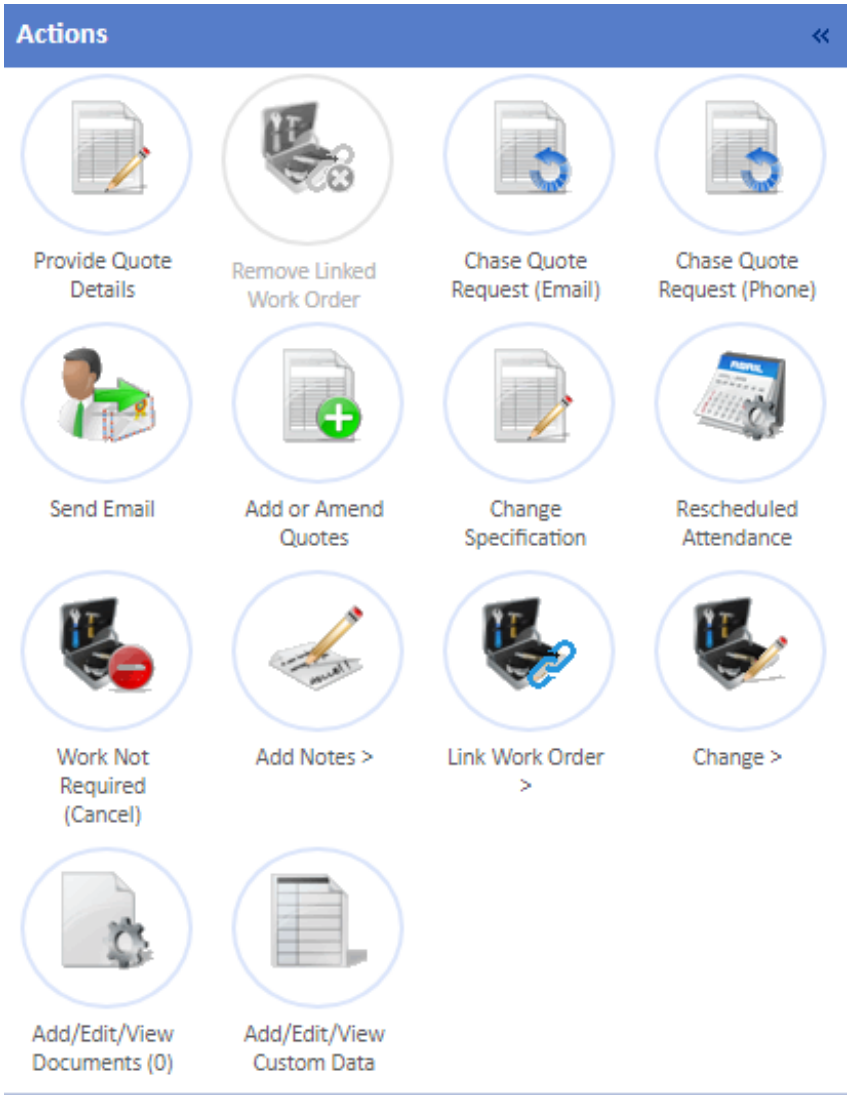
Add or Amend Quotes

Fri, Jan 19, 2024 Job Detail Actions

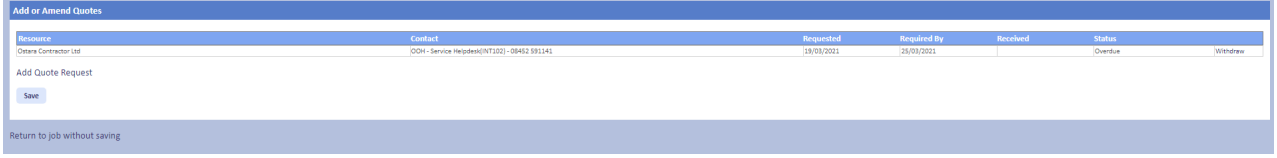
When a Quote job is raised, the User has the ability to add and amend the Quote Requests on this Quote job. This can be done using the "Add or Amend Quotes" button.

1. On the Job Detail screen, select the "Add or Amend Quotes" button to display the Add or Amend Quotes page.



2. This screen displays any Quote Requests that are sent out to the relevant Resources regarding the job. Click the "Add Quote Request" button to display the Quote Request window.

