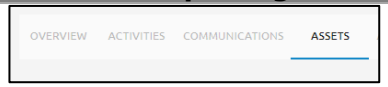
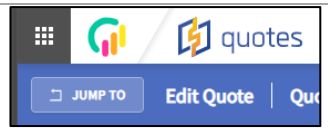
Complete quote

This work instruction is for external estimators and will demonstrate how to complete a quote in Crunchwork.

A. Step by step – Complete quote 1
B. Step by step – Resubmit a quote (&/quote) at 'QA Failed' status 5

A. Step by step – Complete quote

#	Step Instruction	Desktop Image	Mobile Image
1	In the relevant job, click on the *Assets* tab to see a quote in draft on the job. **TIP:** You can use the *Type* filter and select 'Quote' from the drop down if you only want to see the quotes on the job.		
2	Click the *eye* icon next to the quote to open the quote in edit mode.		
3	This will open a new page in the quote's application.		

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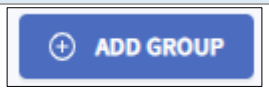
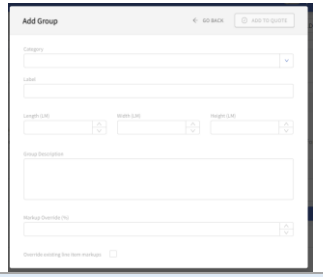
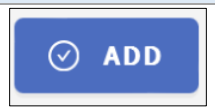
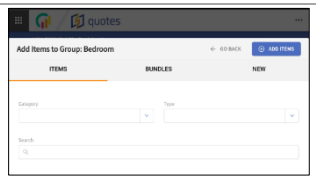
4	Review the details in the *Quote Details* section.		
ⓘ	**Note:** Quote types where aspects of the that claim require '*Cash Settlement'* are to be separated into a separate Group labelled with the Area or room and noted "Cash settlement only" with all line items required to be cash settled listed within it.		
5	Completing a scope: In the *Line Items* section, click *Add Group,* a new pop-up window will appear. a. Enter the name of the room or area name into the *Label* field. b. Enter the *length*, *width,* and *height* dimensions of the area.	 	
ⓘ	**Note:** The *Category, Group Description* and *Markup Override (%)* are not used fields. Please ignore these fields.		
6	Click on *Add to Quote* at the top right-hand side of the pop up. The newly created group will now be visible in the *Line Items* section.		
7	In the *Line Items* section, in the new *Group* created, click *Add Items.* A new pop-up window *Add Items to Group*…. will appear.		

