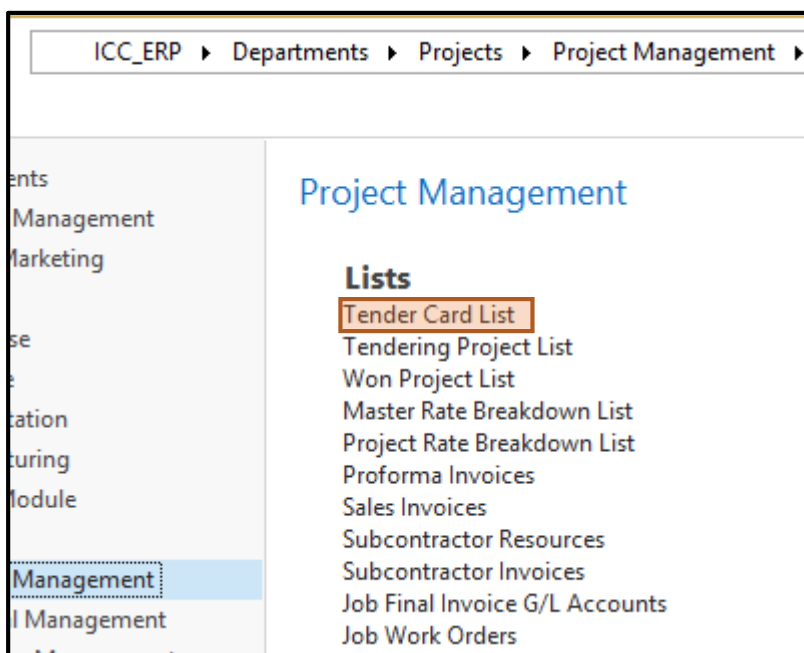
- The Status of Rate Card(s) would change to “Under Development” if a change was done to a Certified Master Rate Card

M-RA-0053	<input checked="" type="checkbox"/>	xyz	28 KG	455.00	New
M-RA-0054	<input checked="" type="checkbox"/>			0.00	New
M-RA-0055	<input checked="" type="checkbox"/>	Provisions 2	DAY	323.34 BUILDING	Under Dev...
M-RA-0056	<input checked="" type="checkbox"/>	test rounding	25KG	200.00	New

3 Tendering

3.1 Creating a Tender Card

- Navigate to Departments -> Projects -> Project Management -> Tender Card List



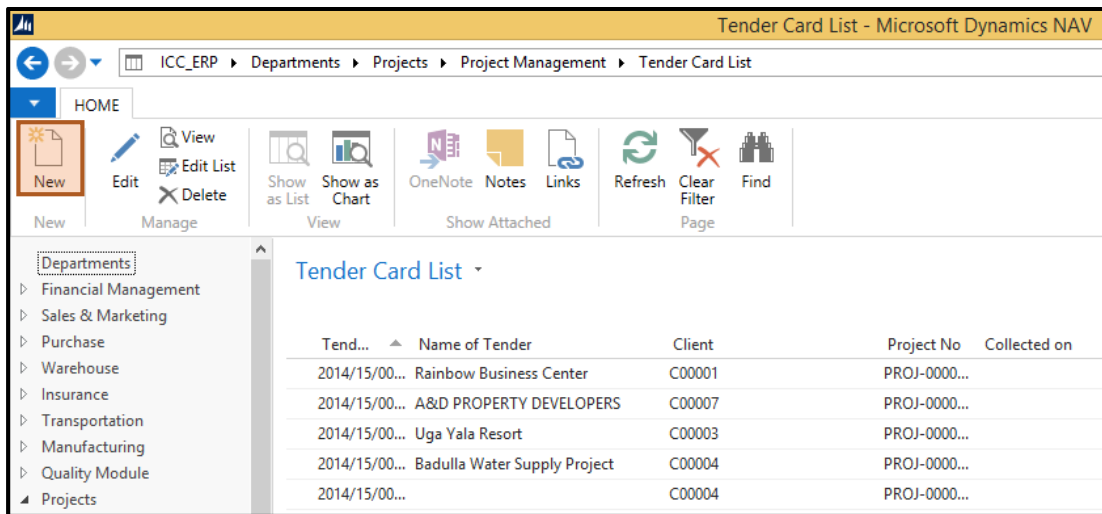
ICC_ERP > Departments > Projects > Project Management >

Project Management

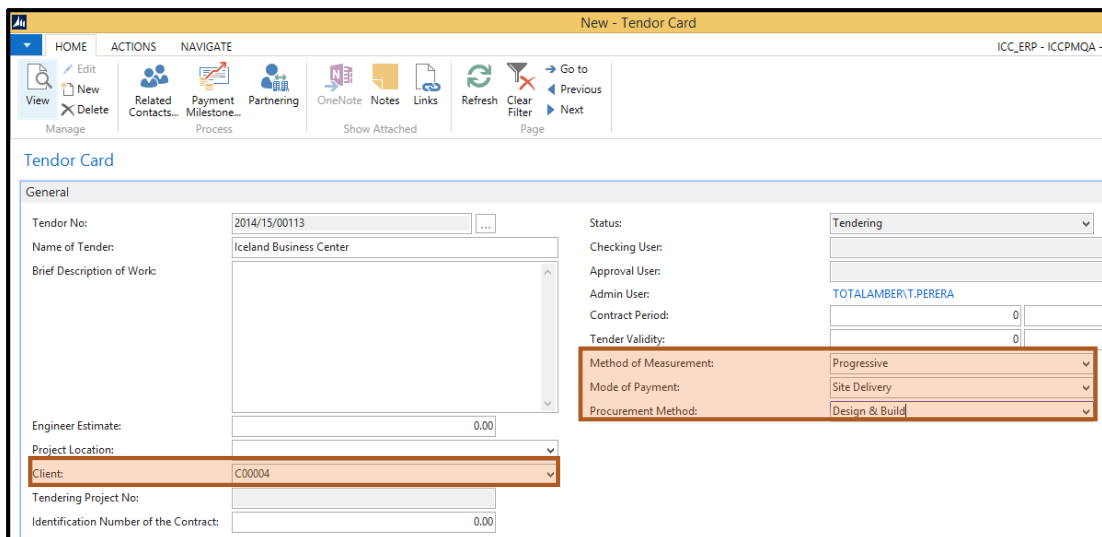
Lists

- Tender Card List
- Tendering Project List
- Won Project List
- Master Rate Breakdown List
- Project Rate Breakdown List
- Proforma Invoices
- Sales Invoices
- Subcontractor Resources
- Subcontractor Invoices
- Job Final Invoice G/L Accounts
- Job Work Orders

- Click “New” in the Ribbon Section of the Tender Card List

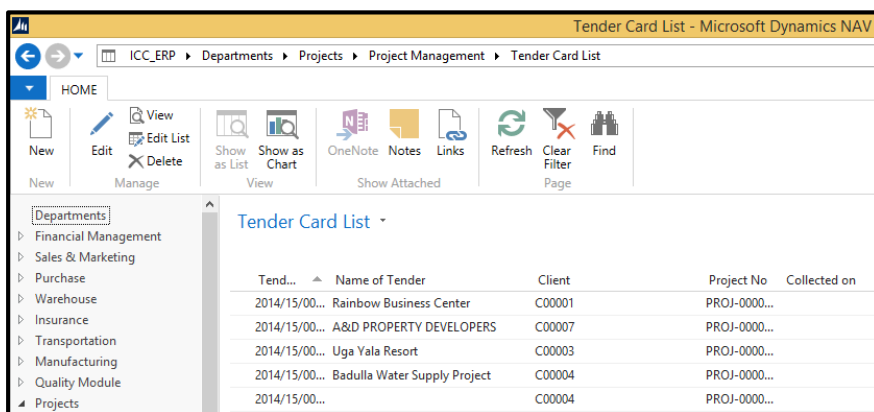


- Insert the mandatory information as shown below

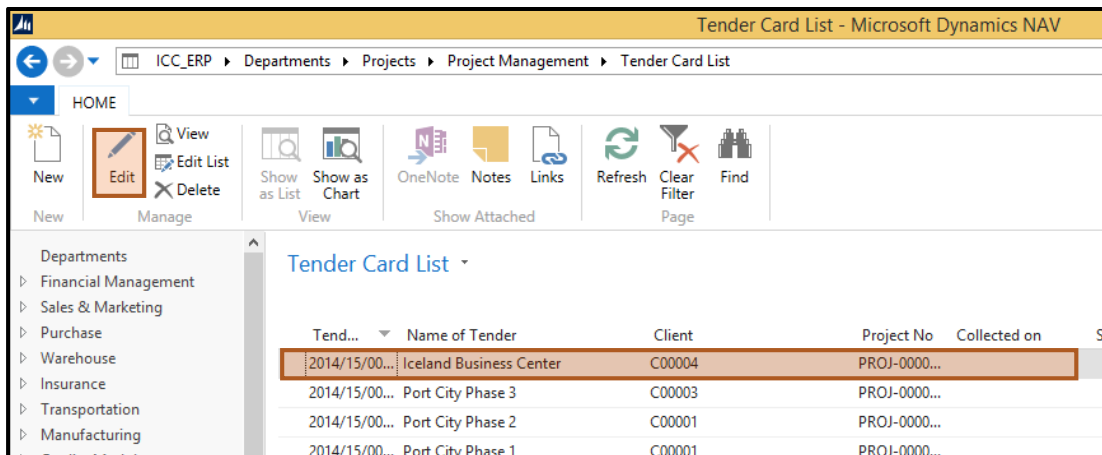


3.2 Creating a Tendering Project Card

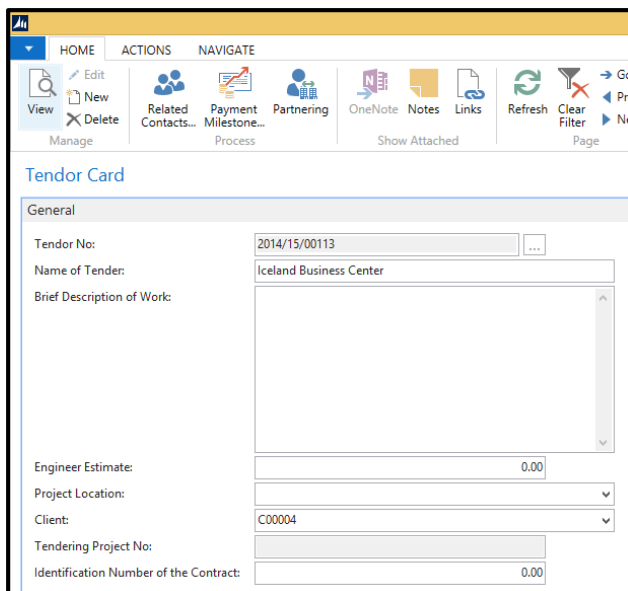
- Navigate to the Tender Card List



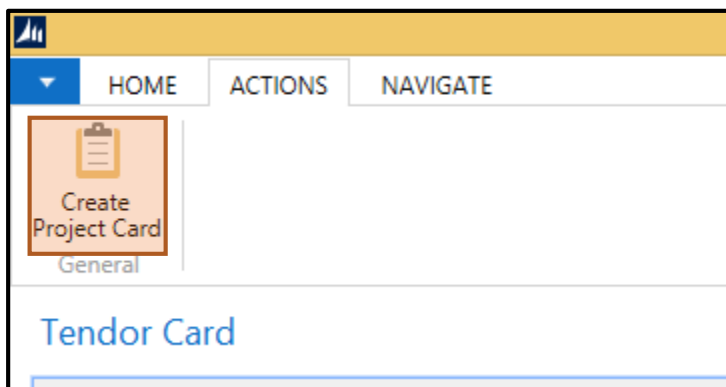
2. Select the Tender and click “Edit” in the Ribbon



