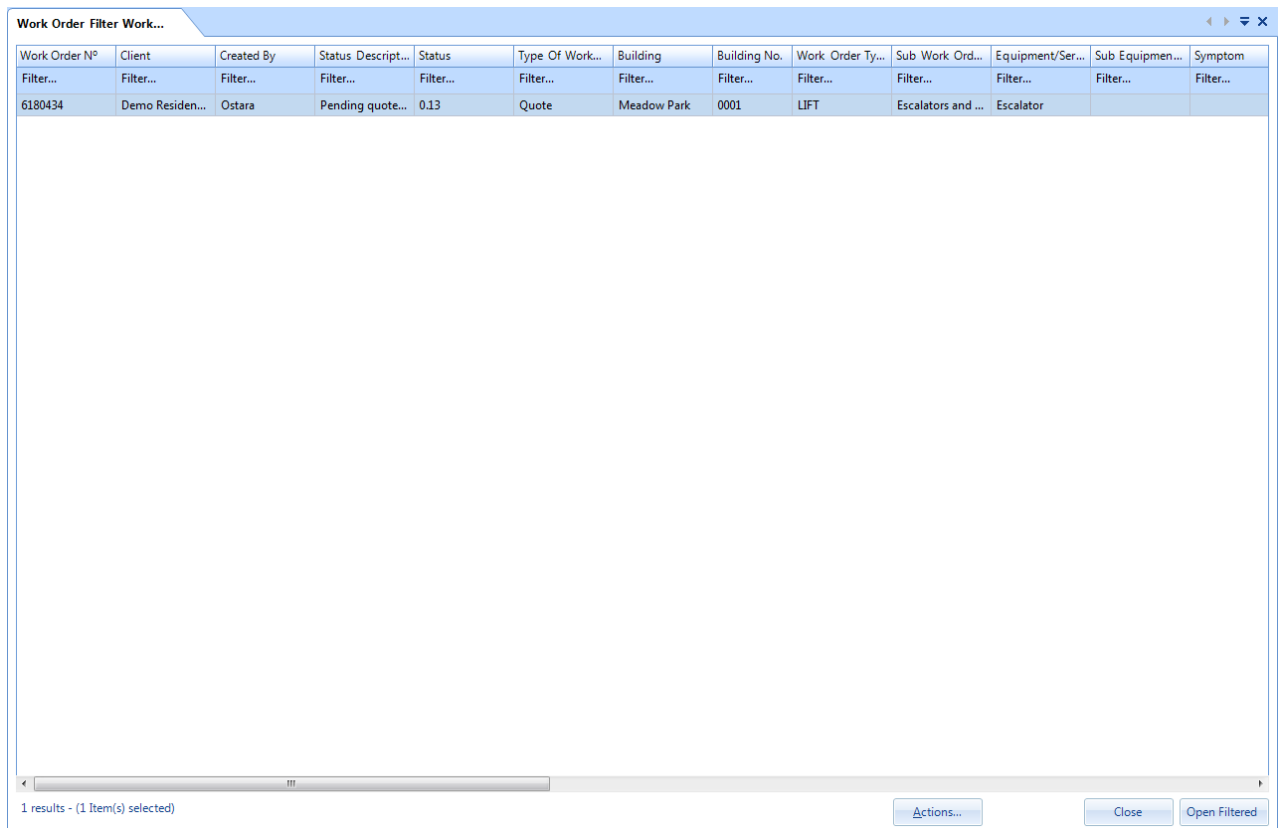# Updating Quotes Introduction

📅 Wed, Jan 17, 2024   📁 Updating Quotes

To update Ostara with quote details, follow these steps:

1. Click on the Work Order module.

2. Search for the Work Order to update. For more information, see the Select Work Order List page.

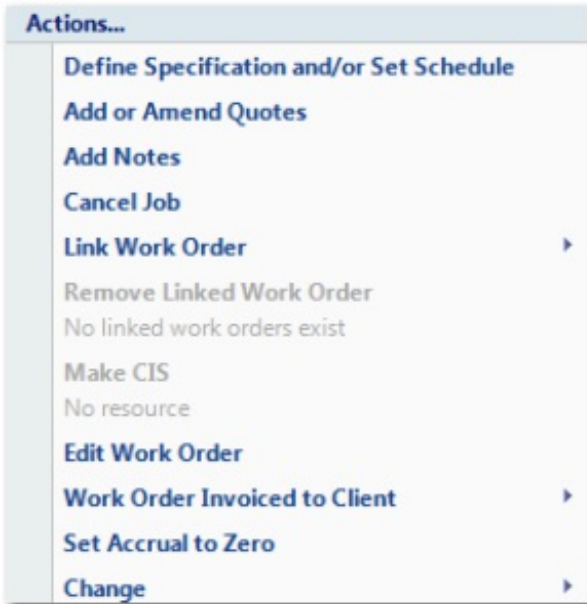3. A list of Work Orders will be returned relevant to the criteria defined in the search.

