



SALESFORCE INDUSTRIES ESTIMATOR

APP FOR ESTIMATION OF
TIME REQUIRED TO BUILD
AN APPLICATION



www.intellicloud-solutions.com



SALESFORCE INDUSTRIES EXPERTS



ABOUT US

Intellicloud Solutions is dedicated to supporting clients in their digital transformation journey, using Salesforce and cloud technologies as enablers.

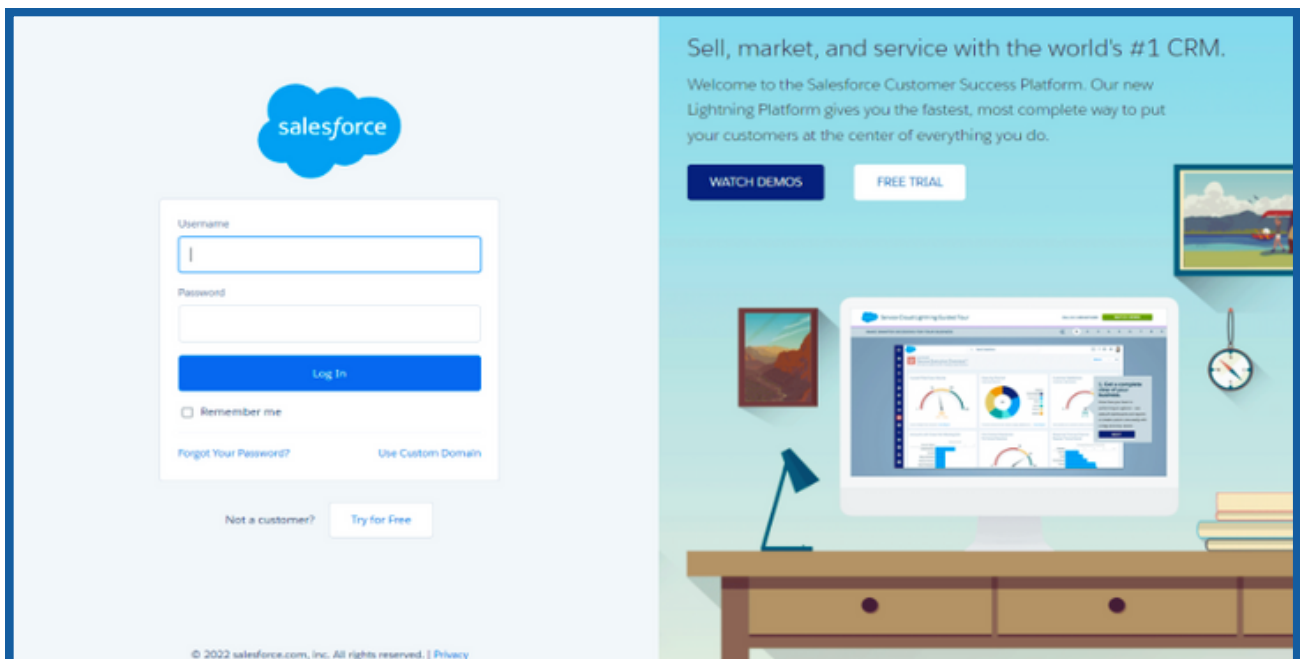
Salesforce Estimator helps the user create the Bottoms up Estimation for Salesforce, Omnistudio, and Communications cloud components. Get a 360 view of efforts for your projects from Plan to Deploy phases to help determine the timeline & resource plan.