3. The Tender Card would open as shown below



4. Click “Create Project Card” in the Actions Tab of the ribbon to create a Tendering Project Card



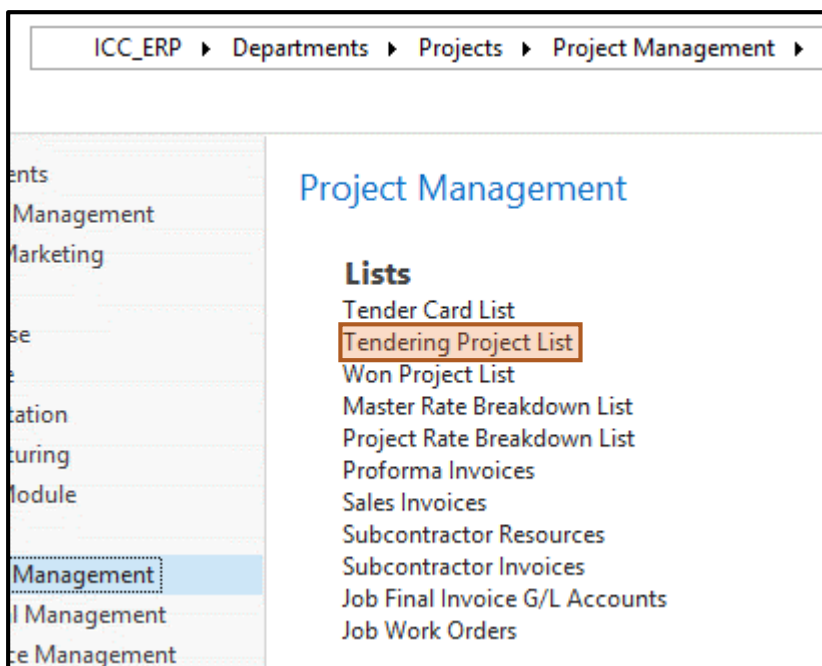
Note: All mandatory information should be entered to create a “Tendering Project Card”

- The “Tendering Project No” would be populated as shown below

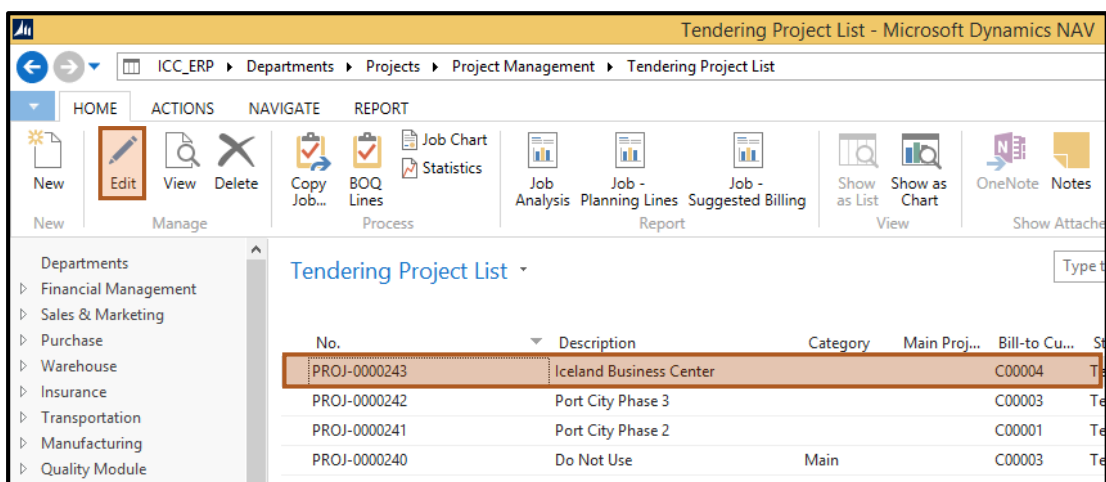
Engineer Estimate:	0.00
Project Location:	
Client:	C00004
Tendering Project No:	PROJ-0000243
Identification Number of the Contract:	0.00

3.3 Updating the Tendering Project Card

- Navigate to Departments -> Projects -> Project Management -> Tendering Project List



- Select the Tendering Project and click “Edit” in the Ribbon



3. Enter mandatory information in the Tendering Project Card as shown below

Edit - Tendering Project Card - PROJ-0000243 - Iceland Business Center

HOME ACTIONS NAVIGATE REPORT

Dimensions View Edit New Imported JobTasks Copy Rates from Masters WON PROJECT BOQ Lines Rate Breakdown Component Pricing Resource Pricing Update Price Create MPS Material Procurement Schedule Statistics Tender... Import BOQ From Excel

PROJ-0000243 · Iceland Business Center

General

Project No.: PROJ-0000243 Archive Version: 0

Project Name: Iceland Business Center Last Date Modified: 3/3/2016

Bill-to Customer No.: C00004 Project Category:

Brief of Work: Project Flag: Design & Build

Type of Work: BUILDING

Blocked: Tender Reference: 2014/15/00113

Category: Consultant:

Main Project No.: Person Responsible:

Won Project No:

Posting

Status: Tendering

Job Posting Group: SETTING UP

WIP Method: COMPLETED CONTRACT

WIP Posting Method: Per Job Ledger Entry

Allow Schedule/Contract Lines:

Apply Usage Link:

Sbu Code: 1.0 BUILDING

Projects Code: 3-00100

Show more fields

Other Info

Project Location: 3-00100

Climatic Condition:

Source of Water: Reservoir

Source of Electricity: Govt. Supply

Cust. Billing

Billing Type: Progressive

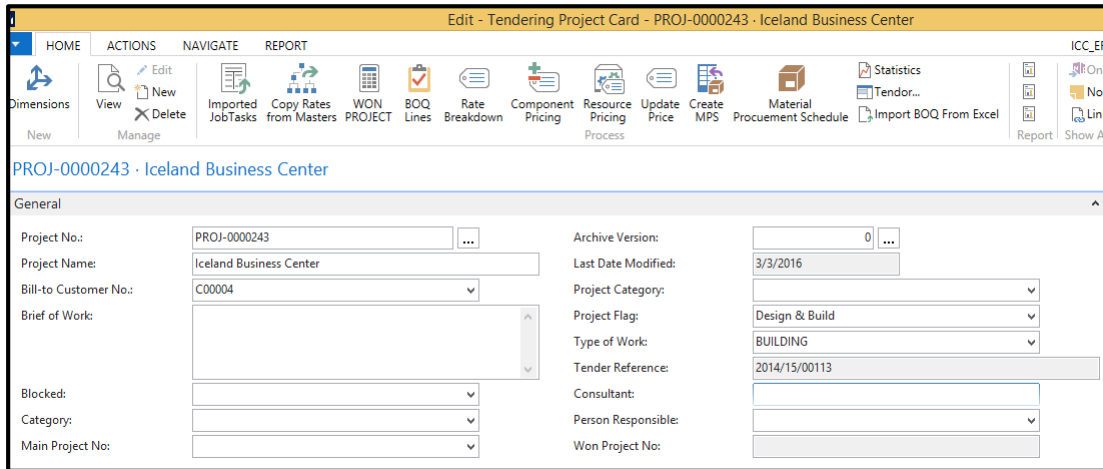
Project Type: Fixed Bid

Material Payment: Site Delivery

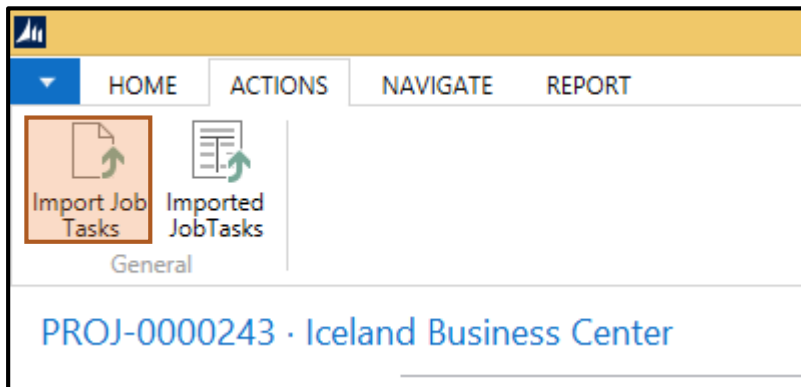
Retention %: 0.000

3.4 Uploading the BOQ to the Tendering Project Card

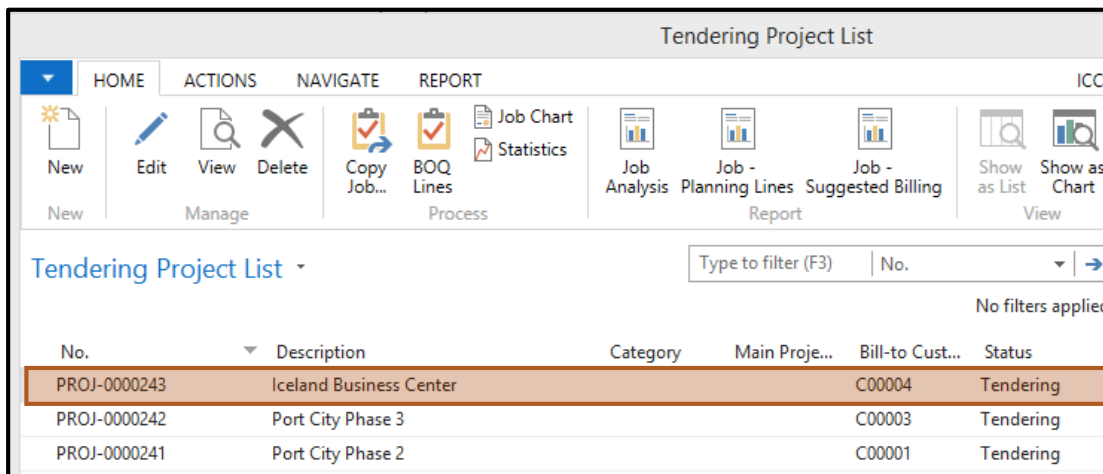
1. Navigate to the Tendering Project Card



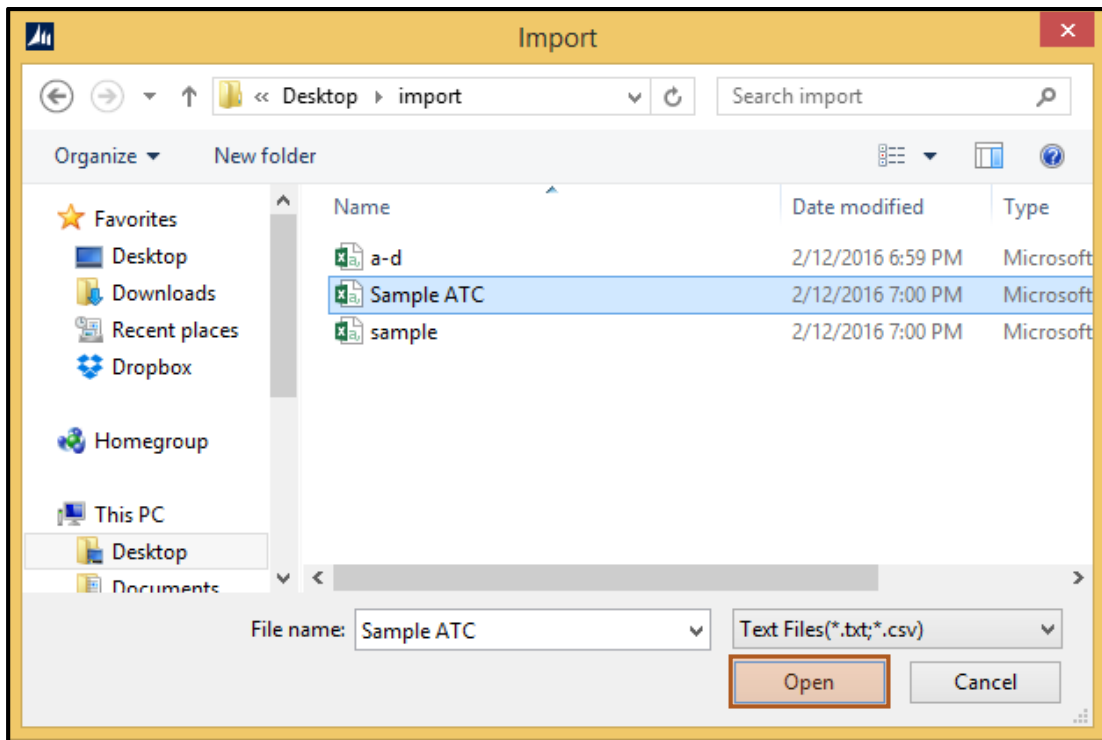
2. Click Import Job Tasks in the Actions Tab of the Ribbon



