Axis Portal™

TR Estimates
User Manual

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About Estimates

Tenants can request Estimates when submitting a service request via a Tenant Services Interface (TSI). Administrators can create Estimates in response to requests made via TSI, telephone or e-mail. The Property Management Office may also choose to create Estimates proactively in order to inform Tenants of unusual charges associated with their requests. Estimates can be formulated by means of pre-configured services if the work to be done corresponds to existing services that are provided for the property.

The main home page displays both created and approved estimates for Work Orders. Work Orders for which an estimate has been requested are displayed on the Estimates list under Tenant Request.

The history of Estimates is tracked and once approved, Estimate line items are automatically copied into the Work Order in the Services section. Estimates can also be printed when a Tenant wishes to provide a signature of approval on a hard-copy.

The Estimates feature is activated by Axis Portal at the request of your Company.

Creating Estimates

If your company provides a TSI for Tenants to submit Requests, Tenants may request Estimates via the TSI. These requests for Estimates are displayed on the Home Page with a red E icon, indicating that an Estimate is required.

Requesting Estimates using the TSI

1. When creating a new request, select the checkbox next to **Estimate Required**?
2. If a request is already present and an estimate is needed, click **All Requests** and open the request.
3. Click **Request Estimate**. The estimate is now recorded on the request and the work order is displayed on the Tenant Request Estimates list in Axis Portal.

Alternatively, Tenants may call, e-mail or otherwise request Estimates for their Service Requests.

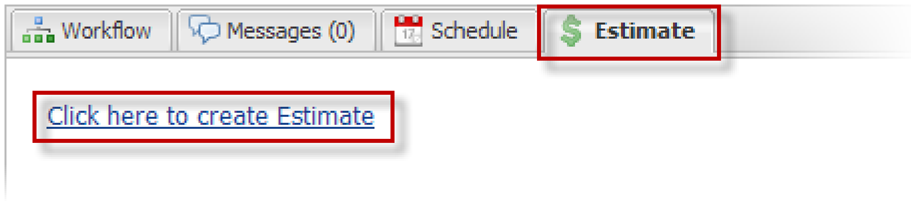
Creating an estimate in Axis Portal based on a Tenant Request

1. Open the desired TR Work Order. If a TR work order has not yet been created, see the section **Adding a Work Order** before proceeding.

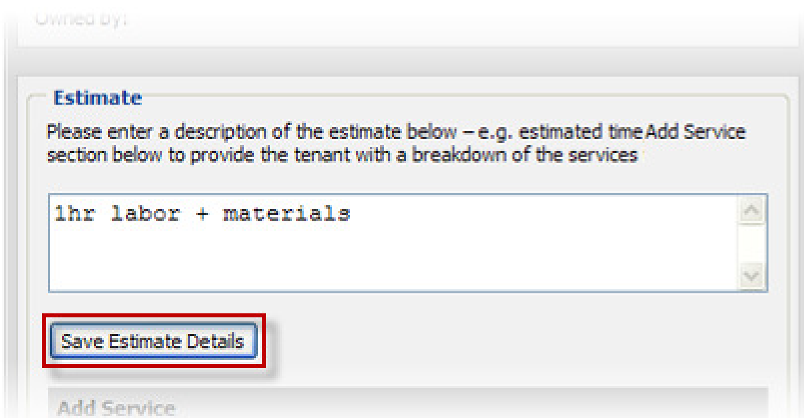
Notes:

- When attempting to create an estimate form a work order created from within Axis Portal, the Work Order must have the Tenant Contact assigned prior to the creation of the work order; otherwise, the estimate cannot be sent.
- Estimates should not be created for proactive work orders (work orders with requested by employee checked) because at present, estimates only apply to tenant-initiated requests that may (or may not) become billable. An estimate that is requested on a work order can be found in the TR work order Estimates list.

2. Click the **Estimate** tab, then on **Click here to create Estimate**.



3. Enter the description of the estimate in the text window (cost, time, details etc.)
4. Click **Save Estimate Details**.

