



FICTIONAL EXAMPLE. The company, people, figures and incidents are made up. This document shows what you get at the end of the Process Week, not what was found at a real client.

THE PROCESS WEEK – REPORT

Quote calculation for commercial charging hubs

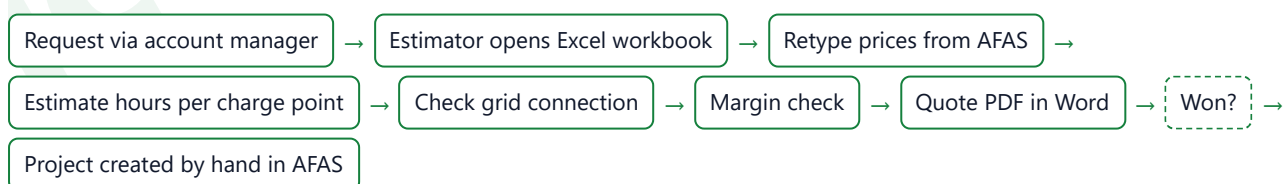
Client	Voorbeeld Installatietechniek B.V. (<i>fictional</i>) · installer of charging hubs and solar power systems for businesses · 140 employees
Process	Quote calculation for commercial charging hubs
Systems	ERP: AFAS Profit · Reporting: Power BI
Interviewed	Estimator (2×), sales manager, project manager, financial controller, IT operations
Review session	Friday, with the sales director

1. Summary and recommendation

The quote calculation for charging hubs runs in a single Excel workbook with 23 tabs, maintained by one senior estimator. A quote takes 2.5 hours on average, prices and hourly rates are retyped from AFAS, and in the past year three quotes went out with a margin that was too low.

Recommendation: build, in two phases. Phase 1 replaces the calculation and pulls items, prices and rates directly from AFAS. Phase 2 automatically turns a won quote into a project in AFAS. The expected saving is about **€52,800 per year** (section 7).

2. Process map — how the process really runs



Step	Who	Handover	What goes wrong
Request	Account manager	→ estimator	Request arrives by email, without fixed fields
Retype prices	Estimator	—	Outdated prices: the workbook is not updated when AFAS changes
Estimate hours	Estimator	—	The knowledge is in one person's head
Grid connection	Estimator	→ project manager	Waits 3 days for an answer on average

Margin check	Sales manager	→ estimator	Checks the grand total, not how it is built up
Create quote	Estimator	→ account manager	Text and amounts are separate; they do not always match
Create project	Project manager	—	Everything typed in again in AFAS

Counts: 5 handovers · 2 times the same number typed in · 1 person who has the full overview.

3. What goes wrong

- **Outdated purchase prices.** In March a quote went out with last year's charge point prices. Lost margin: about €4,000 (*fictional*).
- **Dependency.** During the senior estimator's three-week holiday, 11 requests were left waiting; two customers went to a competitor (*fictional*).
- **Workaround.** For large hubs the estimator calculates with a personal "mark-up tab" that is not in the procedure. That mark-up is the reason the margins usually *do* add up.
- **Earlier attempt.** An AFAS quotation module was tested in 2024 and dropped: the module could not handle the build-up per charge point or the grid connection.
- **Never:** a quote without confirmed grid capacity, or a margin below 18%.

4. Fit-gap analysis — what already exists, what does not

Component	AFAS standard	Standard quotation module	Custom software needed
Items, prices, hourly rates	✓	✓	No — fetch from AFAS
Build-up per charge point and per hub	—	Partly	Yes
Mark-up rules for large hubs	—	—	Yes
Grid capacity check as a mandatory step	—	—	Yes
Margin monitoring per quote line	—	Partly	Yes
Quote PDF	—	✓	No — reuse the template
Won quote → project in AFAS	Partly	Partly	Yes, via the integration

Conclusion: the module covers about half. The rest is exactly the part where the margin is made. Build only that part, and keep AFAS as the source for items and prices.

