

# Beginners guide to the Agility Project-Portal

## Part 1 – Builders

## Part 2 -Suppliers

# Agility Project-Portal Builders

## BEGINNERS GUIDE TO THE AGILITY PROJECT-PORTAL

Version 2 November 2013

[www.project-portal.com.au](http://www.project-portal.com.au)

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Free Support – Help Desk **07 3716 7444**

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# 1 Web Browser Tips

Before we start, these tips will help you get the most from any web based application.

## 1 Not all browsers are equal. Recommended Browsers in order of preference



## 2 Set the default email browser Email Links & Web Browsing

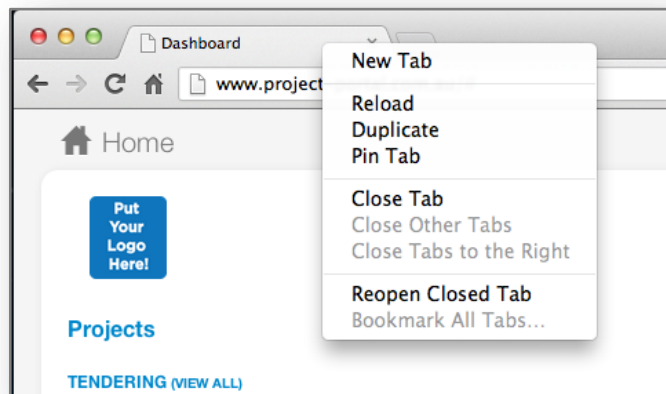
**This is really important!** Getting this right will make your Agility experience far more enjoyable. Irrespective of which web browser you decide to use, e.g. Google Chrome, Safari etc., ensure your default email browser is the same as your default web browser. For example, if you are using Chrome as your default browser, ensure that when you click on a link in an email it also opens Chrome and not a different browser, e.g. Internet explorer. The help desk can show you how to do this.

## 3 Open Multiple Browser Tabs Save Time + Use Multiple Screens

Enables you to instantly jump from one project to another without having to wait for the page to download from the web.

**Computer** - Right Mouse Click on a tab and select *New Tab*

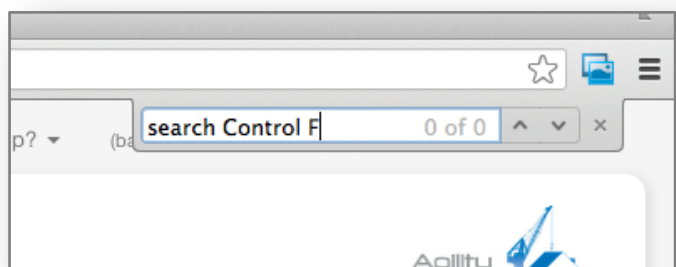
**Ipad** – doesn't have a mouse. Press and hold the link and then select new tab from the menu



## 4 Search Browser Page

Web browsers have built in search functions that let you search any web page.

Windows	Ctrl F
Mac	Command F

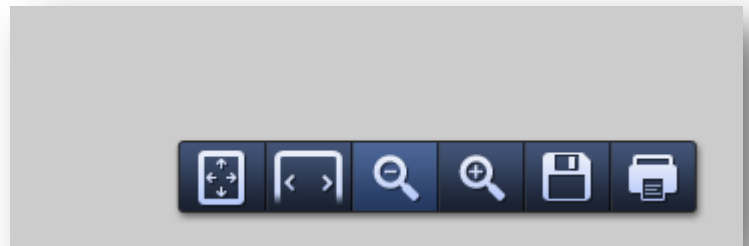




## 5 Print PDF's Quotes, Order etc

### Google Chrome

Move your mouse to the bottom right hand side of your screen and browser menu will appear. Select the print option.



## 6 Printing Your Screen Site View etc

Using Control P or browser options will not print an exact copy of your screen. To print web page exactly as you see it on your screen you need to capture the screen.

### To capture your screen using in built computer functions

**Macs** press *Shift+Command+4*

Trace the area you want to capture and press enter

The screen shot will be saved to your desk top

**PC** press *Prt Screen* key or *Alt+Prt Screen* key to capture a region of your screen

— . . . . .

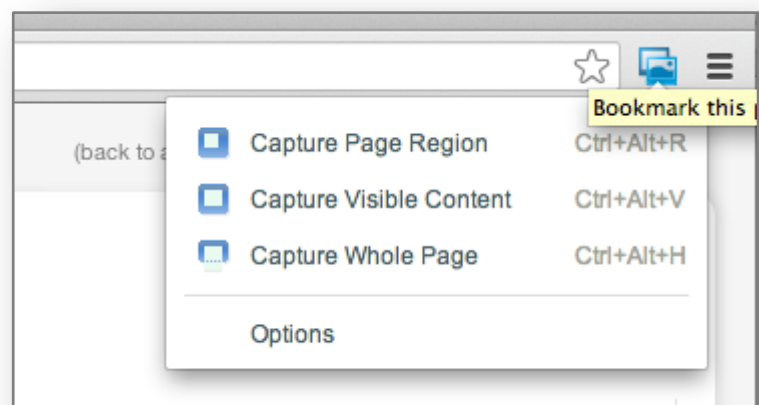
### Ipad & Iphone

Press the home and power button. You will hear a photo clack and the screen will be saved as a photo.

### Using Browser Plug Ins

You can also use special browser plug ins to extend the functionality of your browser.

Call the help desk for more details.



# Effective Communication



....it's an art

Agility makes it easy to request quotes and communicate with suppliers. But let's face it; communication is an art, only you can ensure it is effective.

No one understands your project like you do

**Sending too little information** – e.g. drawings with no specifications or **too much information**, e.g. drawings with a 400 page specification, makes it difficult for suppliers to prepare your quote. It causes unnecessary delays. Worse still, it may result in your request being put in the too hard basket. Either way you lose.

Agility provides two options to request quotes

- **Category Quotes** , lets you access the quotation checklist. Quotation checklists make it easy for suppliers to understand your project requirements and provide prompt, accurate quotes.
- **Broadcast Quotes**  **Broadcast Quote** they're fast and super convenient, but don't have a quotation checklist. Broadcast Quotes, relies on your documentation being just right.

As we said, no one knows your project and its documentation like you do. Think carefully before using Broadcast Quotes, if your documentation is too sparse or too voluminous, Category Quotes may be a better solution.

# 2 Quick Start

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## 1 Create a New project

- Email plans to : [drawings@project-portal.com.au](mailto:drawings@project-portal.com.au)
- In subject line type: *New Project*
- Click Send
- Agility will process the drawings (1-2 minutes) and send you an email once your drawings have been uploaded.

## 2 Enter Project details

**Project #2199 created**

You are almost done!

The project has been created, but we still need some information from you.

Information including the project client and location are still unknown to Project-Portal, you can review this clicking the button below.

[Review your project details](#)

New project details

[Save](#)

Open the email and click the **review your project details** button.

This will log you into the project portal, no password required

Click on the **Edit Details** tab, enter the project details and click save

## 3 Request Quotes

1 Click on the **Project Template**

[Edit Details](#) [Drawings](#) [Estimation](#) [Project Template](#)

[All](#) [Favourite](#) [Used](#) [Broadcast Quote](#) [Key](#)

2 Click **Broadcast Quote**  
Select Categories / Suppliers  
Add any additional comments and click send

**4 Relax** The Agility Help Desk will follow up your quotes with suppliers. You will receive an email alert when your quotes are ready. You can review your quotes from both the dashboard or project template.

# 3 Home - Dashboard

## Why have a dashboard?

If you manage multiple projects, or your projects overlap then the dashboard is a real life saver. It brings together the latest info from all your projects, to one central page making it easy to stay on top of things.