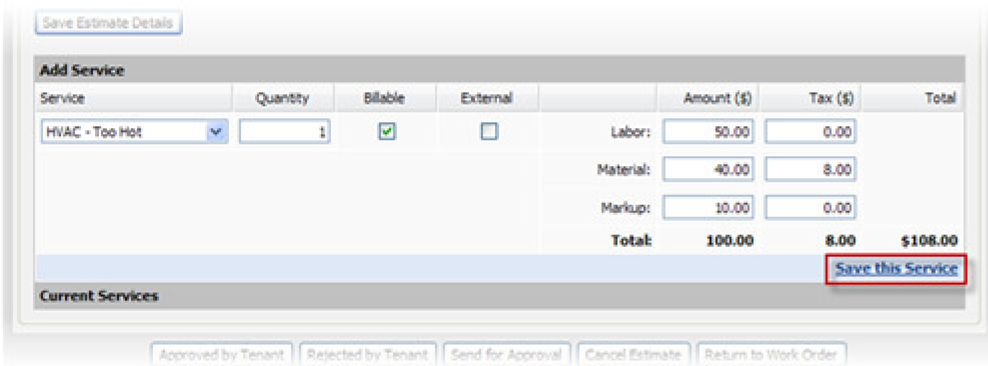


5. You can also describe the estimate by adding existing Services in the Add Service section. Services are pre-configured work line items that can be added to the Estimate, to reflect the work that will be done along with the associated cost.

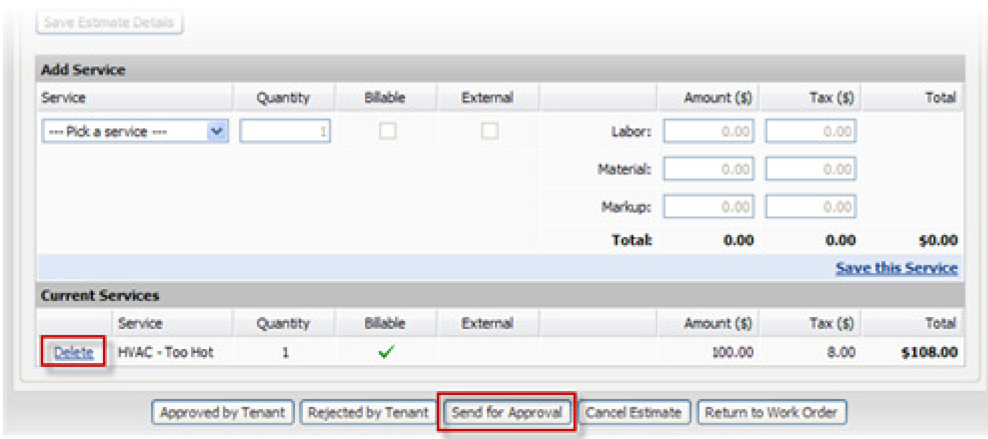
Note:

- Services must have the Billable flag (as shown below) enabled, otherwise the Work Order will not be billable and the user will have to recreate the work order.

6. When you are done adding a service, Click **Save this Service**.



7. If you want to delete any added services, click **Delete** next to the service in the list.
8. After you complete the Estimate information, click **Send for Approval**.



9. The new request is displayed in the **Estimates list**.
   - The Estimate is then sent to the Tenant, or communicated by telephone, by e-mail, or printed for the Tenant's approval.
   - The Tenant can approve the Estimate via TSI or inform the Administrator verbally, by e-mail, or relay the printed approval back.

Approving Estimates

When Estimates are submitted via the TSI, the Tenant is notified via e-mail with the Estimate information. The Tenant has the choice to either Approve or Reject the Estimate at this point.

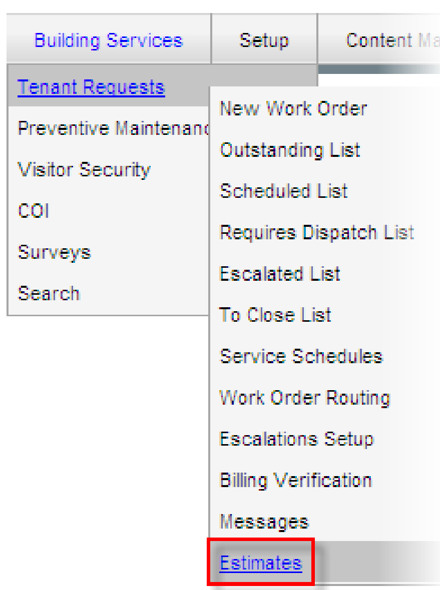
Approving an Estimate from the TSI

1. Click **All Requests** and open the request.
2. Select **Approve Estimate**, and enter the notes as required. Indicate the time requirements.
3. Click **Save my Decision**.
4. Approved Estimates are displayed on the Estimates list.