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USER GUIDE

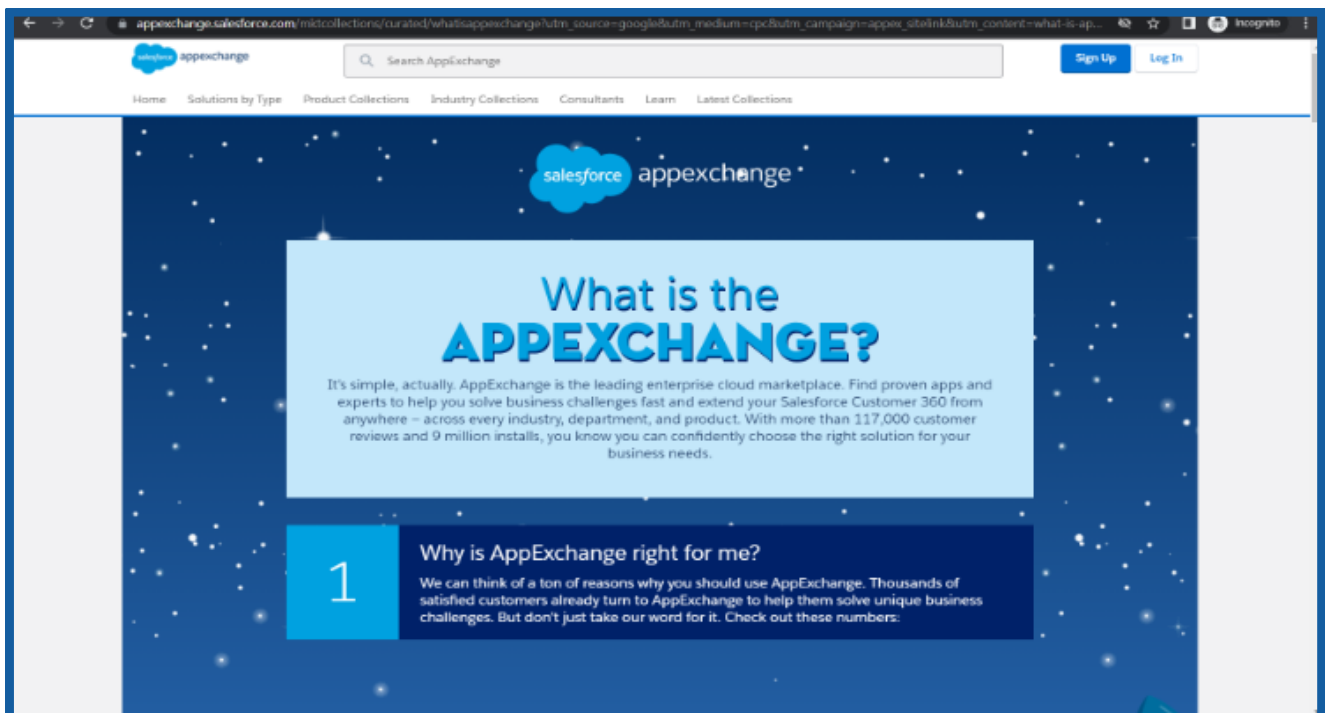
STEP 1: Login into the Salesforce Org

- Open the app and navigate to the login page by entering the URL: "login.salesforce.com".
- Input your username and password in the designated fields on the login page.