Work Order Nº	Client	Created By	Status Descript...	Status	Type Of Work...	Building	Building No.	Work Order Ty...	Sub Work Ord...	Equipment/Ser...	Sub Equipmen...	Symptom
Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...	Filter...
6180434	Demo Residen...	Ostara	Pending quote...	0.13	Quote	Meadow Park	0001	LIFT	Escalators and ...	Escalator		

1 results - (1 Item(s) selected)   Actions...   Close   Open Filtered

4. To view a Work Order, double click on it, this will then take you to the detail screen of this Work Order. To open all the Work Orders in the list click on the Actions button then open all. The User can open all filtered Work Orders by clicking on the Open Filtered button. Note: The User can send a maximum of 100 Work Orders to the Work Order detail screen.

5. In the Work Order detail screen, click on the Agent button in the ribbon menu. This will show a list of the possible actions which can be performed on this Quote (please see Agent Actions for further information).

Actions...

Define Specification and/or Set Schedule

Add or Amend Quotes

Add Notes

Cancel Job

Link Work Order   ▸

Remove Linked Work Order
No linked work orders exist

Make CIS
No resource

Edit Work Order

Work Order Invoiced to Client   ▸

Set Accrual to Zero

Change   ▸

6. Click in the option of Add/Amend Quotes. Note: If no quote has been requested and no quote added to the Work Order, the following "Add Quote Request" window will appear:

Add Quote Request

Resource	Click here to make a selection
Contact	
Date Sent	11 February 2013
Request Method	
Quote Required By	Please select...

OK   Cancel

7. Choose the Resource by clicking on the Resource drop down arrow. This screen will open:

Allocate Resource

Selected Resource　Clear　Refresh All

Resource Name	Otis Lifts	Resource Number	OTI001
Association Type	SRA	Rank	1
Agreement Name	Lift Maintenance Vacant	Agreement Code	4
Attendance	10/07/2013 15:46	Fix	
Temp Fix		Priority	

Associated Resources　Allocate

Rank	Resource Name	Resource Number	Association Type	Code	Attendance	Fix	Temp Fix	Priority
Filt...	Filter...	Filter...	Filter...	Filter...				Filter...
1	Otis Lifts	OTI001	SRA	4	10/07/2013 15:46			
2	Allianz Engineering Inspection Services ...	ALL100	SRA	4	10/07/2013 15:46			

Available Resources　Allocate

Resource Name	Resource Number	Warranty?
Filter...	Filter...	Filter...
21st Century Lifts Ltd	STC100	
21st Century Lifts Ltd Branch	STC101	
ADT Fire & Security Plc	ADT001	
Armourpost Ltd	ARM006	
Bolton Gate Services Ltd	BOL003	

OK

8. If there is an SRA or Contract agreement for the task type and building selected, then the Resource will automatically be selected for you. If there are multiple Resources set on the SRA then these will be shown in order of priority. However, if a Contract exists this will always appear at the top of list above any SRA. Furthermore, if an Asset has been selected, and that Asset is under Warranty, the Warranty Resource would be suggested as the default Resource to use. Therefore order of allocation is as follows: Warranty > Contract > SRA > Manual Allocation.

9. An alternate Resource can be selected by searching in the bottom part of the screen and double-clicking on the chosen Resource (or highlighting the Resource and clicking on the Allocate button).

10. Click "OK" when the Resource has been selected.

11. Select and contact by clicking on the drop down arrow and selecting from the list. Alternatively a contact can be added at the bottom of the contacts screen when clicking on the drop down arrow.

12. Date sent will automatically be set to today's date.

13. Request method is an option of Phone, Email or Portal.
Phone - This will allow the User to add the quote details based on a physical receipt of a phone call
Email - Will automatically send an Email to the relevant Resource.
Portal - Will appear in the Contractors Portal Dashboard as requiring submission.

