Complete quote

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

Α.	Step by step – Complete quote
В.	Step by step – Resubmit a quote (&/quote) at 'QA Failed' status5

A. Step by step – Complete quote

#	Step Instruction	Desktop Image	Mobile Image
1	In the relevant job, click on the <i>Assets</i> tab to see a quote in draft on the job.	OVERVIEW ACTIVITIES COMMUNICATIONS ASSETS	III 🖓 🍌 pulse
	TIP: You can use the <i>Type</i> filter and select 'Quote' from the drop down if you only want to see the quotes on the job. $-\bigcup_{=}^{1}$		Assets Assets
2	Click the <i>eye</i> icon next to the quote to open the quote in edit mode.		
3	This will open a new page in the quote's application.	III G UDTES	Constraint Research Resea

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4	Review the details in the <i>Quote Details</i> section.			
í	Note: Quote types where aspects of the that claim require ' <i>Cash Settlement'</i> 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 <i>Line Items</i> section, click <i>Add Group</i>, a new pop-up window will appear. a. Enter the name of the room or area name into the <i>Label</i> field. b. Enter the <i>length</i>, <i>width</i>, and <i>height</i> dimensions of the area. 		Image: Control of the second	
(i) Note: The <i>Category, Group Description</i> and <i>Markup Override (%)</i> are not used fields. Please ignore these fields.				
6	Click on <i>Add to Quote</i> at the top right-hand side of the pop up. The newly created group will now be visible in the <i>Line Items</i> section.	○ ADD TO QUOTE	⊘ ADD	
7	In the <i>Line Items</i> section, in the new <i>Group</i> created, click <i>Add Items</i> . A new pop-up window <i>Add Items to Group</i> will appear.	+ ADD ITEMS	Add Items to Group Bedicion + 42 Mon Model Rems to Group Bedicion + 42 Mon mass RANGLES NON Composition - 10 Month. - 10 - 10	





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8	At the top of the pop-up window is the option to search for <i>Items</i> , <i>Bundles</i> or create a <i>New</i> item.	ITEMS BUNCLES NEW	Control C
	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 <i>Add Items</i> .		Creag Actions Creage Actions Constrained in States Constrained in States 2 400 FUES 0 100 Constrained 0 100 Constrained
	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.		Infradov
9	Add the required <i>items</i> or <i>bundles</i> . You can use the search field and enter key words. Select and click <i>Add Items</i> to complete.	• ADD ITEMS	• ADD ITEMS
10	Where required, select the "SHOW ITEM NOTES" and add any line-item specific details. This will be visible externally to all parties.	2: COMPACT VIEW O ADD GROUP SHOW ITEM HOTES	
11	Review the scope of works created and update the <i>quantity</i> , <i>unit</i> or <i>PCPS</i> for each line item if required.		Line Items COMMETVER DISONTENENTS A
	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.		Emm Orgo Real Price Price Advances to Advances Advances to Ad











12	Click on <i>Remove Zero Items</i> . This will clear any line items that have a \$0 total associated.	REMOVE ZERO ITEMS V	Constructions Co	
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 <i>Save</i> to save your changes.	SAVE	SAVE	
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.	✓ ✓ Draft ✓ Draft ✓ Published	Image: Control of Control o	
í	(i) 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". (i) 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 <i>Jump To</i> on the top left-hand side of the page (Bottom left in Mobile) to exit quote & return to the external job.	Э ЈИМР ТО	JUMP TO	





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CW BBS Work Instruction - Complete quote (Trade) v1.1

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 coordinator. The status of your job will		QA Failed	QA Failed	
	Please refer to work instruction – Com e. Step by step – Resubmit a report & status)				
í	(i) Note: This is also visible on your Vendor Dashboard:				
			Property Supply Chain		
	Alke Safe Job Offers	SELECT DASHBOARD Vendor Deshboard ·			
	Created C Job Crief PD C PD C Start C Ind Date C Job Ref C PD C Write C Date Date Address Vonder C	Created Julo Ref C PO Blant Cind C Address	C Window C		
	Openand Dot PO New 1 End Address 2 Vendor 2 Date Job Ref 2 MO Vendor 3 Using 27 Promotifier 37 Promotifier	Jobs Failed QA Fride Advest Reason Fride Line - Mo PO Value Line End Address Reason C 2306/20 ZOTA - PTT 778 276 2206/20 2506/20 240000 Frida Address Reason C C	C D Demonphism © Wendo out communer		
(i)	Note : You will be able to submit your o	lraft invoice for the works comp	leted but this will not be submitted for	payment until OA has been	

approved by the estimator / repair coordinator / supervisor.





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