



Quote Management

Quick Reference Guide

Version 24.x
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Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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Overview

Quotes in M5 are bundled work requests to be quoted to a customer, approved by them, and then billed to them when the work is complete. These work requests can be for valid units or departments in M5.

It is important to note that each department can have its own rules to determine whether a given piece of work is subject to being quoted.

A quote serves as a “draft” work order in that it consists of a list of jobs with some overall header information, but the key difference is that it does not necessarily represent a single shop visit. A quote’s work requests can be split up over multiple work orders.

General Quote Process Flow



Typical workflow for a “successful” quote

Build Status

When a customer calls to request work to be done, the responsible M5 user creates a new quote using the Quote Main frame. M5 assigns a unique number to the quote.

With the shell of a quote created, the user then creates work requests corresponding to the necessary jobs to be done. This can be done using the link on Quote Main. Like a quote, a work request also has a status and a work request added to a build-status quote will also be in build status and cannot yet be added to a work order.

Quoted Status

Quote Main displays the sum of the work request estimate tab. To make a profit, the quote is typically not quoted at that value. Instead, the user enters a percentage markup and Quote Main calculates the quote as the estimates plus markup percentage. Users will also enter the following:

- **Quote Expiration Date:** After this date, the quote can no longer be approved and is effectively dead.
- **Billing Method:** “Actuals” or “Fixed bid”. If “Actuals”, the amount of the quote is only advisory and the customer will be billed according to the labor, part and commercial charges actually incurred, plus any markups associated with those individual charges. If “Fixed bid”, then the quoted amount is billed. A quote’s billing method overrides the department’s or unit’s usual billing code settings.
- **Account to Bill:** If the billing method is “Fixed bid”, this must be entered and the entire quote is billed to this account; if “Actuals”, it is optional and, if absent, the accounts charged will be those associated with the individual charges.

After these are set, and the quote has at least one work request, the user manually changes the quote to quoted status. (The quote may be saved in build status with this data filled in, but it does not become quoted until the user sets the status to reflect that.) A quoted-status quote can be printed for the customer’s approval.

When a quote is quoted, its work requests also become quoted. Quoted work requests cannot be added to work orders. Their estimates can be changed because all description-only part lines must be changed to have part numbers before the quote can be approved.

Approved Status

A quote requires one or more approvals to move it into Approved status. Approval criteria and rules are configured on the Department Main Quote Rules tab. For a unit-type quote, the unit’s owning department is used for approval criteria. For a department-type quote, the department that the quote is for is used.

Approvals are then received by using one of several methods. The options are in a hardcoded, dropdown list: phone, email, fax, verbal, and other. The M5 user handling the quote processing enters the approval information and after saving, the quote will update to Approved status.

Any work request associated with the quote are moved to Locked status, meaning they can have due dates set, be added to shop planner, or put on work orders are jobs.

Moving the quote into Approved status will also display the **Build Work Order From Quote** hyperlink on the Quote Main frame next to the Status and Expiration date boxes.

In-Progress Status

After the work request associated with an approved quote are added to a work order, the quote's status automatically updates to In-progress. (This status is also for reporting purposes).

Completed Status

When the work request jobs associated with a work order are marked either 'DON' or 'CAN' the quote status automatically updates to Completed.

Closed Status

A user changes the quote to closed when all charges have been made and the quote is ready to be billed. From that point on, no changes may be made.

Expired Status

The end-of-day batch program checks quoted quotes to see if the quote expiration date has passed. If so, the quote is changed to expired status and it cannot be changed in any way except for its quote expiration date. If that date is changed to today's date or later, the quote is changed back to quoted status. Work requests on expired quotes remain in quoted status.

Cancelled Status

As mentioned, a build quote can be deleted if it has only ever been in build status and if it has no work requests. Otherwise, a quote must be canceled. (Those in build status may also be canceled.) It cannot be canceled if the quote has work requests on jobs in other than canceled (job status "CAN") status. Canceling a quote also puts all its work requests in canceled status, if some work requests are to be retained, they should be dropped from the quote first.

In addition to disposing of unwanted quotes, this feature is also useful for creating templates. The user may create the work requests and estimates and other sample data and then cancel the quote, leaving something that may be cloned later.

