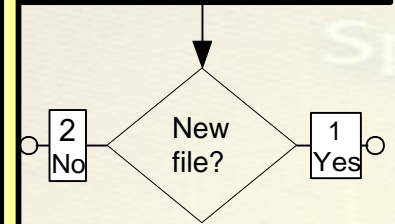


Standard Quotation At A Glance

Create/ Open File



1. Create New Specification, Quotation or Order Document

Click on Create New SQO Document. Select Quotation and click on Create. Enter File Name, then click OK. Default file location is: C: \Program Files\ SQO\UserQuotes\filename.quo.

2. Open Existing Specification, Quotation or Order Document

Click on Open Existing SQO Document. Select Quotation and click on Open. Select File Name, then click OK.

Enter Data

Headers

Enter all necessary project information. Make sure you click on **Update** when finished.

Titles/ Notes

Click on Titles/ Notes - New - Add Title. Enter title name and click OK. Click on Title/ Notes - Edit - Delete to edit/ delete titles/ notes.

Comments

Displayed at the end of the document. Make sure you click on **Update** when finished.

Figures

Click on Figures. Double-click on product category (Roof Drains, etc.). Find and click needed product (1010).

Variations / Options

Select components necessary to the product. Start with Variations (Outlet Type, Outlet Size, i.e. 1010C04). Select Multi-Part/ Single Part/ Options as needed. If "Suppress Invalid/ Incomplete Variation/ Option" feature is off (default value) a warning message will appear for incomplete variations. Click OK to continue. You can turn this feature on in the **Options** menu.

Add For Item

Click on the Add For Item icon; The variations will appear in the green box. To remove, double-click on the selected component in Add For Items box.

Quantity:

Enter quantity in appropriate box. Click **Add To Document** when finished.

Edit/ View Data

Edit Details

Click icon to edit description. You can also add Figure Description and Figure Notes for each line item. Click **Apply** when finished.

Organize Selected Figures

View sequence of entered products. Change order of products on document by selecting products and clicking on **Move Selected**. Products will be displayed in the Desired Document Element Order box. To correct mistakes, click on **Refresh Contents**. Click on **Remove Selected** to delete a product.

- Edit Figure Details Ctrl+D
- Edit Figure Selection Ctrl+S

Double-click on product to open Edit Figure Details/ Edit Figure Selection menu. See Edit Details/ Figures. If figure selection has changed click **Update Document**. The system will automatically return to Organize Selected Figures screen.

Click **Update Document** when finished organizing selected products.

To view document, click **Print**.

View/ Print

Print

Click icon for view/ print menu screen.

Format

Click Format/ Format Options. Select **JRS Default Short Quotation (Qty; List Price)** then click **Apply**

The screen will reflect new document format (figure number, description, location, sizes, quantity, unit price).

Cover Sheet

Click on Format - Cover Sheet and fill in necessary information. Click **Apply** when finished.

To fax a quotation with a cover sheet directly from your computer, select the fax device installed on your computer by clicking on **Printer Setup**. Set up the page and printing features and click OK. Check Format - **Include Cover Sheet** before clicking on Print button.

Print

Select the appropriate printer by clicking on **Printer Setup**, set up the page and printing features and click OK. Click on Print to print quote.