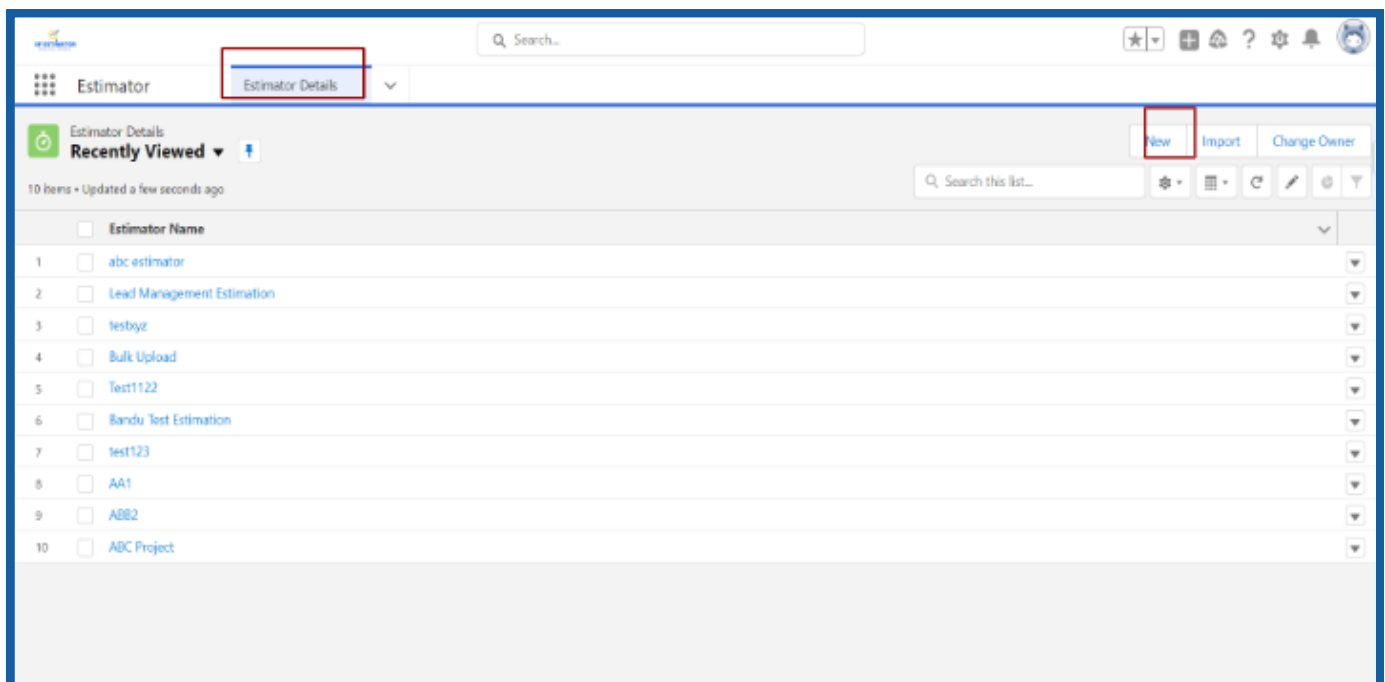
STEP 2: Go to AppExchange

- Search for the "SF Industries Estimator" app on AppExchange.
- Download and install the app onto your device.



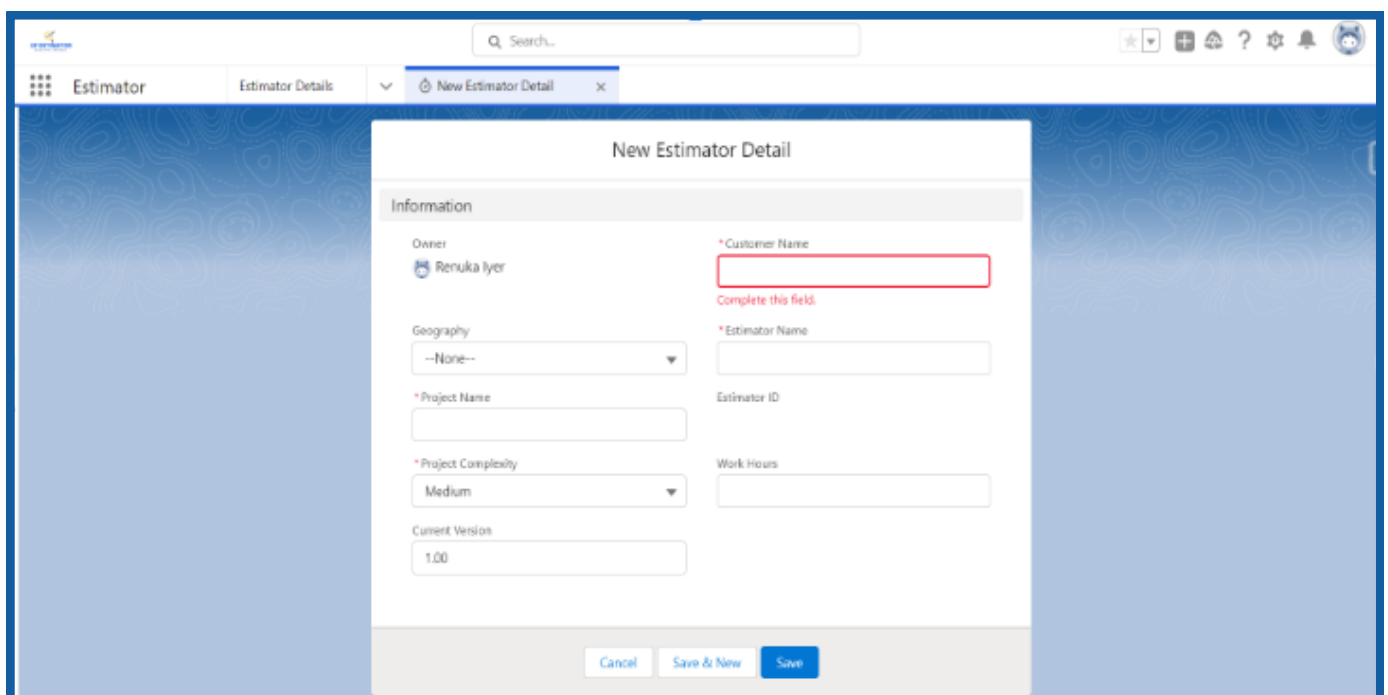
STEP 3: Go to App Home

- Click on the app launcher and search for the Estimator app.
- You will be navigated to the app home page.
- Click on the Estimator Details tab to start creating the estimates for a project.
- Click on the new button top right side to enter new estimator data.