Department Approval Rules

SAVEUNDOREFRESHDELETEFINDRELATED ▾

Department Main

Department Information
Department: Description: Status: ▾

+GeneralOrg HierarchyQuote RulesMotor PoolMarkup MatrixTax MatrixStd Job MatrixCustomers

Quote Information
Approval1 Title: Approval2 Title:

On the **Quote Rules** tab of the Department Main frame, you can designate up to two **Approval Titles** to be associated with the department record.

When a quote is created for either this department or any unit with this department as it's Using Department, this information will automatically populate on the quote's approval section.

- ! The **Quote Rule Information** section below the **Approval** information is related to separate functionality that does not pertain to the subject outlined in this document.

1. Quote Management Scenarios – Tutorials

Creating a Quote

The screenshot shows the 'Quote Main' form in a web application. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'MORE', and 'RELATED'. Below these is the 'Quote Main' title and a 'Quote' section. The 'Quote' section has a 'Number' field with a 'New Quote' button next to it, and a 'Description' field with 'Repairs - Accident'. Below these is a 'Unit' dropdown set to 'TB7000' and the unit name '2019 MDX 4X4 SUV'. The 'Quote Status' section has a 'Status' dropdown set to 'Build' and an 'Expiration Date' field. Below the form are tabs for 'Customer', 'General', 'Value', 'Work Requests/Jobs', and 'History'. There are two 'Approval' sections, each with 'Date', 'Method', 'Name', and 'Title' fields. The first approval has a title of 'APPROVER 1' and the second has a title of 'APPROVER 2'.

1. Select the **New Quote** button.
2. Enter a **Description** for the quote.
3. Choose **Unit** or **Department** from the dropdown.
4. Enter the corresponding entity number (unit no. or dept. no) or double-click in the field to select one from the List of Values (LoV).
5. The **Status** dropdown will default to Build.
6. **Approval** information will populate automatically based on the Department Main record for department quotes or, if the quote is for a unit, it will populate based on the unit's Using Department information.
7. Enter the necessary **Contact** information.
8. Select **SAVE** to create the new quote.

9. On the **General** tab, **Notes** and **Work Request Defaults** can be set.

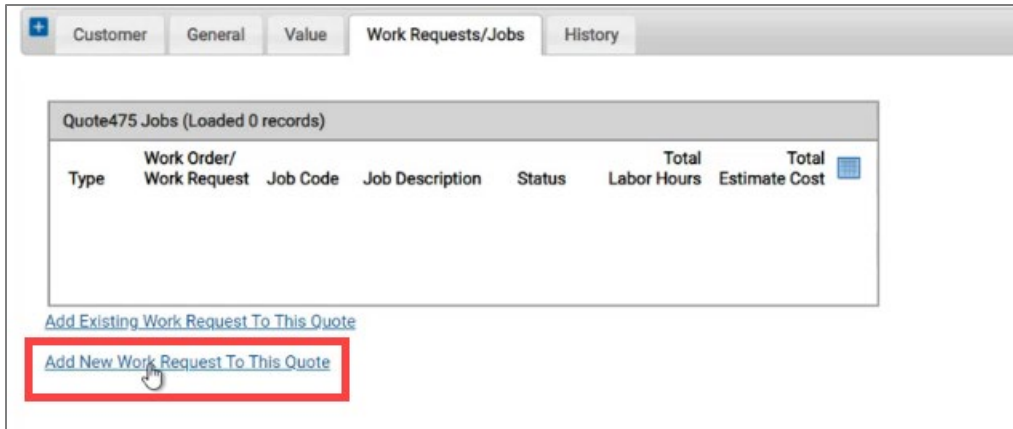
10. On the **Value** tab, select a **Bill Method** from the dropdown. **Note:** These settings override the department or unit's billing settings.

- a. Actual – Quote amount is only “advisory” and the customer will be billed according to actual labor, part, and commercial costs incurred plus any markups.
- b. Fixed – The quote amount is billed. Account to bill is then a required field.

