



CUSTOMER SERVICE

ESTIMATES: MANAGE AN ESTIMATE REQUEST

Provides guidance for locating and managing an Estimate Request.

GETTING STARTED

The **Request** screen is located on the **Home** Screen – for instructions on logging into Facilities Connect, please refer to the **Customer Service: FC Access and Home Screen** job aid.

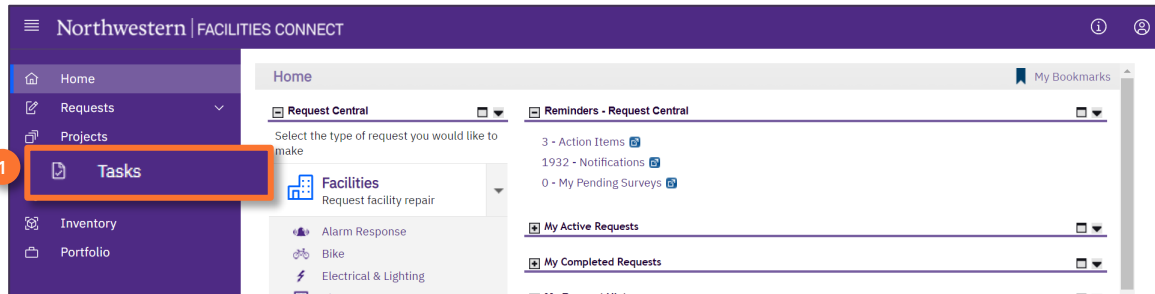
INFORMATION

Customer Service is responsible for receiving and routing **NU Facilities Estimate Requests**. Once an **Estimate Request** is received, Customer Service will review the request and route it to the appropriate workgroup(s) along with the Estimate Form.

DIRECTIONS:

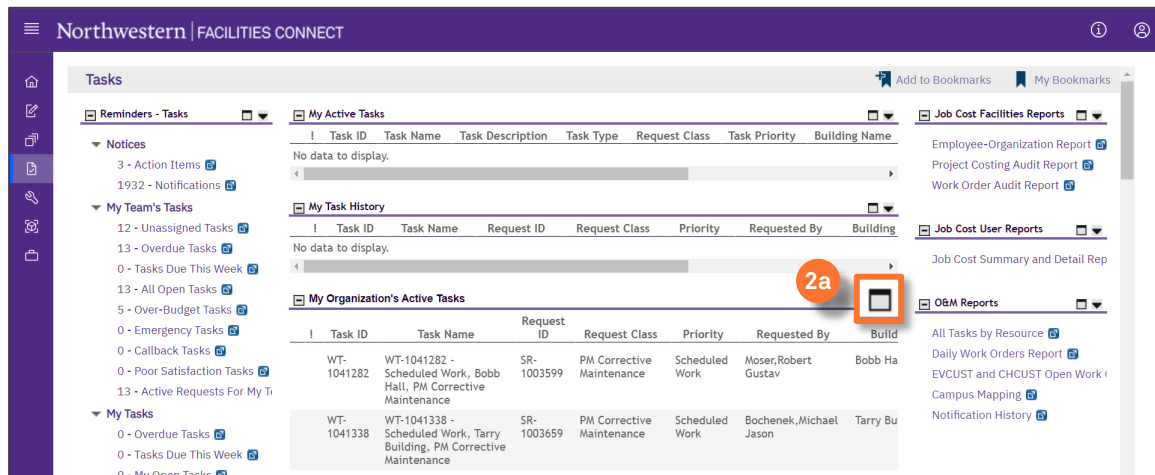
1 To locate existing Estimate Requests, begin on the Facilities Connect **Home Screen**:

1 Click on the **Tasks** tab.



2 Upon clicking, you will be taken to the **Tasks** screen:

2a Scroll to **My Organization's Active Tasks** and click the **Maximize** button.





