Creating a Quote Work Order introduction

💾 Wed, Jan 17, 2024 🛛 🖿 Creating a Quote Work Order

A Quote is a type of Work Order which is used to obtain one or more quotations before the Client decides what Resource will undertake the work.

To create a quoted Work Order click the "Create Quote Work Order" button.

1. The first step is to select the Client that will be used. For information on how to do this, see the Client Selection page. This will only appear if there are multiple Clients to select from. If there is only one then that Client is selected automatically.

2. The Quote Work Order screen appears after selecting a Client.

e New Item								
te Pending								
Building	Click here to make a selection	pn	₹	Notes				
Contact		(ı					- × -
Task		Select Building				_		Search
Tunor		Select Building						
. types		Building Known As	Building Nº	Building Name	Bui	·		
Sub WO Typ	e Equipment/Service	Filter	Filter	Filter	Filt	rea	Location	L
Filter	Filter	Birchen House (\$0702)	\$0702	Birchen House (S0702)	Ter	ilter	Filter	F
		Boundary House (\$0145)	S0145	Boundary House (S0145)	Ter			
		Bridgeman House (S0724)	S0724	Bridgeman House (S0724	l) Ter			
		Capstan House (S1010)	S1010	S1010 Capstan House (S1010) Bra S0703 Castle House (S0703) Bra S0473 Cater House (S0473) Bra				
		Castle House (S0703)	S0703					
		Cater House (S0473)	S0473					
		Charter House (S0704)	S0704	S0704 Charter House (S0704) Te				
		Chaucer House (S0837)	S0837	Chaucer House (S0837)	Ter			
		Cheviot House (S0658)	S0658	S0658 Cheviot House (S0658) Bra				Þ
		Clarendon House (S0891)	S0891	Clarendon House (S0891) Ter	Ter		
		Crewe House (S0712)	S0712	Crewe House (S0712)				
		Crown Building (S0910)	S0910	Crown Building (S0910)	Bra	-	Location	
					· .		Filter	
		376 available items						
					OK Cancel			
		<u></u>						
				Eutro				
				LXUA				
			F	Summary				^
Reason P	lease select	 Capital Budget 						-

3. Select a Building by either double-clicking or by highlighting a Building and clicking "OK".

4. A list of all contacts listed against the Building selected will open. Click on the name of the person who is placing the call and all the details will automatically be populated to the fields below.

Select Contact			
Contact Type	Name	Telephone	Email
All	Filter	Filter	Filter
Client Contact	Smith	123456789 / 09876543	
Contact Type	.	Name	
Number		Email	
			OK Cancel
			Cancel

5. If the person calling is not listed in the main window, click on the Contact Type drop down box

then manually enter the name, number and email address at the bottom of the screen and click "OK". Any information automatically populated can be overwritten here, if for example a contact number has been changed, simply type in the new number and click "OK"

Task is a search field which allows you to search Core Data to find Equipment/Services types to log this work order against.

6. Enter the Task Type and click 'Search' or if you know the Asset number, enter this in the Asset field and click 'Search'.

7. Enter the Task Type and click 'Search' or if you know the Asset number, enter this in the Asset field and click 'Search'.

8. The Ostara application will bring back a list of items which meet the search criteria (based on the keywords set up in Core Data against each equipment/service type). Select the line applicable to the Task or Asset type.

uote New It	em											$\bullet \bullet$
Quote Pendir	ng											
Building Meadow Park (0001)												
Contact Smith												- × =
Tark escalator Scouth						Δsset						Search
Task escalator Search												Search
Task Types					Ass	ets and Loca	itions					
Sub WO	О Туре	Equipment/Service Type	Sub Equipment/Service Type	Releva		Asset Nur	nber	Known As Name	Level	Ar	ea	Location
Filter		Filter	Filter	Most r		Filter		Filter	Filter	Fil	lter	Filter
Escalat	ors and	Escalator		Most r		123456		Escalator	Default L	Level De	efault Area	Default Location
Escalat	ors and	Escalator	Casing	Most r								
Escalat	ors and	Escalator	Control Panel	Most r								
Escalat	ors and	Escalator	Emergency Stop Button	Most r								
Escalat	ors and	Escalator	Hand Rails	Most r								
Escalat	ors and	Escalator	Steps	Most r								
					4							•
										1000	Locat	ion
						Filter			F	Filter	Filter	ion
						P () b (Filter.	
						Default Le	evel		L	Default Area	Defau	Ilt Location
		III		۰.		Extra						
Reason	Please	select		*	s	ummary						
												_
											Cance	el Save

Note: The "Relevance" column defaults to "Most Relevant" but can be changed to "All" or "Related" by clicking on the down arrow button.