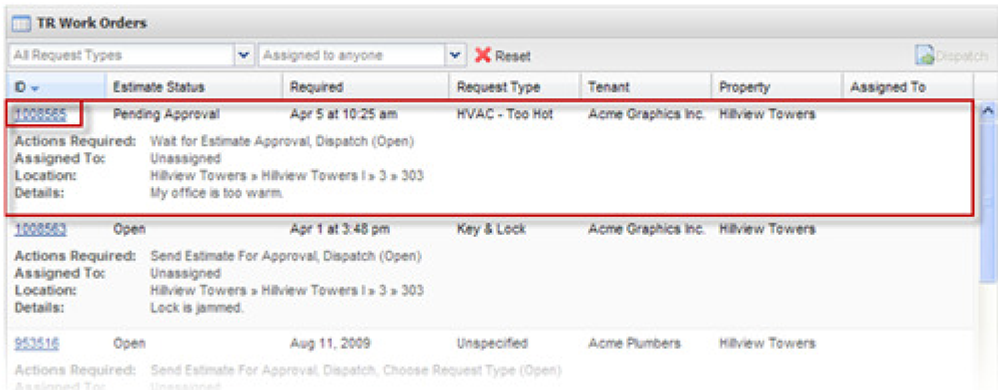
Alternatively, Tenants may call in requests for Estimates, or may require a printed estimate. These Estimates are updated by Administrators by marking the Estimate Approved and entering any associated information directly in Axis Portal.

Approving Estimates using Axis Portal

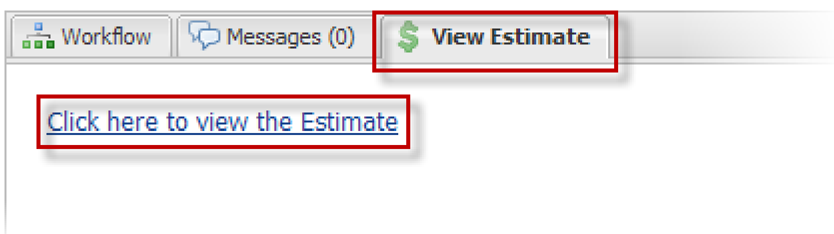
1. Click *Control Panel > Building Services > Tenant Requests > Estimates.*



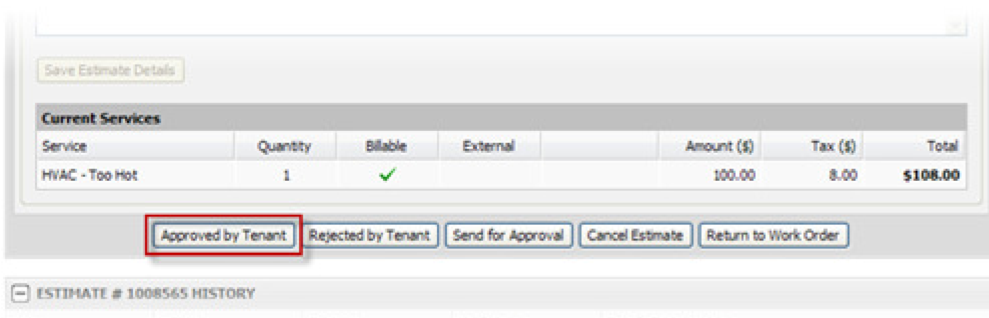
2. Locate the work order estimate to approve from the list, then open the work order by either double-clicking on the row, or clicking on the work order ID number.



