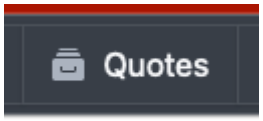
Quote System

- Creating a Quote
- Managing Existing Quotes
- Module Overview
- Quote Process Flow

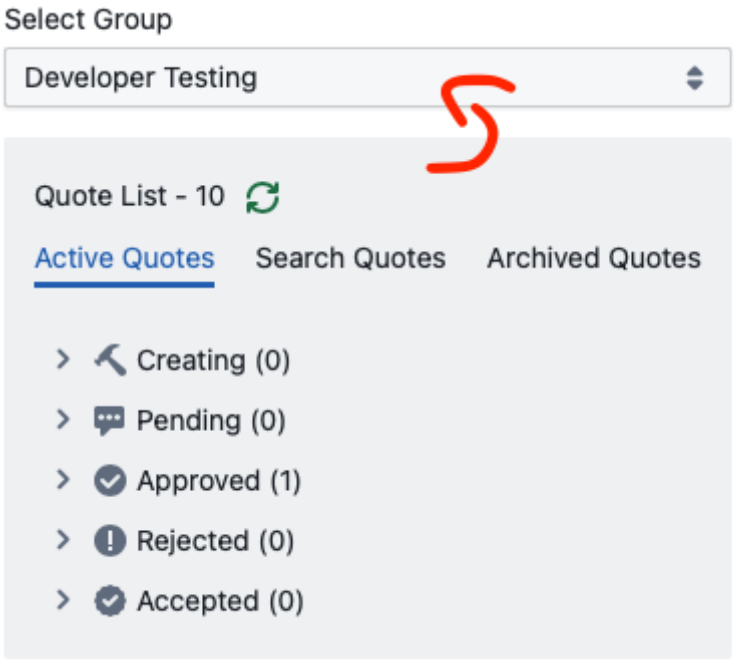
Creating a Quote

To create a quote for a facility a user must be listed as a manager on that facility. Users may be listed as managers on multiple facilities. If so care must be taken to select the correct facility that the quote is being created for. To create a quote use the following steps:

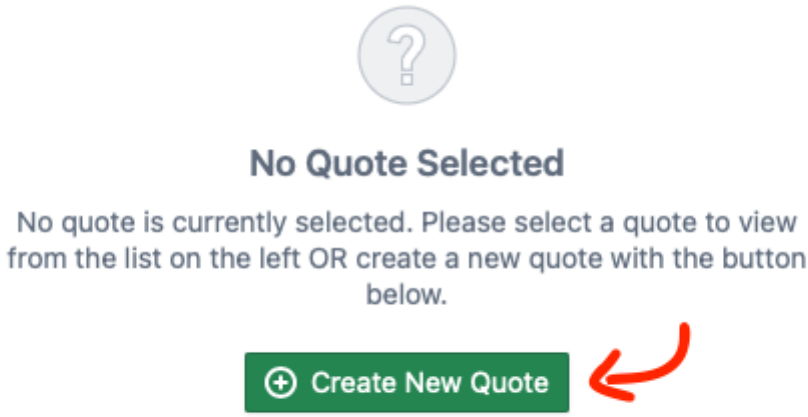
1. Click on the "Quotes" tab.



