

# Bitloom

## DealEconmix for Creatio

### User Guide



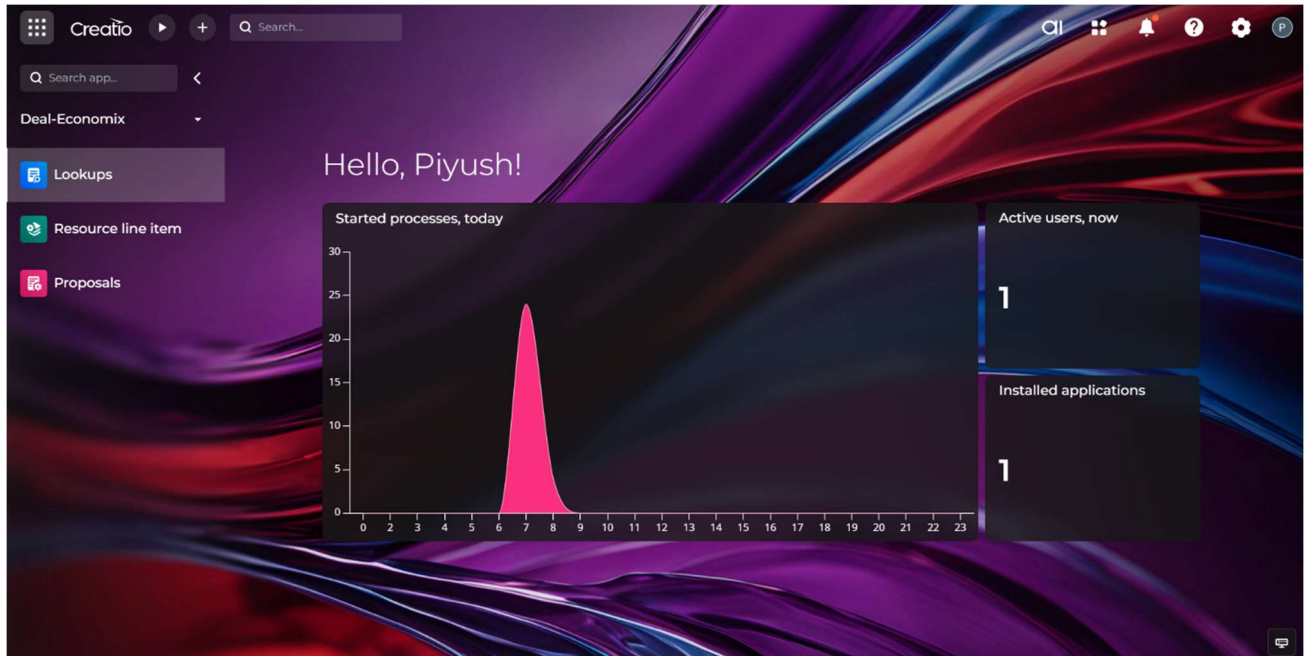
# 1. What is DealEconomix?

DealEconomix is a Creatio add-on for building, pricing, and approving deal proposals. The basic idea: your sales or delivery team assembles a list of resources (people, software licenses, infrastructure), the app calculates the cost automatically, and the result goes through an approval chain before it's finalized.

If you've been doing this in spreadsheets, this replaces that. Everything lives inside Creatio — same platform, same login, no separate tool to maintain.

## Who uses it?

Role	What they do
Sales Manager / Deal Owner	Creates proposals, owns the numbers
Resource Planner	Adds resource line items and fills in costing details
Finance Reviewer	Checks margins, budgets, and overall financial sense
Approver (PM / DM / CXO)	Reviews and approves or rejects proposals
System Admin	Sets up master data, rate cards, and the holiday calendar



# 2. Installing the App

## Step 1 — Open System Designer

Log in to Creatio. Click the gear icon (⚙️) in the top-right corner.

## **Step 2 — Go to Application Hub**

Inside System Designer, find and click Application Hub. This is the Creatio marketplace where you install add-ons.

## **Step 3 — Find and install DealEconomix**

1. Search for "DealEconomix" in the search bar.
2. Click Install

3. Wait for the green SUCCESS screen.

### Step 4 — Compile the system

This step is required. After installation, newly added code isn't active until the system compiles it. If you skip this, the auto-calculations won't work.

4. Go back to System Designer.
5. Click Advanced Settings → Compile all.
6. Wait for compilation to finish, then refresh your browser.

### Step 5 — Confirm it worked

Open the apps/grid menu in the top navigation. You should see Proposals and Resource line item in the list.