5. Requirements

#	Requirement	Priority
R1	Items, purchase prices and hourly rates come from AFAS daily; nobody retypes them	Must
R2	A quote consists of hubs and charge points, with hours and materials per charge point	Must
R3	The mark-up rules for large hubs live in the application and can be adjusted by the sales manager	Must
R4	A quote cannot be sent without confirmed grid capacity	Must
R5	Quote lines below 18% margin are flagged and require approval	Must

R6	The quote PDF comes from the same file as the calculation	Should
R7	A won quote is created in AFAS as a project with a budget	Should (phase 2)
R8	Every change to a quote can be traced: who, when, what	Should
R9	Account managers can see the status of their request	Could
R10	Integration with the grid operator's portal	Won't (for now)

Acceptance R1, example: *Given a changed purchase price in AFAS, when the estimator opens a quote the next morning, then the quote uses the new price without any manual action.*

6. Integration sketch for IT

Direction	Data	How	Frequency
AFAS → application	Items, purchase prices, hourly rates, debtors	GetConnectors (read)	Daily, plus on request
Application → AFAS	Won quote as a project with a budget	UpdateConnector (write)	On award (phase 2)
Application → Power BI	Quotes, margins, lead time	Database view in the application	Daily

What IT needs to do: create an AFAS app connector with a token, enable the GetConnectors, arrange access to Power BI. Estimated time: half a day (*fictional*).

Hosting: in the client's own Azure environment, or by HyperionMind. Decided when the work is commissioned.

7. Business case on one A4 page

What the current process costs (*all figures fictional, from the interviews*)

Item	Calculation	Per year
Calculation time	$368 \text{ quotes} \times 2.5 \text{ h} \times \text{€}65$	€59,800
Recalculations	$10\% \text{ of quotes} \times 1.5 \text{ h} \times \text{€}65$	€3,600
Lost margin	$3 \text{ quotes with outdated prices} \times \text{€}4,000$	€12,000
Total		€75,400

After the build (*assumptions: 0.75 h per quote, 2% recalculation, 1 margin error per year*)

Item	Calculation	Per year
Calculation time	$368 \times 0.75 \text{ h} \times \text{€}65$	€17,900
Recalculations	$2\% \times 1.5 \text{ h} \times \text{€}65$	€700
Lost margin	$1 \times \text{€}4,000$	€4,000
Total		€22,600

Saving: about €52,800 per year. Not expressed in euros, but taken into account: the dependency on one estimator, and the two customers who left during the holiday.

Payback period = fixed build price ÷ €52,800 × 12 months. *The real report shows the build price and the result here. In this example the amount is left out.*

8. Fixed price and planning

Phase 1 — calculation and AFAS integration (read) · fixed price: *left out in this example*

Milestone	What	Week	Payment
M1 Technical design	Data model, screen design, integration design; assumptions tested	1–2	30%
M2 Calculation working	R1–R5 on a test environment, tested by the estimators	3–6	40%
M3 Go-live and reporting	R6, R8, three key figures in Power BI, handover	7–8	30%

Key figures in Power BI: lead time request → quote · margin per quote · win rate.

Assumptions the price rests on

- AFAS items and prices are available through standard GetConnectors
- The mark-up rules fit into at most ten rule types
- Two estimators are available for testing in weeks 3–6, four hours per week combined
- The current quote PDF is the template

If an assumption turns out to be wrong in M1, we discuss the scope again before any further building. Changes after that are agreed in advance.

Phase 2 (won quote as a project in AFAS, R7): priced separately after phase 1 goes live. **Not included:** integration with the grid operator (R10), additional dashboards, data warehouse.

9. What next

- **Build:** start phase 1 within 90 days of this report, and the Process Week fee is credited in full.
- **Don't build:** this report is yours, even if another party carries out the work.
- **Only tidy up the workbook first:** sections 2 and 3 can be used for that straight away.

What would this look like for your process?



Book a free 30-minute process call. You tell me about the process that does not fit in your ERP; I tell you honestly what I see. Within two working days you will have that briefly in writing, even if the answer is "don't build".

[Book a process call →](#)

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