Create Quote Job Tab - Wizard View

Fri, Jan 19, 2024 Create Quote Job Tab

To create a Quote Job using the Wizard View, simply click the “Create Job” tab then the "Create Quote Job" button and follows these steps:

1. Clicking the "Create Quote Job" button will display the first step of the Create Quote Job process: the Building tab. This will do one of two things depending on the number of Building available to the User. If the User has one Building, the "This job is for site " field will be automatically filled in with that Building. If they have more than one, then the User will have the option to either type the Building in the text box or choose the desired Building from the drop down. There is also the option to select whether an Asset is available or not but this is described later on (see the Create Job - Asset Available page).

Once the Building has been selected, click the "Next" button to proceed.

Note: The Summary section to the right will get updated with the information chosen in each tab and provides Users the option to change any information they have entered previously from any point, if the need arises.

2. The next tab is the Task tab. In the "Search" field, enter the item that needs attending to and click the "Search" button. This will display a list of faults/issues/equipment/services relating to the search criteria in which the User must select the correct topic for the quotation. If the User selects an item that is not maintained, a message is displayed next to the task and will not allow the User to select it (this is permission based).

Once the item has been selected, the "Reason" need to be determined. The "Reason" field is a drop down which the User can select from.

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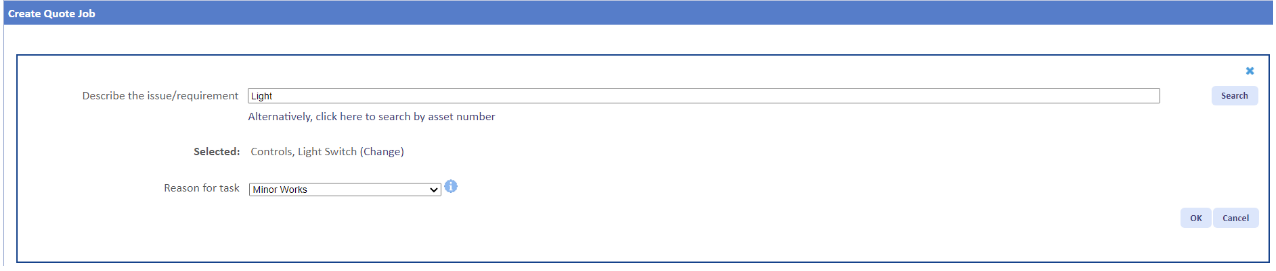
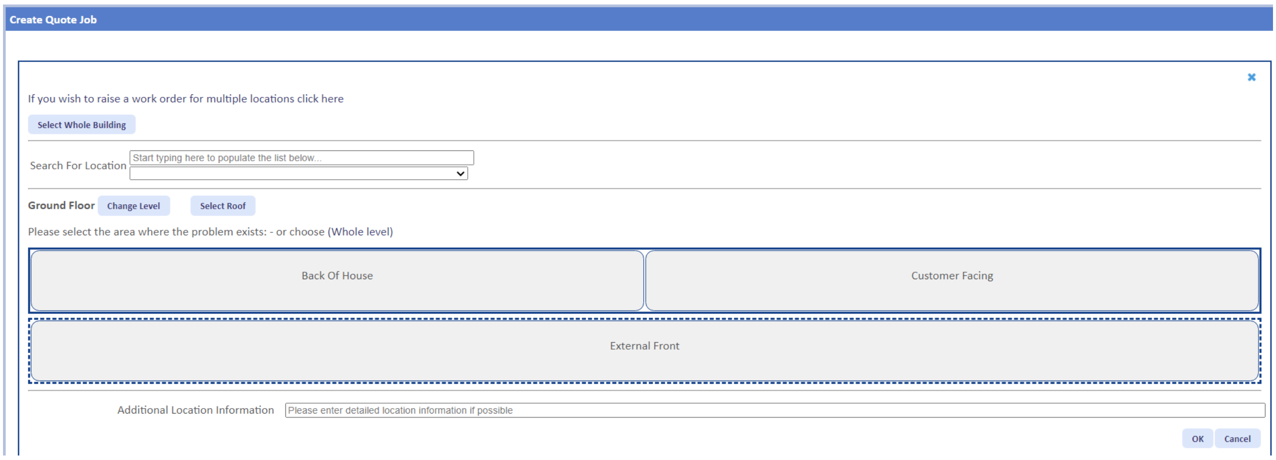


Once the Task and Reason has been selected, click the "Next" button to proceed.