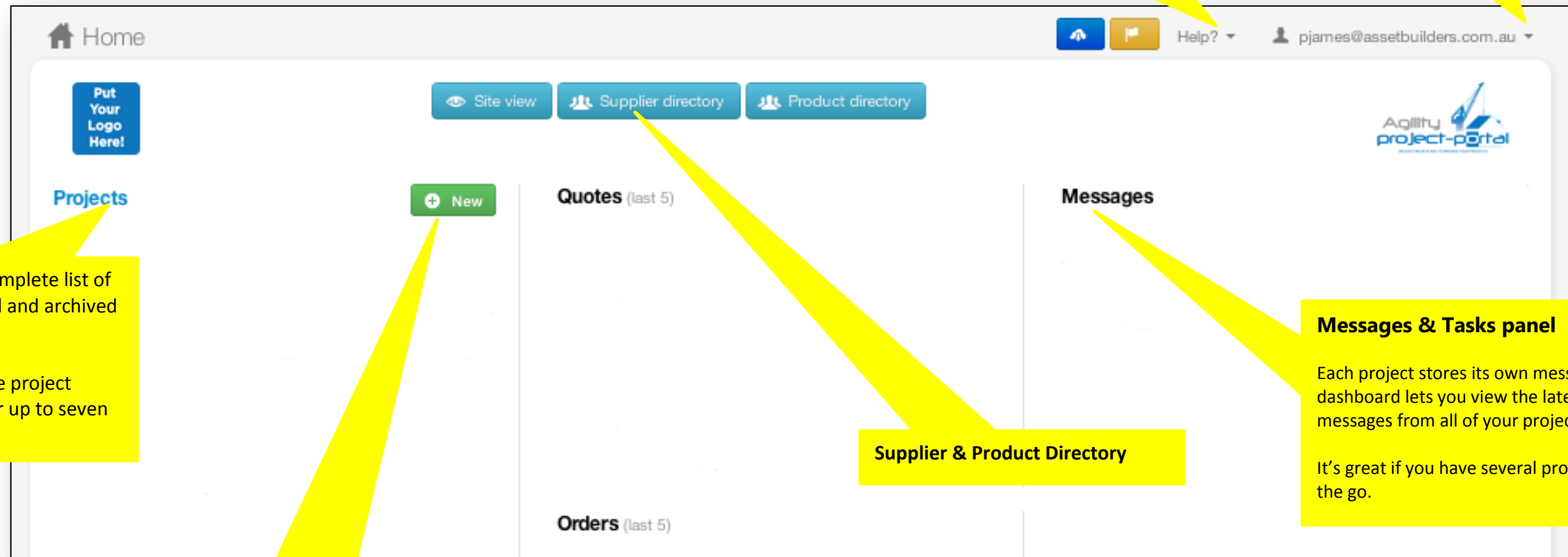
The dashboard is divided into three panels. **1** Projects, **2** Quotes **3** Messages

### Help Menu

- Help Desk
- User Guides
- How to videos
- Team Viewer

### Customise your personal profile

Click on the down arrow to access your personal and company profile.



**Project link** lets you see a complete list of projects including completed and archived projects.

Click on a project to open the project  
Agility stores your project for up to seven years.

### New Project

Click on the green project button to create a new project.

### Supplier & Product Directory

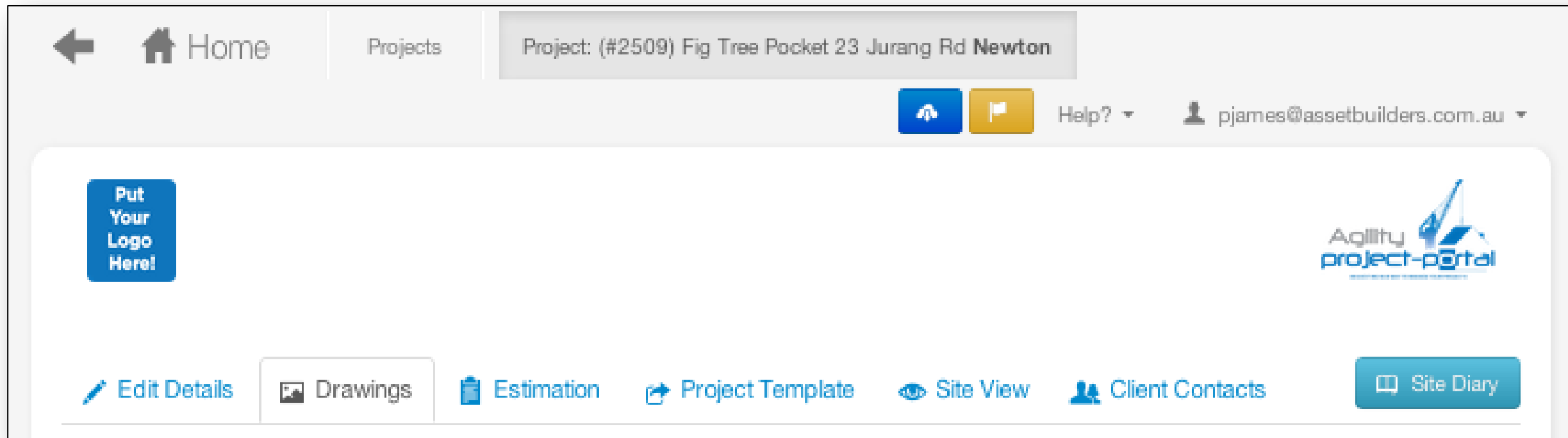
### Messages & Tasks panel

Each project stores its own messages; the dashboard lets you view the latest messages from all of your projects.

It's great if you have several projects on the go.

## 4 Project Pages

Each project has its own dedicated project space which is divided into separate tabs that organise and store all of your drawings, quotes, messages, tasks etc. No need to file anything, but everything is at your finger tips.



Each project is organised into a number of separate tabs. You can **open multiple tabs at the same time**, see section iii Web Browser tips and tricks

**Edit Details** Enter your project details, eg address and manage the project status.

**Drawings** Can be used to store and share all of your project documents, including drawings, contracts, pictures etc. You never need to worry about file size again. Access your drawings at the office, home and site, from your computer, Ipad or smart phone.

**Estimation** Coming soon

**Project Template** Request your quotes and message suppliers. You can also add your own suppliers to the template.

**Site View** Provides a visual time line of your project

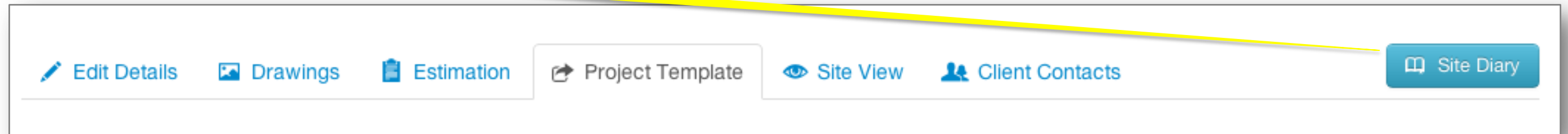
**Client Contacts** Lets you add your client so you can share drawings, message them

**Site Diary** Each project has its own site diary. From prospects to completion, it can be used a number of different ways, e.g. simple CRM or client relationship management tool that helps you manage your clients, event log, reminders, pictures & files. Leaves paper diaries for dead

# 5 Site Diary

- Keep everyone in the loop
- Smooth transition from presale to estimation to construction to handover
- Ensure critical events are logged.
- Add photo or files to your entries

① Opens site diary



## Project Site Diary

The form shows a text entry area with the text: "Window arrived on site, frame for bifold door damaged during unloading. Arrange a replacement from supplier." Below this is a user profile for "Pat James (Test Member Qld)" dated "28/07/13" with a phone number and a "Convert to task" link. At the bottom are buttons for "Post", "Create Task", and "Advanced".

② Type in entry, attach photos or files and click post.

Click on the task link to create a task

The dialog box has fields for "Assign to" (Catherine Abel) and "Task due" (29/07/2013 08:19:57). It includes "Cancel" and "Create task" buttons.

③ Assign a task to yourself or one of your staff or colleagues.

## Main Dashboard – Home Page

Messages	
INBOX (VIEW ALL)	12
Response required	4
Site diary	8
Administrator followed-up	12

Running multiple projects?  
Have one or more supervisors?  
View the latest site diary postings for all your projects in the main dashboard

TASKS (VIEW ALL)	
Past due	6
Today	0
Assigned to you	9
Assigned by you	5

It does not matter if the task is created from site diary entry or supplier message, view them all from the task dashboard.

# 6 Document Control

## Store all of your client and project documentation in one place

- Access documents from your home, office or site computer, I-pad or smart phone
- Share big documents that are too large for email.
- Safe, Secure, Easy to use.

## Use a smart phone or Ipad?

- You can send photos directly to your project documentation or Site Dairy

### Unlimited Storage

- 1 Upload up to 500Mb at a time using the web interface Or
- 2 Email your drawings To **drawings@project-portal.com.au** Subject **1248** Where "1258" refers to the Agility project id Agility will upload your drawings automatically.

### History

Superseded documents;  
The top drawing is the latest version.

Click on the link to view old drawing

**Hover over** the thumbnail to see a larger preview of the document

**Click** on the thumbnail to view or print the drawing

### Share Large Files,

Copy and paste the public link in any message. The receiver can view and download the document.

No special software required.

