



Idea Elan

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2018

ANU Technician

**How to complete a
quote/estimate**

Comprehensive Online Solution for
Lab and Core Facility Management

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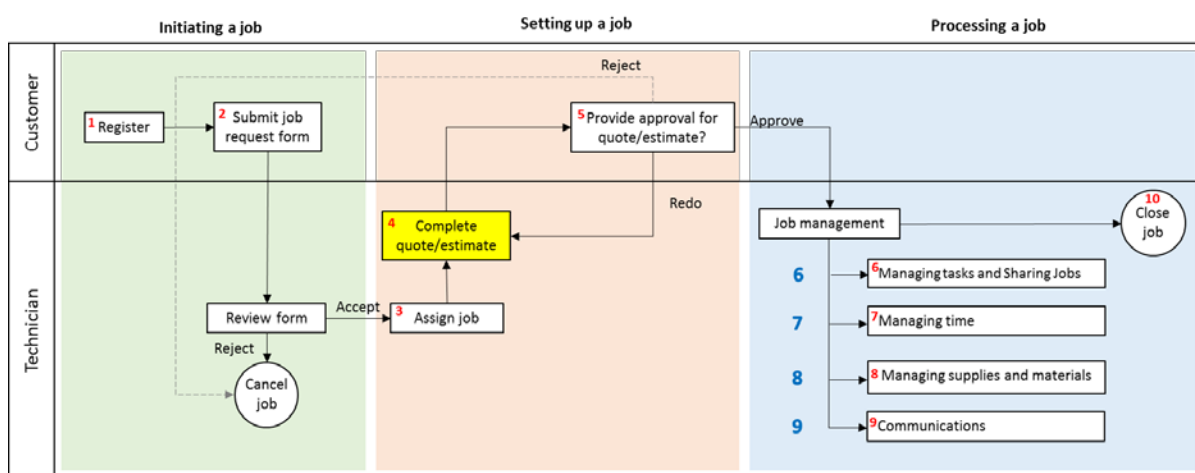
Email: support@IdeaElan.com

How to complete a quote/estimate

Introduction:

This 'how-to guide' will provide you with step-by-step instructions on how a technician can provide a quote or estimate to a job in the Technical Workshops Work Management System. We have produced a series of 'how-to guides' that can be accessed from the System webpage, which can be found here: <https://services.anu.edu.au/information-technology/software-systems/technical-workshop-work-management-system>

Please see the workflow chart below for more information on the system workflow and the associated 'how-to guide' for each step.

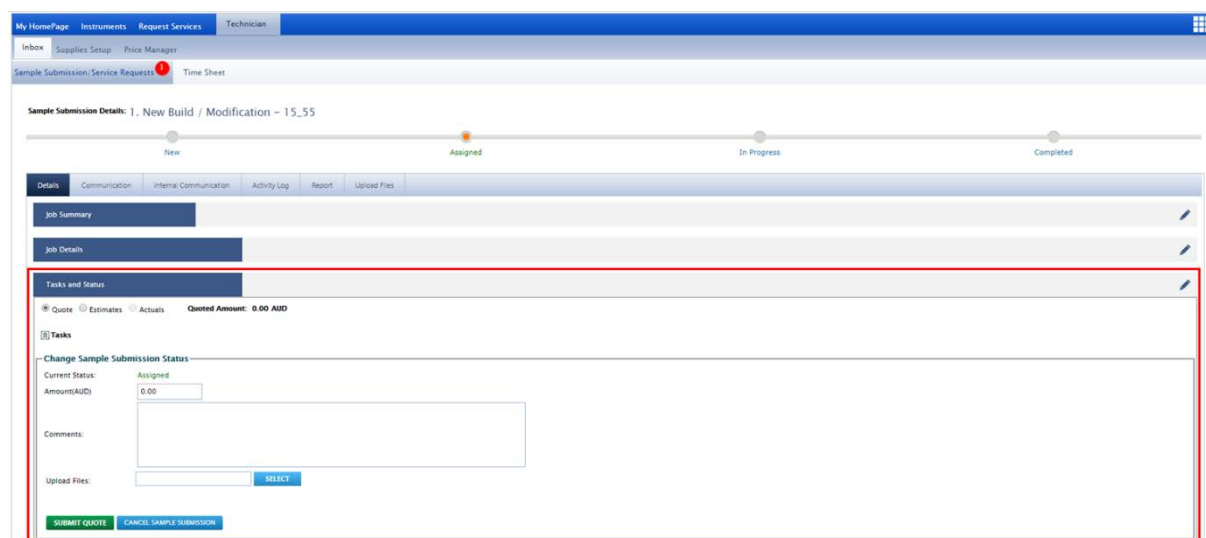


1. How-to guide 1: Registering with the Technical Workshops Work Management System
2. How-to guide 2: Submit a job request
3. How-to guide 3: Assign jobs
4. How-to guide 4: Complete a quote/estimate
5. How-to guide 5: Provide approvals