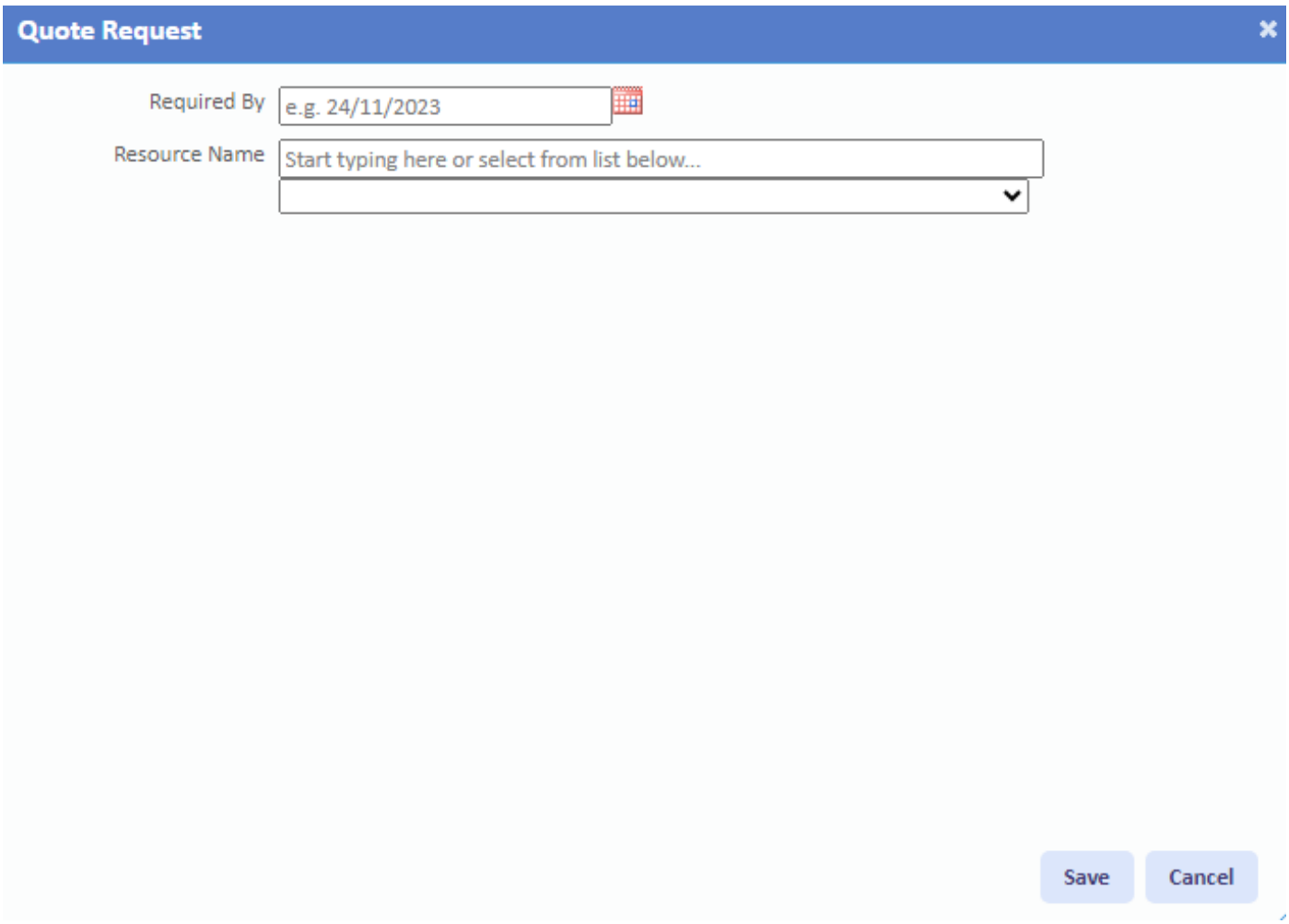
There are two instances of this window:
- When Resources have been automatically selected. This appears when a Quote SRA has been setup for the Equipment Type and Building on the job. Only the Resources shown here can have a Quote Request sent out however they are all sent out at once.



This screen displays any Quote Requests that are sent out to the relevant Resources regarding the job. Click the "Add Quote Request" button to display the Quote Request window.

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- When Resources have been automatically selected. This appears when a Quote SRA has been setup for the Equipment Type and Building on the job. Only the Resources shown here can have a Quote Request sent out however they are all sent out at once.

- When the User must choose the Resources to send a request to. This will appear when there isn't a Quote SRA for the Equipment Type and Building on the job. All Resources that are applicable to do these works can be selected here but the User will need to pick them one at a time. In this case, the User also needs to select a contact for the Resource before sending the request out. It is possible to re-select a Resource if they have had a previously rejected Quote so that they can re-quote for the same piece of work.



3. In this window, apart from the detail mentioned in the previous step, the User must enter the Required By Date to specify when they want the request from the Resource by using the

Date Time picker. Once that has been selected and (during the case of manual selection) the Resource(s) have been chosen, click "Save" to add them to Quote Request screen.

4. Once back on the Add or Amend Quotes screen, the User is shown a summary of the added Quote Requests and determine whether they want them all to be sent out or not. To withdraw any Quote Requests, click "Withdraw" next to the relevant Quote Request. Alternatively, if any that have been withdrawn need to be reactivated then this can be done using the "Reactivate" button next to the relevant request.

Once everything has been selected, click "Save" to send out the Quote Requests.

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