**Filters** make it easy to temporarily hide unwanted drawing.

**Better than folders;** See all documents or use filters to see a specific document type eg structural

### Sort Drawing by

- Name
- Document Type then Name
- Date Uploaded

### Set Document Attributes

- Drawing Type – eg structural.
- Show Supplier
- Show Client

Use these boxes to initially set the attributes of all documents

### Set individual document attributes

- Drawing Type – eg structural.
- Show Supplier
- Show Client

The screenshot shows the 'Project: (#39) Fig Tree Poc' page on 'staging.project-portal.com.au/projects/39'. It features a navigation bar with 'Drawings', 'Estimation', 'Project Template', 'Site View', and 'Client Contacts'. Below the navigation bar are buttons for 'Upload new', 'Supersede drawing...', and 'Download selected drawings...'. A table lists drawings with columns for 'Select', 'Preview', and 'Description'. The first drawing is '10 0056 Working Drawings rev. A' with a 'Current Revision' label. Below it is a 'History' section showing previous versions. The second drawing is 'Window Schedule rev. First Issue' with a 'Superseded Revisions' label. The third drawing is 'Contour Plan Lot 14 rev. Feb 2008'. Each drawing entry includes a 'Public link' and a 'Superseded drawing' button. On the right side, there are filters for 'Filter by All' and 'Sort by Type/Name', and a box for setting document attributes like 'Show supplier', 'Show client', and 'Drawing type'.

### Supersede Drawings

- Click this button to supersede this drawing with a newer version
- Use the un supersede link to undo



# 7 Project Template

Use the project template to initiate a *Broadcast Quote*

- Check Contract Pricing
- Request a re-quote
- Convert Quotes to Orders or place “Free Form Orders”
- Message suppliers

Scoping Filters view  
All-Favourites-Used

All – Categories  
Favourites – Categories marked green  
Used – have a quote request

Broadcast Quote & Broadcast Message

One click – requests a quote from all of your favourite categories and suppliers

Single category quote

- Used to request a quote or re-quote .
- Uses category checklist

Message a Supplier

- Read and respond to new messages

Favourite Category

Click on the favourite button to mark the category as a favourite.

Use the **scoping** button to filter for favourite or used categories

Add your own suppliers

Click on the blue + plus symbol to add your own suppliers to this category

Quote Link

- Hover over the quote link to see a larger preview of the document
- Click on the thumbnail to view or print the quote
- Add notes to your quote for future reference
- Mark preferred quotes

Order Link

Hover over this link to see your order. Orders also appear on the dashboard and site view

Convert a quote to an order

Just click on a quote, add a delivery date and Agility will create an order and send it to the supplier

Free Form Order – No quote required

Just enter what you want to purchase and your order is sent to the supplier.

- Useful to call up a part delivery of a larger quote
- Nil Value orders can also be used to call up trades etc.
- Orders show up in site view

The screenshot displays the 'Project Template' interface. At the top, there's a navigation bar with 'Home', 'Projects', and a project name '1637) Taringa 99 Jesmond Rd Thompson'. Below this is a toolbar with buttons like 'Put Your Logo Here!', 'Edit Details', 'Drawings', 'Estimation', 'Project Template', 'Site View', 'Contacts', and 'Site Diary'. A central section shows a list of categories and suppliers. The 'All' tab is selected, showing categories like 'Natural Steel', 'Roofing - Steel', 'Windows & Doors - Aluminium Domestic Suite', and 'Trend Windows & Doors'. Each category has a 'Favourite' button and a 'Broadcast Quote' button. A 'Broadcast Message' button is also present. A 'Key' button is at the bottom right. A table below the categories shows 'Budget - Quote ex. GST', 'Variation', 'Order number', 'Reg. Price ex. GST', and 'Delivery Due'. It lists items like 'Brisbane Beams', 'Heritage Roofing', 'Hats for Houses', 'Dowell Windows (QLD)', and 'Trend Windows & Doors'. Each item has a 'quote' link and a 'Request read' button. A 'Put Your Logo Here!' button is in the top left corner.



# 8 SiteView

Helps at the tactical level, Use actual or zero value orders to organise deliveries and sub-contractors

- Notifies suppliers
- Provides a visual representation of your site activities.
- Simplifies call up of materials and trades to site

Yellow - To Be Confirmed TBC

Yellow items above the dateline have been ordered but not called up, i.e. no firm delivery date

Green delivery date confirmed.

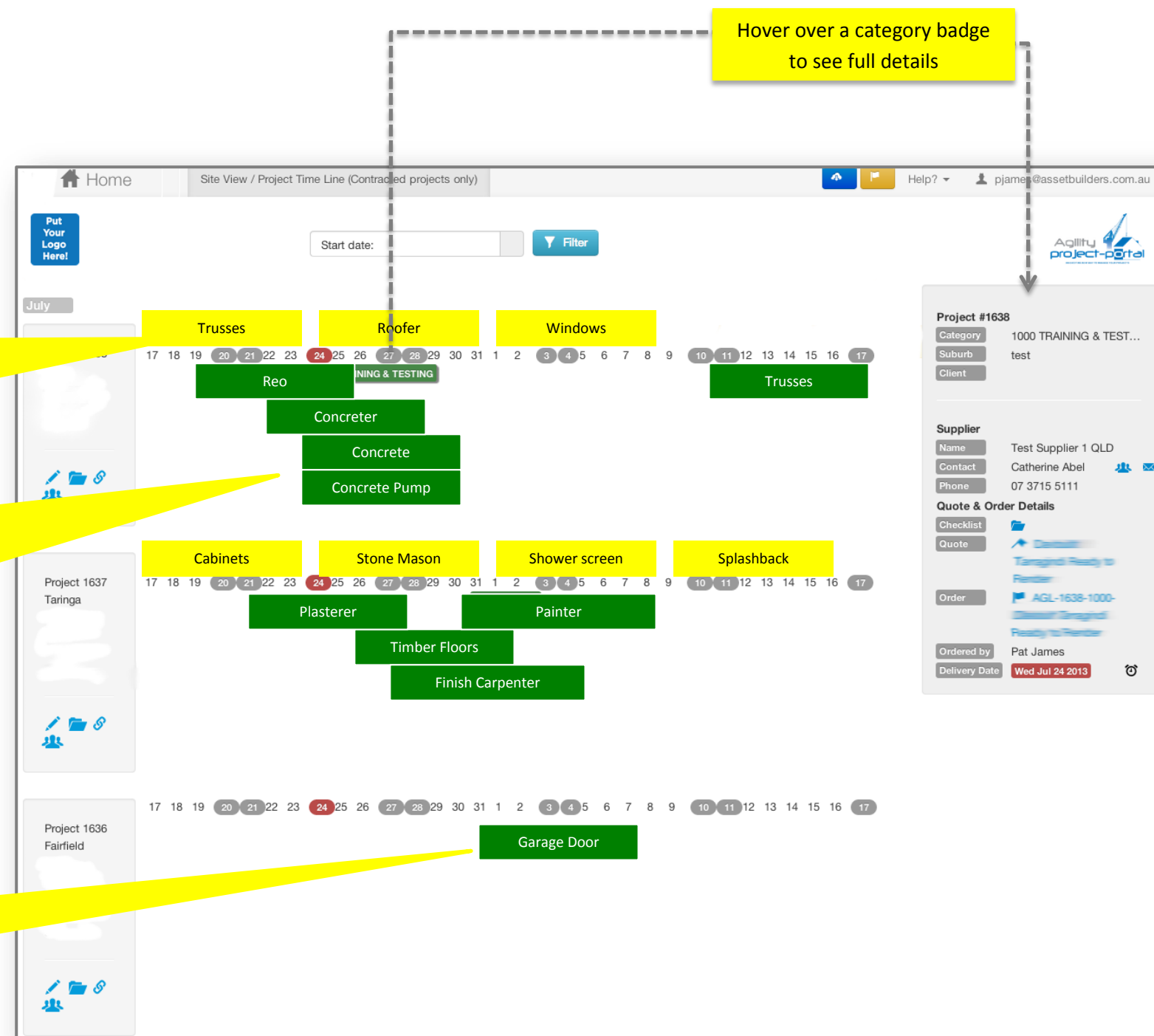
Item is due for delivery on the date indicated.

Concrete and Concrete Pump due 24th

Activity Start Date

Leading edge of bar indicates start of activity

Hover over a category badge to see full details



Forget whiteboards and rigid theoretical planning tools that let you down. Agility Site View, creates a visual chart of your site activities.

Let's face it, a rainy day and your best-laid plans turn to mush.

Site View provides help at the tactical level, you know, the place where brilliant plans collide with everyday real world realities.

Whenever you convert a quote to order, place a *Free Form Order*, Nil Value Order or call confirm delivery of an existing order Agility automatically

- Notifies the supplier
- Updates the Site View page

# 9 Dashboard

Whether you are managing one or one thousand projects the dashboard makes it easy to stay on top of the latest information.