3. Double-click the Tendering Project

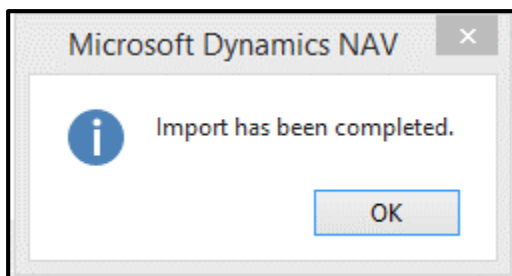


- Navigate to the BOQ.csv excel file and select it

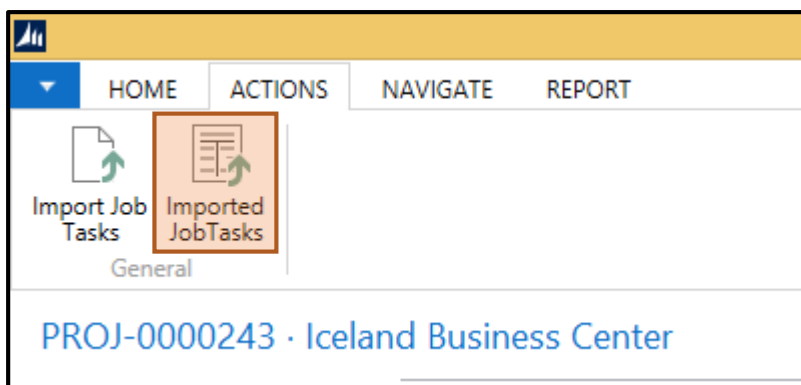


Note: Only excel files of format .csv can be imported

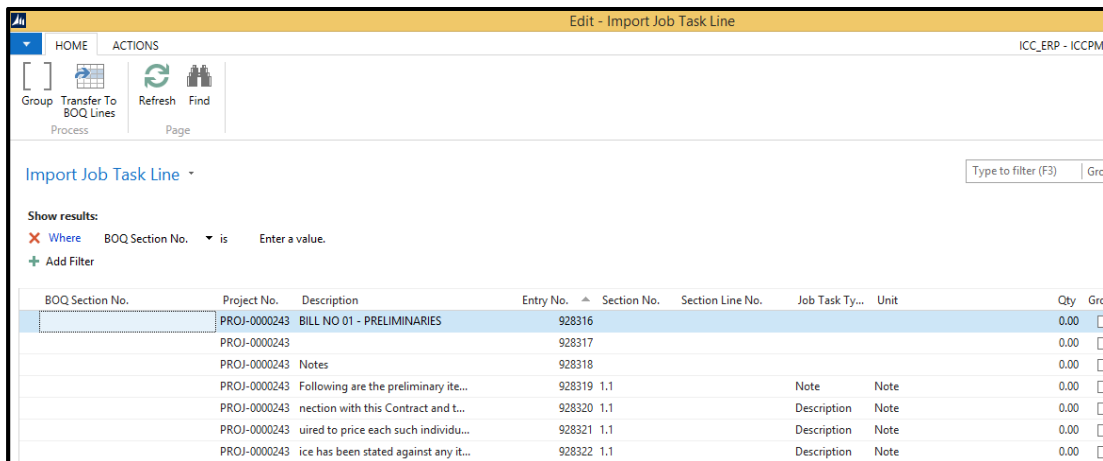
- A message will be shown after the file has been imported



- Click “Imported Job Task” in the Tendering Project Card to view the Imported BOQ Lines

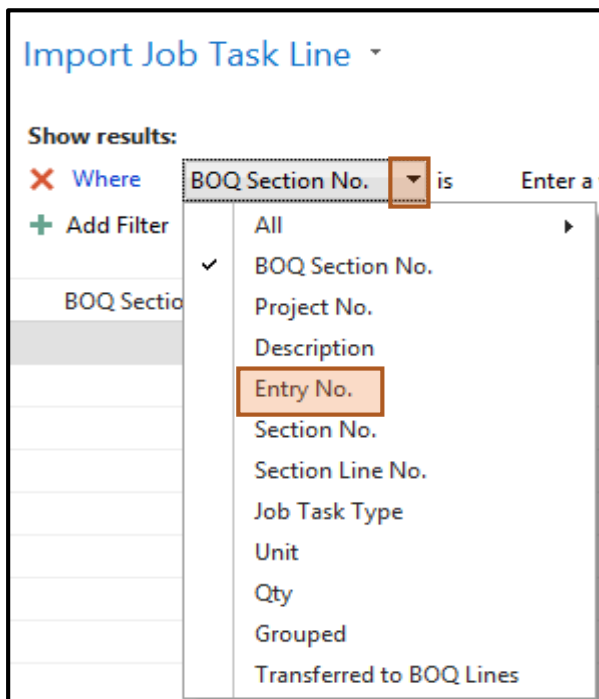


7. The Imported BOQ Lines will be shown



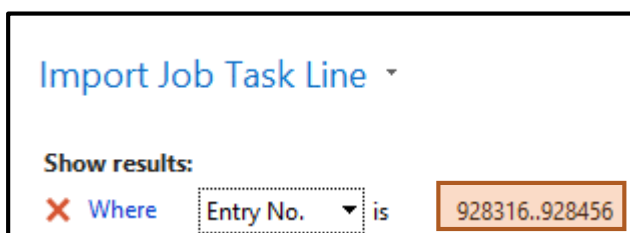
BOQ Section No.	Project No.	Description	Entry No.	Section No.	Section Line No.	Job Task Ty...	Unit	Qty	Gr
	PROJ-0000243	BILL NO 01 - PRELIMINARIES	928316					0.00	
	PROJ-0000243		928317					0.00	
	PROJ-0000243	Notes	928318					0.00	
	PROJ-0000243	Following are the preliminary ite...	928319	1.1		Note	Note	0.00	
	PROJ-0000243	ection with this Contract and t...	928320	1.1		Description	Note	0.00	
	PROJ-0000243	uired to price each such individu...	928321	1.1		Description	Note	0.00	
	PROJ-0000243	ice has been stated against any it...	928322	1.1		Description	Note	0.00	

8. Group the necessary lines using the “Entry No” filter.



Note: Click the “Arrow” to view the list and select “Entry No”

9. Enter a range of lines to transfer



Note: The User can also copy and paste the Entry Nos. of the required range

10. Enter a “Section No.”

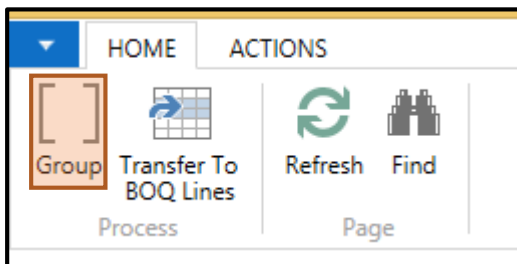
BOQ Section No.	Project No.	Description	Entry No.	Section No.	Section Line No.	Job Task Ty...	Unit	Qty	Gro...	Tran...
	PROJ-0000243	BILL NO 01 - PRELIMINARIES	928316	A				0.00	<input type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928317					0.00	<input type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	Notes	928318					0.00	<input type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	Following are the preliminary it...	928319	1.1		Note	Note	0.00	<input type="checkbox"/>	<input type="checkbox"/>

Note: In Order to group the lines, the first line should have a “Section No.”

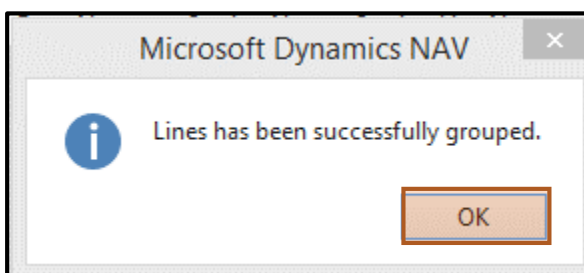
11. Select the lines by clicking the top left corner of the table

<input type="checkbox"/>	BOQ Section No.	Project No.	Description	Entry No.	Section No.	Se
<input type="checkbox"/>		PROJ-0000243	BILL NO 01 - PRELIMINARIES	928316	A	
<input type="checkbox"/>		PROJ-0000243		928317		
<input type="checkbox"/>		PROJ-0000243	Notes	928318		
<input type="checkbox"/>		PROJ-0000243	Following are the preliminary it...	928319	1.1	
<input type="checkbox"/>		PROJ-0000243	nection with this Contract and t...	928320	1.1	
<input type="checkbox"/>		PROJ-0000243	ured to price each such individ...	928321	1.1	
<input type="checkbox"/>		PROJ-0000243	ice has been stated against any ...	928322	1.1	
<input type="checkbox"/>		PROJ-0000243	Contractor will not be entitled ...	928323	1.1	
<input type="checkbox"/>		PROJ-0000243	y for such items even though h...	928324	1.1	
<input type="checkbox"/>		PROJ-0000243	ute the work or provide services...	928325	1.1	
<input type="checkbox"/>		PROJ-0000243	. Preliminary items priced by th...	928326	1.1	
<input type="checkbox"/>		PROJ-0000243	med to include the cost of unpr...	928327	1.1	
<input type="checkbox"/>		PROJ-0000243		928328		
<input type="checkbox"/>		PROJ-0000243	The Tenderer shall read, unders...	928329	1.2	
<input type="checkbox"/>		PROJ-0000243	imself with the equirements in t...	928330	1.2	
<input type="checkbox"/>		PROJ-0000243	ontract Parts I & II, General Spe...	928331	1.2	

12. Click “Group” in the Ribbon to group the selected lines



13. A message as shown below will be displayed if grouped correctly



14. The “Grouped” column will be ticked as shown below

BOQ Section No.	Project No.	Description	Entr...	Section No.	Section ...	Job Task Ty...	Unit	Qty	Gro...	Tran...
	PROJ-0000243		928442	A	000127			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.10	PROJ-0000243	In lift walls 225mm thi...	928443	A	000128	Posting	m2	31.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.10	PROJ-0000243	t)	928444	A	000129	Description	m2	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928445	A	000130			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	Substructure	928446	A	000131			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928447	A	000132			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

15. Select the grouped lines to transfer them

Import Job Task Line ▾

Show results:

✗ **Where** Entry No. ▾ is 928316..928456

✗ **And** Grouped ▾ is Yes ▾

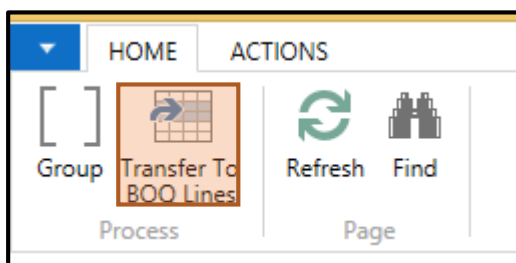
+ **Add Filter**

Note: Lines need to be grouped in order to transfer

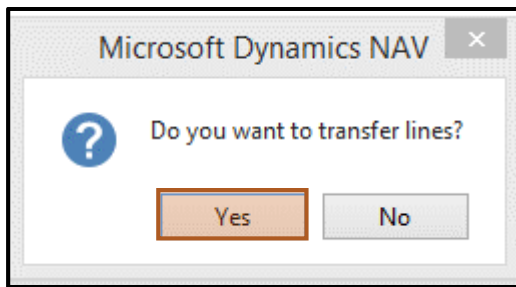
16. Select all the lines by clicking the top left of the table