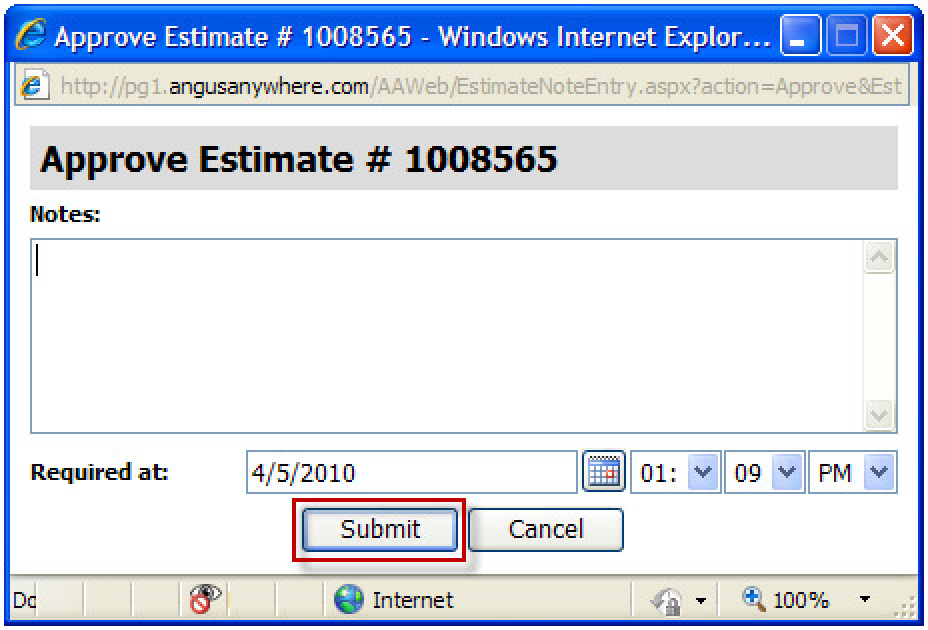
3. Click the **View Estimate** tab, then on Click here to view the Estimate. The estimate is displayed.



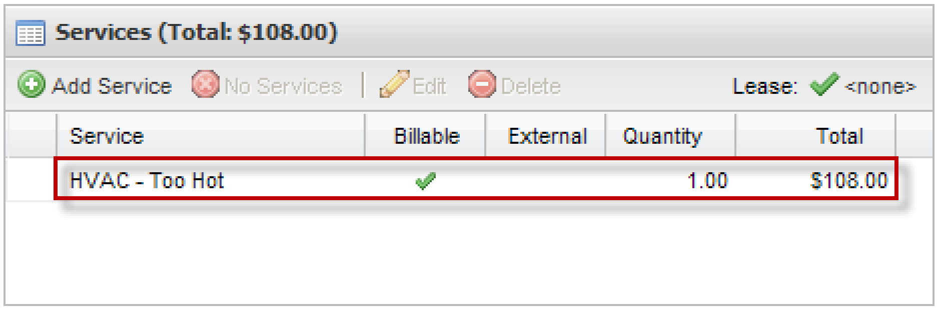
4. At the Estimate screen, click **Approved by Tenant**. A window will popup where you can enter any approval notes communicated by the Tenant.



5. You may want to enter information such as who approved the estimate, whether it was approved by phone, e-mail or in-person, or if the Estimate was printed and approved with a signature.
6. Click **Submit**.



7. Now that the Estimate is approved, its status in the Estimates list will be marked as Approved. all estimate line items are automatically copied into the work order in the Services section, as shown below.



Rejecting Estimates

When Estimates are submitted via a TSI, the Tenant is notified via e-mail with the Estimate information. The Tenant has the choice to Reject the Estimate at this point.

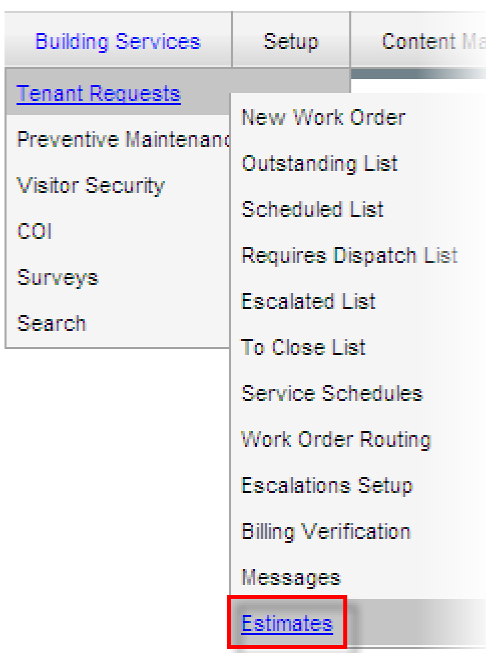
Rejecting an Estimate from the TSI

1. Click **All Requests** and open the request.
2. Select **Reject Estimate**, and enter the notes as required.
3. Click **Save my Decision**. This cancels the request and indicates no work will be done.