**Project Panel** shows your active (tendering & contracted) projects

Click on the blue link to open a projects

The screenshot shows the Agility Project Portal dashboard. The top navigation bar includes 'Home', 'Site view', 'Supplier directory', and 'Product directory'. The main content area is divided into four columns: Projects, Quotes, Orders, and Messages. The Projects column is further divided into PROSPECTS, TENDERING (VIEW ALL), and CONTRACTED (VIEW ALL). The Quotes column is divided into OVERDUE (VIEW ALL) and RECEIVED (VIEW ALL). The Orders column is divided into PLACED (VIEW ALL) and WAITING APPROVAL (VIEW ALL). The Messages column is divided into INBOX (VIEW ALL) and OUTBOX (VIEW ALL). The Tasks column is divided into TASKS (VIEW ALL). The Projects column shows a list of projects with a blue project badge next to each project name. The Quotes column shows a list of quotes with a blue link next to each quote number. The Orders column shows a list of orders with a blue link next to each order number. The Messages column shows a list of messages with a blue link next to each message title. The Tasks column shows a list of tasks with a blue link next to each task title.

## Blue Project Badge

Provides a link to the relevant project, making it easier to compare quotes, request requotes and message suppliers

## Blue Link

View or print your quotes & orders

## Messages Dashboard

Each project stores its own messages; the dashboard lets you view the latest messages from all of your projects.

It's great if you have several projects on the go.

## Tasks

Let's you coordinate office and site activities so that nothing slips through the cracks.

Agility enables you to convert any site diary entry or message to a task.

# 9b Dashboard Messages

Agility Project - Portal messaging has been designed with builders in mind.

- Messaging posts a permanent record of the message in your message wall.
- Sends an email
- Sends an SMS

Unlike emails which are point to point, that is person A to Person B, Project-Portal grouped based, is more like a series of whiteboards, where your team can share messages with the suppliers team.

All messages for all projects can be read from the central message dashboard.

Messages	
INBOX (VIEW ALL) 17	
Response required	11
Site diary	14
Administrator followed-up	28
OUTBOX (VIEW ALL)	
Response required	4
Administrator followed-up	19
TASKS (VIEW ALL) 14	
Past due	6
Today	0
Assigned to you	9
Assigned by you	5

## Response Required

Automatically flags messages that require a response.

Even messages that have been read stay response required until someone in your team actually sends a response.

Any message or site diary entry can be tagged as a task.

You can assign a task to yourself or to other members of your team.

## Each project has its own messages

Messages can be created and viewed from the project template page.

Just click on the envelope icon

Project A

Project B

Project C

Project D

# 9c Messages Dashboard

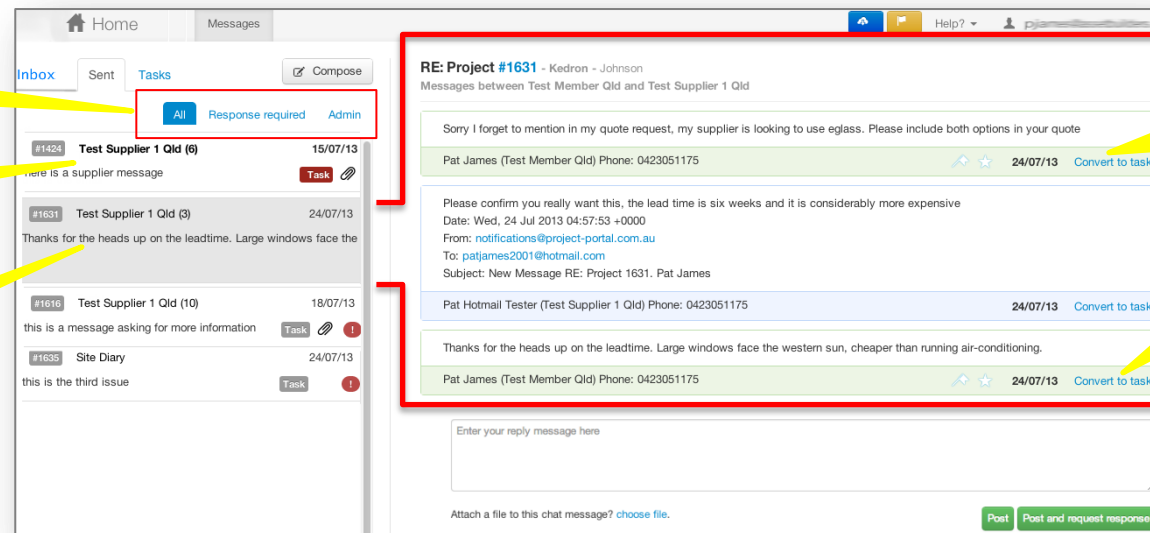
The Agility Project-Portal multi modal messaging has been designed with builders in mind.

- Messaging keeps a permanent record of the conversation message in your message wall.
- Sends an email or SMS

Scoping filters let you hide unwanted messages

Bold text indicates unread message

Grey shading indicates current selected message



Whenever you or one of your staff post or responds to a message, it becomes part of a continuous conversation thread for that project/supplier

Ditto for suppliers

## Why **Agility** messaging

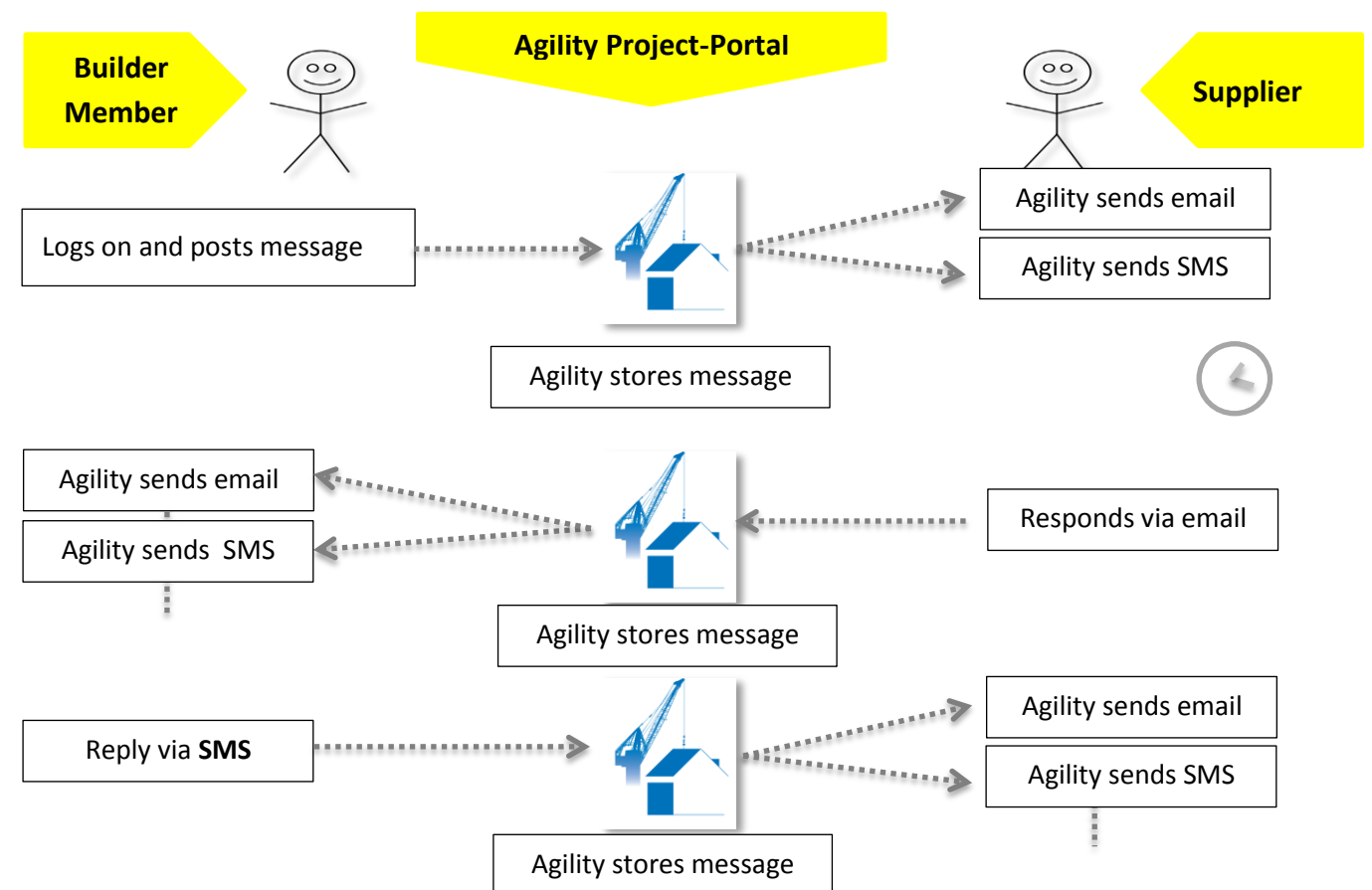
Builders go to great lengths to ensure that all of their documents are located in one place, meantime important contract emails are strewn across multiple email addresses. Your emails deserve a central repository like your other critical documents. Agility solves this problem.