BOQ Section No.	Project No.	Description	Entr...	Section No.	Section ...	Job Task Ty...	Unit	Qty	Gro...	Tran...
	PROJ-0000243	cations and Particular...	928428	A	000113	Description	Note	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	ings and other Contra...	928429	A	000114	Description	Note	0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928430	A	000115			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	Substructure	928431	A	000116			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928432	A	000117			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243	Mass concrete, 75mm...	928433	A	000118			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928434	A	000119			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.1	PROJ-0000243	G15 concrete under B...	928435	A	000120	Posting	m2	985.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928436	A	000121			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.2	PROJ-0000243	G15 concrete under R...	928437	A	000122	Posting	m2	515.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928438	A	000123			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.4	PROJ-0000243	G15 concrete under c...	928439	A	000124	Posting	m2	90.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928440	A	000125			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>
3.9	PROJ-0000243	In lift base slab (car lif...	928441	A	000126	Posting	m2	43.52	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	PROJ-0000243		928442	A	000127			0.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>

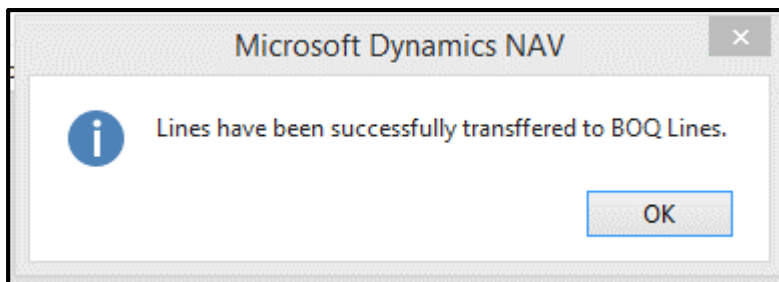
17. Click “Transfer to BOQ Lines”



18. Click “Yes” in the message below to transfer the selected lines



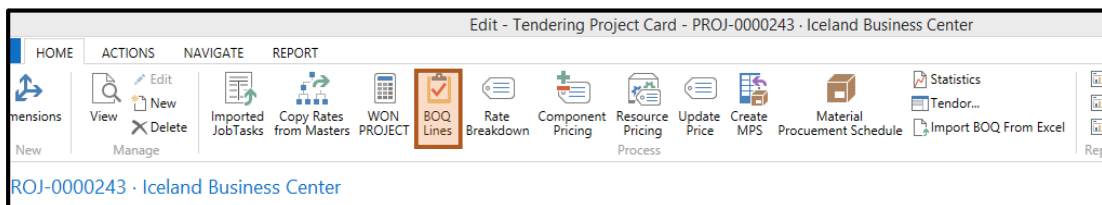
19. A message shown below will be displayed if lines have been transferred



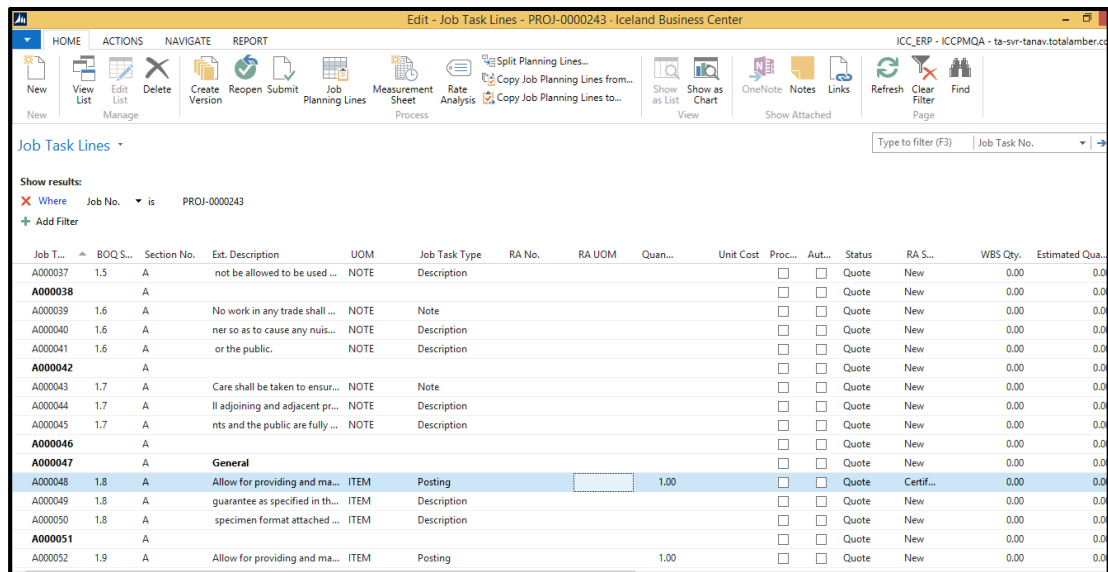
20. The “Transferred” column will be ticked as shown below

BOQ Section No.	Project No.	Description	Entr...	Section No.	Section ...	Job Task Ty...	Unit	Qty	Gro...	Tran...
	PROJ-0000243	ings and other Contra...	928429	A	000114	Description	Note	0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928430	A	000115			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243	Substructure	928431	A	000116			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928432	A	000117			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243	Mass concrete, 75mm...	928433	A	000118			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928434	A	000119			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3.1	PROJ-0000243	G15 concrete under B...	928435	A	000120	Posting	m2	985.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928436	A	000121			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3.2	PROJ-0000243	G15 concrete under R...	928437	A	000122	Posting	m2	515.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928438	A	000123			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3.4	PROJ-0000243	G15 concrete under c...	928439	A	000124	Posting	m2	90.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928440	A	000125			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3.9	PROJ-0000243	In lift base slab (car lif...	928441	A	000126	Posting	m2	43.52	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	PROJ-0000243		928442	A	000127			0.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
3.10	PROJ-0000243	In lift walls 225mm thi...	928443	A	000128	Posting	m2	31.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

21. To view the transferred BOQ Lines click “BOQ Lines” in Tendering Project Card



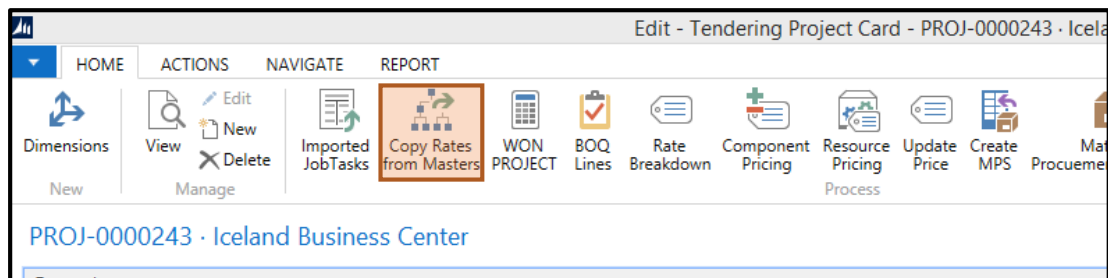
22. Make any changes necessary



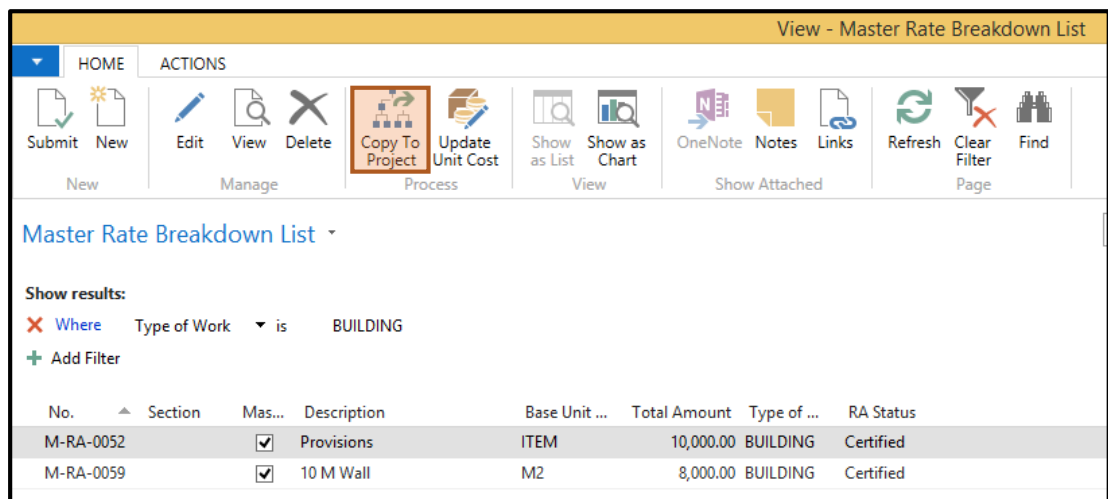
Job T...	BOQ S...	Section No.	Ext. Description	UOM	Job Task Type	RA No.	RA UOM	Quan...	Unit Cost	Proc...	Aut...	Status	RA S...	WBS Qty.	Estimated Qua...
A000037	1.5	A	not be allowed to be used ...	NOTE	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000038		A								<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000039	1.6	A	No work in any trade shall ...	NOTE	Note					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000040	1.6	A	ner so as to cause any nuis...	NOTE	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000041	1.6	A	or the public.	NOTE	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000042		A								<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000043	1.7	A	Care shall be taken to ensur...	NOTE	Note					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000044	1.7	A	ll adjoining and adjacent pr...	NOTE	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000045	1.7	A	nts and the public are fully ...	NOTE	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000046		A								<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000047		A	General							<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000048	1.8	A	Allow for providing and ma...	ITEM	Posting			1.00		<input type="checkbox"/>	<input type="checkbox"/>	Certif...	New	0.00	0.00
A000049	1.8	A	guarantee as specified in th...	ITEM	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000050	1.8	A	specimen format attached ...	ITEM	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000051		A								<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00
A000052	1.9	A	Allow for providing and ma...	ITEM	Posting			1.00		<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00

3.5 Creating Project Rate Cards from Master Rate Cards

1. Navigate to the Tendering Project Card
2. Click “Copy Rates from Masters” in the Ribbon



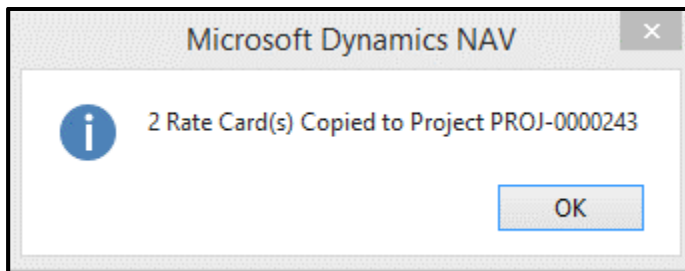
3. Select the Master Rate Card and click “Copy to Project”



No.	Section	Mas...	Description	Base Unit ...	Total Amount	Type of ...	RA Status
M-RA-0052		<input checked="" type="checkbox"/>	Provisions	ITEM	10,000.00	BUILDING	Certified
M-RA-0059		<input checked="" type="checkbox"/>	10 M Wall	M2	8,000.00	BUILDING	Certified

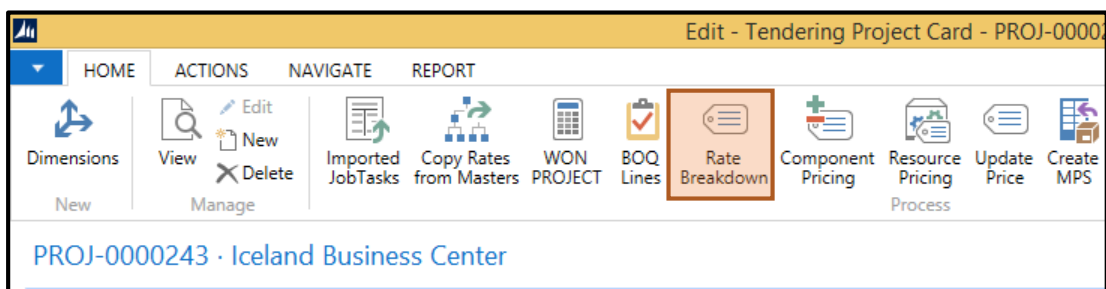
Note: Only Certified Master Rate Cards matching the “Type of Work” in the Tendering Project Card will be shown

- A message as shown below will be displayed.

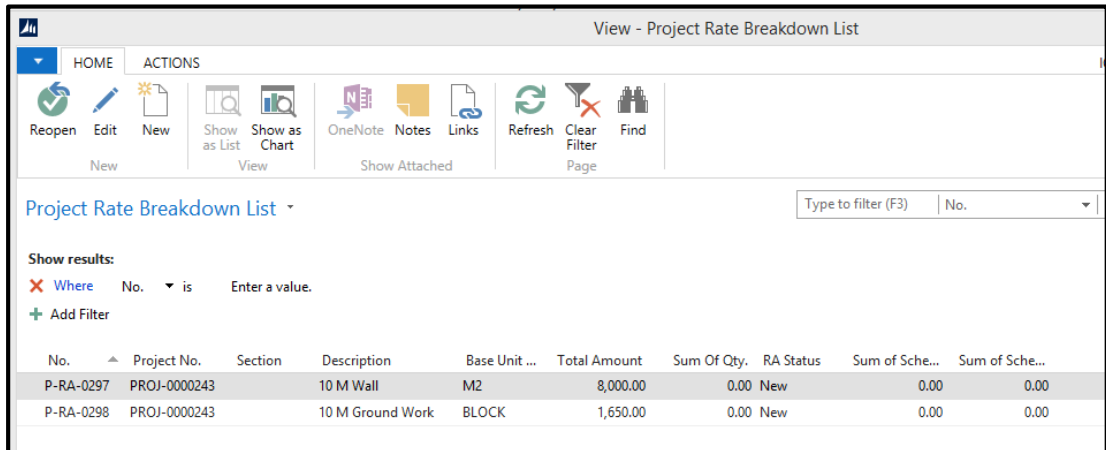


Note: If a Parent Rate Card was selected and copied, its child rate card(s) will also be copied.

- Click “Rate Breakdown” in the Tendering Project Card to view the created Project Rate Cards.



- The Project Rate Breakdown List will show the Tendering Project Cards’ Rate Cards.



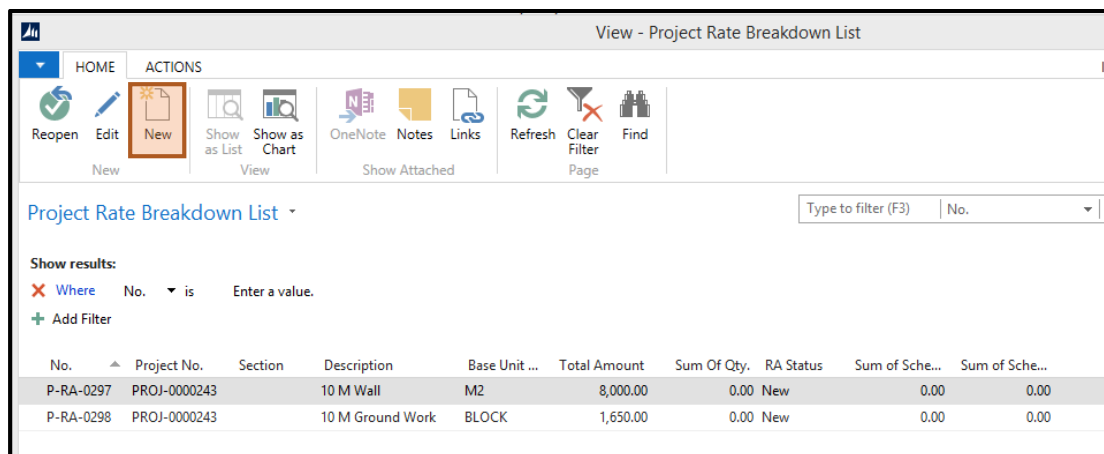
No.	Project No.	Section	Description	Base Unit ...	Total Amount	Sum Of Qty.	RA Status	Sum of Sche...	Sum of Sche...
P-RA-0297	PROJ-0000243		10 M Wall	M2	8,000.00	0.00	New	0.00	0.00
P-RA-0298	PROJ-0000243		10 M Ground Work	BLOCK	1,650.00	0.00	New	0.00	0.00

3.6 Creating Project Specific Project Rate Cards

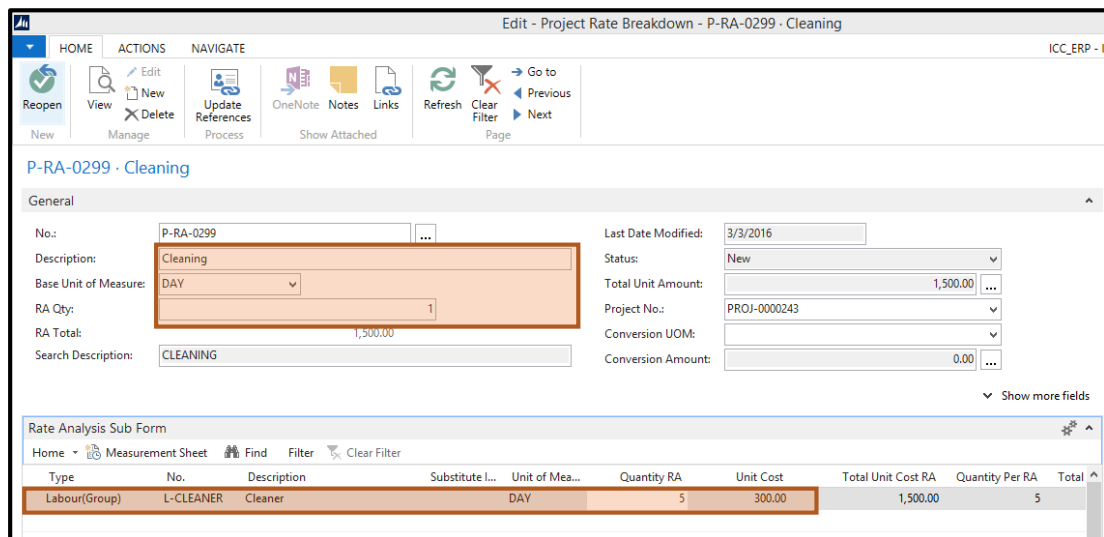
REFER SECTION 2.1 FOR A DETAILED ELABORATION ON HOW TO CREATE RATE CARDS

- Navigate to a Tendering Project Card
- Click “Rate Breakdown” in the Ribbon

3. Click “New” in the Ribbon Section



4. Enter all mandatory Information as shown below



3.7 Selecting Substitute Items in the Project Rate Card

REFER SECTION 2.2 FOR A DETAILED ELABORATION ON HOW TO ADD SUBSTITUTE ITEMS TO A PROJECT RATE CARD

3.8 Sending Project Rate Cards for Approval

REFER SECTION 2.3 FOR A DETAILED ELABORATION ON HOW TO SEND RATE CARDS FOR APPROVAL

3.9 Approving/Reject Project Rate Cards

REFER SECTION 2.4 FOR A DETAILED ELABORATION ON HOW TO APPROVE PROJECT RATE CARDS

3.10 Re-Open an Approved Project Rate Card

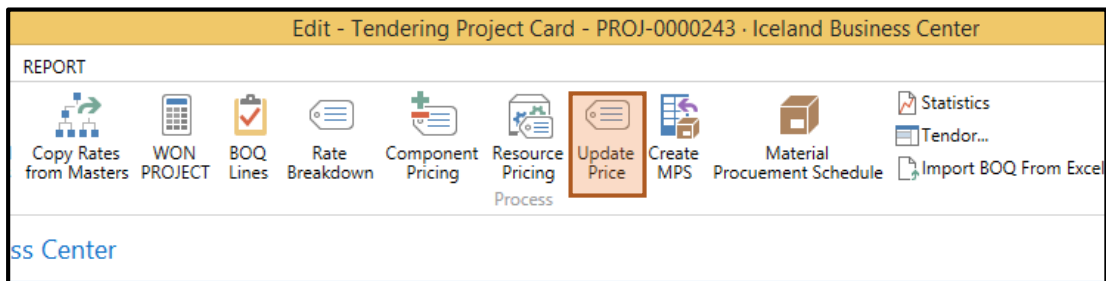
REFER SECTION 2.5 FOR A DETAILED ELABORATION ON HOW TO RE-OPEN AN APPROVED PROJECT RATE CARD

3.11 Updating the Child Rate Card

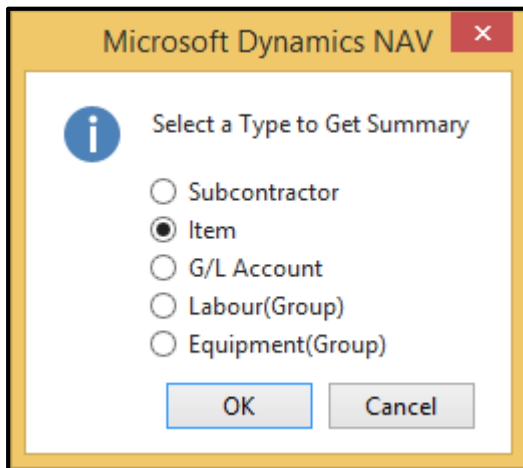
REFER SECTION 2.6 FOR A DETAILED ELABORATION ON HOW TO UPDATE CHILD RATE CARDS

3.12 Bulk Cost Update

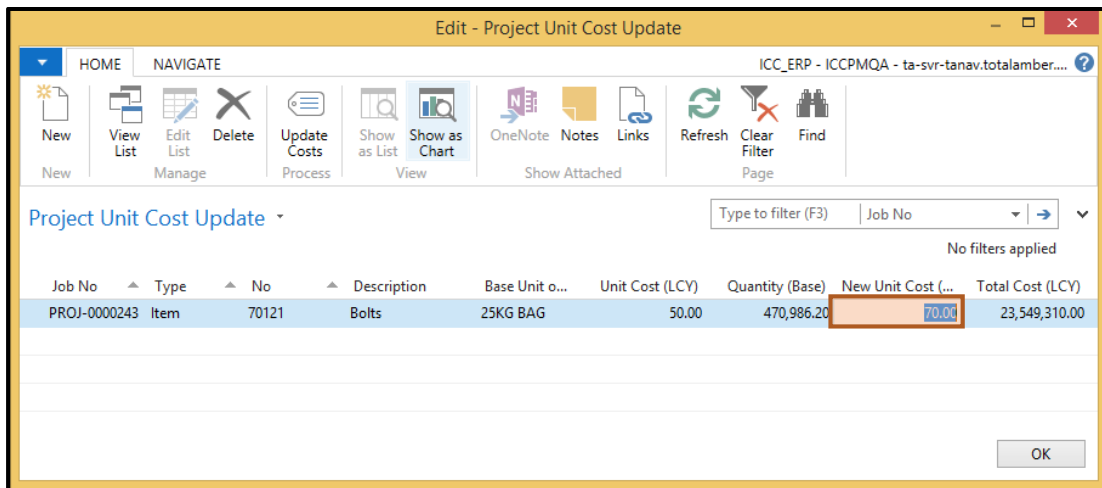
1. Navigate to the Tendering Project Card
2. Click “Update Price” in the Home Tab of the Ribbon Section