STEP 4: Enter the Estimator data

- Enter new estimator data like select geography, select project complexity, enter project name, customer name, work hours, current version, and save the details.
- An estimation id will be generated automatically.



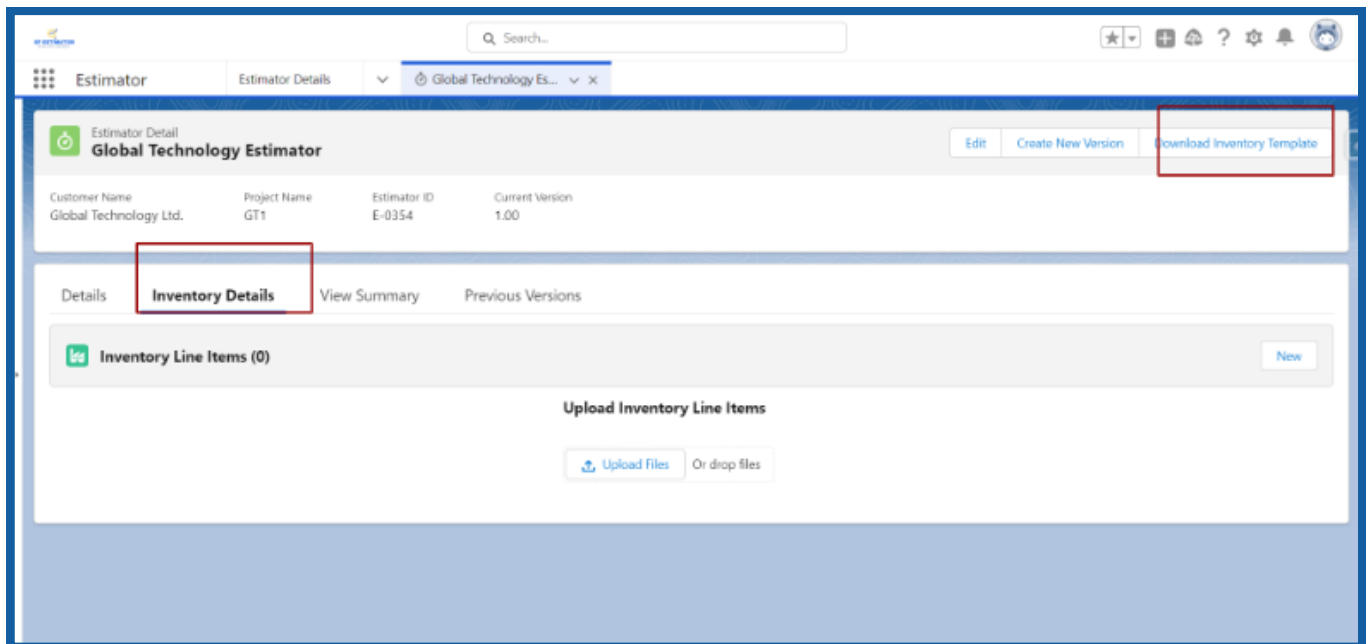
The screenshot shows the 'New Estimator Detail' form within the SF ESTIMATOR application. The form is titled 'New Estimator Detail' and is divided into an 'Information' section. The form contains the following fields:

- Owner:** Renuka Iyer (with a user icon)
- *Customer Name:** A required text field with a red border and a red error message 'Complete this field.' below it.
- Geography:** A dropdown menu currently showing '--None--'.
- *Estimator Name:** A required text field.
- *Project Name:** A required text field.
- Estimator ID:** A text field.
- *Project Complexity:** A dropdown menu currently showing 'Medium'.
- Work Hours:** A text field.
- Current Version:** A text field currently showing '1.00'.

At the bottom of the form, there are three buttons: 'Cancel', 'Save & New', and 'Save'.