## How it works

It does not matter whether the recipient replies to your initial message via email, SMS or directly with their own web post.

Agility's multi-modal capability **threads all replies into a single**, complete, coherent conversation.

Agility keeps everyone in the loop, reduces misunderstandings and puts you on a very sure footing in the event of a dispute.





## 1 Help Desk Not your usual help desk

- Australian Based – no internet delay or poor call quality
- 07 3716 7444
- Email [agilityhelpdesk@project-portal.com.au](mailto:agilityhelpdesk@project-portal.com.au)
- English as a mother tongue
- Knowledgeable - Helpful - Friendly

Agility Help Menu

## 2 You Tube Channel Provides short video clips that get you going

Shows you how to get the most from Agility, including i-pads and i-phones.

Just Google you tube AgilityHelpDesk or paste the link below into your web browser

<http://www.youtube.com/channel/UCA-1vdd86KFjbVMBy8NAnnA>

## 3 Agility Knowledge Base A great reference tool

Agility Knowledge Base is a growing repository of helpful articles that cover a range of Agility technical issues. <https://sites.google.com/a/project-portal.com.au/agility-knowledge-base/>

## 4 Breaking News Keeps you up to date with the latest improvement

Whenever something important changes we let you know. Read now or mark to read later, it's your choice. Need to refresh your memory; review previous news postings, simply click on the 'V' symbol next to your username (upper right hand side of your screen)

## 5 Update Friday Every Friday, one email that keeps you up to date

Bombarded by spam, we know how it feels. We gather the news and give you succinct weekly digest called *Update Friday*.

## 6 Team Viewer For those times when we cannot be there in person

Let's us share our screen and vice versa, it is the next best thing to being there in person. To download the Team Viewer app from the Agility website, click on the *I need help* option and select the PC or Mac version.



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# Agility Project-Portal Accredited Suppliers

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# Suppliers Table of Contents

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- 2** Logging-On There is more than one way to log on
- 3** It starts with a quote request
  - 4** Responding Directly via the Web (Preferred)  
Web response, safe, and simple, direct to the builder, also provide additional functionality that is just not possible with email.
  - 5** Responding Using Email
- 6**
  - a** Dashboard Provides an overview of your project-portal
  - b,c** Messaging  
Understand how team based messaging works and how it can help your business
- 7** Customise your personal profile Optional  
Customise notification alerts, update your contact details
- 8** Customise your company profile Optional  
Customise company lead-time, link to drop box and more
- 10** Help & Support Get the most from the Agility



# 1 Web Browser Tips

Before we start, these tips will help you get the most from any web based application.

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## 2 Set the default email browser Email Links & Web Browsing

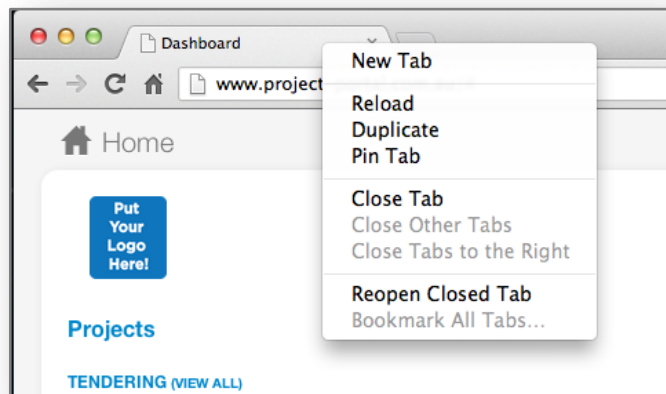
**This is really important!** Getting this right will make your Agility experience far more enjoyable. Irrespective of which web browser you decide to use, e.g. Google Chrome, Safari etc., ensure your default email browser is the same as your default web browser. For example, if you are using Chrome as your default browser, ensure that when you click on a link in an email it also opens Chrome and not a different browser, e.g. Internet explorer. The help desk can show you how to do this.

## 3 Open Multiple Browser Tabs Save Time + Use Multiple Screens

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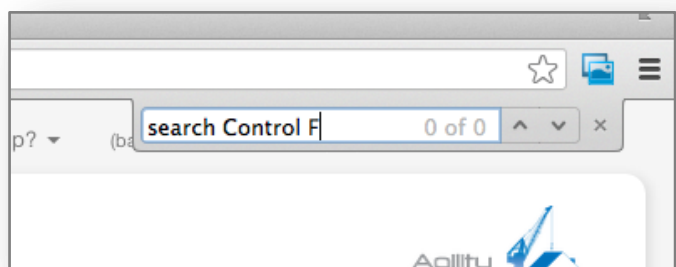
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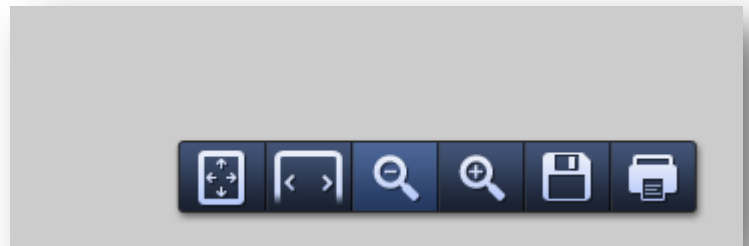




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### To capture your screen using in built computer functionality

**Macs** press *Shift+Command+4*

Trace the area you want to capture and press enter  
The screen shot will be saved to your desk top

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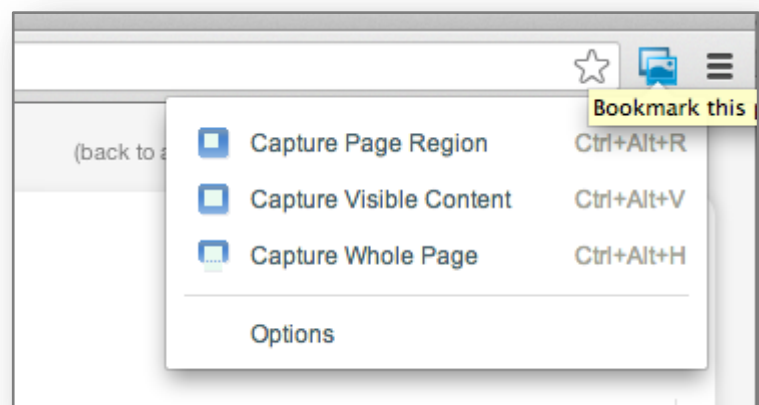
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Press the home and power button. You will hear a photo clack and the screen will be saved as a photo.

### Using Browser Plug Ins

You can also use special browser plug ins to extend the functionality of your browser.

Call the help desk for more details.



# 2

## Logging On

Free Support 07 3716 7444

### Don't share your Log On

Agility is group based. This means that you can view postings made by other members of your team and visa versa. We feel this is a much better solution then sending everyone a just in case email. Agility makes it easy for you to access an organised conversation thread, the whole story if you like, whenever you need it. For example if someone is sick, on annual leave.

If you share your log in, other users cannot be sure who sent what and importantly who they should contact in the event something is not clear.

### Logging On - There are three ways to log on

1 Go to [www.project-portal.com.au](http://www.project-portal.com.au), click on the **"I'm a Supplier"** link and enter your email address and Agility password. This will let you access to all of your projects.

Or

2 Click on the link in the notification email no password required. This will give you access to this project, your dashboard, but you will need to log in to see other projects.

Or

3 This will sound silly, but we did not know where else to say it. Don't log on, simply reply to the notification email. Section five will show you how.

1

2

**Quote request**  
Project #2366. Narangba - Ss 226.4

Jason [redacted] from [redacted] Homes has requested a quote from you.

To respond to this quote request,

1. Click reply.
2. Attach your quote (PDF), single attachment only.
3. Enter the \$ amount (no commas, no cents, ex GST) in the space provided.
4. Click send.

Quoted Price (excludes GST):  
\$ [input field]  
no commas, no cents (e.g. 1234 not \$1,234.00)  
excludes GST  
Enter your price above.

If you prefer, you can view and respond to the quote [online](#).