2. Select the facility to generate a quote for.

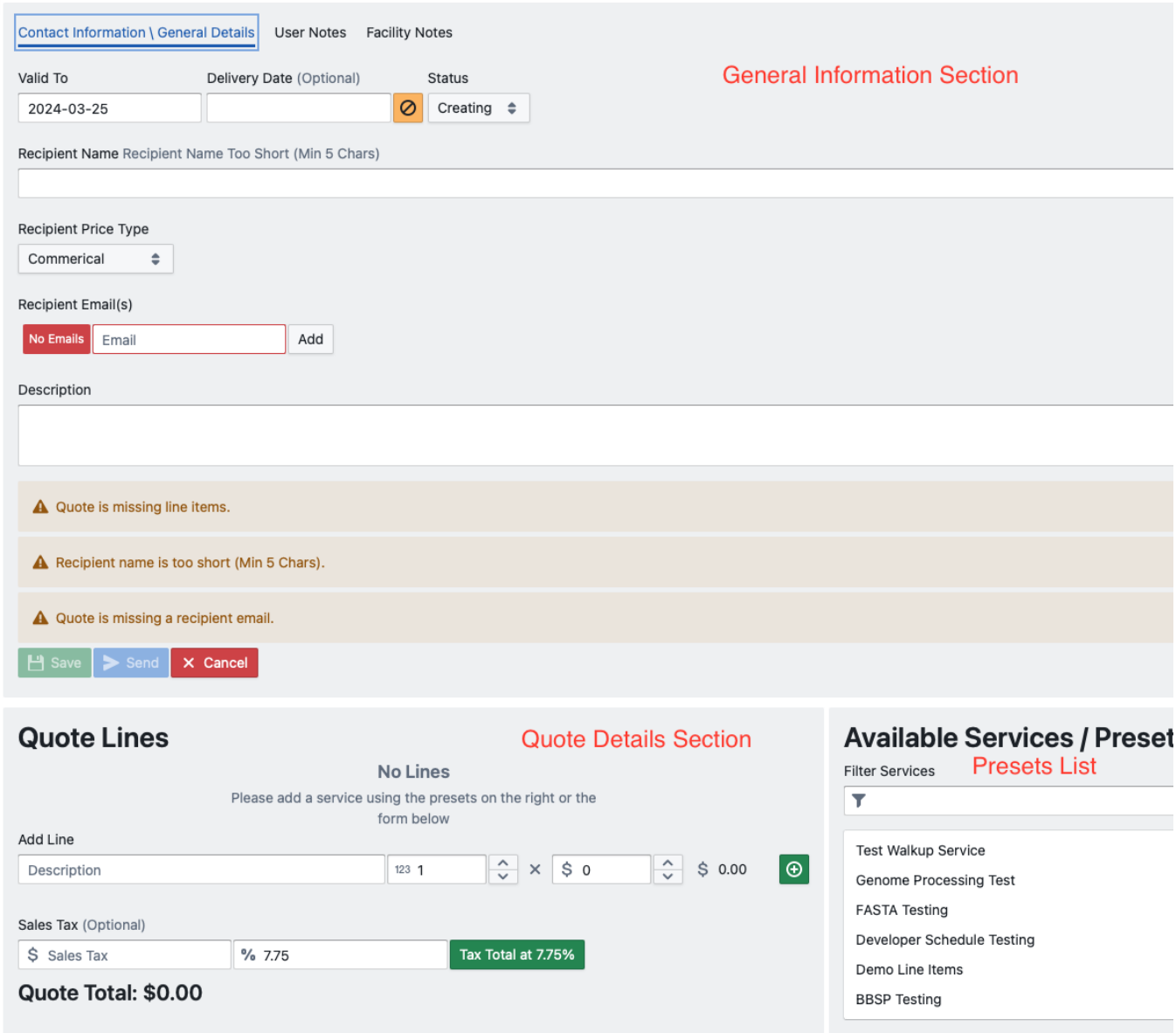


3. Click the "Create New Quote" button



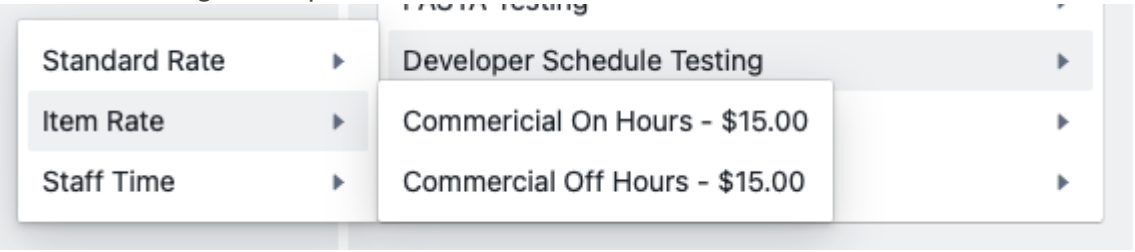
4. Fill out the quote wizard.