9. Once a Task Type has been selected the User will then need to choose a Location. What is shown in the Locations table depends on what is selected in the Location Type drop down. By default, Specific is selected and displays the specific Location Mappings for the Building. Selecting Whole Area displays Location Mappings that have a Level and Area and selecting Whole Level displays Location Mappings that have just a Level, all for the selected Building. The last option in the Location Type drop down is Unspecified Location and this should be chosen if the location of the work has not been specified or is unknown.

Any extra information that may be required to help locate the issue can be added in the "Extra" field.

Note: If an Asset has been selected you do not need to select a location as this has already been set in the Asset module.

10. Notes can be added at this stage. Notes can be copied using the Ctrl+A, selects/highlights all in the notes field (text can also be highlighted using the mouse). Ctrl+C, which will copy any highlighted text and Ctrl+P, which will paste any copied text into the notes field.

Reason is a predefined drop down list of Reason codes which are listed against the Client selected. The identification of Reason Code will ensure accurate identification for reporting and trend analysis.

11. Select a Reason for the Task by clicking on the arrow and choosing one of the options from the drop down.

12. A summary of the Task and Location will be displayed in the "Summary" field.

Powred by PHPKB (Knowledge Base Software)

13. Once the information has been completed click "Save". If you would like to abandon without saving click the "Cancel" button.

If, when clicking on "Save" the following exclamation mark is visible at the side of the screen, it will be due to missing mandatory information. Please fill in all required fields and click on the Save button again.



14. Ostara will now automatically check for duplications, by checking for any Work Orders which have been raised against the same Building and with the same Task Type/Asset over the past 14 days (Note: 14 days is the default, but this is can be set by Management Company). At the same time, Ostara will advise the User if Building Events exist that could be impacted by the creation of this Work Order. If there are no duplicates or Building Events present then the system will automatically raise the Work Order and proceed to the next step. If, however, there are potential duplicates found the following screen will appear:

-	Quot	e New Item										$\bullet \bullet$	× ⇒ ×
	Quo	ote Work Order Nu	Vork Order Number: Pending - Duplicates										Deta
	WO No Raised Date Last Action Contact Equipment/Service Asset No Status Sympt					Symptom	Resource						
		6180433	07/02/2013	07/02/2013	Smith	Escalator	123456	0.10			View	Confirm	erifi
		4 matches 📒 3 n	natches 2 matc	ches or less									9
	Buil	ding Events											
	Nan	ne							Start Date		End Date		
											Cance	el Sav	/e

15. Any Quoted Work Order numbers which are potential duplicates will be shown in a list. The colour coding (shown in the first column) denotes how many parts of the Work Order match one already raised. The more matches the more similar the Work Order is. If you are sure the work order that the new Work Order created is not a duplicate click on the "Save" button.

If on the other hand you think that one of the listed results is a duplicate and should be used for this work, click on the "View" button and this Work Order will open in a new tab (the one you are raising will NOT be lost). If this is the same and a duplicate Work Order will be raised then go back to the one being raised and click on the "Confirm" button. This will take the User to the Work Order previously raised and the new one will be cancelled automatically.

Powred by PHPKB (Knowledge Base Software)

16. The application will ask for confirmation that there are no duplicates for the Quoted Work Order being raised. In order to proceed to the creation stage click "Yes". Clicking on "No" will return you back to the verification screen.



17. Once the User confirms that this is not a duplicate the Quoted Work Order has now been successfully created.

Defining the Specification and Setting the Schedule for Attendance

Updating Quotes

Choosing the Preferred Quote

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=243