Need assistance? Call the help desk on 07 3716 7444.

**Additional Information**

please supply quote for electric roller door as per plan. if you have any questions or require further information please don't hesitate to call.

**Quote request details**

The quotation checklist is attached to this email, however you can follow [this link](#) to

- View the checklist or drawings [online](#).
- Message or request more information from the builder.
- View the builders full contact details.

Drawings

3

Don't log on, simply reply to the notification email.

### 3 It starts with a quote request..

Free Support 07 3716 7444

## Quote request

### Project #2366. Narangba - Ss 226.4

Jason S ( ) from May Homes has requested a quote from you.

To respond to this quote request,

1. Click reply,
2. Attach your quote (PDF), single attachment only.
3. Enter the \$ amount (no commas, no cents, ex GST) in the space provided,
4. Click send.

Quoted Price (excludes GST):

\$

no commas, no cents (e.g. 1234 not \$1,234.00), excludes GST

Enter your price above.

If you prefer, you can view and respond to the quote [online](#).

Need assistance? Call the help desk on **07 3716 7444**.

#### Additional Information

please supply quote for electric roller door as per plan. if you have any questions or require further information please don't hesitate to call.

#### Quote request details

The quotation checklist is attached to this email, however you can follow [this link](#) to

- View the checklist or drawings [online](#),
- Message or **request more information** from the builder,
- View the builders full **contact details**.

Drawings

**Normally\* you will receive a quote request via email**  
notifications@project-portal.com.au

The notification email will contain the following:-

1. Instructions on how to obtain drawings and submit your quote.
2. Builders contact details
3. Project Identifier i.e. Number , Suburb & Client
4. Link that provides **Limited Access** to the project (no password required)
  - View, print or download the quotation checklist
  - Select and download **the most up to date** drawings
    - Individually or
    - As a zip file or
    - Via drop box.
  - Request additional information
  - Submit your quote
  - Decline to quote
5. Link to download a drawings (zip file)

\*Normally - May vary depending on your company and personal profile settings.  
Please note: Agility is flexible, if you have unusual IT requirements please contact the help desk to discuss your needs

### You have two ways to respond

- Via the web (section 4)
- Via email (section 5)

## 4 Responding to a quote request (directly via the web)

### What is a quote request?

When the builder wants a quote from you the project-portal will send you a notification email that includes full instructions that explain you can access drawings and submit your quote.

The notification email can be divided into 4 sections, see below.

### Notification Email

**Quote request**  
**Project #2520. Banyo - Evans**

Craig Riddle(0413 873 083) from Aaron Building has requested a quote from you.

To respond to this quote request,

1. Click reply,
2. Attach your quote (PDF), single attachment only,
3. Enter the \$ amount (no commas, no cents, ex GST) in the space provided,
4. Click send.

Quoted Price (excludes GST):  
\$  
No commas, no cents (e.g. 1234 not 1,234.00) ex GST  
Enter your price above.

If you prefer, you can view and respond to the quote [online](#).

Need assistance? Call the help desk on 07 3716 7444.

#### Section 1 - respond directly via the web

Click on the "online" link

### Online let's you

- View and print drawings
- Request additional information
- Submit more than one quote

### Respond directly via the web

Home Scope of Works 2520 - BANYO - Evans Print Quotation Checklist

#### Project details

Status: ☐ New build ☒ Tendering  
Target market: ☐ Affordable Housing

#### Quotation Checklist from member

**Additional Comments**  
There will be new 90mm treated pine framed walls to kitchen, dining & WC. Deck ceiling height 3.2 TME

Supplier Lead - Asset use only

Details of Project (Whole or Part House): Deck extension to include new main house roof trussed

Area to be certified defined on Plan? ☒ yes ☐ no

Stages to be certified: ☒ Foundation cut ☐ Steel placement ☒ Framing ☐ Retaining wall ☐ Pool

#### All project drawings

Select	Preview	Description
<input type="checkbox"/>		122_Wellington_St_Banyo rev. N

Download selected drawings... Download checklist

#### Your quote details

Attach Quote\*  No file chosen

Quote number

Quoted price ex gst

Print Quotation Checklist Submit Quote I require more information... Decline Quote

#### Section 1 - Project Status & Details

#### Section 2 - Quotation checklist

See additional information / specifications not normally contained in drawings.

#### Section 3 - Project Drawings

Preview , select, download the latest version of all drawings.

#### Section 4 - Submit your quote.

Request additional information, etc

# 5 Responding to a quote request (via email)

## What is a quote request?

When the builder wants a quote from you the project-portal will send you a notification email that includes full instructions that explain you can access drawings and submit your quote.

The notification email can be divided into 4 sections, see below.

**Quote request**  
**Project #2520. Banyo - Evans**

Craig Riddle(0413 873 063) from Aaron Building has requested a quote from you.

To respond to this quote request,

1. Click reply,
2. Attach your quote (PDF), single attachment only.
3. Enter the \$ amount (no commas, no cents, ex GST) in the space provided,
4. Click send.

Quoted Price (excludes GST):  
\$  
Enter your price above.

If you prefer, you can view and respond to the quote [online](#).

Need assistance? Call the help desk on 07 3716 7444.

### Section 1 – the response section

If you choose to replying **via email**, simply click reply, attach you quote (PDF) and enter the amount in the box shown.

**Additional Information**

There will be new 90mm treated pine framed walls to kitchen, dining & WC. Deck ceiling height 3.2 TME

**Quote request details**

The quotation checklist is attached to this email. You can follow [this link](#) to:

- View the checklist or drawings [online](#),
- Message or [request more information](#) from the builder,
- View the builders full contact details.

### Section 2 – Quotation Checklist

The quotation checklist provides builders a simple specification / checklist that complements their drawings and eliminate unproductive telephone tag, and follow up emails.

*Quotation Checklists* have been specifically developed for each category.

The *Quotation Checklist* is sent as an attachment to the notification email.

### Drawings

To view or download the drawings linked to this quote request, please use either Option A (Dropbox) or Option B (pre-defined download) or Option C (let me select the drawings I want to download).

#### • Option A - Use dropbox - Preferred

You can register Agility with your dropbox account. This enables Agility to automatically forward any linked drawings to your dropbox account. It is easy, fast, reliable and safe.

To link your dropbox account, takes 30 seconds, simply..

1. Log onto [www.project-portal.com.au](http://www.project-portal.com.au),
2. Click on the V symbol, next to your email address on the right hand side of the screen,
3. Click on settings,
4. Click on the register dropbox link and follow the instructions

If you don't have a Dropbox account, simply browse to [www.dropbox.com](http://www.dropbox.com) to create a free account.

#### • Option B - Predefined Download

Click [here to download](#) a ZIP file containing the relevant drawings.

#### • Option C - Manual Download

Click on [this link](#) to manually select and download your drawings.

### Section 3 – Drawings

The Project-Portal provides a number of different options to enable suppliers to download drawings without any special software.

Downloading drawings overcomes file restrictions associated with email.

Note Option C – Manual download lets you review all drawings and ensures you have access to the latest revision of drawings, including any that have changed since the quote request was generated.

### Email system validation token

Please **do not** modify the lines below.  
This information is included so that the Agility Project-Portal emailing system can verify the validity of this email and all responses.

### Section 4 – Validation Tokens

The email validation tokens are used by Agility to process email responses.

You can forward the request to a colleague. Provided they are listed in your organisation's contacts they can respond on your behalf.

**Warning: Do not change email validation tokens**



# 6 Dashboard

The dashboard is divided into 3 sections

Quotes • Orders • Messages

Each section of the dashboard provides 5 latest entries.

Click on the heading link to see all entries

## Heading Link

Each section provides the latest 5 changes, click on the blue heading link to see all records.

## Change of deliver date

If a builder requests a change a delivery date the system prompts you to accept the new date.

Keeps track of downloaded drawing zip files.

Click on the down arrow to customise your personal or company profile.

## Help

Instant answers to most common questions.

## Response Required

Keep your revenue pipeline moving. If you need additional information from a builder mark your message response required.

Read message still retain the "response required" status until the Builder actually respond.

## Project Link

Click on a project link to view the

- Builders contact details
- Quotation Checklist
- Drawings

## Tasks

Let's you coordinate office and site activities so that nothing slips through the cracks.

Agility enables you to convert any message to a task and assign that task to one of your staff.

It replaces white boards, emails etc and puts everyone on the same page.

## Administration Follow up

Follow up by Agility staff is kept separate from your direct conversations with builders.

**Need Help?** For free support call the help desk on 07 3716 7444

# 6b Dashboard Messages

Agility Project - Portal messaging has been designed with builders and suppliers in mind.

