

## **1. Introduction/Purpose**

The purpose of this document is to provide information about the process for submitting work to be completed by the Technical Shops.

## **2. Work Process**

There are two types of work processes which depend on the job and shop operations at the time. For a regular job, a formal quote is prepared; this is initiated by using the Job Request form (see section 3 of this document).

A formal quote is generated and once the quote has been signed, the work begins with ongoing consultations until the work is completed. An invoice is created and at the end of each month, a PDF of the invoice is sent to the customer while a journal is sent to Research Accounting. Any changes to the scope of the job will be reflected in a Job Change Request form.

Refer to page 2 of this document for a flowchart of the workflow process.

NOTE: If the job is needed within 24 hours (1 business day), the hourly rate is increased by 25%.

## **3. Job Request Form**

Refer to page 3 of this document to see a copy of the Job Request form. The top portion of the form is to be completed by the customer and can be filled out beforehand. The job description is completed by the technician, from the initial consultation with the customer. Enough detail is needed to generate a formal quote and any drawings should be submitted at this point.

## **4. Blanket Quote Form**

If the job is <3 hours and customer can't wait for formal quote, a Blanket Quote form is completed (i.e. if it is a rush job or the Shop Coordinator is not available to complete a formal quote). Refer to Page 4 of this document to see a copy of the Blanket Quote form. The top portion of the form is to be completed by the customer and can be filled out beforehand.

The actual hours and material will be recorded on the bottom of the Blanket Quote form and after the job is completed an invoice will be prepared based on the actual hours and materials of the job.

## **5. Fields in the Job Request and Blanket Forms**

*Requested By:* The person who is submitting the job to be completed.

*Authorized By:* The person with signing authority on the Cost Centre.

*Cost Centre #:* This is the cost centre to which the job should be charged. If the account is different from the default 305000 account then it should also be noted here.

*Account Holder & Monitor:* If there is an Account Holder/Monitor that is different from the person requesting the job and/or the person authorized on the cost centre, this section needs to be completed.

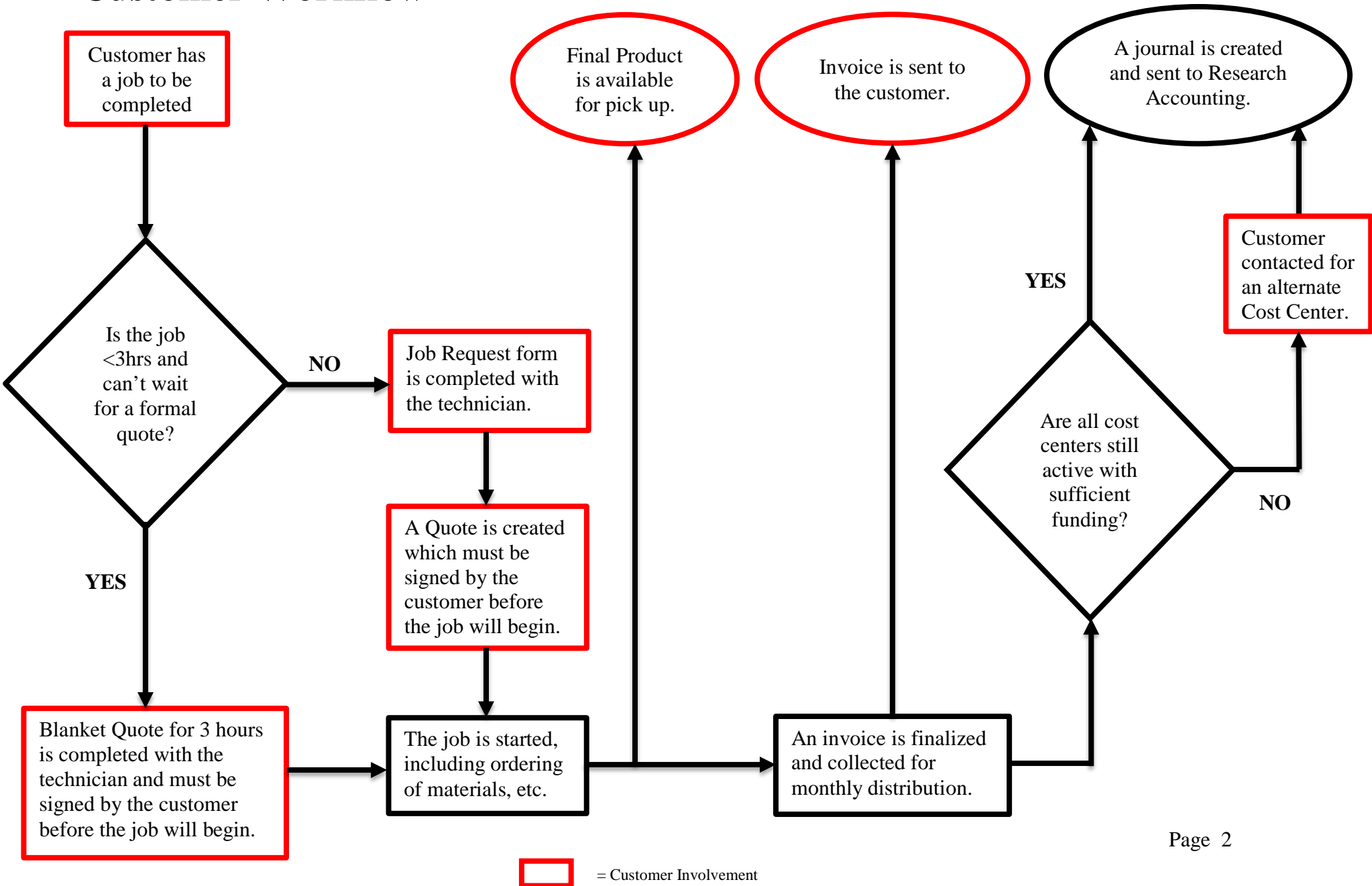
*Email:* This is the email address for the person requesting the job, who would be contacted for follow up details on the job.

*Phone:* This is the phone number for the person requesting the job, who would be contacted for follow up details on the job.

*Invoice to be e-mailed to:* The email address of the person who should receive the invoice.

*Department:* The department for which the work is being done.

# Customer Workflow







Technical Shop Services

Job # MS-\_\_\_\_-\_\_\_\_

Technical Services Blanket Quote

Date: \_\_\_\_\_

Requested By/Contact: \_\_\_\_\_  
 Authorized By:\* \_\_\_\_\_  
 Cost Centre #:\* \_\_\_\_\_  
 Account Holder & Monitor: \_\_\_\_\_  
 Email: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Invoice to be e-mailed to: \_\_\_\_\_  
 Department: \_\_\_\_\_

} Filled by Client

\*Mandatory. Work will not start without correct information in these fields

Job Description:  This job is requested to be within 1 business day (hourly rate will be increased by 25%)

[Empty box for Job Description]

Material/Parts List:

[Empty box for Material/Parts List]

By signing below, client authorizes York Technical Services to begin work. This is a flat rate quote for up to 3 hours. (Actual hours will be what is charged). Any job requiring more then 3 hours service will require a job request form to be filled and a quote will be sent to be authorized.

Centre Authorization Signature : \_\_\_\_\_

Date: \_\_\_\_\_

Material Costs: \_\_\_\_\_

Actual Hours: \_\_\_\_\_

Technician: \_\_\_\_\_