Select/Deselect Quote

💾 Wed, Jan 17, 2024 🛛 🖿 Updating Quotes

Once Quote Requests have been received, the User then needs to select the appropriate Quote so the Resource can complete the work. To select a Quote, go to the Agent Actions menu and choose the "Select Quote" action and to deselect a Quote that has already been accepted choose the "Deselect Quote" action. The following screen will be displayed:

Select Quote									
									Detail
Resource	Date Requested	Request Method	Date Required	Reference	Date Received	Cost	Status	Description	
BEECHWOOD	25/07/2015	Phone	01/08/2015	97666-8335824	24/07/2015	£615.50	Received		
								ОК	Cancel

A list of all the Quotes that can be selected are displayed. The details of these Quotes can be viewed by either highlighting the Quote and clicking "Detail" or by double clicking a Quote. To select the Quote, highlight the Quote and click "OK". It is the same procedure for deselecting a Quote.

Once a Quote has been selected, there maybe points where the User no longer wants to progress with that Quote. If that is the case then it is possible to deselect the Quote by performing the "Deselect Quote" action from the Agent Actions menu. This action works in the same way as the "Select Quote" action except highlighting the Quote and clicking "OK" will deselect the Quote.

Note: In many cases Quotes go into the Authorisation process. This means that the Quote will be selected and can only be deselected when it is has progressed through Authorisation.

Note: If a Quote at Status 0.15 - Pending quote selection is cancelled, a rejection email will be sent to all Resources that provided a Quote to the Work Order.

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=245