Quote Wizard



- **Valid To Date -** This is when the quote is set to expire. By default this is 1 month from the current date.
- **Delivery Date -** This is an optional field that can be used to specify the "Date of Delivery/Date of Service". If this field is not set then it will not appear on the quote in question. The orange button to the left of this field may be used to clear the field.
- **Status** - A dropdown indicator showing the status of this quote inside a list of all possible quote statues.
- **Recipient Name** - The name of the individual for whom this quote is intended. This may be the name of an individual, organization, or company.
- **Recipient Price Type** - This field determines which pricing scheme is used for the totals calculation on quotes.
  - **Internal** - The university internal rate is used
  - **Federal F/A** - The university internal rate x the group specified off-campus educational multiplier is used.
  - **Commercial** - The commercial rate for a given item/service is used.
- **Recipient Email(s)** - The email address/es to which this quote will be emailed when completed. May be multiple emails.
- **Description** - As short (1-2 paragraph) description of the services to be provided and/or project overview
- **Error Block** - Any errors with the current quote will be listed here for remediation
- **Action Buttons** - The available actions for this quote. Note that most actions will be disabled unless the quote is in a ready to send state.
  - **Save** - Saving a quote will save your progress for further editing without sending the quote to the recipient. Saved quotes can be accessed under the "Active Quotes" tab on the quote list. Newly created quotes will be listed as "Creating"
  - **Send** - Sending a quote generates an email with a link to a PDF of the created quoted for approval to the listed recipient emails. Sent quotes will be listed as "Pending" on the "Active Quotes" list.
  - **Cancel** - Cancel any edits on this quote if editing, close and discard if creating.
- **Quote Lines Block**
  - **Quote Line List**
    - Description - The description of the item to be added
    - Quantity Field - The number of items described by this line
    - Rate Field - The amount to charge per item
    - Remove Button
  - **Add Line Block**
    - Description - The description of the item to be added
    - Quantity Field - The number of items described by this line
    - Rate Field - The amount to charge per item
    - Add Button - Note: Empty fields may be added to the quotes list
- **Sales Tax Block (Commercial Recipients Only)** - This optional block contains a way to attach an estimate of the sales tax for the listed items above. Clicking the green button will auto-fill the Sales Tax field with a percentage calculation of the sum of the items in the Quote Line List. The Sales Tax field can be overridden manually.

- **Available Services / Presets Block** - This block contains a list of all services available from the selected group. Available service rates can be selected to auto-populate a new line with the rate description and cost. The displayed rates will be either the internal or commercial rates based on which Recipient Type is selected above. Clicking on a specific rate will add that rate as a new line item.

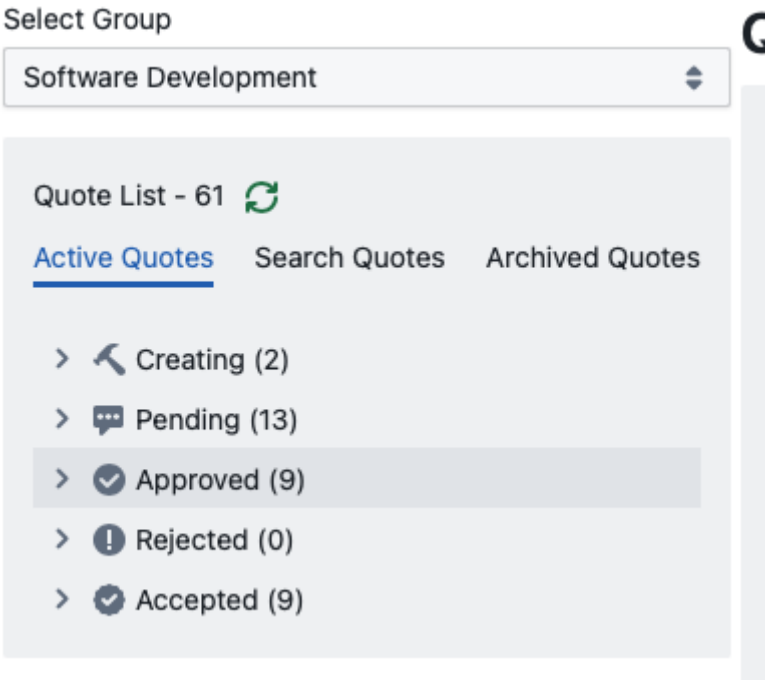


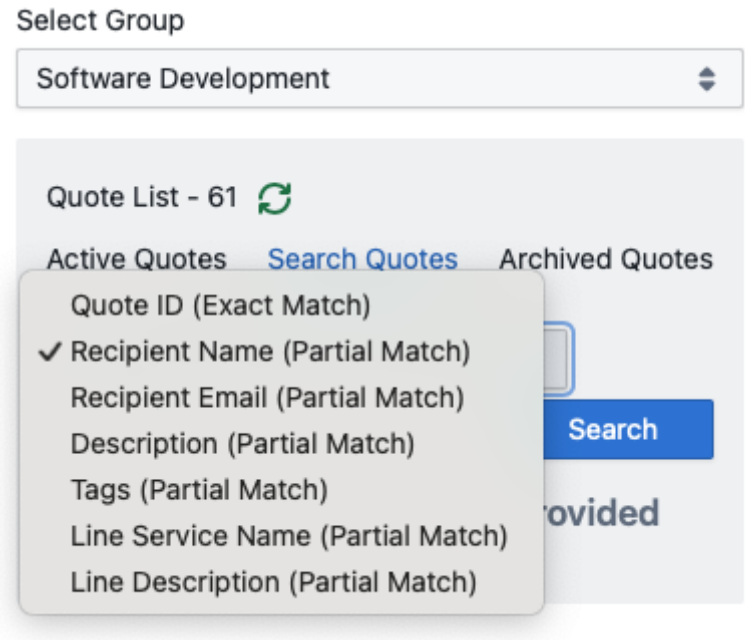
Managing Existing Quotes

Quote States

Quotes may be in one of 6 states:

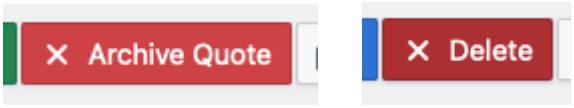
1. **Creating** - All unsent quotes in the process of being built.
2. **Pending** - A quote that has been emailed to the user and is awaiting their review and approval/rejection.
3. **Approved** - A quote that has been accepted by the end user. May have comments from the end user
4. **Rejected** - A quote that has been accepted by the end user. Should have comments from the end user regarding why the quote was rejected.
5. **Accepted** - A quote that has been approved by the end user AND accepted by the facility
6. **Archived** - All quotes that are no-longer active in the system. Generally accepted quotes are moved to "archived" after work has begun.





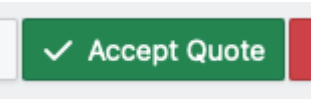
Deleting/Archiving Quotes

Creating and Pending quotes may be deleted at any time. Approved, Rejected, and Accepted quotes will be marked as archived instead of being deleted outright.



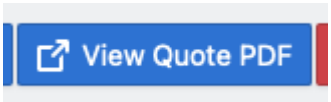
Accepting Quotes

An approved quote may be marked as accepted by clicking the "Accept Quote" button. Pending quotes may not be "force approved"



Previewing Quotes

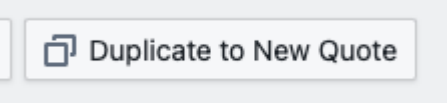
Any quote that has been saved at least once may be previewed by clicking on the "View Quote PDF" button. This will open a PDF of the quote in question in a new tab for review.



> Managers are encouraged to "Save" a quote and preview it prior to sending to ensure all appears as intended.

Duplicating Quotes

Any quote that has been saved at least once may be duplicated into a new quote. This is most often used to issue a new quote after a rejection since any quote no-longer in the "Creating" state cannot be edited.



Module Overview

External users often have a need for a PDF quote for services prior to starting a project. Using the "Quotes" module managers can create and send PDF quotes to users for approval.

Workflow

1. Managers create a new quote using the Quote Wizard in the Quotes module
2. Once created quotes may either be saved in a "Creating" state or immediately sent to the end user for approval
3. Quotes that have been sent to end users are saved in the "Pending" state. Pending quotes are editable but updates will not be immediately sent to end users for approval. After updating a pending quote the quote should be sent to the user again.
4. Users will receive an email notification when a quote is ready for approval. Any user who receives the notification email will be able to sign off on the quote or reject it. Multiple user emails can be listed.
5. Users can click on a link in the notification email to access the Quote review screen. After reviewing the quote on this screen the user is prompted to provide their Full Name and either approve or reject the quote.
6. Once a quote is approved or rejected the manager who created the quote initially will receive a notification email regarding the approval/rejection.
7. Approved or rejected quotes can be archived for future reference.

Managers can clone previous quotes for convenience. When creating new quotes a full list of services for facilities that they control is available to select from in addition to freeform line entry.

All quotes have 2 notes sections for freeform comments/text relevant to the quote that do not appear on the quote PDF itself. These notes can be used/edited until the quote is archived.

> Quotes are marked as estimates for since very often project changes will occur. Provided quotes are not meant to represent commitments to specific pricing or services.

Quote Process Flow

Quotes will generally follow the process below:

1. **Creation** - A quote is generated by the facility and emailed to the recipient.
2. **Approval** - After creation the quote is email to the recipients for approval
   - Recipients will receive an email with a PDF of the quote and a link to submit their approval. Approval is performed by entering their full name, any comments, and then clicking the approve or reject buttons.
3. **Review + Acceptance** - Approved or Rejected quotes are then reviewed by the facility for acceptance. The facility contact email(s) will receive a notification email when a quote is approved or rejected.
4. **Archiving** - Post-Acceptance the facility may mark a quote as archived to remove it from the active quotes list. Usually this occurs after work has either begun or is completed on a given quote/project.