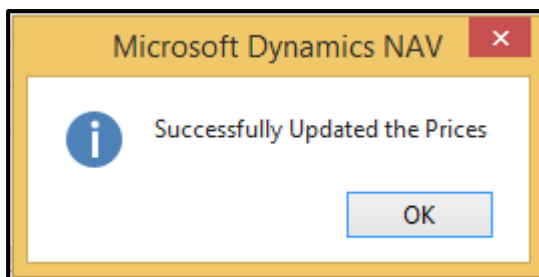
3. Select the type of component to update and click “OK”



4. Enter the new Unit Cost and click “Update Costs”



5. A message will be displayed as shown below

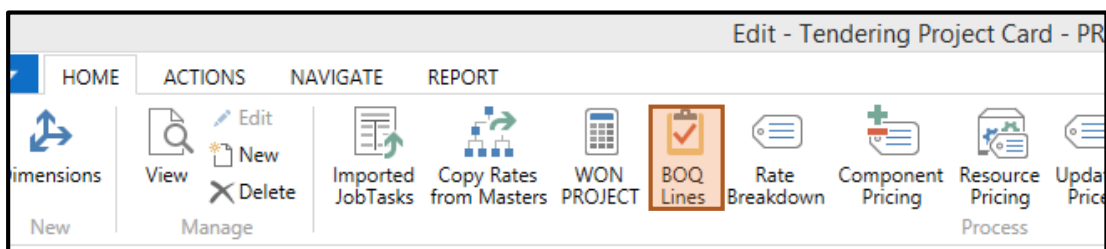


6. Process Estimated the BOQ Lines to update the Job Planning lines with the new cost
REFER SECTION 3.14 for a detailed elaboration on Process Estimation

3.13 Adding Project Rate Cards to BOQ Lines

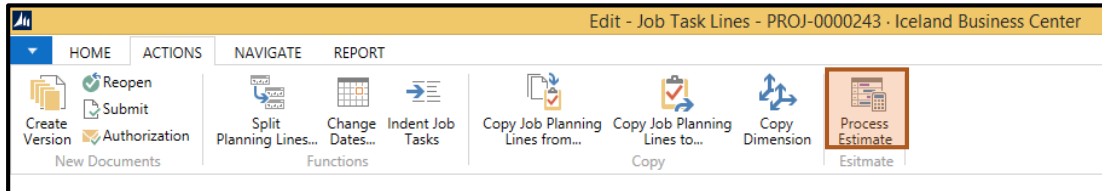
REFER SECTION 3.5 ON HOW TO CREATE PROJECT RATE CARDS

1. Navigate to the Tendering Project Card
2. Click “BOQ Lines” in the Ribbon Section

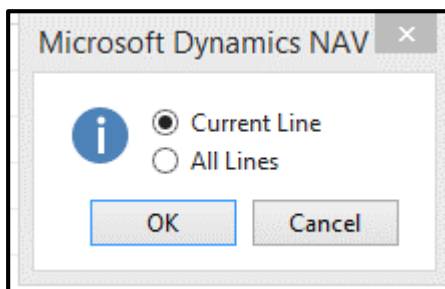


3.14 Process Estimation

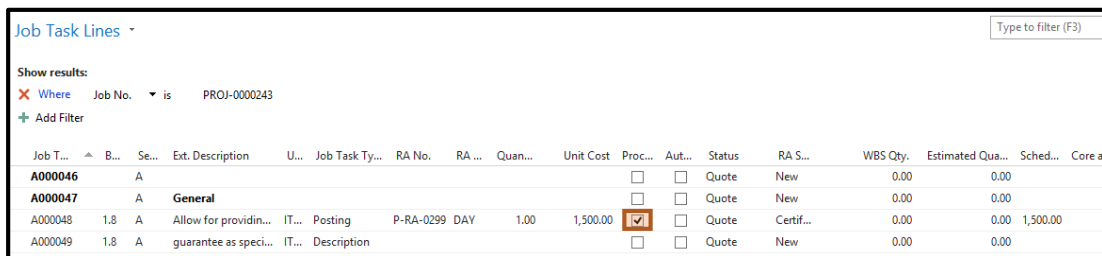
1. Navigate to the Tendering Project Card
2. Click BOQ Lines in the Ribbon Section
3. Click “Process Estimate” in the Ribbon section



4. Select the “Process Estimation” method and click “OK”



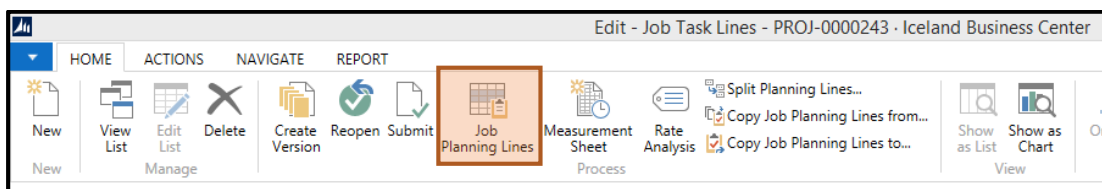
- Current Line: Update Planning lines of the selected task
 - All Lines: Update Planning lines of all “Posting” lines
5. The BOQ Line will be updated as shown below



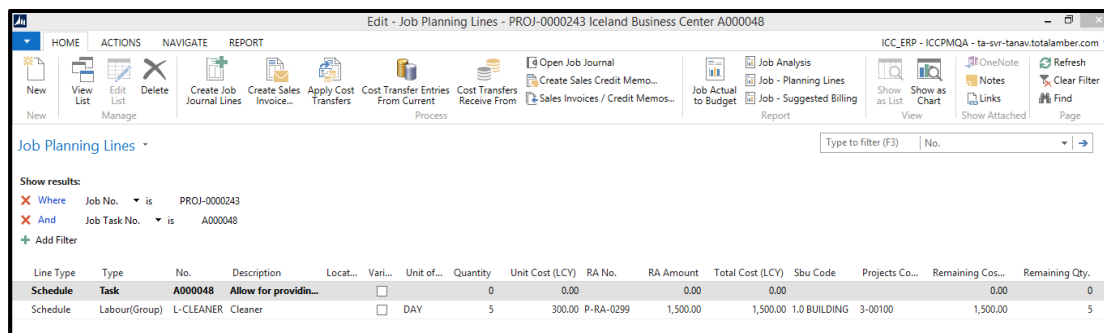
The screenshot shows the 'Job Task Lines' table in Microsoft Dynamics NAV. The table has columns for Job T..., B..., Se..., Ext. Description, U..., Job Task Ty..., RA No., RA ..., Quan..., Unit Cost, Proc..., Aut..., Status, RA S..., WBS Qty., Estimated Qua..., Sched..., and Core s... The table contains four rows of data. The third row, with Job No. A000048 and Description 'Allow for providin...', is highlighted. The 'Proc...' column for this row has a checked checkbox.

Job T...	B...	Se...	Ext. Description	U...	Job Task Ty...	RA No.	RA ...	Quan...	Unit Cost	Proc...	Aut...	Status	RA S...	WBS Qty.	Estimated Qua...	Sched...	Core s...
A000046		A								<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00		
A000047		A	General							<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00		
A000048	1.8	A	Allow for providin...	IT...	Posting	P-RA-0299	DAY	1.00	1,500.00	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Quote	Certif...	0.00	0.00	1,500.00	
A000049	1.8	A	guarantee as speci...	IT...	Description					<input type="checkbox"/>	<input type="checkbox"/>	Quote	New	0.00	0.00		