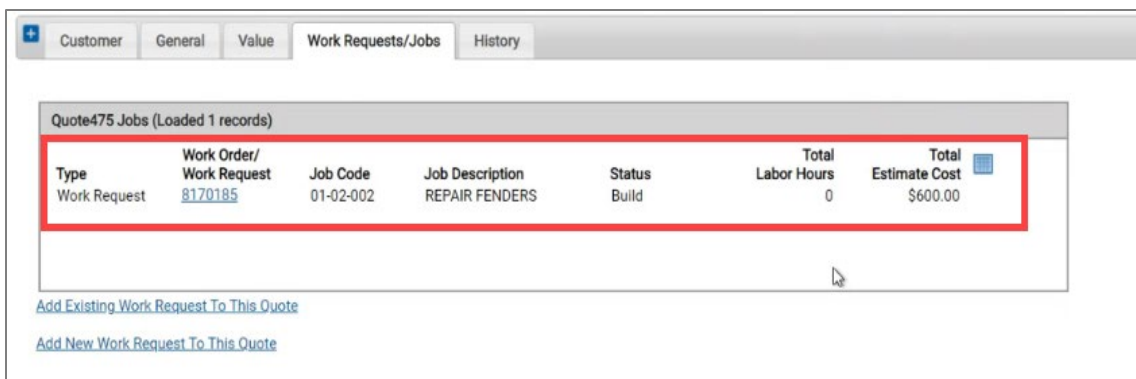
11. **Estimates** are pulled from Work Request information after added to the quote.

12. The **Markup** field is only editable when the method is set to Fixed.

13. The **Quote Value** field is read-only and updates automatically. This is the total value of the quote.



14. On the **Work Request** tab, select **Add New Work Request to this Quote**. This launches Work Request Main.
15. Follow the standard set of steps for creating a work request as necessary/according to business needs. After estimate data is entered, select the **SAVE** button. The system will save the work request, add it to the quote and return you to the Quote Main frame.



16. Repeat as necessary to add more work requests to the quote.
17. The **Value** tab will update with estimate values from the newly created work request.
18. To move the quote into Quoted status there needs to be work requests on the quote and an **Expiration Date** must be entered past which the quote is no longer valid.

The screenshot shows the 'Quote Main' form. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, MORE, and RELATED. Below these is the 'Quote Main' title. The form contains several fields: 'Number' (475), 'Description' (Repairs - Accident), 'Unit' (TB7000), and '2019 MDX 4X4 SUV'. The 'Quote Status' section is highlighted with a red box, showing 'Status' set to 'Quoted' and 'Expiration Date' set to '09/05/2021'. At the bottom, there are tabs for Customer, General, Value, Work Requests/Jobs, and History.

19. After entering an **Expiration Date**, selected Quoted from the **Status** dropdown, and select the **SAVE** button.

20. This will then open **Approval** information for editing on the **Customer** tab.

The screenshot shows the 'Customer' tab in the Quote Management system. It displays two approval sections, 'Approval 1' and 'Approval 2'. Each section has fields for 'Date', 'Method', 'Name', and 'Title'. The 'Title' field for both approvals is set to 'APPROVER 1' and 'APPROVER 2' respectively. The 'Date' field has a calendar icon next to it.

21. To move the quote into Approved status, **Approval** information must be entered based on the rules defined on the Department Main record for either the department itself or unit's Using Department.

⚠ Even if no rules are defined on the Department Main record, at least one set of Approval information must be entered here to update the quote status. There is no way to move the quote into approval status without doing so.

22. After the requisite **Approval** information is entered, select the **SAVE** button. The quote status will automatically update to Approved and the **Build Work Order From Quote** hyperlink will appear.

Quote Main

Quote
 Number: 475 Description: Repairs - Accident
 Unit: TB7000 2019 MDX 4X4 SUV

Quote Status
 Status: Approved Expiration Date: 09/05/2021 [Build Work Order From Quote](#)

+ Customer General Value Work Requests/Jobs History

Approval 1
 Date: 08/06/2021 Method: EMAIL
 Name: J. SMITH Title: APPROVER 1

Approval 2
 Date: 08/06/2021 Method: EMAIL
 Name: T. SMITH Title: APPROVER 2

23. Select the link to open the **Build Work Order From Quote** frame.

Build Work Order From Quote

Unit/Dept Type
 By Type:
 Unit:

Quote Information
 Quote Number: 475
 Unit/Dept Number: TB7000 2019 MDX 4X4 SUV

New Work Order
 Visit Reason: P PREVENTATIVE Manual Work Order Number:
 Work Order Start Date: 08/06/2021 10:18:40

24. Enter a **Visit Reason** and a **Start Date** for the new work order.

25. Select the **SAVE** button. You will be returned to the Quote Main frame.
26. The quote status will update to In-Progress.
27. Select the **Work Requests/Jobs** tab to view the new work order information for this quote.

