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.

   ![Tasks Tab](image1)

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

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

   ![Maximize Button](image2)
Upon clicking, you will see the full screen view of My Organization's Active Tasks:

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.

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

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

Next, click on the Resources tab.
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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DIRECTIONS:

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

2. To begin, click the **Note & Documents** tab.

![Screenshot showing the Notes & Documents tab](image1)

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

3. Click the **Upload** button in the **Related Documents** section.

![Screenshot showing the Upload button](image2)

Object Attachment Upload pop-up will appear:

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

![Screenshot showing the Object Attachment Upload pop-up](image3)
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DIRECTIONS:

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.**