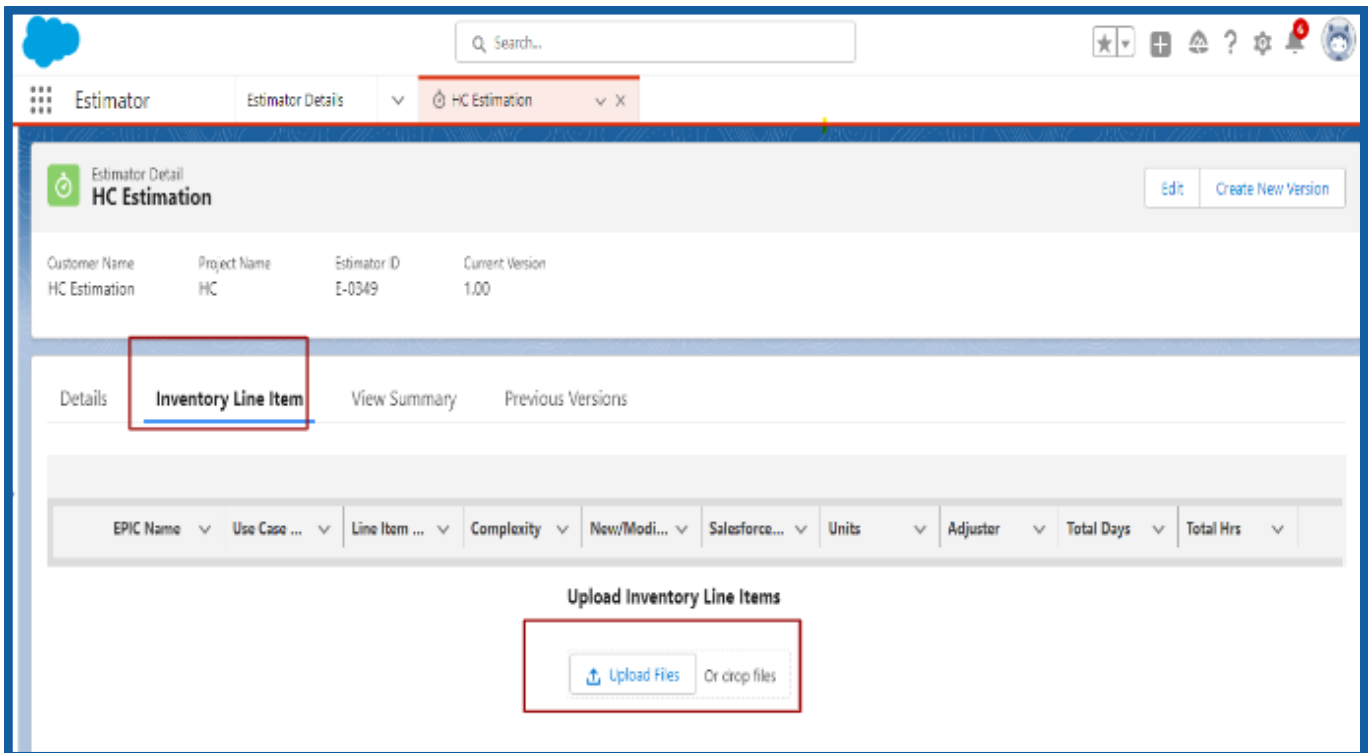
STEP 5: Download sample Component data in Inventory Line Items

- Click on the Inventory Line Item sub tab to upload the component details required for each Epic/Story.
- Click on the Download Inventory Template button to download sample csv file
- Refer [FactorList.pdf](#) for component details.