Type	Work Order/ Work Request	Job Code	Job Description	Status	Total Labor Hours	Total Estimate Cost
Work Order	533118733	01-02-002	REPAIR FENDERS	WFA	0	\$600.00
Work Order	533118733	01-03-003	REPAIR METER ASSEMBLY	WFA	0	\$50.00
Work Request	8170185	01-02-002	REPAIR FENDERS	On Work Order	0	\$600.00
Work Request	8170186	01-03-003	REPAIR METER ASSEMBLY	On Work Order	0	\$50.00

28. You can select the **Work Order Number** to open Work Order Main.
29. After all jobs associated with the quote are marked DON, the quote status will update to Completed.

Quote Status

Status: Expiration Date: 09/05/2021

Type	Work Order/ Work Request	Job Code	Job Description	Status	Total Labor Hours
Work Order	533118733	01-02-002	REPAIR FENDERS	DON	0
Work Order	533118733	01-03-003	REPAIR METER ASSEMBLY	DON	0
Work Request	8170185	01-02-002	REPAIR FENDERS	On Work Order	0
Work Request	8170186	01-03-003	REPAIR METER ASSEMBLY	On Work Order	0

30. The quote can now be set to Closed and is ready to be billed.

Create Quote with Existing Work Requests

Quote Main

Quote Number: 476 Description: test

Unit: TB7001 2019 MDX 4X4 SUV

Quote Status: Status: Build Expiration Date:

Customer General Value **Work Requests/Jobs** History

Quote476 Jobs (Loaded 0 records)

Work Order/Type	Work Request	Job Code	Job Description	Status	Total Labor Hours	Total Estimate Cost
Add Existing Work Request To This Quote Add New Work Request To This Quote						

1. Repeat steps 1 through 13 as outlined above.
2. On the **Work Request/Jobs** tab, select the **Add Existing Work Requests to this Quote** hyperlink. This will launch the **Existing Work Request List** frame.

Existing Work Request List

Work Request List

Quote Number: 476 test Unit: TB7001 2019 MDX 4X4 SUV

Work Request List (Record 3 of 3)

Add	Job	Description	Quote No.	Visit Reason	Due Date	Earliest Date	Location
<input type="checkbox"/>	01-00-999	REPAIR FOR DISPOSAL		P	08/07/2021	08/07/2021	FM
<input checked="" type="checkbox"/>	02-02-002	INSPECT FENDERS		P	08/07/2021	08/07/2021	FM
<input checked="" type="checkbox"/>	02-14-007	INSPECT LICENSE CARRIER		P	08/07/2021	08/07/2021	FM

Press to submit the selection. (Shortcut key is ALT-S)

Submit Cancel


3. To add existing work requests from the list, select the checkbox in the **Add** column for each work request you want to add and then select **Submit** when finished.
4. After the existing work requests are added, continuing processing the quote as outlined above in steps 16 through 30.

