Enhanced Quotes Module in **Elogs CAFM**

UPDATES

Budget Quote Submitted
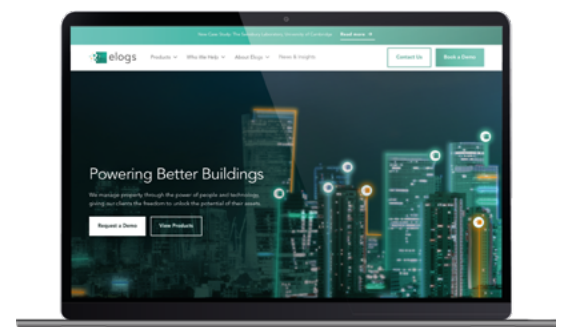
Enhanced Quotes Module in Elogs CAFM

At Elogs, we always prioritise feedback from our clients to ensure we are continually evolving and improving the CAFM system.

We take a 'you ask, we listen' approach, meaning we take on board your suggestions and ideas and put them into action. So, based on various recommendations from some our clients and internal discussions with key stakeholders, we decided to enhance and revamp the quotes module on Elogs CAFM.

We have reworked the entire quotes module to make it more user-friendly and improve design and functionality. We have also introduced a brand-new budget quote workflow feature which will boost overall visibility and streamline the process of handling quotes intended for budgeting purposes.

What is the quotes module and what does it do?

The quotes module is such a powerful part of the CAFM system, handling jobs and quotes for reactive maintenance and allowing benchmarking of service providers (SPs) before committing to a value and converting to a job.

As the FM user, you are able to allocate a quote request to a service provider (or multiple service providers) who will then provider quote options for you to accept or decline.

Once accepted, the quote is converted into a job to be carried through. Working in tandem with your jobs on CAFM, the quotes module allows you to benchmark multiple service providers across your supply chain.

Given that the quotes module is one of the most used features in Elogs CAFM, we decided to completely rework the user interface (UI) and user experience (UX). Overall, this will improve user friendliness and drive efficiency, not to mention we have also added some brand new functionality.

What are the key benefits of this enhanced module?

There are many benefits to enhancing the quotes module in Elogs CAFM; the aim of this rework is to take user experience to the next level with more intuitive navigation, fewer clicks, better information visibility on the homepage, and other enhancements such as the ability to add a new service provider to an existing quote.

In summary, the key benefits are

- Better UI and UX.
- Enhanced user friendliness.
- More intuitive navigation.
- Increased information presented on the homepage, leading to fewer clicks.
- New budget quotes workflow feature.
- Ability to add a new service provider to an existing quote.

With more information in the quotes module, CAFM users will be able to gain better visibility, making it simpler to manage quotes day-to-day.

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Why was the rework of this module needed now?

The rework was driven by the need to update the quotes module and give it a fresh new look. Although the quotes module has always been functional, we wanted to give it a revamp and refresh. The ultimate aim of this enhancement is to improve user experience as well as the overall appearance and functionality of the module.

Since we were introducing the brand-new budget quotes workflow feature, it provided an opportunity to overhaul the entire module. We wanted to make the quotes page even more valuable for CAFM users by presenting even more information on the homepage. This allows users to get a great overview of their quotes and service providers at a glance.

What is the budget quotes workflow feature?

The new budget quotes workflow feature, distinct from the UI rework, is aimed at enhancing the quotes module. This market leading functionality allows for a more streamlined process in handling quotes which is required for budgeting purposes. This is part of the wider strategy to improve to the entire quotes module.