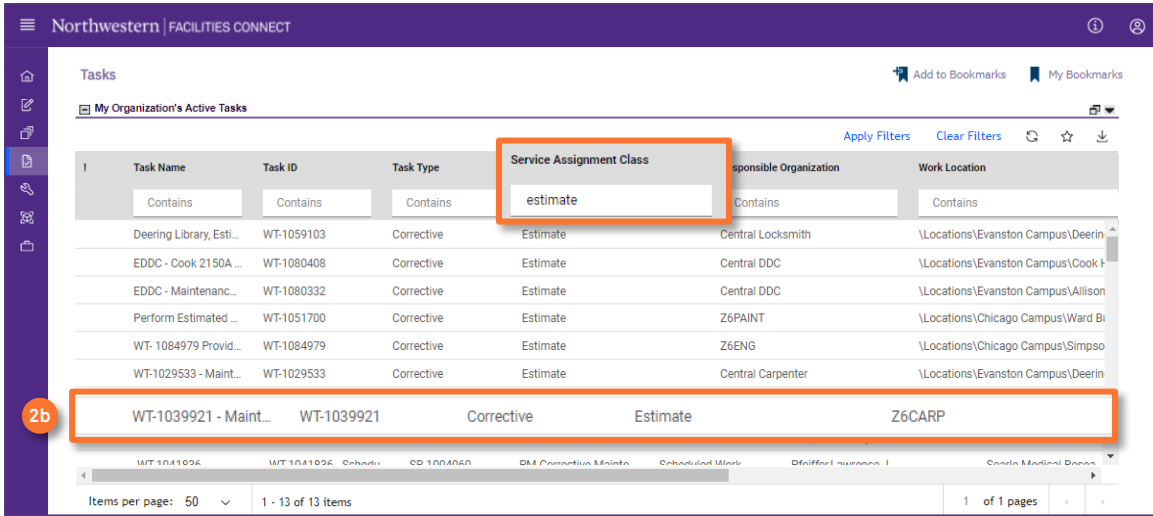
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2 Upon clicking, you will see the full screen view of **My Organization's Active Tasks**:

2b Locate and select a **Work Task** which contains **Estimate Request** in the Request Class field. Click anywhere on the **Work Task Record** to open.



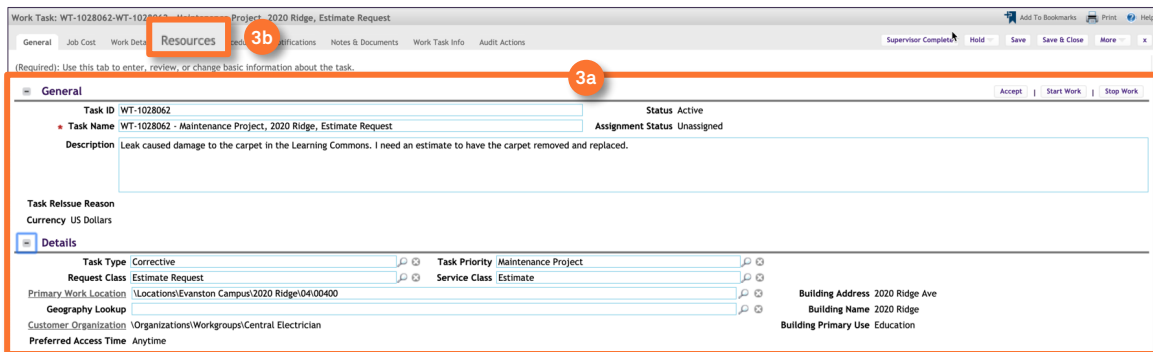
▼ TIP & TRICKS

Utilize the column headers and search bars to narrow your search. The quickest way to locate **Estimate Requests** is to search for an 'Estimate Request' in the **Request Class** column.

3 Upon clicking, the selected **Work Task (Estimate Request)** will open:

3a Review the details and description of the request to determine which trade(s) which should be involved in the estimate creation process.

3b Next, click on the **Resources** tab.





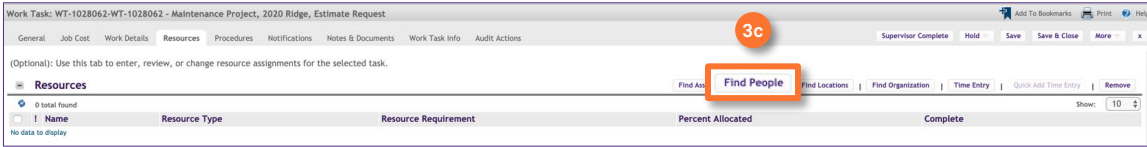
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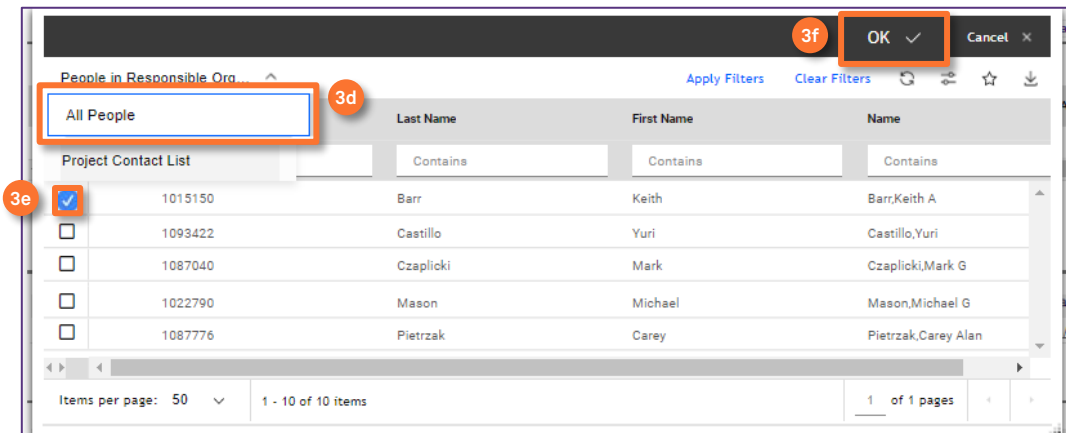
3 Upon clicking, the **Resources** tab will open:

3c In the **Resource** section, click on **Find People**.