14. Quote Required By will display all dates between today and the scheduled start date that has been set on the Work Order. Select the date appropriate to the requirements. This is set to a 14 day default, but this default can be configured by your Ostara System Administrator should you require a different default to be set.

15. If the start date of the Work Order has passed, the following message will be displayed:
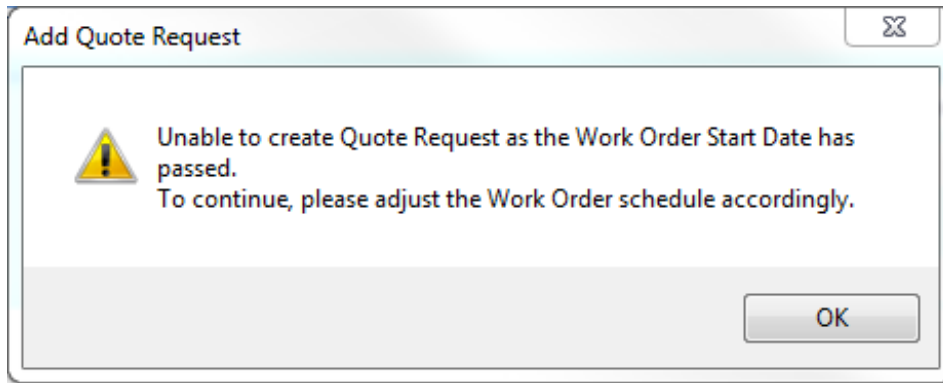
The Work Order schedule can be adjusted by following these steps: Defining the Specification and Setting the Schedule for Attendance.

16. The requested Quote will be displayed on the Work Order and can be viewed by clicking on the view button.

17. Having requested a quote, the User can then add a quote by clicking on the Add/Amend Quote Details from the Agent Action menu. This screen will then pop-up:

18. The menu options provide the following functionality:

Select: This will select the highlighted quote as the preferred choice.

Edit: Edit/Add Quote details from the Resource on the currently selected quote request.

Add Quote: Add received Quote details to the Work Order against a different Resource.

Add Request: Add a new Quote Request to the Work Order, which will either send an Email or add to the Contractor Portal.

Reject: This will reject the highlighted quote receipt line.

Withdraw: This withdraws the quote request.

Show Inactive: Displays any withdrawn and rejected quotes in the list.

If the quote scheduled date is in the past, it is only possible to see the detail and show inactive buttons.

19. Selecting Edit from the previous screen will allow the User to enter the quote details against the Resource Quote Request chosen. Each field is shown below:

Contact this is the Contact Name that can be chosen from the list of Contacts set against the Resource selected.

Date Received this is a date field and this is the date that the quote is received back from the Resource.

Valid For (days) is a number field which allows the User to show how many days the Resource has advised that this quoted cost is valid for.

Received Method this is a drop down selection box which allows the User to select the method in which the quote was received from the Resource.

Quote Reference is a freeform field and should be used to record any reference which the Resource has used for this quote.

Impact is a drop down field for the User to select the impact which this work will have on the piece of equipment.

Replacing Item this is also a drop down field where the User can indicate if the work quoted for requires a piece of equipment replacing.

Description of Work is a freeform field for the Resource to specify what will be done as part of the work on the Work Order.

Labour - Rate is a currency field which allows the User to enter the hourly rate being charged by the Resource for any work carried out.

Hours is a numerical field which allows the User to record how long the Resource estimates it will take them to complete the work specified.

No. of Personnel is a numerical field which allows the User to show how many personnel the Resource has said will be attending site.

Materials is a calculated field which uses the Materials - Cost and Materials - Mark-up fields to advise what the total cost of materials will be for this work.

Materials - Cost is a currency field which allows the User to enter the cost of materials which has been quoted for this job.

Materials - Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Materials - Cost Mark-up is a numerical field which allows the User to state what the mark-up for materials will be for this quote.

Plant is a calculated field which uses the Plant Cost and the Plant Mark-up field to advise what the total cost of Plant will be for this work.

Plant - Cost is a currency field which allows the User to enter the cost of Plant items which have been quoted for on this work order.

Plant - Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Plant - Cost Mark-up is a numerical field which allows the User to state what the mark-up for plant will be for this quote.

Misc is a calculated field which uses the Misc Cost and the Misc Mark-up field to advise what the total cost of Misc will be for this work.

Misc - Cost is a currency field which allows the User to enter the cost of Misc items which have been quoted for on this work order.