6. How-to guide 6: Managing tasks and Sharing Jobs
7. How-to guide 7: Manage timesheets
8. How-to guide 8: Manage purchases
9. How-to guide 9: Communications
10. How-to guide 10: Close a job

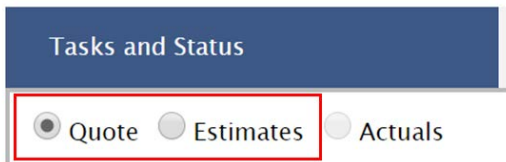
Step 1:

When viewing a job in the Sample Submission Details, navigate to the Tasks and Status tab



Step 2:

Depending on whether you are providing a quote or estimate, select the appropriate option



Tasks and Status

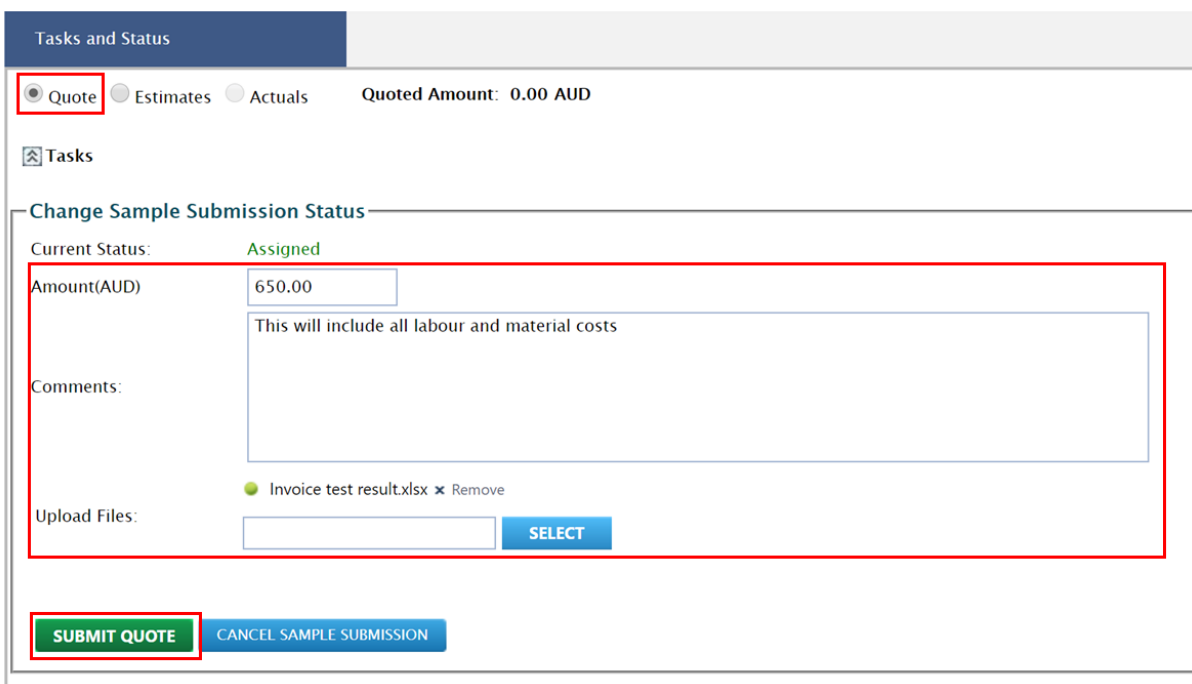
Quote Estimates Actuals

Note: The 'Actuals' option will not be enabled until either a quote or estimate has been submitted and approved by the customer.

Step 3a - Quote:

If you are providing a quote, select the 'Quote' option. Enter the Quoted amount in the 'Amount (AUD)' field, add any comments and if you would like, upload a file. Any file types can be uploaded and the maximum size limit is 10mb.

Click the 'Submit Quote' button.