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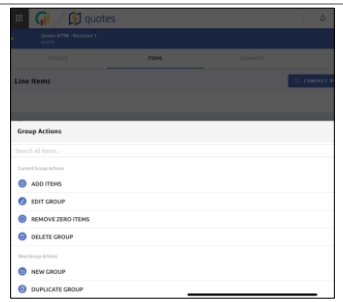
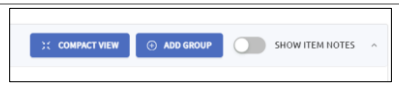
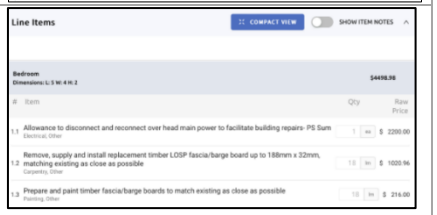
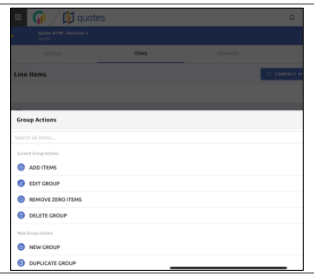
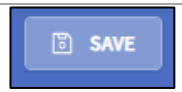
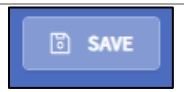
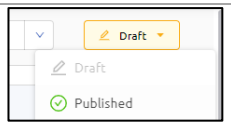
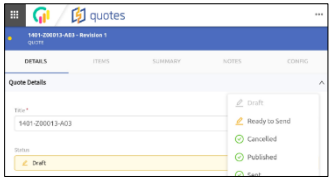
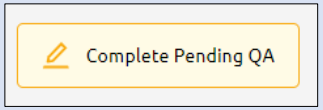
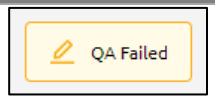
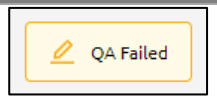
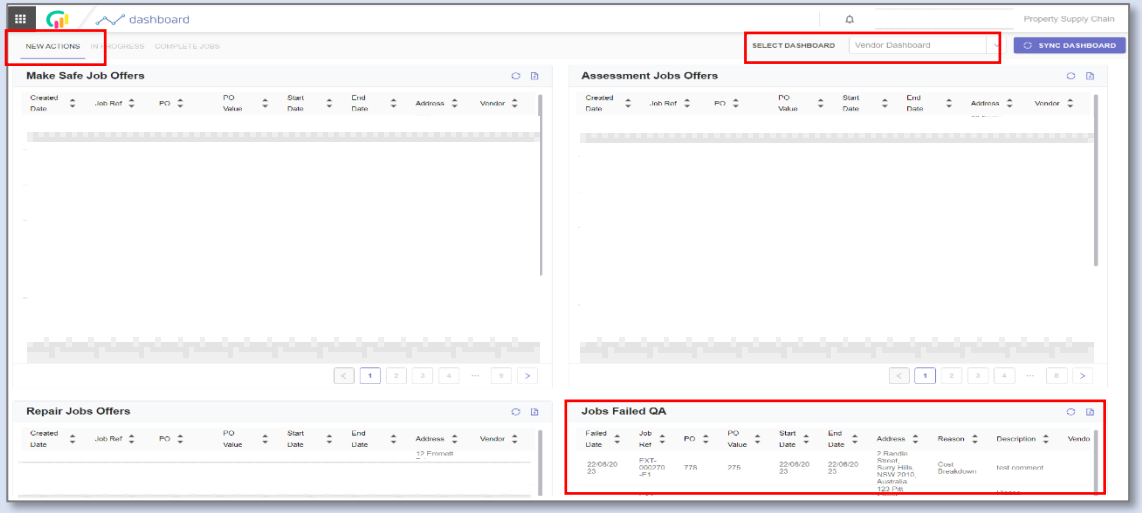
8	At the top of the pop-up window is the option to search for *Items*, *Bundles* or create a *New* item. In Mobile – tap on the Group name to expand the Add Items tab or tap on the ellipsis on the Group name and then select *Add Items.* **Best Practice:** It is best practice to start by selecting a bundle and then making the relevant adjustments to the scope by removing / adding individual line items.		
9	Add the required *items* or *bundles*. You can use the search field and enter key words. Select and click *Add Items* to complete.		
10	Where required, select the "SHOW ITEM NOTES" and add any line-item specific details. This will be visible externally to all parties.		
11	Review the scope of works created and update the *quantity*, *unit* or *PCPS* for each line item if required. **TIP:** Clicking the N/A on the line item will default the line-item quantity to the group (room) measurements. If it's a M2 item OR LM, each time you click it will show you the quatity for walls, floor/ceiling areas etc. N/A		

12	Click on *Remove Zero Items*. This will clear any line items that have a $0 total associated.		
13	Review scope for preliminary items. If required create a new group labelled as 'Prelims' e.g., Supervision, Insurances, etc.		
14	Review entire scope. Once all fields have been filled as required, click *Save* to save your changes.		
15	When you have filled out the quote, update the status of the quote to 'Published' by clicking the quote status button on the top right-hand side of the page and selecting 'Published' from the drop down.		
ⓘ	**Note:** Once published, you can still make changes to your scope by selecting the create button and select "New revision" this will change the quote status back to draft. Once all updates have been made you will than need to re-complete step 15 - publish. The status will than return to "Complete Pending QA".		
16	Select *Jump To* on the top left-hand side of the page (Bottom left in Mobile) to exit quote & return to the external job.		

B. Step by step – Resubmit a quote (&/quote) at 'QA Failed' status

#	Step Instruction	Desktop Image	Mobile Image
1	If works complete have failed QA, you will be notified by your job coordinator. The status of your job will appear as 'QA Failed'. Please refer to work instruction – Complete Reports (Trade) (Section e. Step by step – Resubmit a report & / or quote at 'QA Failed' status)		

ⓘ **Note**: This is also visible on your *Vendor Dashboard*:



ⓘ **Note**: You will be able to submit your draft invoice for the works completed but this will not be submitted for payment until QA has been approved by the estimator / repair coordinator / supervisor.