Idea Elan

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ANU Technician

How to complete a quote/estimate

Comprehensive Online Solution for Lab and Core Facility Management

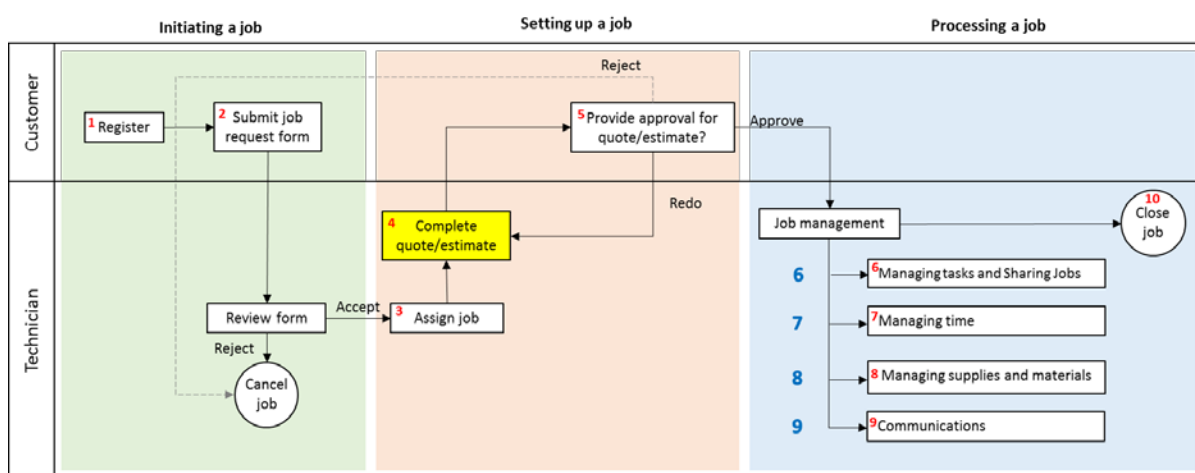13800 Coppermine Rd,
Herndon, VA 20171
Phone: 1-800-506-5905
Email: support@IdeaElan.com

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.
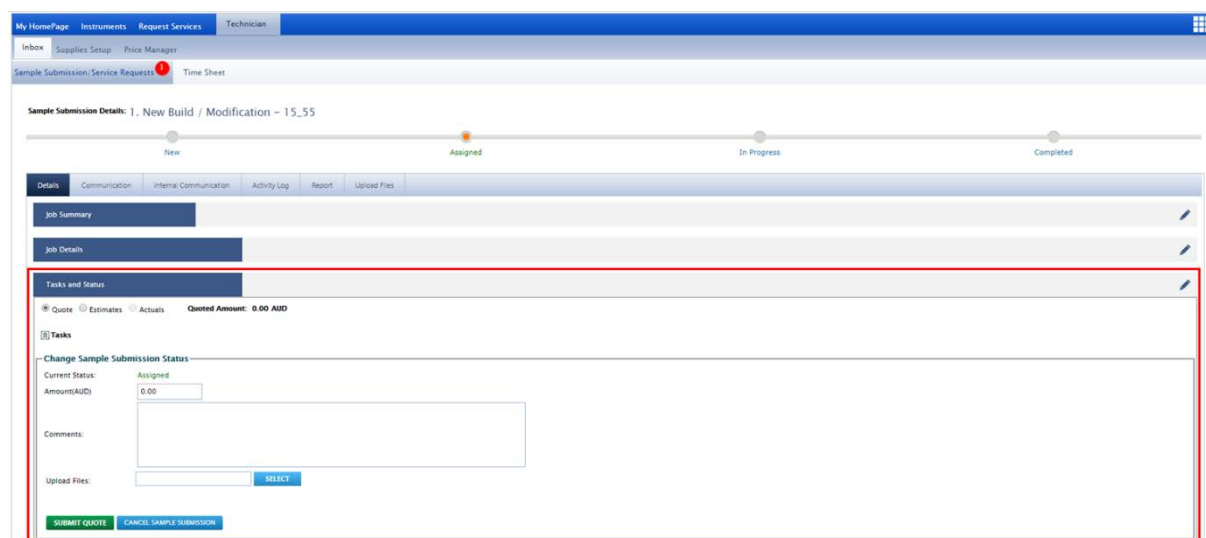

1. How-to guide 1: Registering with the Technical Workshops Work Management System
2. How-to guide 2: Submit a job request
3. How-to guide 3: Assign jobs
4. How-to guide 4: Complete a quote/estimate
5. How-to guide 5: Provide approvals
6. How-to guide 6: Managing tasks and Sharing Jobs
7. How-to guide 7: Manage timesheets
8. How-to guide 8: Manage purchases
9. How-to guide 9: Communications
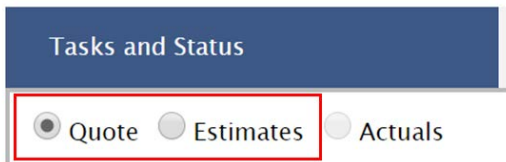10. How-to guide 10: Close a job

Step 1:

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

Step 2:

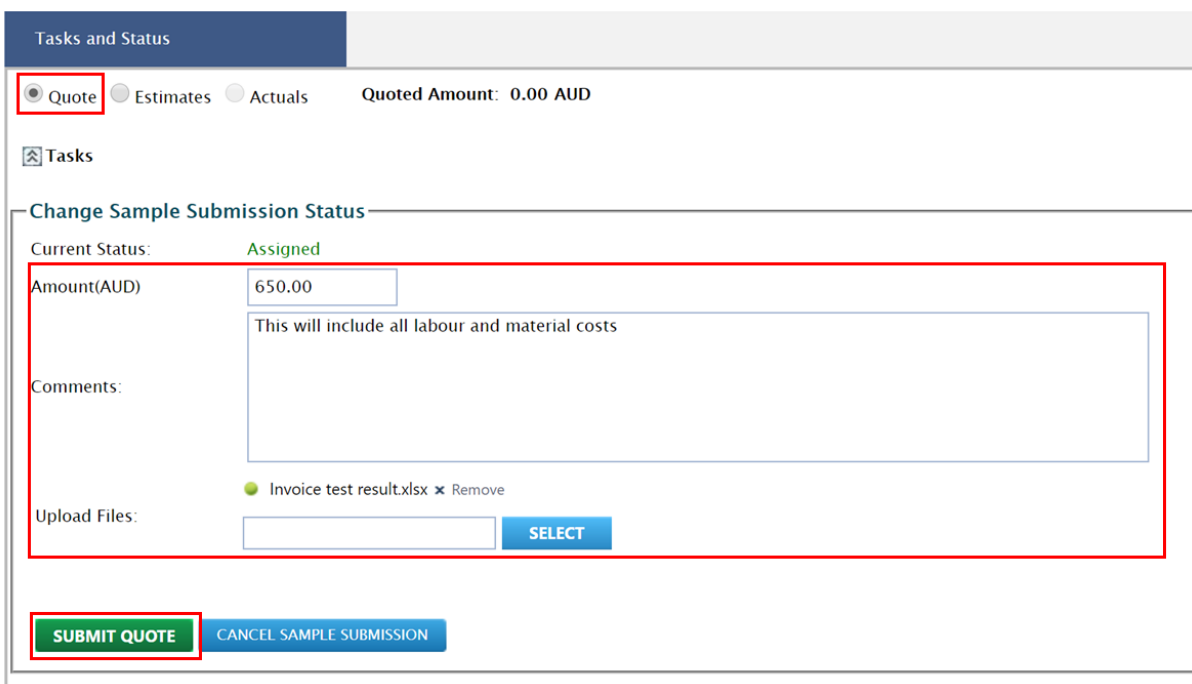Depending on whether you are providing a quote or estimate, select the appropriate option

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.

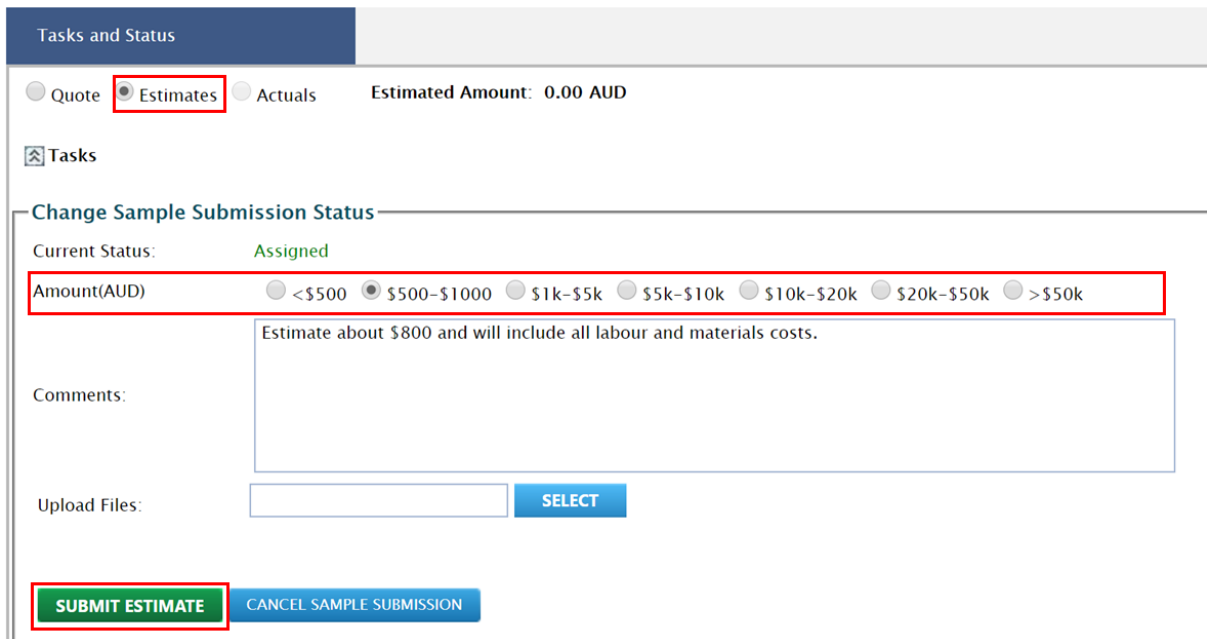Click the 'Submit Quote' button.

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.

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.

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).

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).