Tasks and Status

Quote Estimates Actuals Quoted Amount: 0.00 AUD

Tasks

Change Sample Submission Status

Current Status: Assigned

Amount(AUD) 650.00

Comments: This will include all labour and material costs

Upload Files: Invoice test result.xlsx Remove

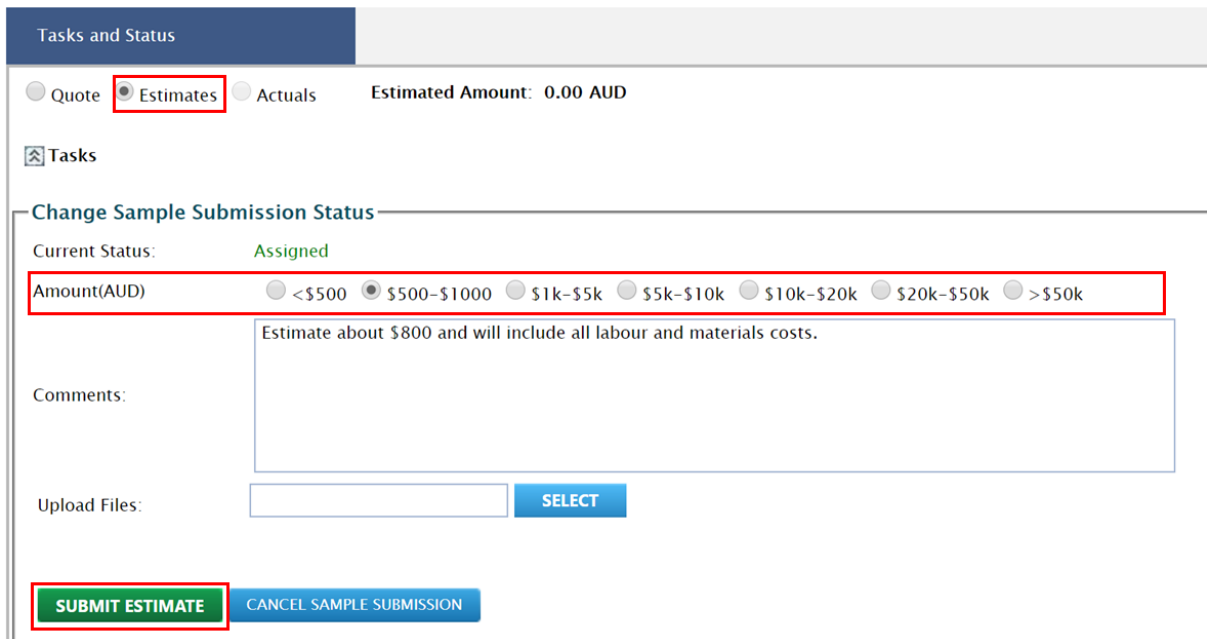
SELECT

SUBMIT QUOTE CANCEL SAMPLE SUBMISSION

Step 3b - Estimates:

If you are providing an estimate, select the 'Estimate' option. Chose the estimated amount from the available ranges, add any comments and if you would like, upload a file. Any file types can be uploaded and the maximum size limit is 10mb.

Click the 'Submit Estimate' button.



Tasks and Status

Quote
 Estimates
 Actuals
 Estimated Amount: 0.00 AUD

Tasks

Change Sample Submission Status

Current Status: Assigned

Amount(AUD) <\$500 \$500-\$1000 \$1k-\$5k \$5k-\$10k \$10k-\$20k \$20k-\$50k >\$50k

Comments: Estimate about \$800 and will include all labour and materials costs.

Upload Files:

Please note that if an estimate greater than \$50,000 is selected then the customers D3 delegate will be displayed. You will need to select their name to submit the estimate. The D3 delegate will receive an email notification, but will not be required to approve.



Tasks and Status

Quote
 Estimates
 Actuals
 Estimated Amount: 0.00 AUD

Tasks

Change Sample Submission Status

Current Status: Assigned

Amount(AUD) <\$500 \$500-\$1000 \$1k-\$5k \$5k-\$10k \$10k-\$20k \$20k-\$50k >\$50k

D3 delegate*: West, Lakshmi

Comments: Estimate about \$800 and will include all labour and materials costs.

Upload Files:

Step 4:

Once the estimate or quote is submitted, the quoted or estimated amount will be displayed and the job status updated the 'Assigned (Sent for client approval)'.

Tasks and Status

Quote
 Estimates
 Actuals
 Estimated Amount: \$20k-\$50k AUD

Tasks

Change Sample Submission Status

Current Status: Assigned (Sent for client approval)

Amount(AUD)
 <\$500
 \$500-\$1000
 \$1k-\$5k
 \$5k-\$10k
 \$10k-\$20k
 \$20k-\$50k
 >\$50k

Comments:

Upload Files: SELECT

SUBMIT ESTIMATE
CANCEL SAMPLE SUBMISSION
Submitted Successfully

Step 5:

The customer will be sent an email notification to Approve or Reject the estimate or quote. Once the customer has approved the quote or estimate, the system will move to 'Actuals' and the status will update to 'Assigned (Approved)'.

Technicians will now be able to start processing the job (logging time and adding supplies and materials to the job).

Tasks and Status

Quote
 Estimates
 Actuals

Service Items/Supplies and Tasks

Change Sample Submission Status

Current Status: Assigned (Approved)

Comments:

Upload Files: SELECT

IN PROGRESS
CANCEL SAMPLE SUBMISSION