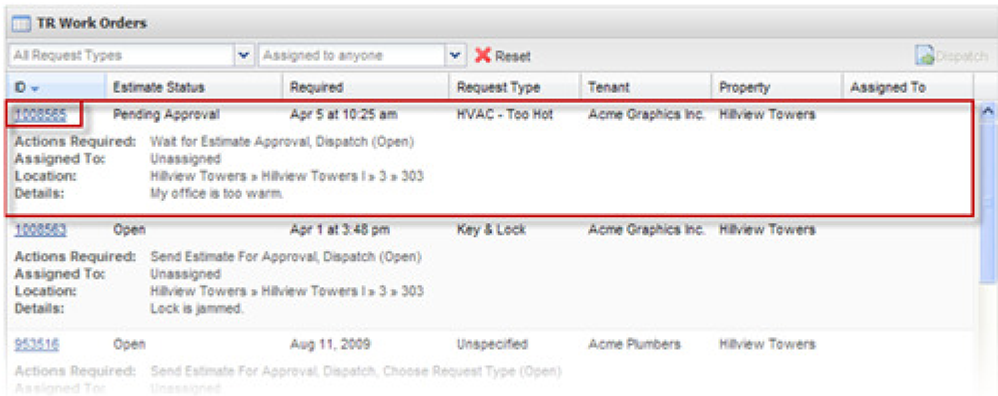
Alternatively, the Tenant may advise the Property Management Office via the TSI, telephone or in writing that they do not accept the Estimate. In this case an Administrator can Reject the Estimate in Axis Portal.

Rejecting an Estimate in Axis Portal

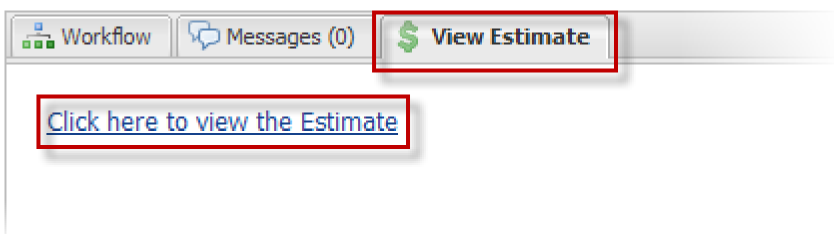
1. Click *Control Panel > Building Services > Tenant Requests > Estimates.*



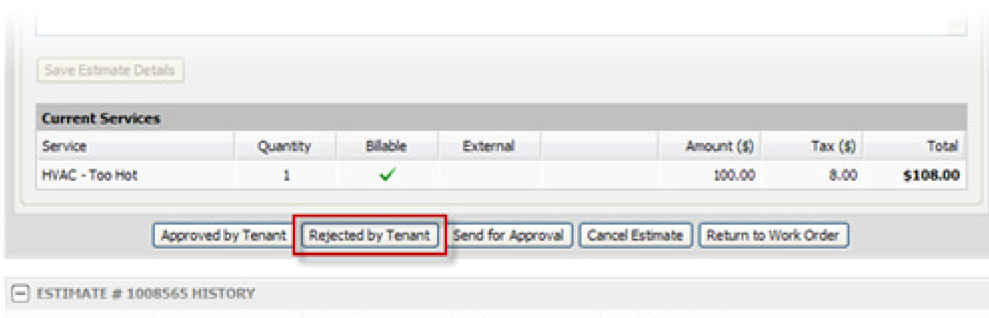
2. Locate the work order estimate to reject from the list, then open the work order by either double-clicking on the row, or clicking on the work order ID number.



