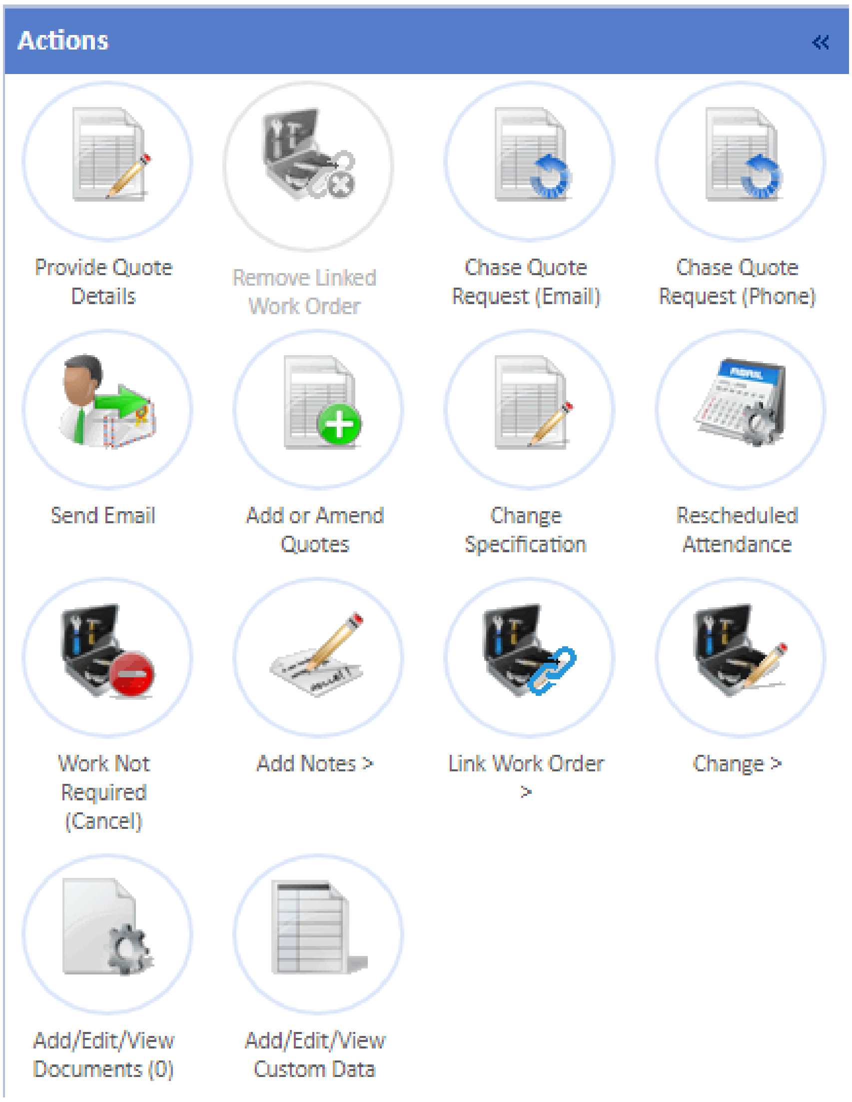
Providing Quote Details

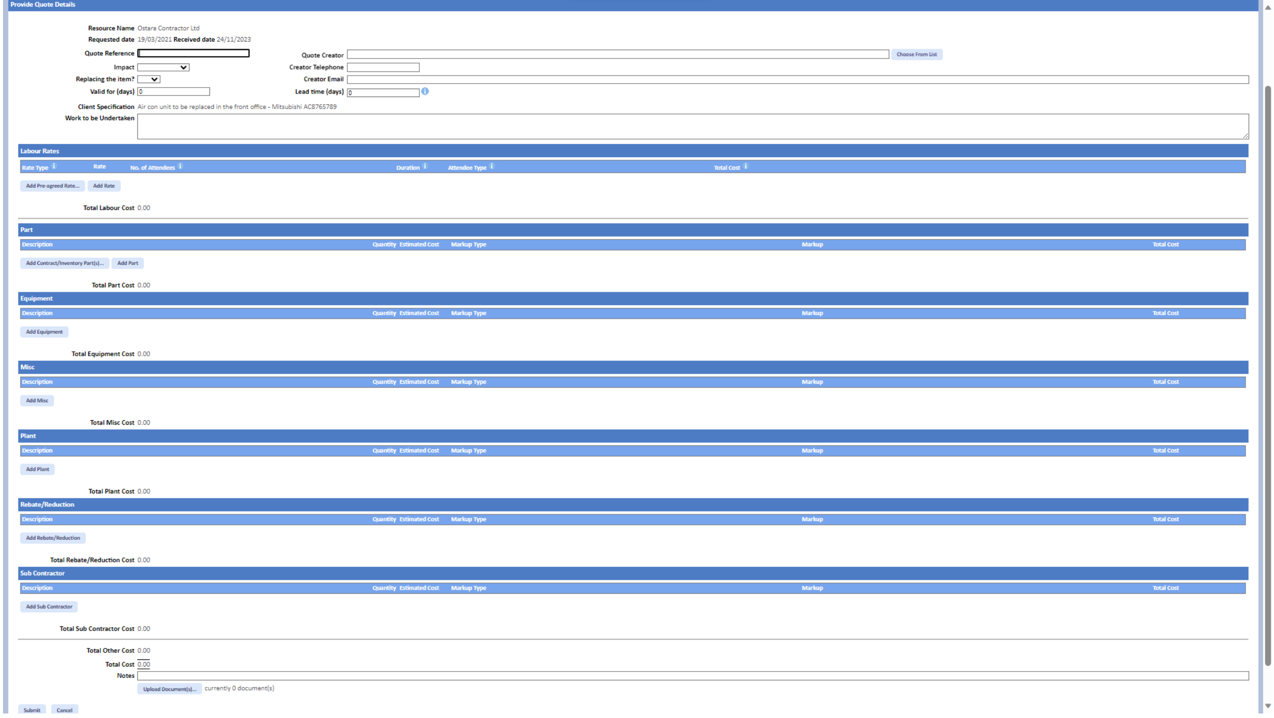
Fri, Jan 19, 2024 Job Detail Actions

When a Quote job is raised, Resources will need a way to provide quote details for any jobs that the Client has requested they provide a quote for. This can be done using the "Provide Quote Details" button. Head Office Users will not only be able to perform this for their own Quotes but also for their Branches.

1. On the Job Detail screen, select the "Provide Quote Details" button to display the Provide Quote Details page.



2. Firstly, select the Contact by using the "Choose From List" button and selecting a Contact from the list. This will then populate the Contact fields below. Next, provide the details of the quote. This include the impact of the work, how long the quote is valid for (measured in days), the number of personnel required and the cost of any parts, materials and labour. Documents can also be uploaded relating to the quote by using the "Upload Document(s)..." button (see "Add/Edit/View Documents" for more information on document uploads).



Once all details have been entered, click the "Submit" button to submit the quote to the Client. The Client will then be given the option to either accept or reject the quote.

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