Add Quote on Work Order Main

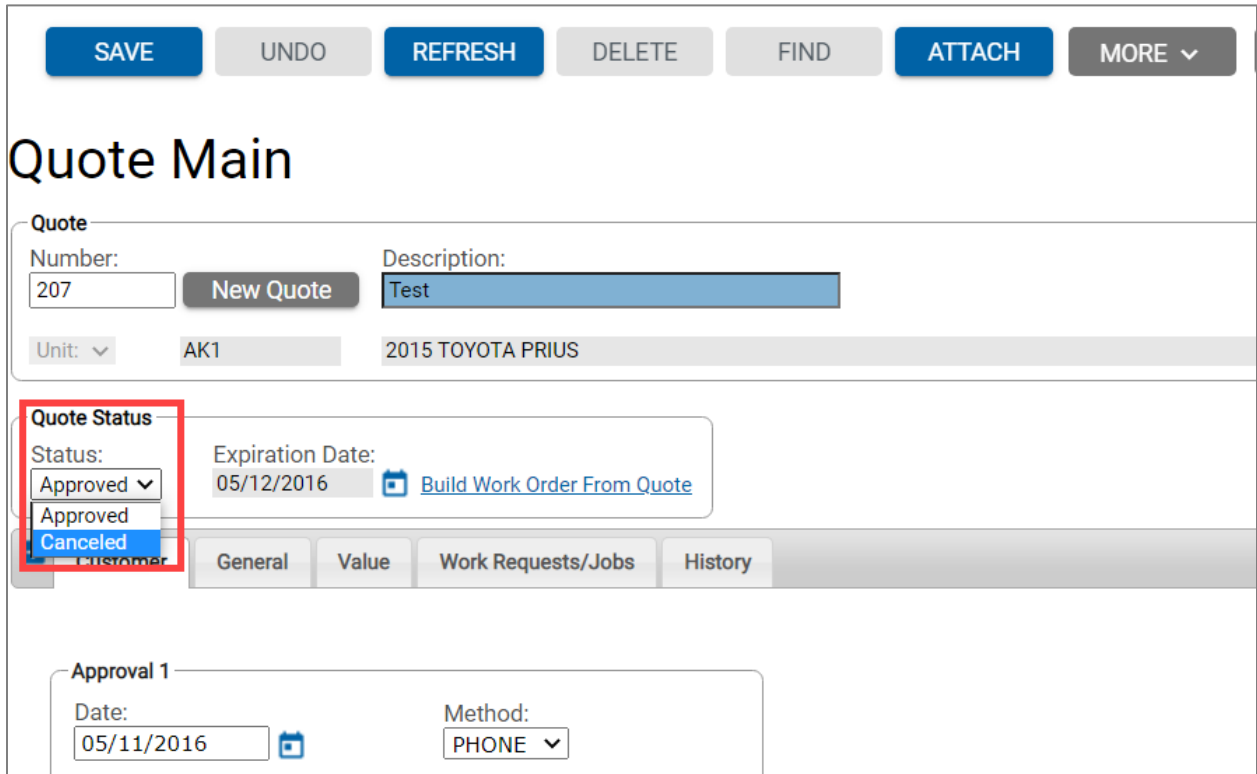
1. To add a quote to a work order directly by using Work Order Main, navigate to the Work Order Main frame and after entering the WO Number or entity value (Unit, Dept., or Component), select the valid quote work requests from the **Work Request List**.
2. If multiple work requests are on the quote, you will receive a prompt asking if you want to add all work requests associated with the quote. Select **Yes** to confirm the action.

Add	Job	Description	Quote No	Visit Reason	Defect #	Cannot be	Due Date	Ear
<input type="checkbox"/>	01-10-141						12/21/	
<input type="checkbox"/>	01-PM-021						10/18/	
<input checked="" type="checkbox"/>	02-PM-025						09/16/	
<input type="checkbox"/>	02-PM-027						09/16/	
<input type="checkbox"/>	04-50						01/31/	
<input type="checkbox"/>	05-PM-021						09/23/	
<input type="checkbox"/>	05-PM-022						10/18/	
<input type="checkbox"/>	MF-23-006						09/16/	

- Quote processing continues as normal from there after the work request have been added to the work order.

 Only quotes in Approved status will be visible on Work Order Main.

Cancel Quotes



The screenshot shows the 'Quote Main' interface. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and MORE. Below these is the 'Quote Main' title. The 'Quote' section contains fields for Number (207), Description (Test), and Unit (AK1). The 'Quote Status' section shows a dropdown menu with 'Approved' selected, and 'Canceled' is highlighted in blue. The 'Expiration Date' is 05/12/2016, and there is a 'Build Work Order From Quote' button. Below this are tabs for General, Value, Work Requests/Jobs, and History. The 'Approval 1' section shows a Date of 05/11/2016 and a Method of PHONE.

- To cancel a quote, you can simply select the Canceled status from the **Status** dropdown menu on Quote Main.
- When finished, select the **SAVE** button to update the status.
- All work request associated with the quote are also cancelled.