STEP 6: Upload Component data in Inventory Line Items

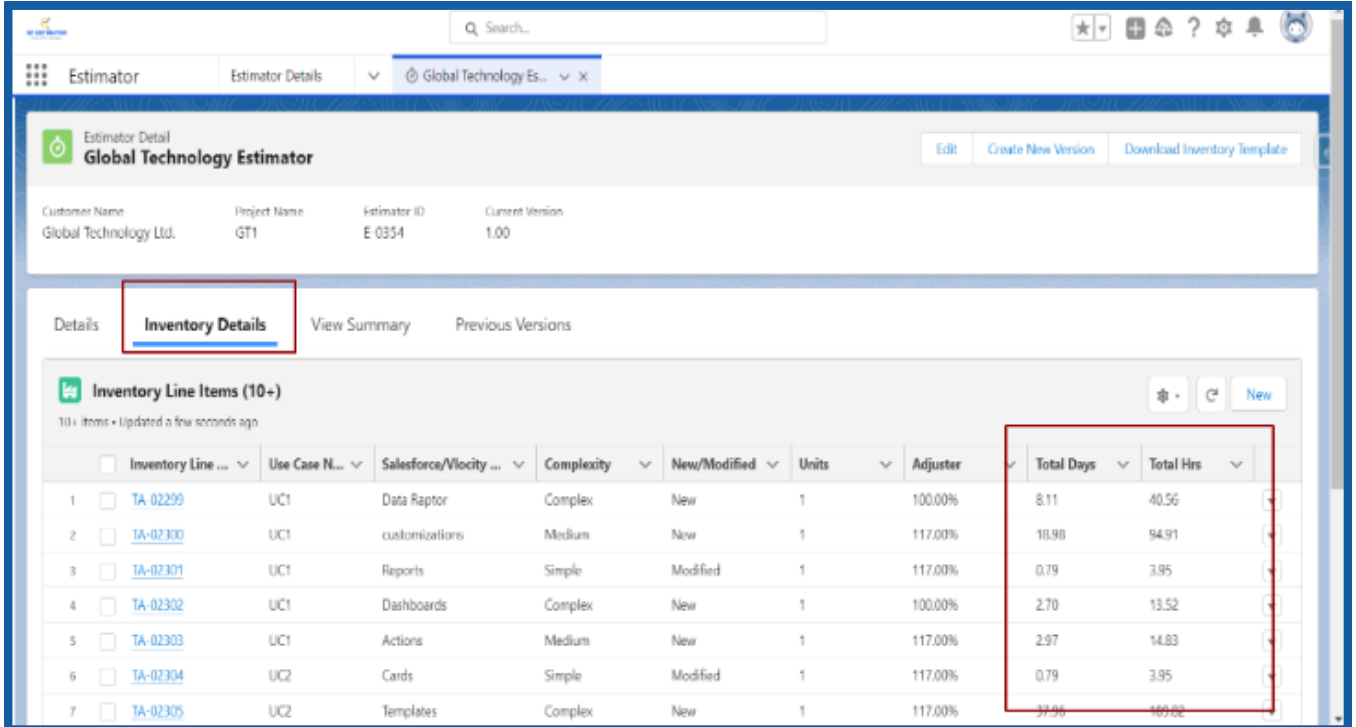
- Click on the Inventory Line Item sub tab to upload the component details required for each Epic/Story.
- Click on Upload Files button or drop the file and upload data using a csv file.
- Note: Use the attached CSV file for filling in the component details..



The screenshot displays the SF ESTIMATOR web application interface. At the top, there is a navigation bar with a search bar and several icons. Below this, a tab labeled 'Estimator' is active, with a sub-tab 'HC Estimation' selected. The main content area shows the 'Estimator Detail' for 'HC Estimation'. It includes fields for 'Customer Name' (HC Estimation), 'Project Name' (HC), 'Estimator ID' (E-0349), and 'Current Version' (1.00). Below these fields, there are tabs for 'Details', 'Inventory Line Item' (which is highlighted with a red box), 'View Summary', and 'Previous Versions'. Under the 'Inventory Line Item' tab, there is a section titled 'Upload Inventory Line Items' which contains a button labeled 'Upload Files' and a text input field for 'Or drop files'.