# How does the budget quotes workflow feature work?

In CAFM, the new budget quote workflow feature will allow users to mark this as a "quote for budget purposes only" when adding a new quote request. Once the quote request has been created, it will now be marked as a budget quote in the quotes list view.
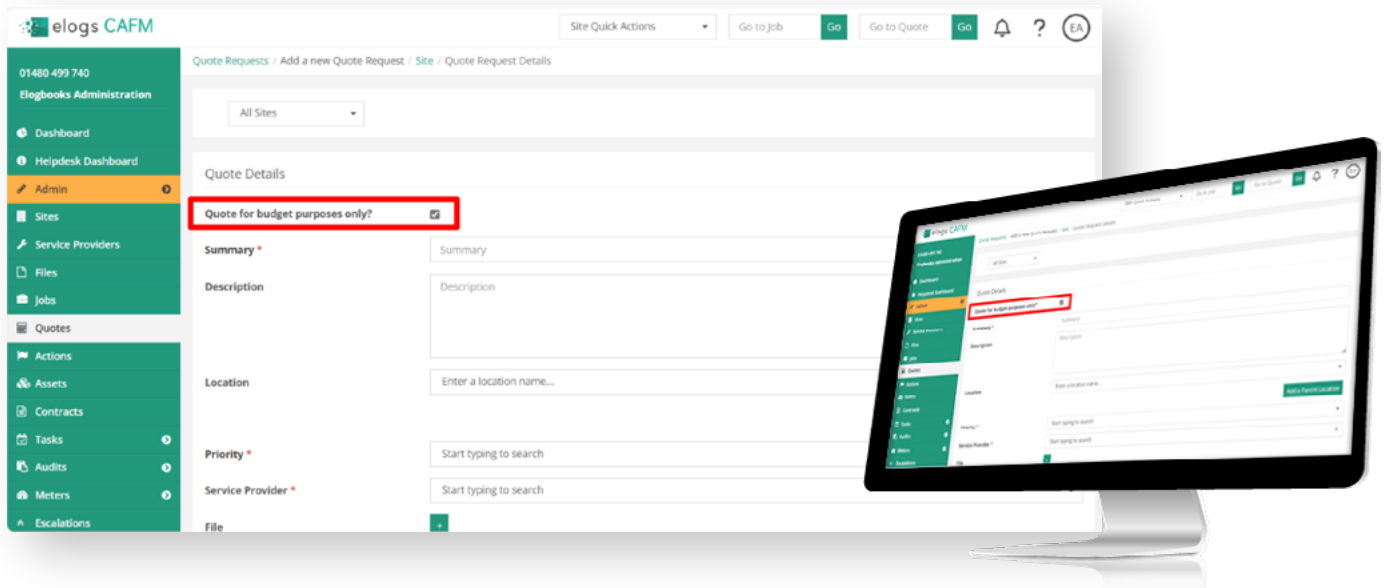