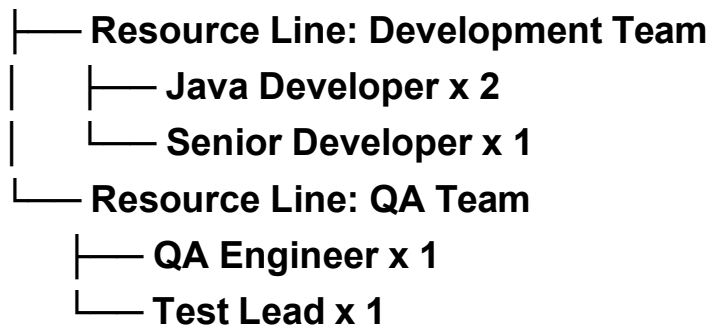
## 3. How the App is Structured

DealEconomix adds two main sections to Creatio:

- Proposals — where you create and manage deal proposals. Each proposal has a name, dates, type, budget, and a list of resources.
- Resource Line Items — where the cost rows live. Each row represents one resource type (e.g., a Java Developer, a QA Lead) with their rate, duration, and any allowances.

The relationship between them looks like this:

#### Proposal



## 4. Setting Up Master Data

To access lookups: gear icon ⚙ → System Designer → Lookups. Search by name and open the list to add values.

### 4.1 Employee Bands

Seniority tiers used to determine which rate to apply. Typical setup:

Band	Typical Profile
Level 4	Junior / Entry level
Level 5	Mid-level
Level 6	Senior
Level 7	Lead / Specialist
Level 8	Principal / Architect
Level 9	Senior Principal / Director

### 4.2 Employee Types

Classifies the category of employee. Add values to the Employee type lookup:

- Permanent
- Contractor
- Consultant
- Freelancer

### 4.3 Employment Types

Describes the engagement model — how the person is hired. Add to the Employment type lookup:

- Full-time
- Part-time
- Fixed-term Contract
- Retainer

### 4.4 Experience Levels

Years of experience, combined with band and role, determines the rate from the rate card. Add to the Experience level lookup:

- 0–2 years
- 2–5 years
- 5–8 years
- 8–12 years
- 12+ years

## 4.5 Resource Roles

The job role the resource performs on the project. Add to the Resource role lookup. Start with the roles your team commonly uses:

- Project Manager
- Business Analyst
- Solution Architect
- Java Developer
- .NET Developer
- Frontend Developer
- QA Engineer
- Test Lead
- DevOps Engineer
- Data Engineer

You can add more later. Roles don't need to be exhaustive from day one.

## 4.6 Resource Types

Categorises what kind of resource is being added. This matters because the form fields change depending on which type you select.

Resource Type	When to use it
Manpower	Human resources — shows employee band, experience, location fields
Database	Database-related resources — shows database-specific fields
License	Software licenses — shows licensor fields
Infrastructure	Hardware, hosting, or infra costs

## 4.7 Location Types

Where the resource will be working from. This affects the base rate — offshore and onsite resources are typically priced differently.

- Onsite (at the client's location)
- Offshore (from your delivery centre)
- Nearshore
- Remote
- Hybrid

## 4.8 Project Types

The category of project this proposal covers. Add to the Project type lookup:

- New Implementation
- Enhancement / Change Request
- Support & Maintenance
- Migration

- Consulting

## 4.9 Proposal Types

Controls how the financial calculations work. Two types are already in the system — do not rename them. The application’s logic depends on these exact names.

Type	What it means
Customer fixed budget	The client tells you their maximum budget. The margin is what’s left after your resource costs.
Fixed price quote	You calculate a price based on what it costs to deliver. The client’s budget isn’t the starting point.

## 4.10 Proposal Status

Tracks where a proposal is in its lifecycle. Add these in order — they appear as stage buttons on the proposal form.

Status	When it applies
Draft	Proposal is being prepared
Pending Approval	Submitted for review
PM approval pending	Waiting for Project Manager
DM approval pending	Waiting for Delivery Manager
CXO approved	Approved by senior leadership
Approved	Fully approved
Rejected	Rejected at any stage

## 4.11 Margin Types

How margin is applied or calculated on the proposal. Add to the Margin type lookup:

- Percentage
- Fixed amount
- Gross margin
- Net margin

## 4.12 Database Types

Types of databases, used when Resource Type = Database. The following are included in the package by default: PostgreSQL, MS SQL, MongoDB, Oracle. Add others as needed.