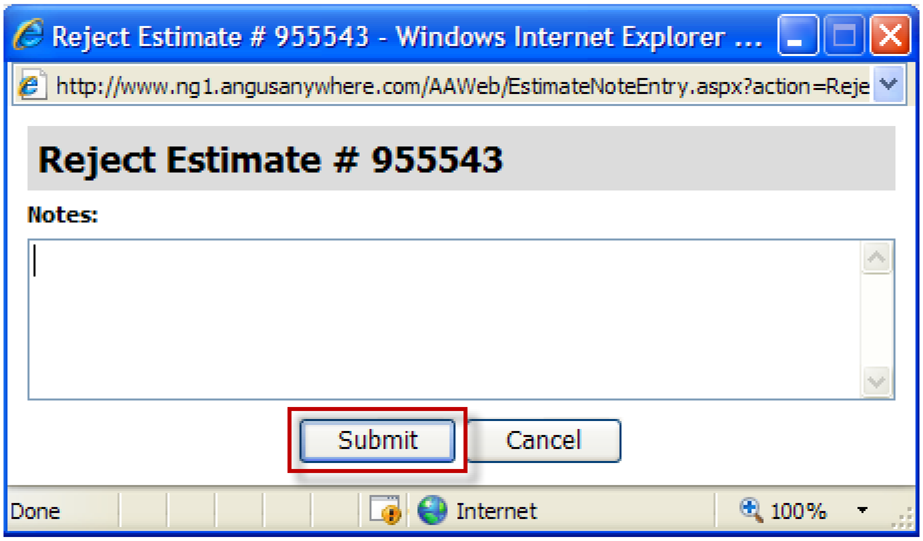
3. Click the **View Estimate** tab, then on **Click here to view the Estimate**. The estimate is displayed.



4. At the Estimate screen, click **Rejected by Tenant**. A window will popup where you can enter any rejection notes communicated by the Tenant.

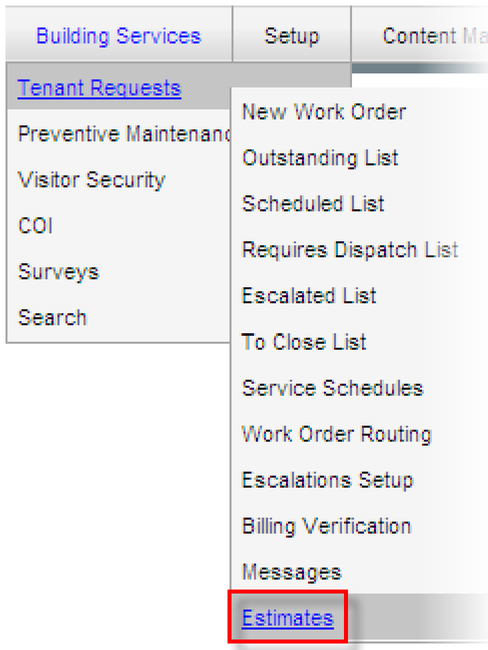


5. Click **Submit**. The estimate has now been rejected.

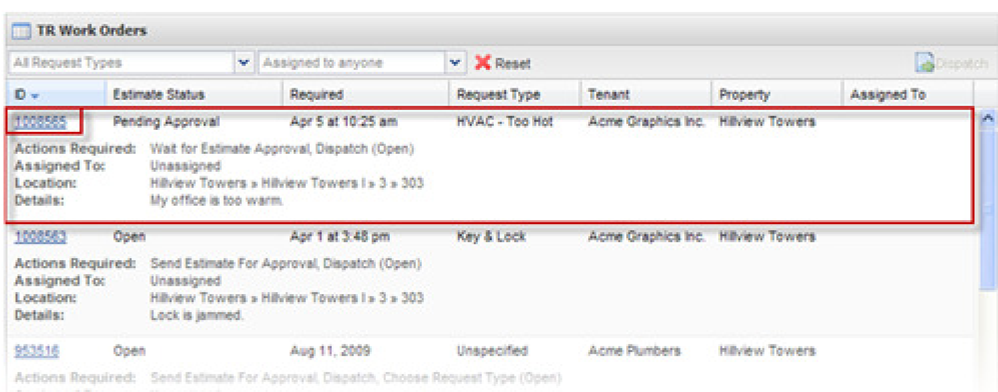

Reject Estimate # 955543 - Windows Internet Explorer ...
http://www.ng1.angusanywhere.com/AAWeb/EstimateNoteEntry.aspx?action=Reje
Reject Estimate # 955543
Notes:
Submit
Cancel
Done
Internet
100%

