

WD WORKDASH®

WorkDash Instruction

Create Quote

1. Purpose and Scope

To help organise and visualise the Job Quotation Process.

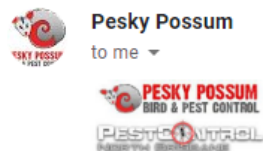
2. Process Details

This procedure includes the process of filing for a Job Quotation.

2.1 Job Assigned to You

Job-11504 has been assigned to you. - An email notification with the job details and specifications will be sent for quotation.

Job-11504 has been assigned to you.



2.2 Accept Job

Select "Accept job" for the details to be automatically added to the WorkDash system.



Contact us immediately if you are unable to detach or download your PDF attachment. Thank you

Pesky Possum | Contact us: 1300 767 786 or info@peskypossum.com.au | Powered by WorkDash

2.3 Access Job

Log in to WorkDash and select Jobs > All Jobs and search for the Job number.

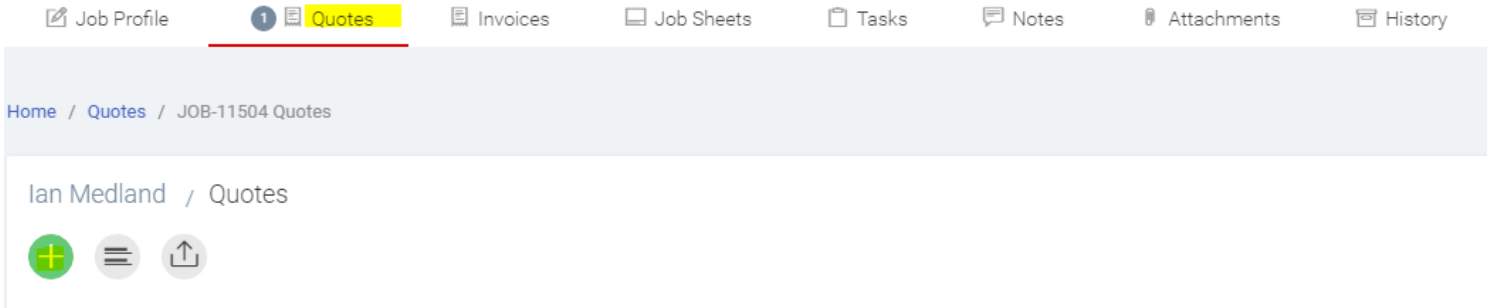
Showing 1 to 1 of 1 entries (filtered from 11,185 total entries)

Job No	Quote No	Customer	Contact	Job Total	Job Date	Technicians	Assets	Tags	Job Progress	Created Date	Actions
11504	2640	IM		\$1,232.00		Darren Hobbins		PP- Bird - Proofing	Quoted 03/11/2020 06:02 am Darren Hobbins (Tech) - Accepted	02/11/2020 04:15 pm	Actions

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Revision: 1	Approved By: Managing Director	Printed:	

2.4 Create Quote

Once in the Job Profile, go to Quotes > Create Quotes.



2.5 Create Quote

Attach the needed Job descriptions and requirements to Additional Notes and Save once done.

Additional Notes



Bird Proofing Details

Inclusions

- 3 Yr Warranty on bird proofing
- Galvanised & UV PVC coated wire proofing mesh
- Plastic fasteners (no screws)
- Height Access via industrial rope access/ ladder
- All labour and materials to complete works
- High Pressure Clean of Solar Panels including roof area under and around solar panels (included in quote)

Customer Requirements

- Items around house to be cleared/ protected from falling debris and organic material
- Solar panels to be turned off during works
- Windows and doors to be closed during cleaning works

Include Line Items Include Comments

Save

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2.6 Create Quote

2.7 Add all needed Job Quotations, Save as Draft for rechecking or Save and Submit once all the details are confirmed

Item	Qty	Account Code	Cost Price	Markup %	Sell Price	GST	Disc %	Total
Bird Proof Solar Panels	1.00	881	\$672.00	36.90%	\$920.00	10.00		\$920.00
Clean Solar Panels	1.00	881	\$55.00	127.27%	\$125.00	10.00		\$125.00
Clear Roofs and Gutt...	1.00	881	\$140.00	89.29%	\$265.00	10.00		\$265.00

[+ Add Item](#)

Sub Total	\$1,310.00
GST	\$131.00
Total (inc GST)	\$1,441.00

[Cancel](#)
[Save as Draft](#)
[Save and Submit](#)

2.8 Approval

2.9 Job Quotation will be sent directly to the client for their approval.

Status	Date Quoted	Expiry Date	Quote Type
Waiting for approval	03/11/2020	03/12/2020	Normal

Item	Qty	Account Code	Cost Price	Margin %	Sell Price	GST	Disc %	Total
Bird Proof 23x Solar Panels	1.00	41209	740.00	25.63	995.00	10.00		\$995.00
Clean Solar Panels	1.00	41209	55.00	55.00	125.00	10.00		\$125.00

Sub Total	\$1,120.00
GST	\$112.00
Total (inc GST)	\$1,232.00

2.10 Schedule

2.11 Once approved, send the email quotation to the technician to confirm the available schedule.

Hi Caio,

Please confirm the date and time for this job.

Job-11360

Date TBC

[5 Rotorua Court, Aspley 4034 QLD](#)

Pigeon Proof Solar Panels (24 panels)

Clean Solar Panels

Clean Roof and Gutters



2.12 Schedule

2.13 Send the confirmed schedule details to Julieanne for booking.

On Mon, 26 Oct 2020 at 09:53, [redacted] wrote:

Darren,

Can you book it for 3rd of November please Around 14:00-15:00.

Kindest Regards

Caio



[redacted]
Hi J,

Can you book it for 3rd of November please Around 14:00-15:00.

Cheers,

B.