Misc - Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Misc - Cost Mark-up is a numerical field which allows the User to state what the mark-up for misc will be for this quote.

Notes is a freeform field which allows the User to add any additional notes that may be relevant to each quote.

Mark-up to Client this section allows for the Client to mark-up the Resources quote in order to invoice to their customer at a marked-up value.

Labour After Mark-up is a calculated field which uses the hourly rate, the hours on site and the mark-up fields to advise what the total cost of labour will be for this work.

Labour Mark-up is a numerical field which allows the User to state what the mark-up for labour is for the work.

Labour Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Materials After Mark-up is a calculated field which uses the material costs and the materials mark-up fields to advise what the total cost of materials will be for this work.

Materials Mark-up is a numerical field which allows the User to state what the mark-up for materials will be for this work.

Material Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Plant After Mark-up is a calculated field which uses the plant costs and the plant mark-up fields to advise what the total cost of plant will be for this work.

Plant Mark-up is a numerical field which allows the User to state what the mark-up for plant will be for this work.

Plant Mark-up Type is a drop down field for the User to select whether a mark-up will be applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Misc After Mark-up is a calculated field which uses the misc costs and the misc mark-up fields to advise what the total cost of misc will be for this work.

Misc Mark-up is a numerical field which allows the User to state what the mark-up for misc will be for this work.

Misc Mark-up Type is a drop down field for the User to select whether a mark-up will be
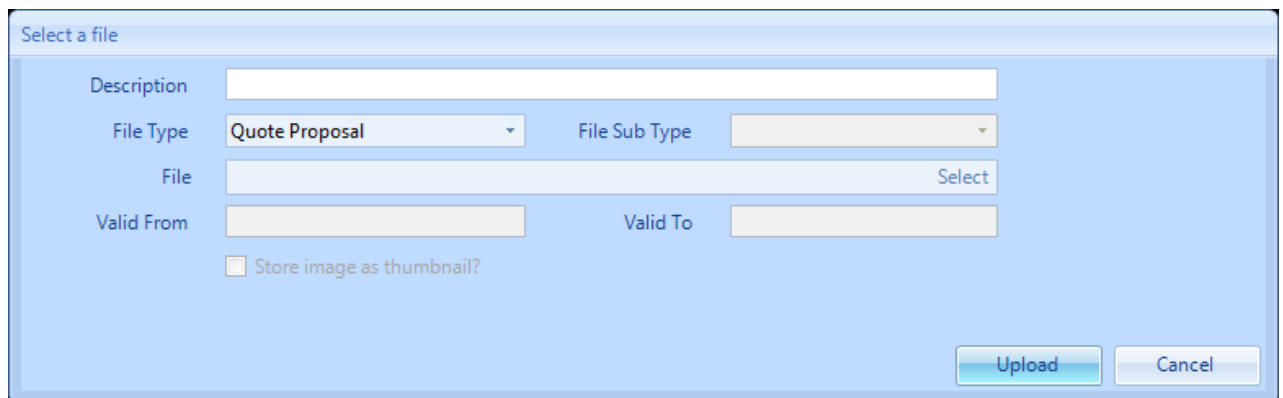
applied as a percentage or a value. If Mark-ups are not applicable then leave this field blank.

Total Cost is a calculated field which uses all of the above totals to calculate what the total cost advised will be for the work from this Resource.

Cost to Customer is a calculated field which uses the total cost field and the mark-up fields to calculate what the total cost to the customer will be for this work.

Documents Button this allows the User to add or view any documents against this quote.

20. Upon clicking the Documents button on the Add/Amend Quotes screen, the following screen will be displayed:

Description this is a freeform field that allows for a brief description of the document being uploaded.

File Type this is a drop down field that allows for the entry of "Quote Proposal", "Image" or "Risk Assessment".

File Sub Type is a drop down field that only applies to File Types of Image and allows for greater definition of the type of image.

File upon clicking Select, the User will have the ability to browse for a document and select it for upload to Ostara. This document can be no larger than 30Mb.

Valid From is a date select field and sets the validity from date of the document.

Valid To is a date select field and sets the validity to date of the document.

Store Image as Thumbnail? is a tick box, only applicable to images, and will store the image as a thumbnail as well as storing the full image.

21. If a quotation is being submitted via the Portal please see the Portal User guide for more information.

Select/Deselect Quote

Request Quote Review

Online URL: https://ostarasystems.knowledgebase.co/article.php?id=247