6. Select the “Posting” line and click Job Planning Lines in the Ribbon

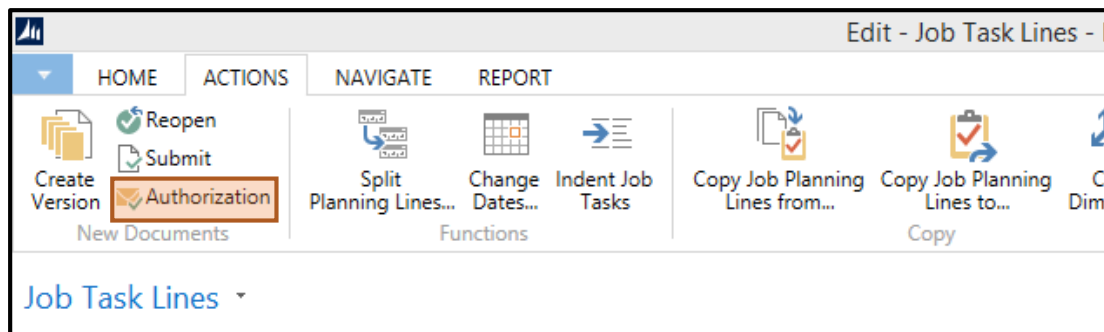


7. The Job Planning Lines Page will open as shown below

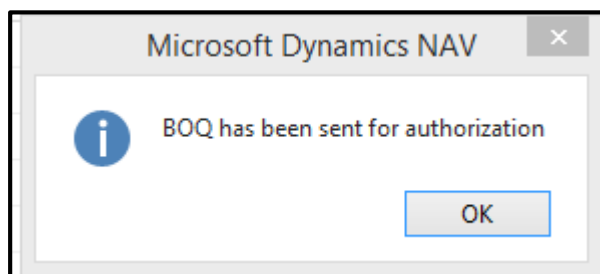


3.15 Sending BOQ for Authorization

1. Navigate to the Tendering Project Card
2. Click BOQ Lines
3. Click Authorization to send BOQ Lines for Authorization

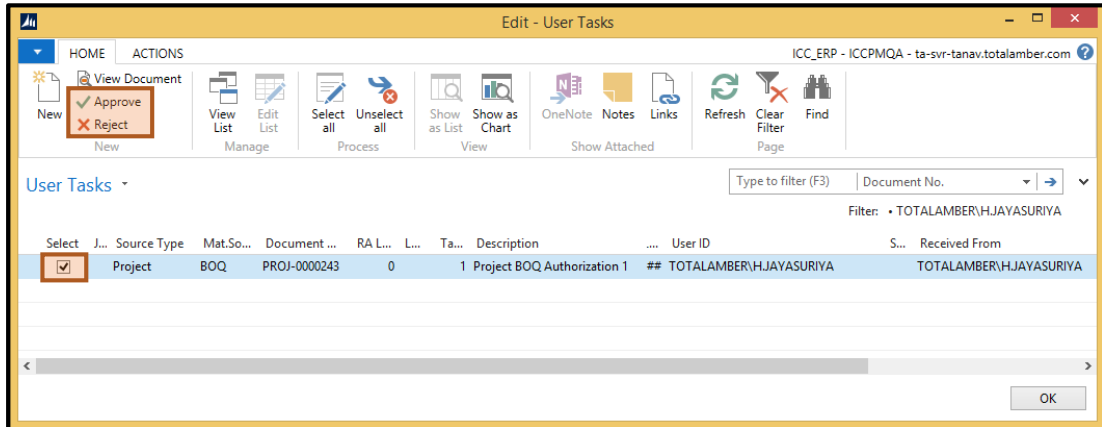


4. A message will be displayed as shown below



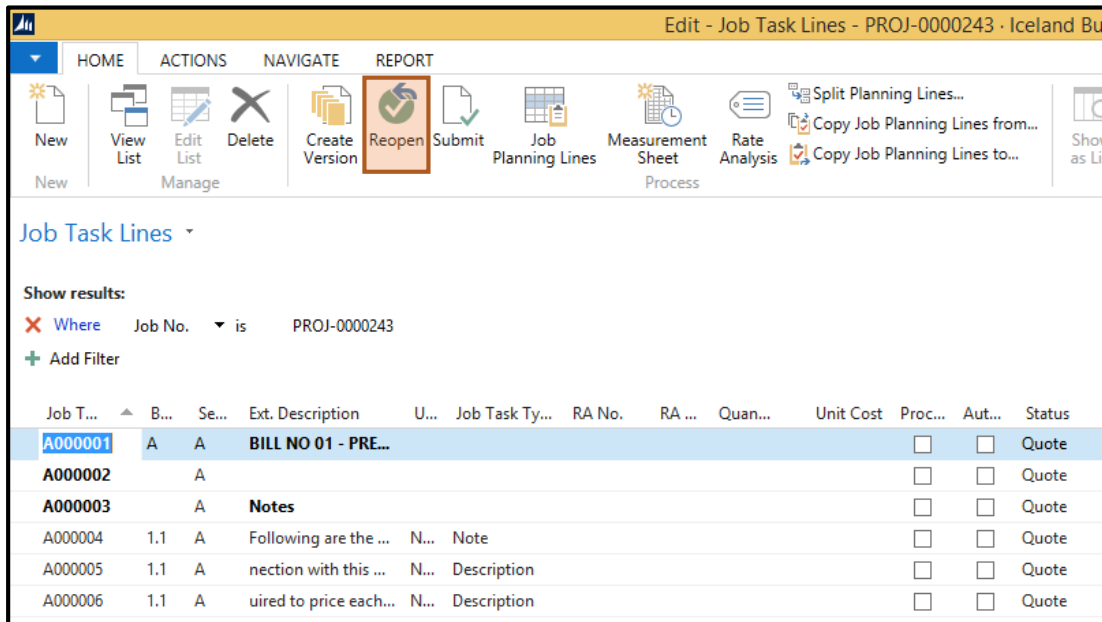
3.16 Authorizing the BOQ Lines

1. Navigate to User Tasks
2. Select the line and click “Approve” or “Reject”



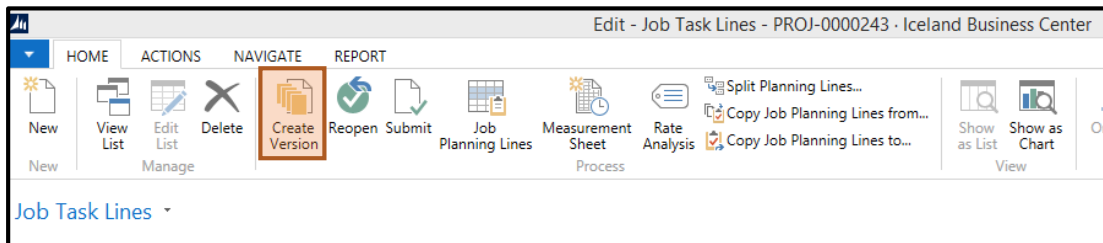
3.17 Re-Open BOQ Lines

1. Navigate to the Tendering Project Card
2. Click BOQ Lines
3. Click Re-Open in the Ribbon



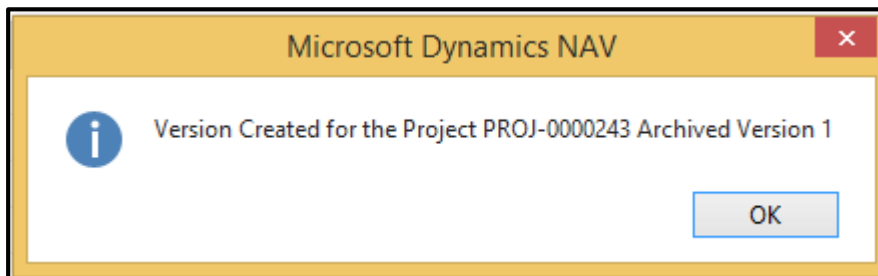
3.18 Version

1. Navigate to the Tendering Project Card
2. Click BOQ Lines
3. Click “Create Version” in the Ribbon

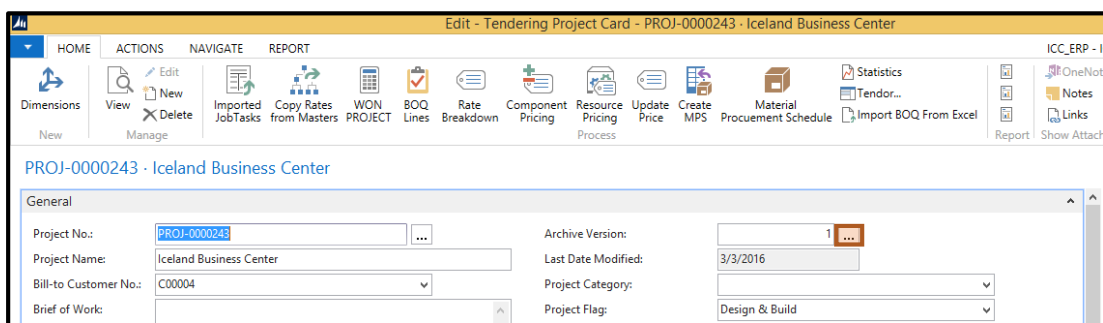


Note: BOQ Lines need to be authorized be authorized prior to creating a version

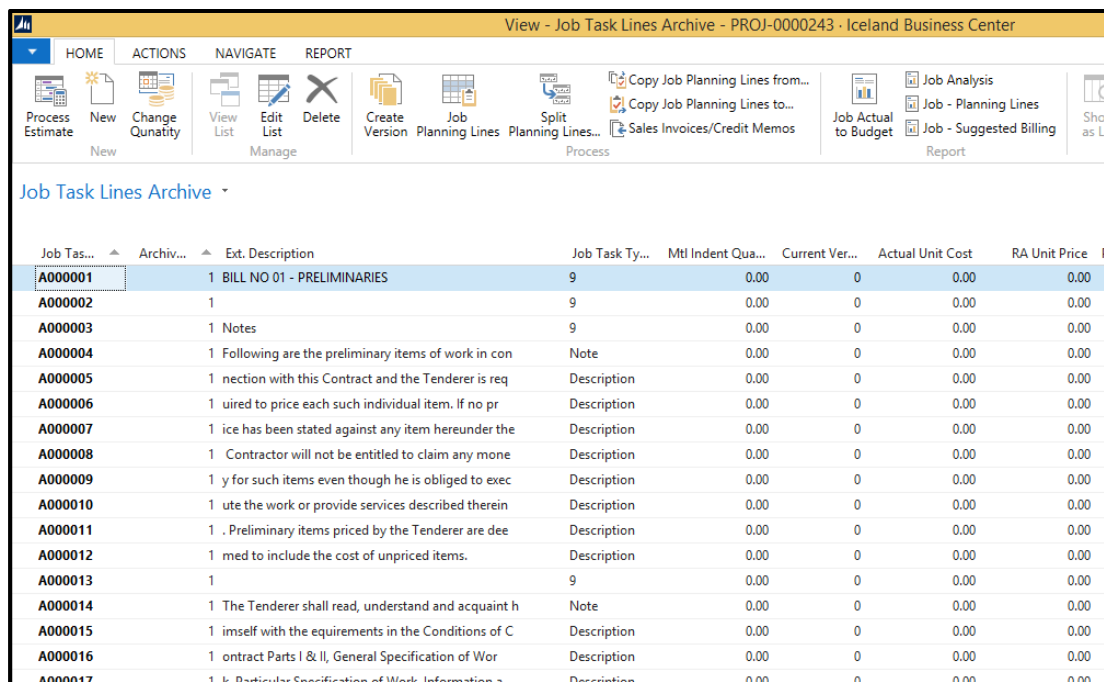
4. A message will be displayed as shown below



5. Changes can be made to the BOQ Lines after a version has been created and the BOQ needs to be sent for approval
6. To view the created Version, click “Archive Version” in the Tendering Project Card



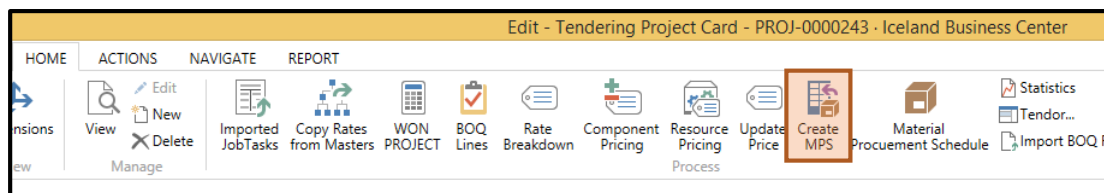
7. The Archived Version page would open



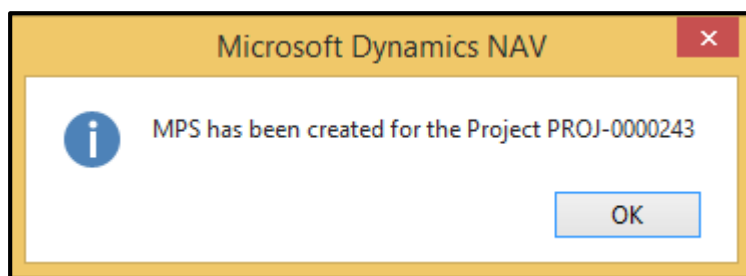
Job Tas...	Archiv...	Ext. Description	Job Task Ty...	Mtl Indent Qua...	Current Ver...	Actual Unit Cost	RA Unit Price
A000001	1	BILL NO 01 - PRELIMINARIES	9	0.00	0	0.00	0.00
A000002	1		9	0.00	0	0.00	0.00
A000003	1	Notes	9	0.00	0	0.00	0.00
A000004	1	Following are the preliminary items of work in con	Note	0.00	0	0.00	0.00
A000005	1	nection with this Contract and the Tenderer is req	Description	0.00	0	0.00	0.00
A000006	1	uired to price each such individual item. If no pr	Description	0.00	0	0.00	0.00
A000007	1	ice has been stated against any item hereunder the	Description	0.00	0	0.00	0.00
A000008	1	Contractor will not be entitled to claim any mone	Description	0.00	0	0.00	0.00
A000009	1	y for such items even though he is obliged to exec	Description	0.00	0	0.00	0.00
A000010	1	ute the work or provide services described therein	Description	0.00	0	0.00	0.00
A000011	1	. Preliminary items priced by the Tenderer are dee	Description	0.00	0	0.00	0.00
A000012	1	med to include the cost of unpriced items.	Description	0.00	0	0.00	0.00
A000013	1		9	0.00	0	0.00	0.00
A000014	1	The Tenderer shall read, understand and acquaint h	Note	0.00	0	0.00	0.00
A000015	1	himself with the requirements in the Conditions of C	Description	0.00	0	0.00	0.00
A000016	1	ontract Parts I & II, General Specification of Wor	Description	0.00	0	0.00	0.00
A000017	1	Particular Specification of Work Information a	Description	0.00	0	0.00	0.00