### 4.13 Licensor

Software vendors whose licenses may appear in a proposal. Add to the Licensor lookup:

- Microsoft
- Oracle
- SAP
- Salesforce
- Adobe

## 5. Setting Up the Holiday Calendar

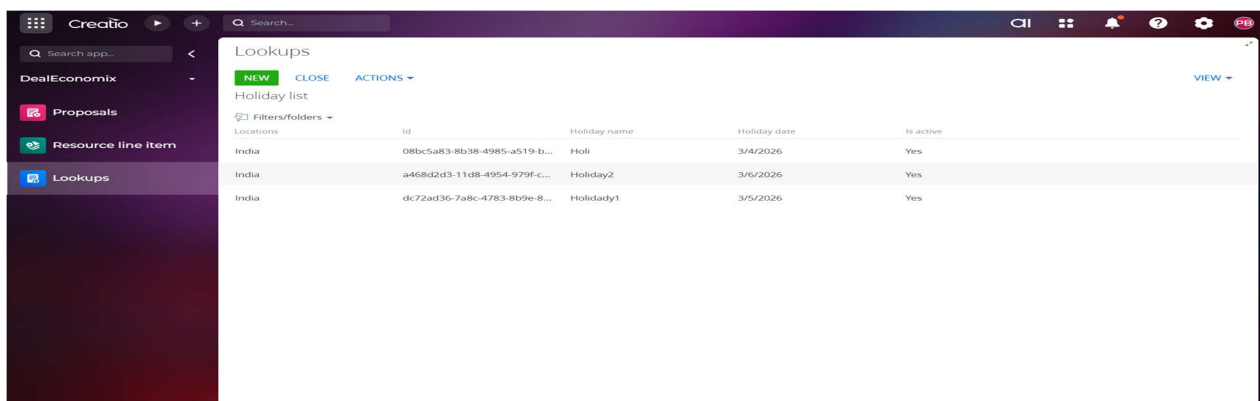
When a resource line item has start and end dates, the app calculates net working days by subtracting weekends and public holidays. The holiday calendar is where you enter those public holidays. Without it, the day count will include days that should be excluded.

### Adding holidays

7. Go to the DealEconomy section in the left navigation.
8. Create new lookup named Holiday master.
9. Select object Holiday and for reference have a look at data models.
10. Click [+ New] for each holiday.
11. Fill in: Holiday date, Name, and Country (relevant if your proposals span multiple countries).
12. Save.

Example holidays for India:

Date	Holiday
26 Jan	Republic Day
14 Apr	Dr. Ambedkar Jayanti
15 Aug	Independence Day
2 Oct	Gandhi Jayanti
25 Dec	Christmas Day



## 6. Setting Up Rate Cards

Rate cards are how the app knows what to charge for a given resource. Without them, base rate fields will be blank and someone will need to enter every rate manually.

The screenshot shows the 'Lookups' section in the Creatio application. It displays a table of 'Resource rate card' entries. The table has columns for Name, Location, Resource ty..., Resource rol..., Employee ty..., Employee b..., Rat..., Base Daily R..., Licensor, Database, and Experience. There are 12 rows of data, each representing a different resource configuration with associated rates and experience levels.

Name	Location	Resource ty...	Resource rol...	Employee ty...	Employee b...	Rat...	Base Daily R...	Licensor	Database	Experience
.NET - 0 Yrs - Level 0 - Accou...	Onshore	.NET	Account Ex...	Level 0	Daily	130.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Accou...	OffShore	.NET	Account Ex...	Level 0	Daily	65.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Accou...	Near-Shore	.NET	Account Ex...	Level 0	Daily	97.50				2-5 Yrs
.NET - 0 Yrs - Level 0 - Accou...	OffShore	.NET	Account Ex...	Level 0	Ho...	8.12				2-5 Yrs
.NET - 0 Yrs - Level 0 - Accou...	Near-Shore	.NET	Account Ex...	Level 0	Ho...	12.19				2-5 Yrs
.NET - 0 Yrs - Level 0 - Accou...	Onshore	.NET	Account Ex...	Level 0	Ho...	16.25				2-5 Yrs
.NET - 0 Yrs - Level 0 - Archit...	OffShore	.NET	Architect	Level 0	Daily	80.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Archit...	Onshore	.NET	Architect	Level 0	Daily	160.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Archit...	Near-Shore	.NET	Architect	Level 0	Daily	120.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Archit...	Onshore	.NET	Architect	Level 0	Ho...	20.00				2-5 Yrs
.NET - 0 Yrs - Level 0 - Archit...	Near-Shore	.NET	Architect	Level 0	Ho...	15.00				2-5 Yrs

## 6.1 What a rate card does

A rate card maps a combination of attributes to a daily rate. For example:

**Java Developer — Level 6 — 5–8 years experience — Offshore = ₹8,500/day**

When you create a resource line item and fill in those four attributes, the app looks up the rate card and populates the base rate automatically.