- Messaging posts a permanent record of the message in your message wall.
- Sends an email
- Sends an SMS

Unlike emails which are point to point or person A to Person B, Project-Portal is grouped base which means that postings that you make can be read by both your team and the builder's team. It eliminates the need for just in case emails.

All messages for all projects can be read from the central message dashboard.

Messages	
<b>INBOX (VIEW ALL)</b> 17	
Response required	11
Site diary	14
Administrator followed-up	28
<b>OUTBOX (VIEW ALL)</b>	
Response required	4
Administrator followed-up	19
<b>TASKS (VIEW ALL)</b> 14	
Past due	6
Today	0
Assigned to you	9
Assigned by you	5

**Response Required**  
Automatically flags messages that require a response.

Even messages that have been read stay response required until someone in your team actually sends a response.

Any message or site diary entry can be tagged as a task.  
You can assign any tasks to yourself or delegate it to another members of your team.

**Each project has its own messages**

Messages can be created and viewed from the project template page.

Just click on the envelope icon

Project A

Project B

Project C

Project D

# 6c Messages Dashboard

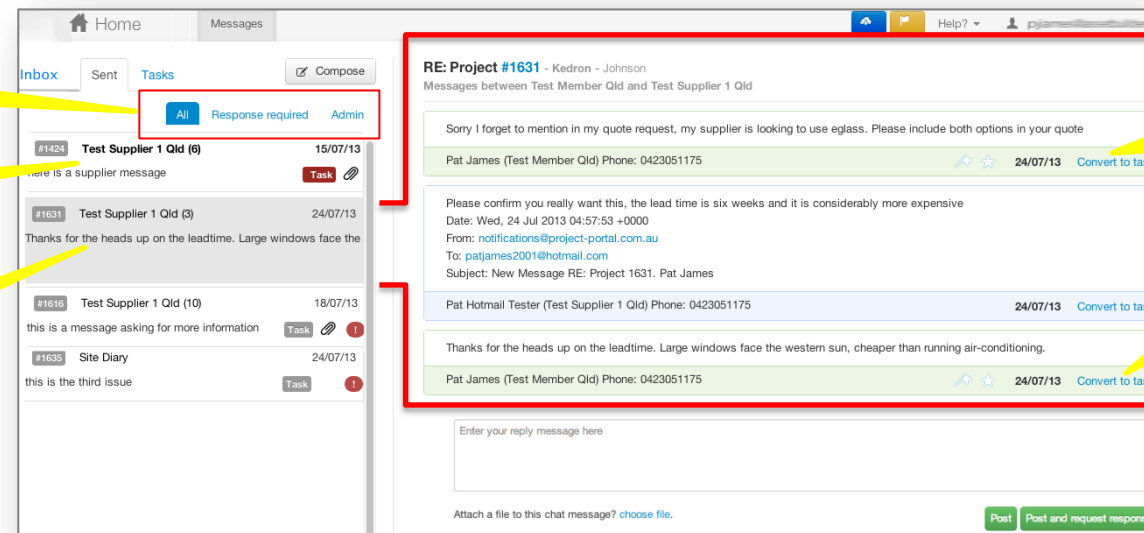
The Agility Project-Portal multi modal messaging has been designed with builders and suppliers in mind.

- Messaging keeps a permanent record of the conversation message in your message wall.
- Sends an email or SMS

Scoping filters let you hide unwanted messages

Bold text indicates unread message

Grey shading indicates current selected message



Whenever you or one of your staff post or responds to a message, it becomes part of a continuous conversation thread for that project.

Ditto for builders

## Why **Agility** messaging?

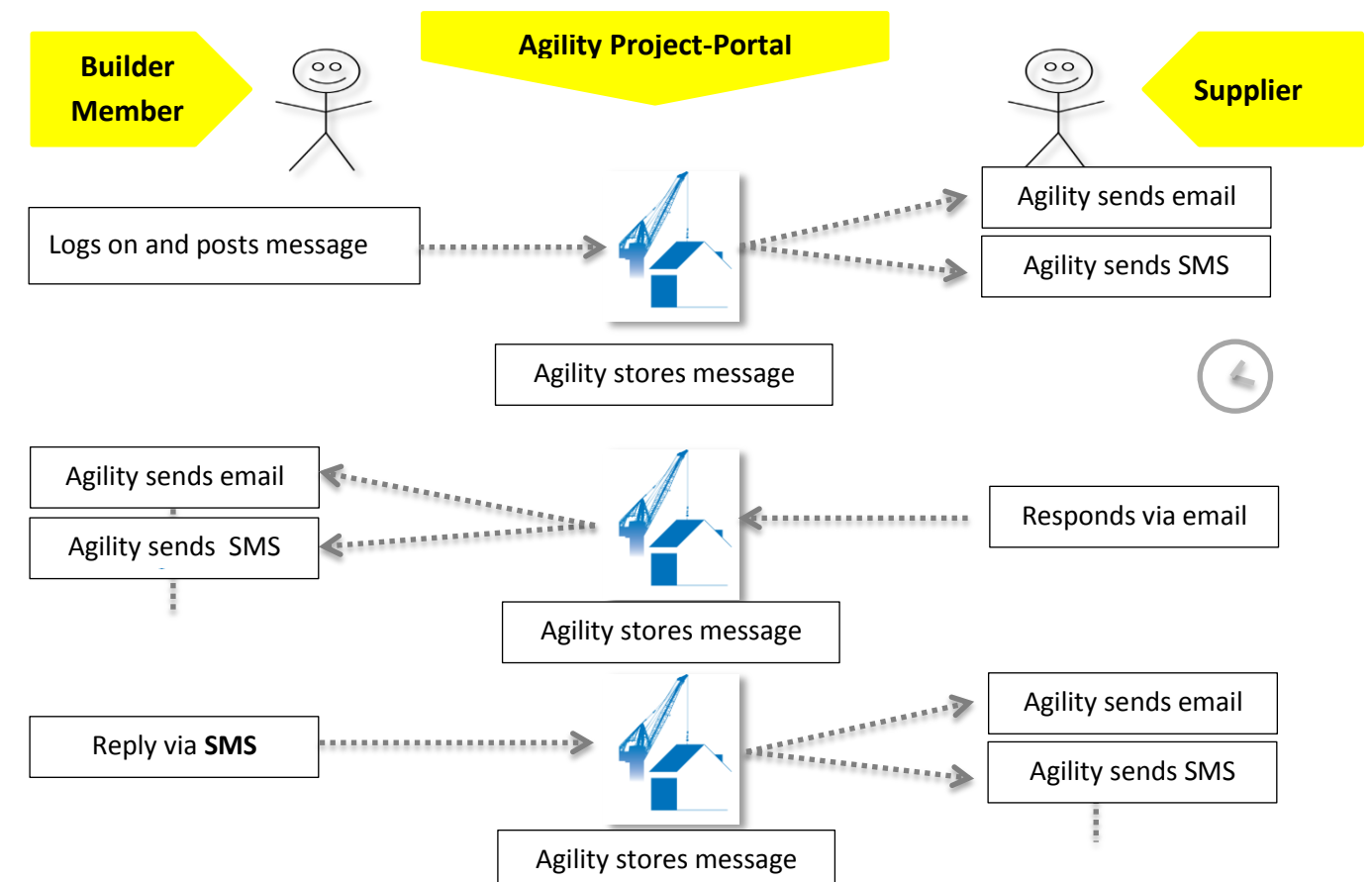
Many suppliers go to great lengths to ensure that all of their documents are located in one place, meantime important contract emails are strewn across multiple computers and email addresses. Your emails deserve a central repository like your other critical documents. Agility solves this problem.

## How it works

It does not matter whether the recipient replies to your initial message via email, SMS or directly with their own web post.

Agility's multi-modal capability **threads all replies into a single**, complete, coherent conversation.

Agility keeps everyone in the loop, reduces misunderstandings and puts you on a very sure footing in the event of a dispute.