The quote information panel will also display the new flag, and the workflow buttons will be updated to highlight that this is in the new budget quote workflow.
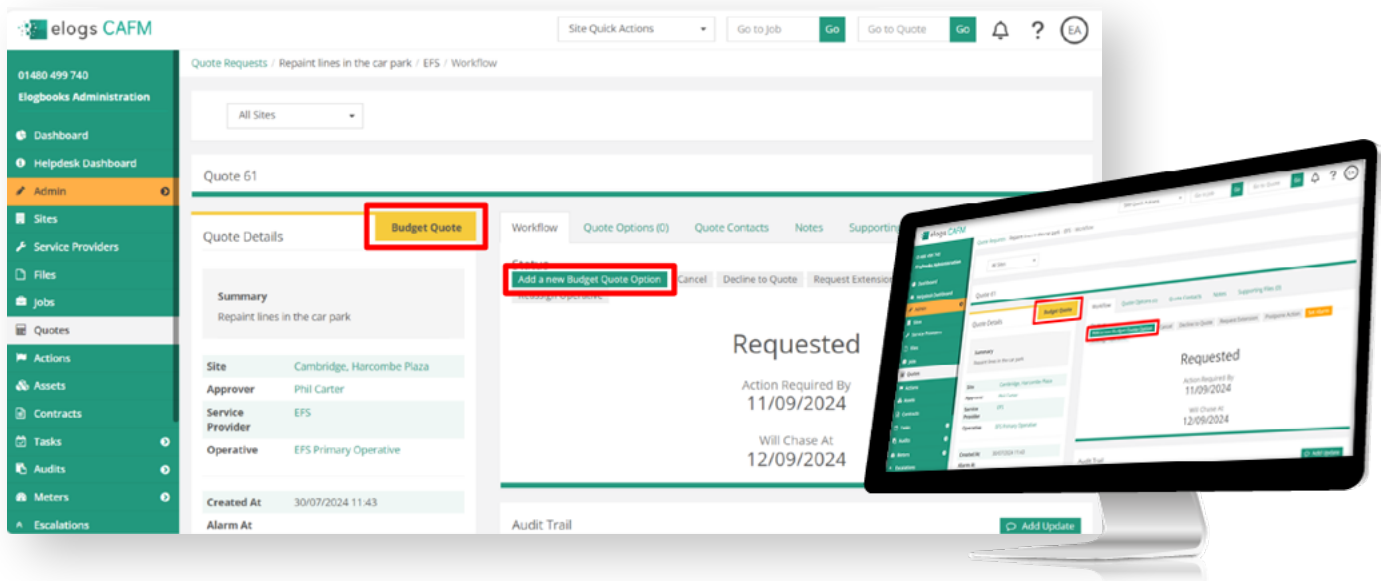
The method of creating and submitting a quote option for the service provider remains unchanged. Users will now just see the budget quote flag throughout these steps. Once the quote option(s) have been submitted, this