CUSTOMER SERVICE

ESTIMATES: MANAGE AN ESTIMATE REQUEST

Provides guidance for locating and managing an Estimate Request.

▼ GETTING STARTED

The Request tab is located on the Home Screen – for instructions on logging into Facilities Connect, please refer to the Access + Navigation: 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 tab:

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

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.

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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DIRECTIONS:

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

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

Find People pop-up window will appear:

3d Next, 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. Once located, check the box for the individual you wish to include.

**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.

3f Next, 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).
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DIRECTIONS:

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

   To begin, click the Note & Documents tab.

   Upon clicking, the Notes & Documents tab will open:

   Click the Upload button in the Related Documents section.

   Object Attachment Upload pop-up will appear:

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

Continued:

4d Click on Submit button to complete the upload.

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.