3. Next is the Location tab. This is where the location of the issue is entered. Start off by selecting whether a Whole Level or Whole Area from the left hand side and this will display a number of Areas. Next, select an Area and a set of Location will appear. Finally select a Location and the full location will be displayed in the "Selected Location" field. If any further information about location can be provided then this can be added to the "Additional location information" field.



Once the location has been provided, click the "Next" button to proceed.

4. The next tab is the Contact tab. The person or team that will be the contact for this job is selected here. When this tab is displayed, by default the details of the User creating the job automatically populate the fields at the bottom of the screen. A list of contacts to select from is also displayed. Each Contact in the list has a Name, Job Title and Telephone Number. Select one of these by clicking the contact name and the "Job Title", "Name" & "Telephone" fields are populated with the contacts details.

Once the contact information has been provided, click the "Next" button to proceed.

5. Once the contact is selected, the Response tab is displayed. This is where the User details the time the job needs to be completed by. They can determine whether a temporary fix is in

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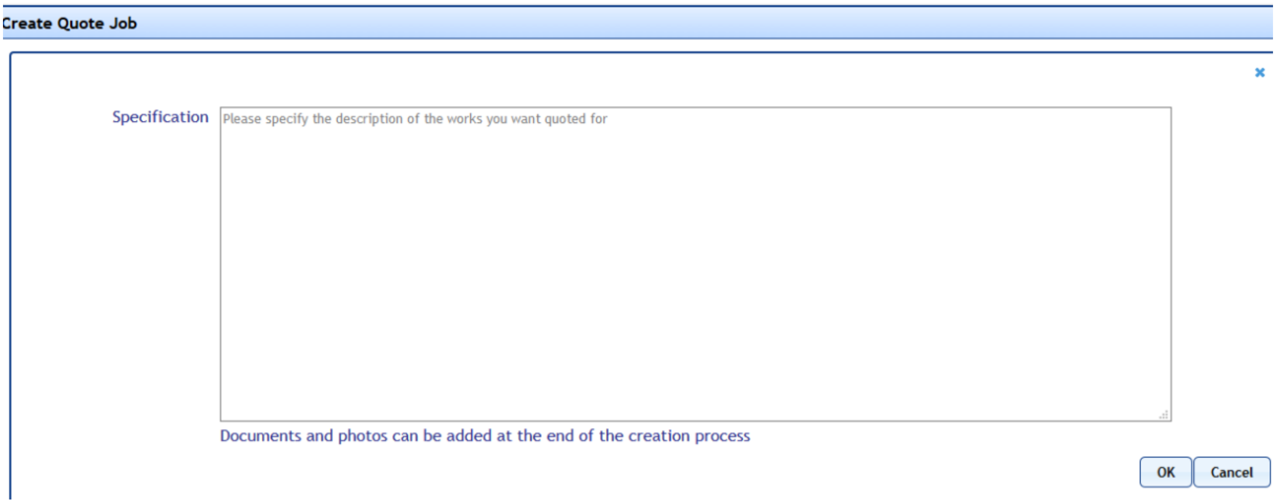
place (using the "Is there a temporary solution in place?" tick box) and the priority of the job. The priority can be selected using the "Priority" drop down.

Note: Some priorities will display a Date/Time picker. When these are chosen, the User should select the Date/Time accordingly. Other priorities will show the calculation of what the calculated SLA (based on the Contract) will be.

Note: The summary is also updated at this point. The Resource who will be assigned to the job and the Agreed SLA will now be shown if they have the correct permissions to do. It is possible for a User to be able to choose the Resource they wish for the job to be assigned to but this also requires the correct permission. Please see the Create Job - Resource Selection page for more details.

Once the priority information has been provided, click the "Next" button to proceed.

6. The next tab is the Notes tab. Here, the User can enter any extra details relating to the job that don't fit in the other tabs. All that is shown here is the Additional Information field in which detail can be entered. Once entered, click the "Next" button to proceed.



7. Before the job is created, the Confirm tab is displayed. This tab shows a complete summary of the job and allows the User one final chance to review before submitting the job. Clicking any of the previous tabs or the "(Change)" buttons will take the User to the correct tab to amend that piece of information, if needed. This can also be achieved by selecting the "Back" button.

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When ready to create the Quote job, click the "Submit Job" button.

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