is the end of the budget quote workflow, and the status moves to "budget quote submitted".
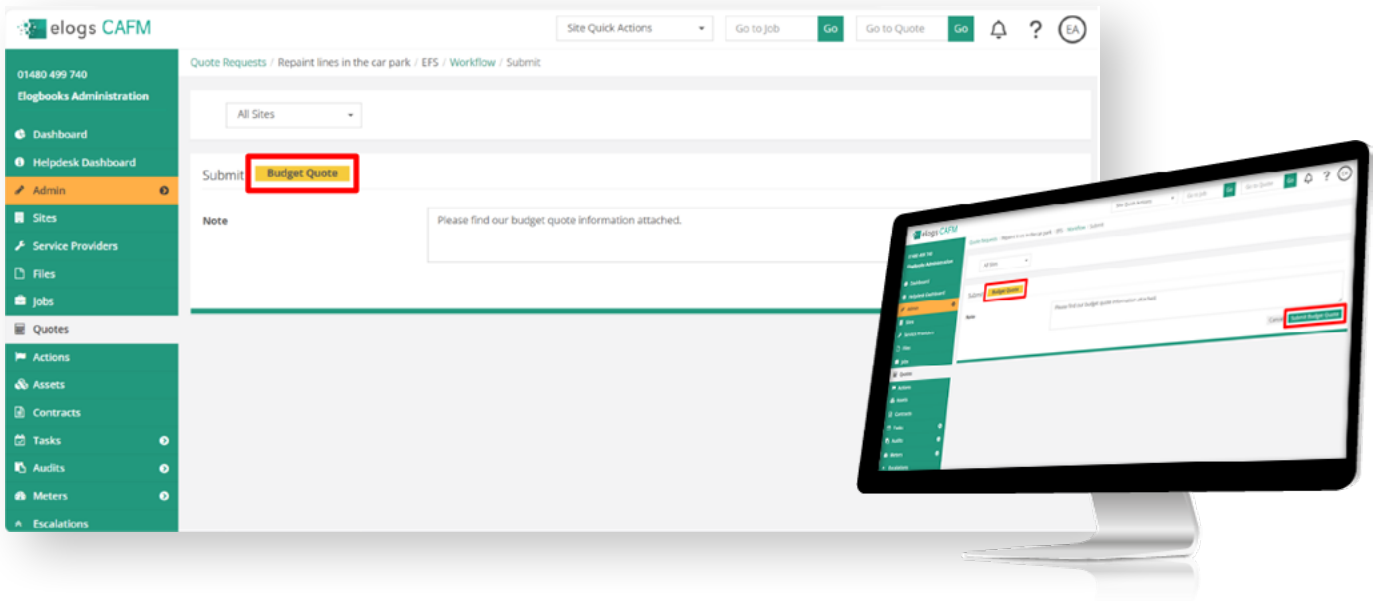
The FM can "Request More Information" to put this back into the hands of the Service Provider, and they will be able to edit or add further quote options before resubmitting and returning to this final status.
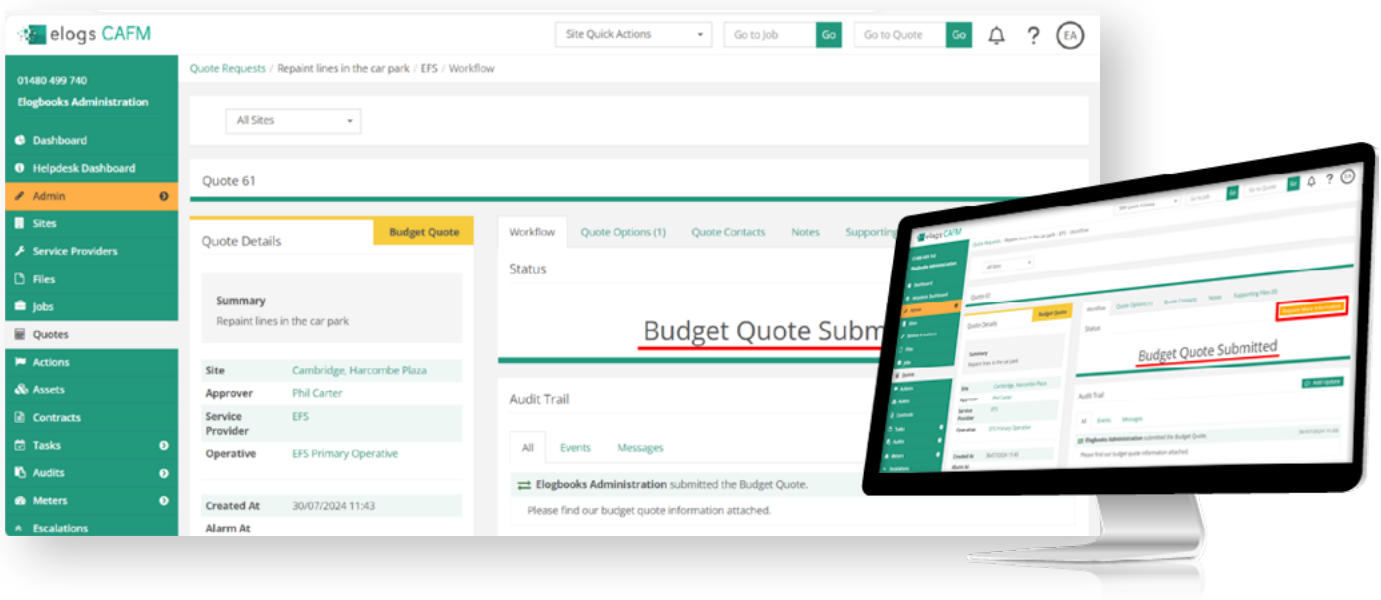
What is the goal of this enhancement?