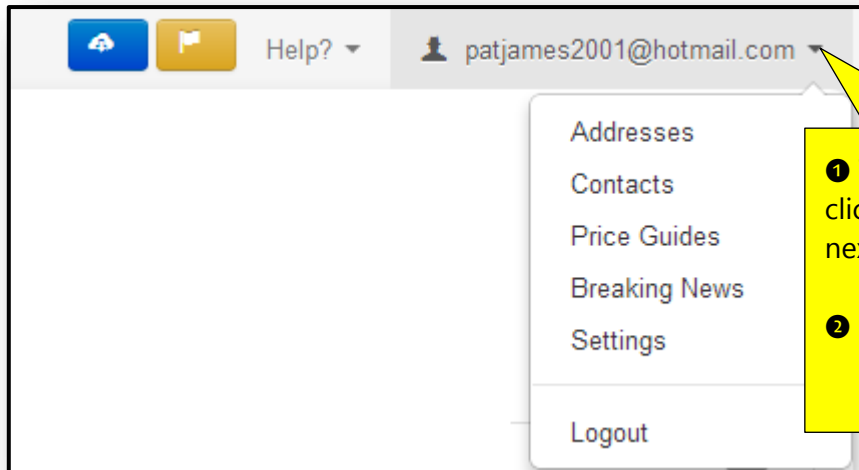




# 7

## Customise your personal profile

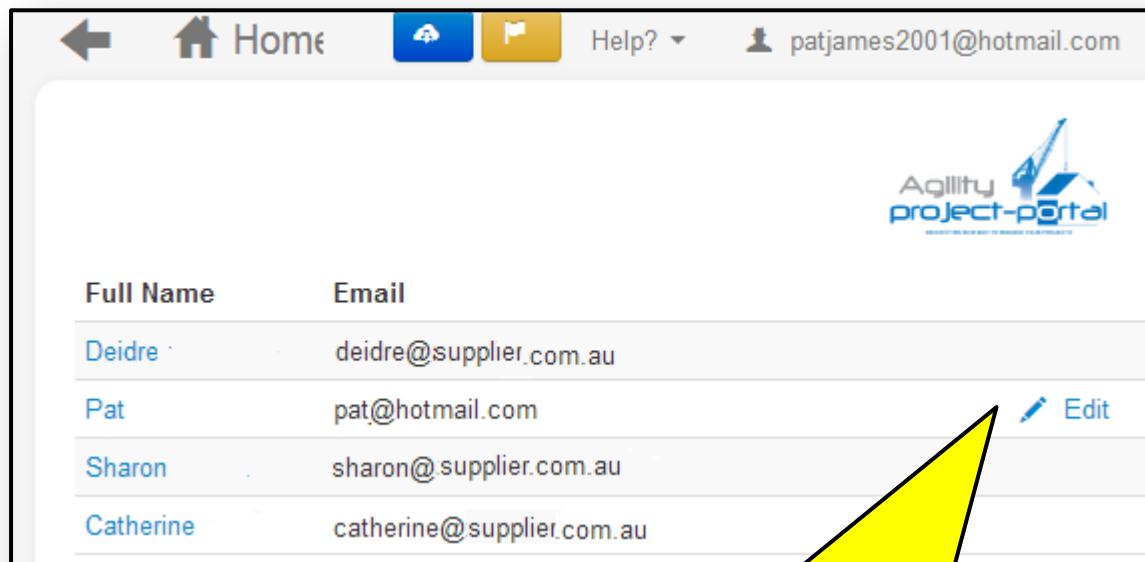
1



❶ To access your profile click on the down arrow next to your email.

❷ Click on contacts

2

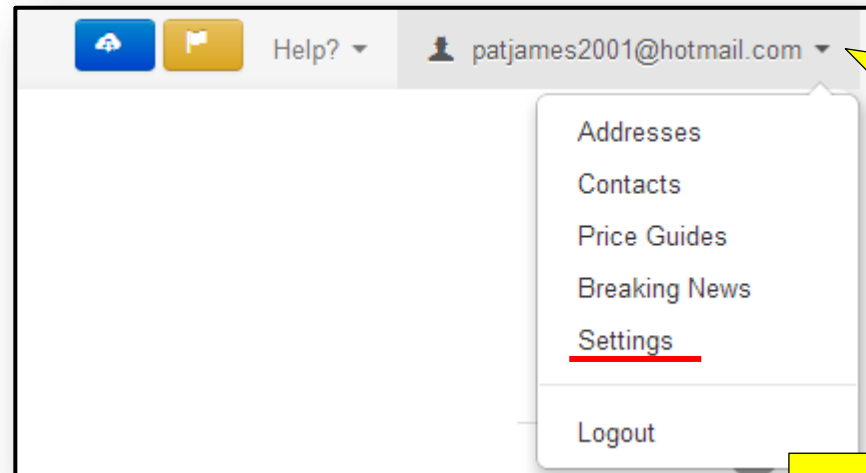


You can see all your organisations contacts, you can **edit** your own contact

Your company's designated admin contact can edit all contacts

This is **optional!** Agility will work perfectly OK using the pre-set company profile.

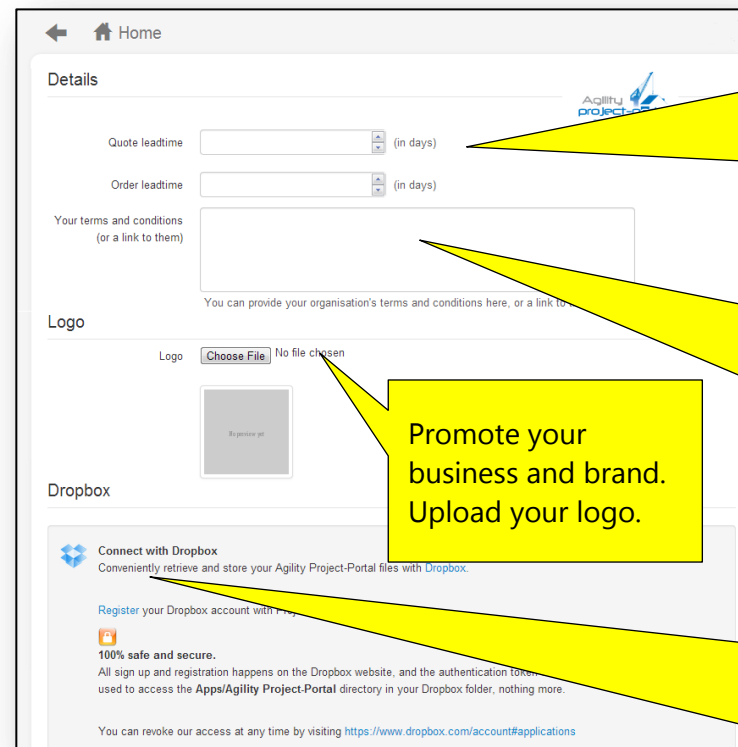
1



❶ To access your profile click on the down arrow next to your email.

❷ Click on settings

2



## Lead Time

Agility used the quote and order lead-time to give the builders a heads as to when the quote will become overdue. If no lead-time is specified the default is 5 days.

## Standard Terms and Conditions

Cut and paste your standard terms and conditions here. When a builder requests a quote they will see your standard terms and conditions.

Promote your business and brand. Upload your logo.

## Link your drop box account.

When a builder requests a quote relevant drawings will be forwarded directly to your drop box account. See the you tube demonstration for more details.

## Logo file types

Agility will accept most type of image files eg

- JPEG
- Giff
- PNG
- But not PDF files

Agility will automatically resize your logo.

Need help? Call the help desk.

## Standard Terms and Conditions

When you upload a quote, agility only accepts one file, preferably a PDF. But what if you also want to make the builder aware of your standard terms and conditions.

There are several options

- You could combine your separate PDF files into one file and then upload that file.

Or

- You could just add your terms and conditions to the portal.

# 9

# Help & Support



## 1 Help Desk Not your usual help desk

- Australian Based – no internet delay or poor call quality
- 07 3716 7444
- Email [agilityhelpdesk@project-portal.com.au](mailto:agilityhelpdesk@project-portal.com.au)
- English as a mother tongue
- Knowledgeable - Helpful - Friendly

Agility Help Menu

## 2 You Tube Channel Provides short video clips that get you going

Shows you how to get the most from Agility, including i-pads and i-phones.

Just Google you tube AgilityHelpDesk or paste the link below into your web browser

<http://www.youtube.com/channel/UCA-1vdd86KFjbVMBy8NAnnA>

## 3 Agility Knowledge Base A great reference tool

Agility Knowledge Base is a growing repository of helpful articles that cover a range of Agility technical issues. <https://sites.google.com/a/project-portal.com.au/agility-knowledge-base/>

## 4 Breaking News Keeps you up to date with the latest improvement

Whenever something important changes we let you know. Read now or mark to read later, it's your choice. Need to refresh your memory; review previous news postings, simply click on the 'V' symbol next to your username (upper right hand side of your screen)

## 5 Update Friday Every Friday, one email that keeps you up to date

Bombarded by spam, we know how it feels. We gather the news and give you succinct weekly digest called *Update Friday*.

## 6 Team Viewer For those times when we cannot be there in person

Let's us share our screen and vice versa, it is the next best thing to being there in person. To download the Team Viewer app from the Agility website, click on the *I need help* option and select the PC or Mac version.