STEP 7: View Component Estimates

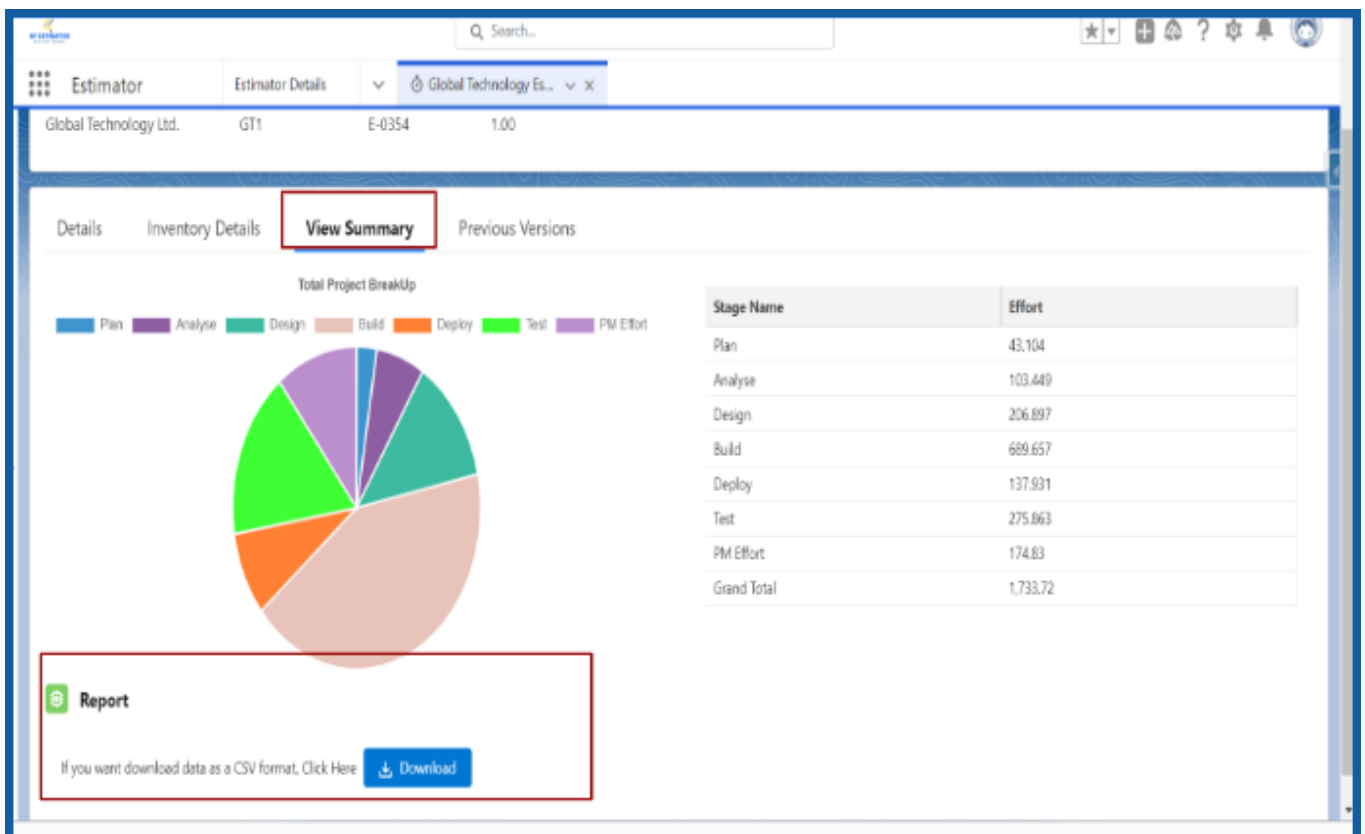
- Once the file is successfully uploaded, click the refresh button.
- Navigate to Inventory Line Items sub-tab and user can view line level estimates for each of the components in Total Days or Total Hours.



Inventory Line	Use Case	Salesforce/Vlocity	Complexity	New/Modified	Units	Adjuster	Total Days	Total Hrs
1 TA-02299	UC1	Data Raptor	Complex	New	1	100.00%	8.11	40.56
2 TA-02300	UC1	customizations	Medium	New	1	117.00%	10.98	94.91
3 TA-02301	UC1	Reports	Simple	Modified	1	117.00%	0.79	3.95
4 TA-02302	UC1	Dashboards	Complex	New	1	100.00%	2.70	13.52
5 TA-02303	UC1	Actions	Medium	New	1	117.00%	2.97	14.83
6 TA-02304	UC2	Cards	Simple	Modified	1	117.00%	0.79	3.95
7 TA-02305	UC2	Templates	Complex	New	1	117.00%	37.96	149.62

STEP 8: View Summary

- Go to the View Summary sub-tab to view the Phase-wise effort breakup for the project.
- Users would be able to export the effort estimates by clicking on the Download button Report section.



STEP 9: Create new version of the Estimator

- The ability to revise estimates and maintain version history can be done by clicking on Create New Version.
- This duplicates the data and maintains the history in the Previous Versions tab.