The focus of this project is to improve the UI and UX of the quotes module, benefitting our users and increasing visibility on the platform.

With input from both clients and our internal stakeholders, we wanted to develop this module to make quotes even easier to manage and keep them all in one place, creating a single source of truth. The UI rework and the new budget quotes workflow feature are part of the same package, aiming to collectively enhance the quotes module.

With these improvements, the entire quotes module should now feel more up-to-date and modern, working seamlessly within the CAFM system.

Current Quotes UI
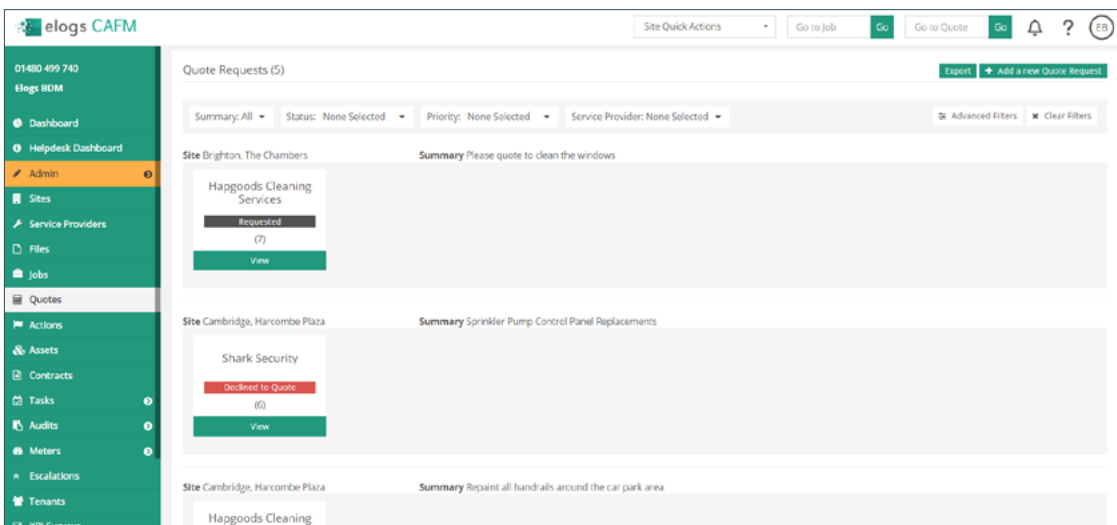
NEW Quotes UI
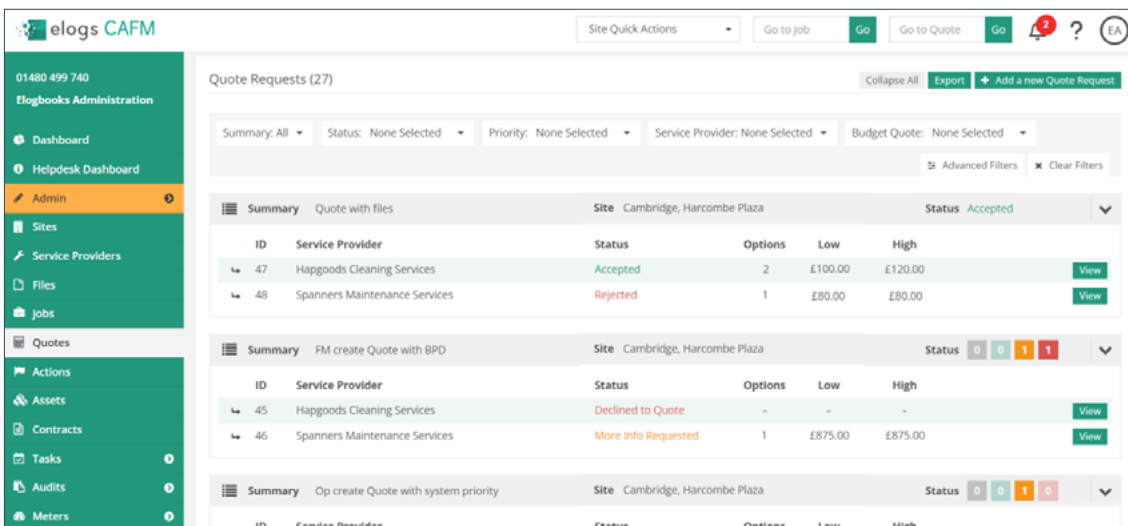
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