3.19 Creating a MPS

1. Navigate to the Tendering Project Card
2. Click "Create MPS" in the Ribbon Section

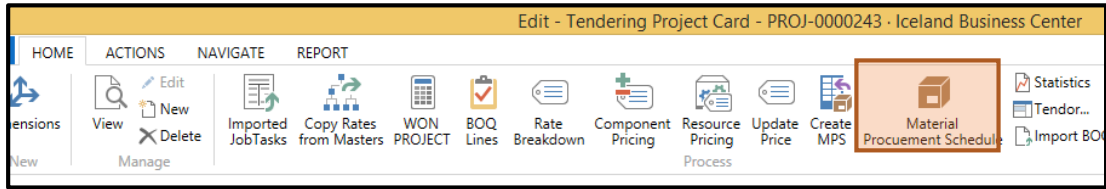


3. A message will be displayed as shown below

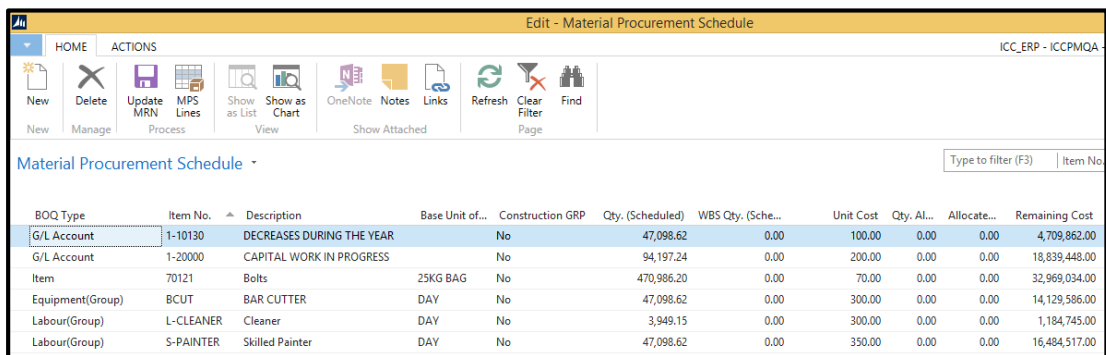


3.20 Viewing the MPS

1. Navigate to the Tendering Project Card
2. Click “Material Procurement Schedule” in the Ribbon



3. The MPS will be displayed as shown below

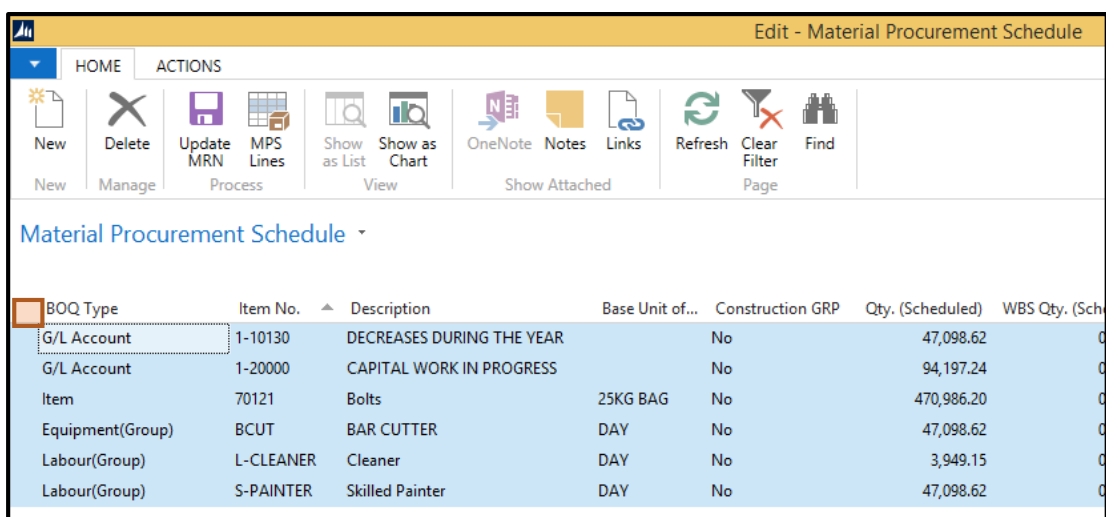


The screenshot shows the 'Material Procurement Schedule' table with the following data:

BOQ Type	Item No.	Description	Base Unit of...	Construction GRP	Qty. (Scheduled)	WBS Qty. (Sche...	Unit Cost	Qty. Al...	Allocate...	Remaining Cost
G/L Account	1-10130	DECREASES DURING THE YEAR		No	47,098.62	0.00	100.00	0.00	0.00	4,709,862.00
G/L Account	1-20000	CAPITAL WORK IN PROGRESS		No	94,197.24	0.00	200.00	0.00	0.00	18,839,448.00
Item	70121	Bolts	25KG BAG	No	470,986.20	0.00	70.00	0.00	0.00	32,969,034.00
Equipment(Group)	BCUT	BAR CUTTER	DAY	No	47,098.62	0.00	300.00	0.00	0.00	14,129,586.00
Labour(Group)	L-CLEANER	Cleaner	DAY	No	3,949.15	0.00	300.00	0.00	0.00	1,184,745.00
Labour(Group)	S-PAINTER	Skilled Painter	DAY	No	47,098.62	0.00	350.00	0.00	0.00	16,484,517.00

3.21 Deleting the MPS

1. Navigate to the Tendering Project Card
2. Click “Material Procurement Schedule” in the Ribbon
3. Select all lines by clicking the top left corner of the table and Click “Delete” in the Ribbon



The screenshot shows the 'Material Procurement Schedule' table with the top-left corner of the table selected. The ribbon shows the 'Delete' button highlighted.

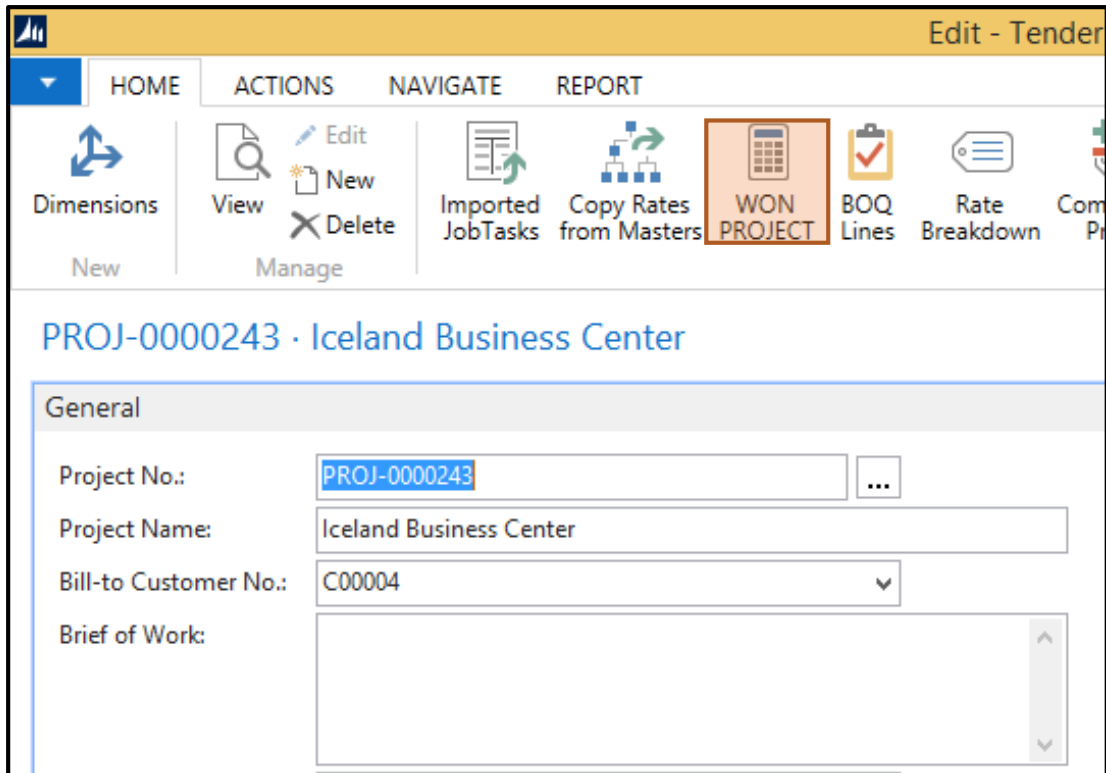
BOQ Type	Item No.	Description	Base Unit of...	Construction GRP	Qty. (Scheduled)	WBS Qty. (Sch)
G/L Account	1-10130	DECREASES DURING THE YEAR		No	47,098.62	0
G/L Account	1-20000	CAPITAL WORK IN PROGRESS		No	94,197.24	0
Item	70121	Bolts	25KG BAG	No	470,986.20	0
Equipment(Group)	BCUT	BAR CUTTER	DAY	No	47,098.62	0
Labour(Group)	L-CLEANER	Cleaner	DAY	No	3,949.15	0
Labour(Group)	S-PAINTER	Skilled Painter	DAY	No	47,098.62	0

4. Click “Create MPS” again to create the updated MPS

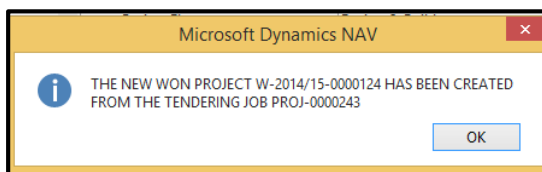
4 Won Project

4.1 Creating a “Won” Project

1. Navigate to the Tendering Project Card
2. Click “Won Project”

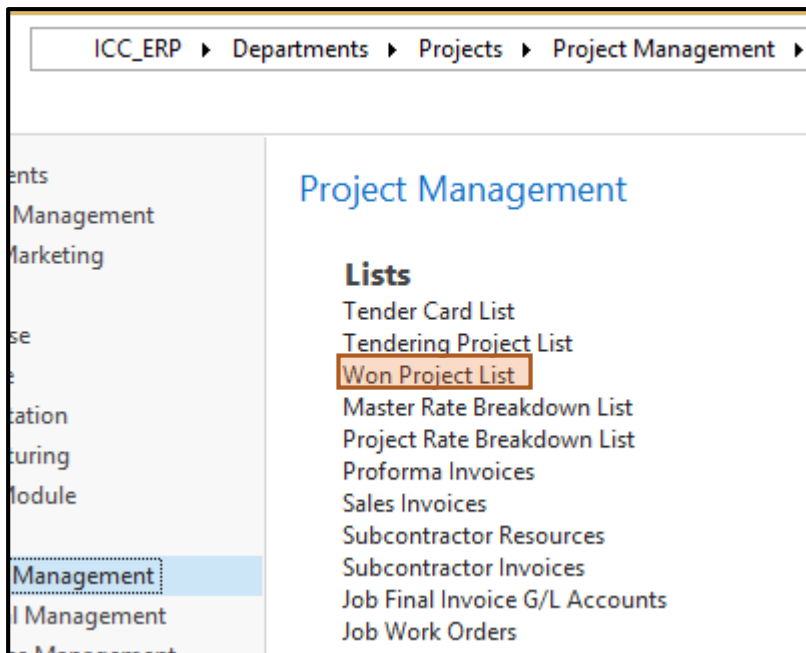


3. A message as shown below will be displayed

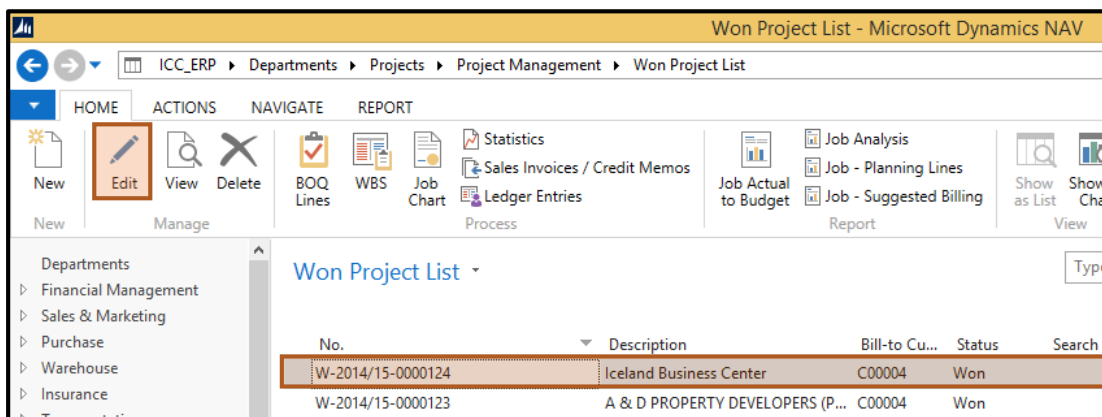


4.2 Navigating to the “Won” Project

1. Navigate to Departments -> Projects -> Project Management -> Won Project List



2. Select the Won Project and click “Edit”



3. The Won Project Card opens

