

# TaskMax Quotes

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This article covers the topic of *Quotes* within **TaskMax**.

When work is required for the building, and quotes need to be obtained, the details of the job must be entered first, and contractors selected.

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## Request Quotes

1. Open **TaskMax** and click the *New* button.
2. Select a building from the building list, and click *OK*.
3. When the *Job Entry* screen appears, enter the *Originator* details using one of the following options:
  - Manually type the name in the first field, then the address in the large field, then phone numbers and email in the corresponding fields beneath.
  - Click the *List* button and select an *Originator* from the table. These are *Originators* that have been entered and used previously.
  - Click the *Roll* button and select a lot owner.
4. Enter the *Contact* details using one of the following options:
  - Click the *Originator* button to copy the Originator details above.
  - Manually type the name in the top field and phone numbers in the other fields.
  - Click the *List* button and select an *Contact* from the table. These are *Contacts* that have been entered and used previously.
  - Click the *Roll* button and select a lot owner.
5. If required, tick the preferred contact method, which will be the only one that displays on the work order.
6. Type in the *Subject* field in the Job section, or select from the subject list.
7. In the large field beneath the *Subject*, type in the details of the job.
8. Click the *Property Affected* field and click the *Common Property* or *Select Lot Account* button.
  - The Edit Property List button will open the **Property Details** menu.
9. Manually type the *Location at Site* if required, and tick the *Urgent* box if applicable.
10. *Start* and *Finish* dates can be typed in manually as well.
11. No other fields are required at this point, so click the *Request Quote* button on the right-hand side.
12. The *Account Code List* window will appear where each contractor can be tagged.
  - Use the *Search* field to search for either a name or the account code.
  - Filter the list on display the building's preferred contractors by ticking the *Show Preferred*

*Creditors Only* box.

- Click the *Master Chart* button to include contractors from the Master Chart of accounts as well.
- If a required contractor doesn't exist in StrataMax, it can be added using *Quick Add* button (the green *plus* sign).

13. Once all contractors are tagged, click *OK*.

14. The *Quotations Dates* will appear for review and can be change if required, before clicking *OK*.

15. The quote request document will appear on screen and when the printer button is clicked, it will be processed depending on the preferred contact method of each contractor.

16. The status of the job will then change to *B-Quoting*.

The option 'Email Copy To' only applies to when the Work Order is issued; the additional emails will not receive Quote Requests.

## Receive Quotes

When the quotes are received from the contractors, the details can be entered as they arrive.

1. Open **TaskMax** and click the required job.
  - If the job isn't present, the *All* radio buttons may need to be selected, in the bottom right, under *Options*.
2. Click the *Open* button.
3. In the bottom right of the *Job Entry* screen, click the *Quotes* button.
4. Highlight the Quote, which should have a status of *A-Sent*, and click the *Receive* button.
5. In the small *Receive Quote* window, enter the:
  - *Amount of Quote*.
  - *Document ID* (click the field and then the drop-down arrow to open **DocMax** and select a document).
  - *Quote Ref No.* (optional).
6. Click *OK* to close this window and return to the *Job Entry* screen.
7. The quote will then have a status of *B-Received*.

## Approve Quotes

When all quotes have been received for a job, they can be sent to committee members for approval if required.

1. Open **TaskMax** and click the required job.

- If the job isn't present, the *All* radio buttons may need to be selected in the bottom right, under *Options*.
- 2. Click the *Open* button.
- 3. In the bottom right of the *Job Entry* screen, click the *Quotes* button.
- 4. Highlight the Quote, which should have a status of *B-Received*, and click the *Print Confirmation* button.
- 5. The *Tag Recipients* window will open, where the required committee members must be tagged before clicking *OK*.
- 6. When the preview of the confirmation letter appears, click the *Printer* icon.
- 7. If any of the recipients have an email address, a prompt will appear asking the confirmation should be sent by email.

Multiple email addresses can cause issues and it is recommended to add email addresses that are no longer than 30 characters

## Accept Quotes

Once approved (if required), the quote can be accepted.

1. Open **TaskMax** and click the required job.
  - If the job isn't present, the *All* radio buttons may need to be selected, in the bottom right, under *Options*.
2. Click the *Open* button.
3. In the bottom right of the *Job Entry* screen, click the *Quotes* button.
4. Highlight the Quote, which should have a status of *B-Received*, and click the *Accept* button.
  - If all quotes have not been received, a prompt will display asking to confirm the acceptance.
5. A preview will appear of the rejection letter that can be issued to the unsuccessful contractors.
6. When asked to 'Issue Work Order' click *Yes* to issue immediately, or *No* to make any changes in the *Job Entry* screen first.
7. The Status of the job will be *D-Issued*.