The **Find People** pop-up window will appear:

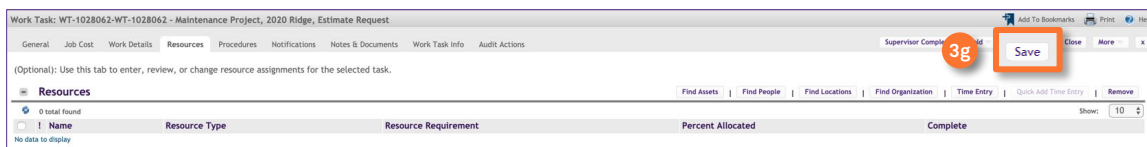
3d Toggle the **Related Reports** drop down menu and select **All People**.



3e Select the shop Supervisor(s) you wish to assign as a **Resource** for creating the **Estimate** in question by checking the box next to the name of the individual.

3f Click on the **Ok** button to assign. Repeat **3e** and **3f** as necessary for multiple individuals.

3g Click on the **Save** button to confirm the assignment(s).



▼ TIP & TRICKS

Utilize the column headers and search bars to narrow your search. Searching by first and last name, sorted by **All People** is most effective way to locate a resource.



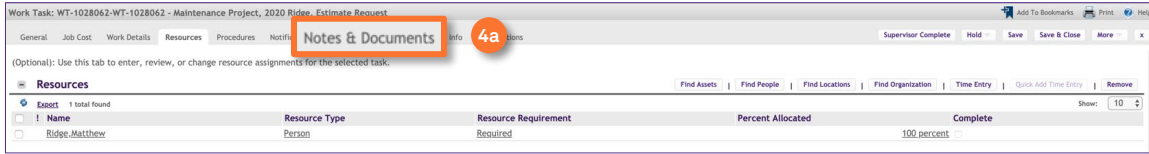
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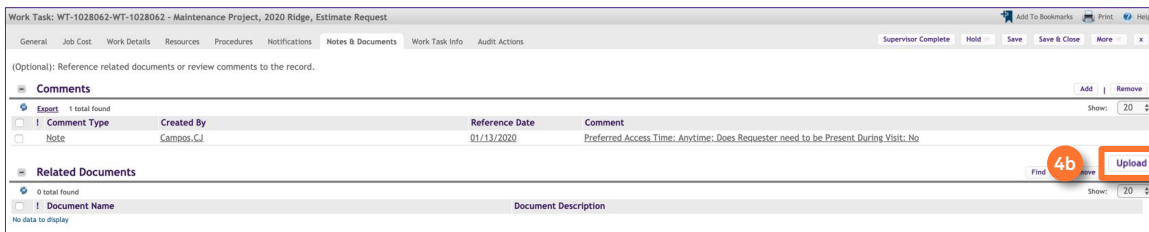
4 Next, upload the **Estimate Form** and any additional supporting documents to the **Work Task**.

4a To begin, click the **Note & Documents** tab.