Cancelling Estimates

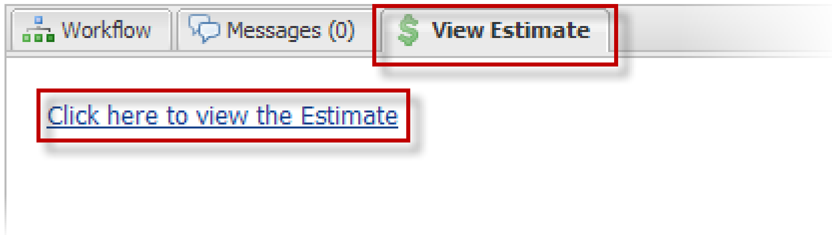
1. Click *Control Panel > Building Services > Tenant Requests > Estimates.*



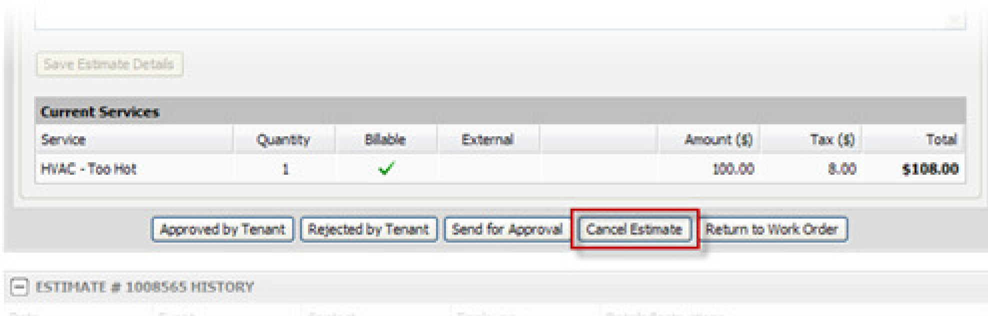
2. Locate the work order estimate to cancel from the list, then open the work order by either double-clicking on the row, or clicking on the work order ID number.



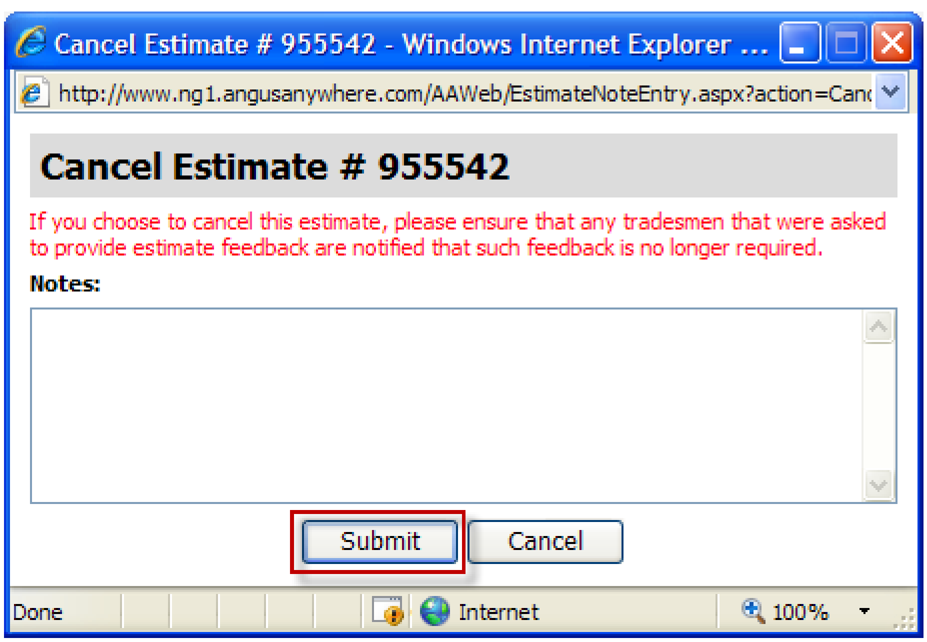
3. Click the **View Estimate** tab, then on **Click here to view the Estimate**. The estimate is displayed.