## 6.2 Creating a rate card

13. Go to the lookup in the DealEconomix workspace.
14. Click [+ New].
15. Create new lookup and select object Rate card.
16. Add details.
17. Save.

You can have multiple rate cards — by region, client type. Only one needs to be active at a time, or you can have several active for different contexts.

## 6.3 Adding rate criteria

Rate criteria are the rows inside a rate card. Each row is one pricing rule.

18. Open the rate card you just created.
19. In the Rate Criteria tab, click [+ New].
20. Fill in the fields: Resource role, Employee band, Experience level, Location type, Base rate, Currency.
21. Save. Repeat for every combination you need.

Example rows:

Role	Band	Experience	Location	Base Rate
Java Developer	Level 4	0–2 years	Offshore	₹5,000
Java Developer	Level 5	2–5 years	Offshore	₹6,500
Java Developer	Level 6	5–8 years	Offshore	₹8,500
Java Developer	Level 6	5–8 years	Onsite	₹12,000
Project Manager	Level 7	8–12 years	Offshore	₹10,000
QA Engineer	Level 5	2–5 years	Offshore	₹5,500
Solution Architect	Level 8	12+ years	Offshore	₹15,000

## 7. Creating a Proposal

### 7.1 Opening the Proposals section

In the left navigation, go to the DealEconomiX workspace and click Proposals. Click [+ New] to open a blank proposal form.

### 7.2 Filling in proposal details

Basic information:

Field	What to enter	Required?
Proposal / Project name	A clear name, e.g. "Cloud Migration — Acme Corp 2026"	Yes
Proposal type	Customer fixed budget or Fixed price quote	Yes
Proposal status	Starts as Draft automatically	Auto
Start date / End date	Expected project dates	Recommended

Financial fields:

Field	Notes
Select local currency	Required for Customer fixed budget proposals
Planned budget (local currency)	Required for Customer fixed budget proposals
Planned budget (\$)	Auto-converted to USD
Margin / Margin %	Auto-calculated once resources are added
Buffer %	Optional contingency, e.g. 10%

Save the form once the basic details are filled in. The financial fields will populate automatically as you add resources.

### 7.3 Proposal types — how they differ

**Customer fixed budget:** the client gives you a number and you work within it. The app calculates margin as Budget – Total Cost. Use this when the client has a set maximum.

**Fixed price quote:** you calculate a price based on your costs. The planned budget and local currency fields are hidden because they're not relevant. The quote is driven by what it costs to deliver, plus any buffer you add.

## 8. Adding Resource Line Items

← Res-00005
Close

Add tag
 Feed Attachments

Number  
Res-00005

Proposal header  
Test-2

Resource country\*  
Denmark

Resource start date\*  
5/11/2026

Resource end date\*  
5/18/2026

Net-working days  
6

Rate card  
Manpower - 0-2 Yrs - Level 1...

Base daily rate  
180.00

Total cost  
1,188.00

**GENERAL INFORMATION**

Project type	Platform	Resource type	Manpower
Resource quantity	1	Resource description	
Employment type	Contract		
Resource site location	Near-Shore	Rate criteria	Daily
Employee band	Level 1		
Experience	0-2 Yrs		
Role	Architect		

Additional allowance

Include allowances in buffer calculation

Buffer (%) 10.00

### 8.1 What a resource line item is

Each line item is one type of person or resource on the proposal. It captures who (role, band, experience), when (dates, working days), and how much (base rate, allowances). The cost fields calculate automatically once you've set up rate cards.

### 8.2 Adding a resource

With your proposal open, scroll to the Resource Line Details section and click [+ New].

#### Step 1 — Describe the resource:

Field	What to enter
Resource type	Start here — Manpower, Database, or License. This determines which other fields appear.
Resource role	The job role, e.g. Java Developer, QA Engineer
Employee band	Seniority level, e.g. Level 5, Level 6
Employee type	Permanent, Contractor, etc.
Employment type	Full-time, Part-time, etc.
Experience level	Years of experience tier
Location	Where they'll work — Offshore, Onsite, etc.