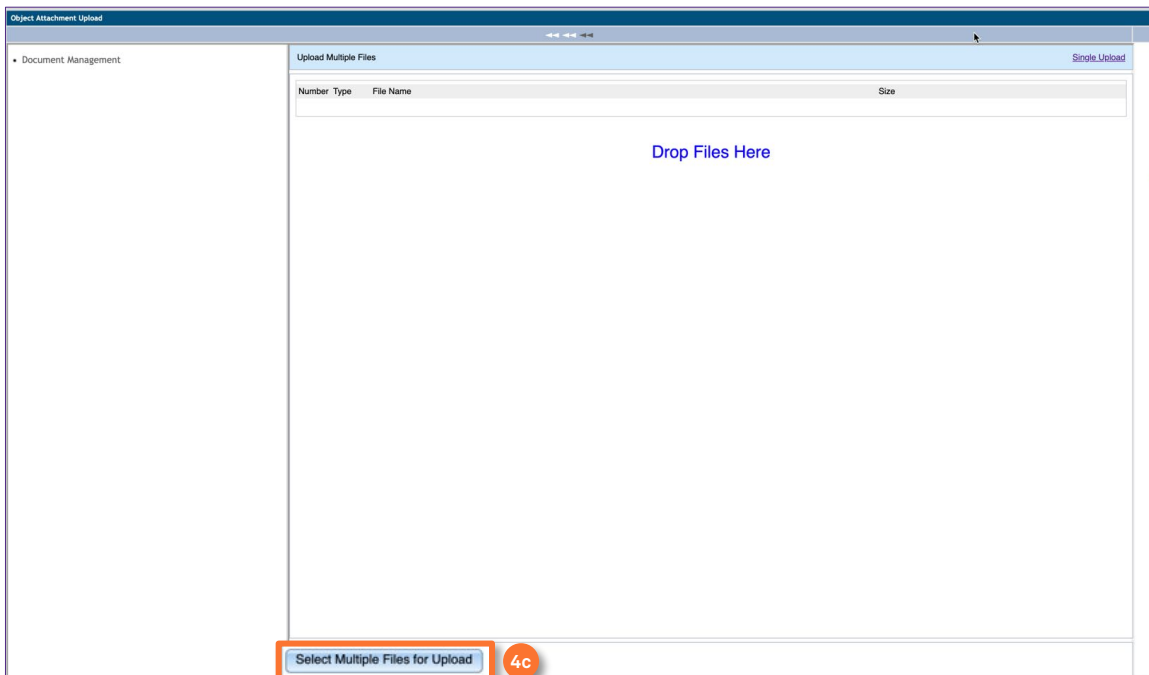
Upon clicking, the **Notes & Documents** tab will open:

4b Click the **Upload** button in the **Related Documents** section.



Object Attachment Upload pop-up will appear:

4b Click **Select Multiple Files for Upload** to add the **Estimate Form** and any other **Documents** from your computer.





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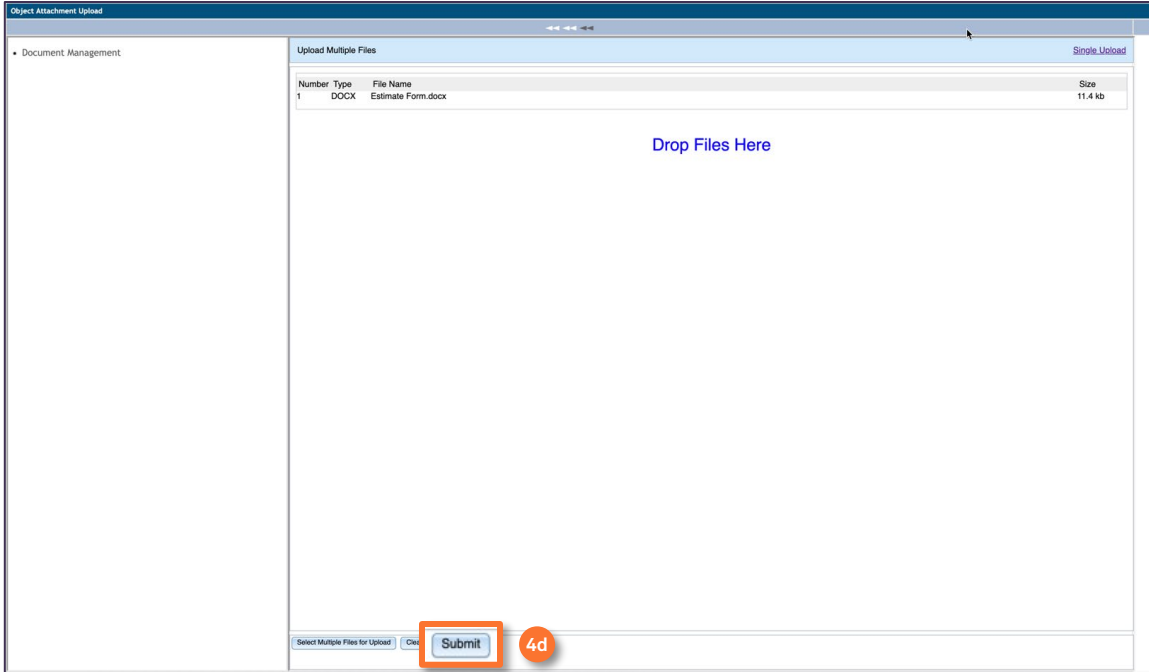
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4

Continued:

4d Click on **Submit** button to complete the upload.



5

Upon clicking, you will be returned to the **Work Task**. The added document(s) will now be viewable in the **Related Documents** section.

5 Click the **Save & Close** button.



▼ INFORMATION

Once the **Estimate Request** has been completed by the applicable shop(s), the **Estimate Request** will be returned to the customer for review and approval. If the customer chooses to proceed with the Estimate Work, a new Work Task will need to be created in the Perform Estimated Work Service Type.