4. At the Estimate screen, click **Cancel Estimate**. A window will popup where you can enter any cancellation notes.

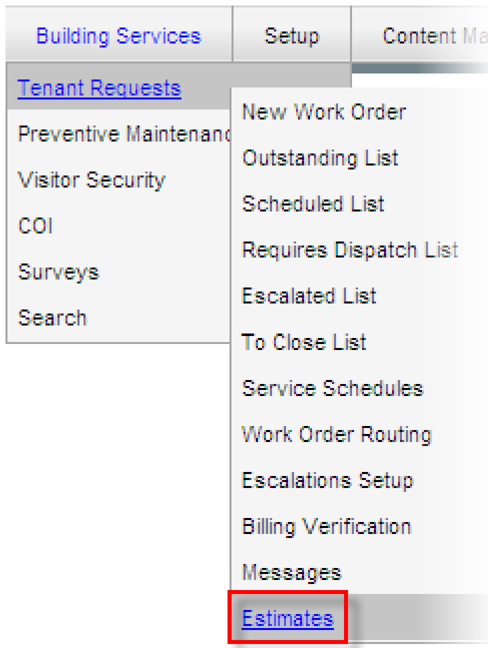


5. Click **Submit**. The estimate has now been rejected. This does not affect the Work Order creation process in any way. A link to the cancelled estimate will be displayed under the **View Estimate** tab.

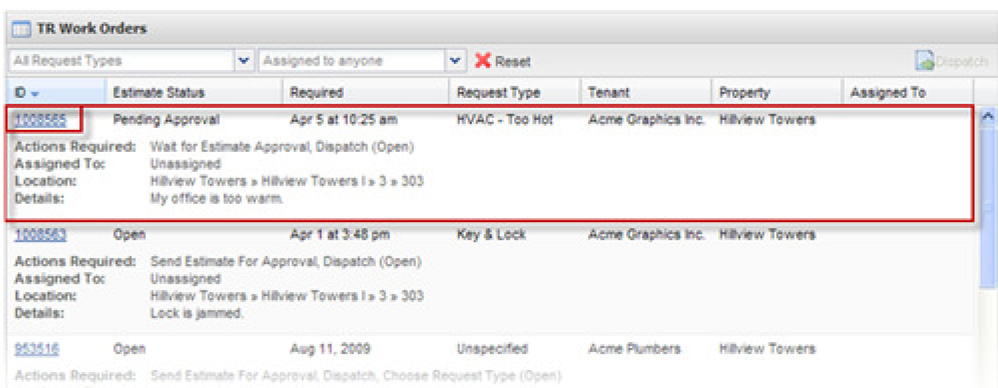


Printing Estimates

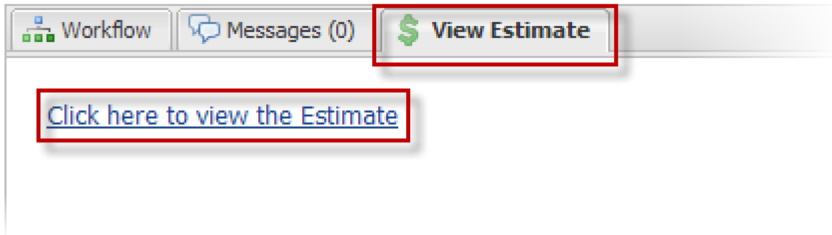
1. Click *Control Panel > Building Services > Tenant Requests > Estimates.*



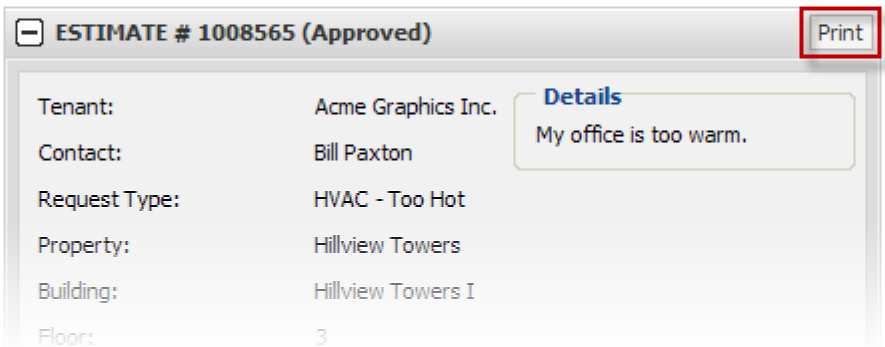
2. Locate the work order estimate to approve from the list, then open the work order by either double-clicking on the row, or clicking on the work order ID number.



3. Click the **View Estimate** tab, then on **Click here to view the Estimate**. The estimate is displayed.



4. Click **Print** in the Estimate heading. The Estimate is displayed and the Print dialogue window is displayed by your computer.



5. Click **Print**. The estimate will now be printed.