**Step 2 — Set the dates and quantity:**

Field	What to enter
Start date / End date	When this resource is working
Days (Net working days)	Auto-calculated from the dates, minus holidays. Can also be entered manually.
Quantity	Number of people of this type. Default is 1.

**Step 3 — Check the cost:**

Field	What to enter
Base rate	Auto-filled from the rate card. If blank, enter manually (daily rate).
Total cost	Auto-calculated: Base rate × Days.

### 8.3 Cost fields explained

Field	What it means
Base rate	Daily cost for this resource, e.g. ₹8,500/day
Days (Net working days)	Working days between start and end, excluding weekends and public holidays
Total cost	Base rate × Days
Monthly salary	Alternative to daily rate — for resources priced monthly

### 8.4 Adding allowances

Allowances are extra costs on top of the base rate. Fill in whichever apply:

Field	What it covers
Hardware	Laptop, equipment, peripherals provided to the resource
Miscellaneous	Any other costs not covered elsewhere
Night shift	Extra pay for night shift working
Cab	Transport / taxi costs

The Cumulative Allowance field totals all four automatically and is included in the proposal's overall cost.

### 8.5 Other fields

Field	What it does
Serial No	Controls display order of line items. Enter 1, 2, 3... to set the sequence.
Active	Set to No to exclude this item from calculations without deleting it. Useful for what-if scenarios.
Display	Controls whether this line appears in printed or exported proposals.
Resource description	Free-text field for notes on what this resource will do.

## 9. How Auto-Calculations Work

Here's what the app calculates for you, so you know what to expect:

On each resource line item (when saved):

$$\text{Days} = (\text{End Date} - \text{Start Date}) - \text{Public Holidays} - \text{Weekends}$$

$$\text{Total Cost} = \text{Base Rate} \times \text{Days}$$

$$\text{Cumul. Allowance} = \text{Hardware} + \text{Miscellaneous} + \text{Night Shift} + \text{Cab}$$

On the proposal header (updates when line items are saved):

$$\text{Total Resource Cost} = \text{Sum of all line item Total Costs} + \text{Cumulative Allowances}$$

For Customer fixed budget proposals:

$$\text{Margin (\$)} = \text{Planned Budget} - \text{Total Resource Cost}$$

$$\text{Margin \%} = (\text{Margin} \div \text{Planned Budget}) \times 100$$

For Fixed price quote proposals:

$$\text{Fixed Price} = \text{Total Resource Cost} + (\text{Total Resource Cost} \times \text{Buffer \%})$$

## 10. Submitting for Approval

Once the proposal looks right, submit it for management sign-off.

**Before you submit, check:**

- Proposal name is clear
- All resource line items have been added
- Base rates are populated (not blank)
- Start and end dates are correct
- The margin is reasonable
- Budget figures are correct

**How to submit**

22. Open the proposal.
23. At the top of the form, you'll see the stage buttons (Draft → PM approval pending → ...). Click the next stage.
24. The status updates, and the first-level approver gets a notification.

## 11. The Approval Process

If you're an approver (Project Manager, Delivery Manager, or at the CXO level), here's how to handle proposals that come to you.

### Finding proposals awaiting your review

Either check the notification bell in Creatio's top nav (you'll see "Proposal [name] requires your approval"), or go to Activities / Tasks and look for the approval task.

### What to check

- Proposal summary — name, type, dates, country, currency
- Resource line items — roles, levels, days, rates
- Financial summary — total cost, budget, margin %
- Anything that seems off — negative margin, unusually high rates, dates that don't make sense

### Approving or rejecting

Use the stage buttons at the top of the form. Click Approve to pass it to the next level, or Reject to return it to the deal owner. If you're rejecting, add a comment explaining why — it helps the deal owner know what to fix.

The approval chain:

**Deal Owner submits(Draft)**



**Level 1: PM approves**



**Level 2: DM approves**



**Level 3: CXO approves**

← Test-2 Close Refresh Feed Attachments

**Draft** **PM approval pending** **DM approved** **CXO approved** **Approved**

Proposal/Project name\*  
Test-2

Start date\*  
5/18/2026

End date\*  
6/18/2026

Proposal type\*  
Fixed price quote

Select margin percentage  
20%

Fixed quote to customer  
1,425.60 ⓘ

**ESTIMATION**

Resource line details + ↺ ⓘ 🔍

Number	Resource country	Resource + ⓘ
Res-00005	Denmark	5/11/2026

**Approvals** × ⓘ

Show only my approvals

5/8/2026 12:43 PM  
Proposal status Draft  
Approval required

5/8/2026 12:37 PM  
Proposal status Draft  
Approval required