2. Quote Progress

SAVE
UNDO
REFRESH
DELETE
FIND

Quote Progress

Selection Criteria

Unit:

Quote Description: Expiration Date:

Quote No.: Needed between: days ago and: days from now

Status:

All:

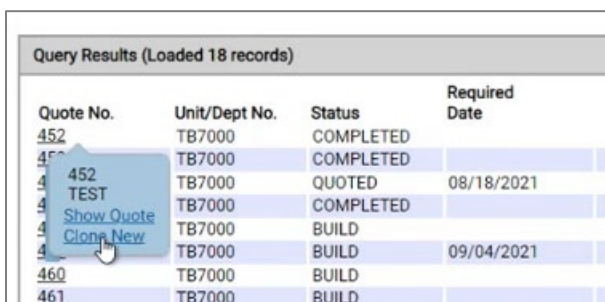
Query Results (Loaded 321 records)

Quote No.	Unit/Dept No.	Status	Required Date	Estimate Total	Total Expenditures	Current Ratio	Location
101	ADR1	COMPLETED		\$0.00	\$396.90	0	FRED
103	ADR2	COMPLETED		\$348.25	\$0.00	0	FRED
104	ADR3	APPROVED		\$1,249.30		0	
105	ADR3	CANCELED		\$598.25		0	
106	ADR4	CANCELED		\$598.25		0	
107	ADR5	BUILD		\$598.25		0	
108	ADR6	BUILD		\$0.00		0	
109	ADR18	BUILD		\$449.05		0	
110	2309	CANCELED		\$2,056.65		0	
111	ADR15	CANCELED		\$1,728.35	\$0.00	0	

The Quote Progress frame is a query frame that allows you to review quote data in the M5 system.

To run a query:

1. Enter selection criteria. At least one filter must be used.
2. Select the **Retrieve** button to display you results.
3. You can hover over the **Quote No.** and choose from one of two options:



- a. Show Quote – Launches Quote Main.
 - b. Clone New – Launches Quote Copy (must be completed, closed, or cancelled to copy).
4. To run a new query, select the **Clear** button to remove your selection criteria then enter new filters and run the query again.

3. Quote Copy

SAVE UNDO REFRESH DELETE FIND RELATED ▾

Quote Copy

Existing Source

Source: Closed Work Order: ▾ [] Description: []

Existing Unit/Dept

Number: [] Unit: ▾ []

To copy a quote:

- ⚠ Quotes must be in completed, closed, or cancelled status in order to be available on this frame.
1. Choose a **Source** from the dropdown menu. Valid options are: Closed Work Order and Old Quote.
 2. Enter the work order number or quote number depending on your selection in the **Source** dropdown. You can also double-click in the field to select one from the List of Values (LoV).
 3. In the **Existing Unit/Dept** section select the valid Unit or Department for which you want to copy this quote.
 4. Select the **SAVE** button.
 5. This launches Quote Main where you can continue building/processing the copied quote as needed.

4. Quote Report

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH

MORE ▾

RELATED ▾

Quote Report

Quote Main

Quote

Number: New Quote Description:

Unit:

Quote Status

Status: Expiration Date:

There is a printable quote report available by selecting the **MORE** options dropdown on Quote Main. Alternatively, the **Printer** icon may display depending on user profile settings.

Quotation

Fleet Services

FM Parking Location

Quote Number:	462	Requested By:	TOM
Date:	8/5/2021	Phone:	(610) 555-5555
Expiration Date:	09/04/2021	Email:	FLEET@FLEETSERVICES.NET
Prepared By:	<input type="text" value=""/>		
	(+1) 610--225		
Unit / Department:	TB7000 - 2019 MDX 4X4 SUV		
Description:	Accident - Multiple Jobs		

Item	Job code	Job Description	Priority	Labor Cost	Part Cost	Comm Cost	Total Cost
1	01-14-002	REPAIR BUMPERS & ATTACHING PART	9	\$600.00	\$40.00	\$0.00	\$640.00
2	05-14-001	PERFORM FRAME ASSEMBLY	9	\$750.00	\$0.00	\$0.00	\$750.00

TOTAL QUOTE AMOUNT: \$1,390.00 **This is an estimate of your bill, the actual bill may vary**

Notes: Accident:
 -needs new bumpers
 -paint job
 -windshield replaced
 -tires replaced

Updates

Release	Section	Description
23.2	All sections	Applied miscellaneous writing style updates throughout the document.