

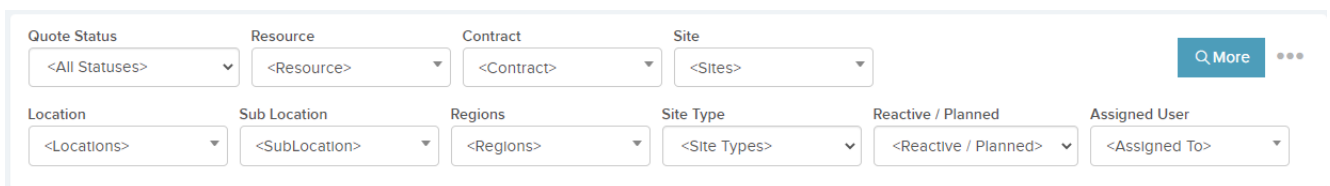
# Job Quotes and Estimates

The Quotes Module is split into:

1. Contractor Quotes – Quotes that come from contractors/engineers via the Contractors Portal, Resource App or emailed into the client.
2. Sales Quotes – Sales quotes can be created independently or against a Job. For independent Sales quotes you will get an option to create a New job when quote is approved.

The *Jobs -> Job Quotes / Estimates -> Contractor Quotes* area shows a grid containing information on quotes and estimates that have been created for jobs and job tasks. You can view and edit details, add documents, submit or print the Quote / Estimate information to PDF by selecting the Quote / Estimate number (#) from the list.

You can filter the list by selecting the *Filters* button at the top-right of the page. This will reveal a number of filtering options for you to choose from:



The screenshot shows a filter bar with two rows of dropdown menus. The first row contains: Quote Status (with '<All Statuses>' selected), Resource (with '<Resource>' selected), Contract (with '<Contract>' selected), and Site (with '<Sites>' selected). To the right of these is a blue button labeled 'Q. More' followed by three dots. The second row contains: Location (with '<Locations>' selected), Sub Location (with '<SubLocation>' selected), Regions (with '<Regions>' selected), Site Type (with '<Site Types>' selected), Reactive / Planned (with '<Reactive / Planned>' selected), and Assigned User (with '<Assigned To>' selected).

Next to the *Filters* button are three dots which gives you the option to export the list to excel.

Clicking on a Quote / Estimate number will bring you to the *Quote / Estimate Details* view:

Contractor Quote

[Back](#)
[Documents](#)
[Submit Quote](#)

[Edit Header](#)

Quote Number

2541-001

Job Task No.

2541-001

Job Number

2541

Status

Pending

Contractor Name

abba plumbers

Contractor Quote Reference

a1

Sales Quote

Description

Quote 1

Date Requested

11/12/2020 18:45

Created By

abba

ADD COST ROW

Description	Materials	Labour	Call Out	Total
Totals	0.00	0.00	0.00	0.00
No Cost Rows				

(**Note:** Selecting *Edit Header* on this page will only allow you to modify the Description and Reference details.)

From here, you can view the *Job* or *Job Task Details* page by selecting the Job Number or Job Task Number from the list:

For Quotes / Estimates that have not yet been submitted, you will see an option to *Add Cost Row*. This will create a new row for you to populate with the Description, Materials, Labour, and Call Out costs. Click on *Update* to add this to the *Cost List*:

ADD COST ROW

Description	Materials	Labour	Call Out	Total
Totals	0.00	0.00	0.00	0.00

UPDATE

CANCEL

You will also see these options at the top-right of the page. You have the option to print the information to a PDF file, Submit the Quote / Estimate, or add Documents:



You can create a quote or estimate by going to the *Quotes* tab of the *Job Details* view of the job you would like to add to:

2647

Building No 15:36

Job No.

Site

Job Detail

Job Tasks

Costs

Quotes

Ass

On this page you have the option to either create a *Contractor Quote* or *Sales Quote*.

Contractor Quotes

Sales Quotes

Selecting *Contractor Quotes* will reveal a pop up where you can capture the information about the quote and click save.

When you click *Save* you will be taken to the *Contractor Quote Details* page where you will be asked to add Cost Rows:

+

ADD COST ROW

Description	Materials	Labour	Call Out	Total	
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div>✓ UPDATE</div> <div>⌂ CANCEL</div>
<div>ⓘ</div> <div>Totals</div>	0.00	0.00	0.00	0.00	

After adding the cost row(s) you have the option to submit the quote / estimate for approval:



Selecting *Sales Quotes* will direct you to the *New Sales Quote* page where you can capture the information about the quote and click save.

New Sales Quote

▶ Save

Sales Quote Reference	<input type="text"/>	Currency	<div>(please select) ▼</div>
Description	<div><div></div></div>	Sales Labour Value	<div>0</div>
Sales Quote Status	Pending	Sales Materials Value	<div>0</div>
Date Created	<div>30/08/2021 09:50</div>	Sales Other Value	<div>0</div>
Date Sent		Sales Total Value	
Date Approved			
Date Rejected			

When you click *Save* you will be taken to the *Sales Quote Details* page where you can edit Sales Quote Values and information. Sales Quotes can then be sent out via email.

If a quote / estimated has not been submitted, it will appear in the *Quotes / Estimates* grid of the *Quotes / Estimates* tab with the status of “Pending”:

If a quote / estimate has been submitted, but not yet approved, it will appear with the status of “Submitted”:

The job itself will also appear in the *Jobs List* with the status of “Quote Requested”:

When all quotes for a job have been approved, it will appear with the status of “Quote Approved”: