



# Electronic Consultant<sup>™</sup>

Version 10.0.3 (updated 8/1/11)

A Residential In-Home Presentation Program



## **Inside This Manual**

- **How to set up databases**
- **How to use the Electronic Consultant<sup>™</sup> in the home**
- **Viewing & Printing Professional Proposals**
- **How to compare prices of several systems in minutes**

**Electronic Consultant<sup>™</sup> Manual \$19.95**

## **Important Information**

**Please Note:** To maximize your training investment, the following guidelines are recommended.

All trainees are to have a computer. Be sure and bring your workbook, power supply and all external drives (CD-ROM & floppy drive).

All computers are to have the Electronic Consultant and the Energy Analyzer (optional) software installed and unlocked (validated) prior to starting time. Call Connie at (815) 452-2345 to validate.

Electronic Consultant CD-ROM should be in CD-ROM drive (*usually*; D:\ , E:\, or F:\).

Please silence all cell phones, beepers, or other disruptive devices.

Please have computers plugged in and ready to begin at the pre-set starting time.

### **Look for *Hints*:**

*Throughout this workbook, you will find boxes like this with additional information or hints that are informative and helpful.*

### **System Requirements:**

Windows® 98 or higher, NT, or XP operating system. (ME not recommended)

Pentium® 100 or higher processor.

64 megabytes of RAM.

CD-ROM or DVD drive.

Sound card.

High color monitor.

30 MB hard drive space available.

### **Recommended hardware for best performance:**

Pentium® 300 or higher processor.

128 megabytes of memory or more.

1 GB or more of storage (hard drive).

Digital camera.

Portable printer.

External mouse

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# Table of Contents



## ***Informational Notes.***

*Page Number*

---

Helpful hints.	2
System Requirements	
Recommended Hardware	

## ***Section I. Understanding computer basics.***

---

Quick Start Guide	5-6
File Structure	7
Glossary of Terms	8 - 9
Settings and Version Numbers	9

---

Company Information: <i>Company Setup.</i>	11 - 12
Setting Up the Standard Proposal: <i>Print Setup</i>	13
Determining Your Markup: <i>Markups and Margins</i>	14
Custom Discounts and Warranties and Rebates	15
The Payment Calculator: <i>Finance Options</i>	16
Purchase Orders: <i>Shipping Information</i>	17
Importing Digital Pictures: <i>Importing Proposal Cover</i>	18
Importing Price Files: <i>Updating Price Files</i>	18
Setting Up Multiple Computers: Exporting: <i>Exporting Setup Files</i>	19
Setting Up Multiple Computers: Importing: <i>Restoring Setup Files</i>	20

## Table of Contents (continued)



### ***Section III. How to set up your database***

*Page Number*

---

Data Tags	21
Adding items to the database: <i>Installation Data</i>	22
Adding items to the database: <i>Equipment Data</i>	23
Entering Equipment Specifications	24
Entering Associated Parts: <i>Accessories</i>	25
Building Kits: <i>Kit Builder</i>	26 - 27
: <i>Manual Entry</i>	28
Entering Warranty Data	29
Warranty & Equipment Match	30

### ***Section IV. Steps of the in-home presentation process***

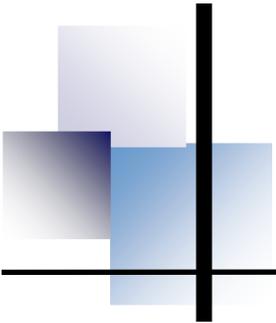
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Pre-call Preparation	31
Importing the Proposal Cover	32
Entering Job Information	33
Importing the Existing System Pictures	34
Customer Involvement	35 - 36
Developing a Professional Image	37
Personalizing Your Presentation	38
Showing Your Quality Work: <i>Before &amp; After Pictures</i>	39
: <i>Installations</i>	40
Presenting Your Products: <i>With Pictures</i>	41
: <i>With Movies</i>	42
Audio & Video Setup	43
Power Point Presentation	44
Building The Proposal	45 - 46
Comparing Equipment Prices	47
Equipment Specifications and Features	48
Add Associated Parts and Manual Entries	49
Adding an Extended Warranty	50

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Previewing and Printing the Proposal	51 - 52
Printing Your Documents	53
Printing Post Sale Information	54

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# Quick Start Guide

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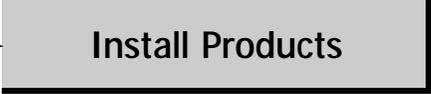
## *Welcome To Adtek Software!*

Thank you for your interest in our products. The following is a step-by-step guide to help you get started.

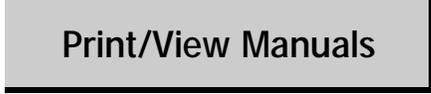
Insert the disk in your CD ROM drive. It may start automatically, if not, click on the Start button and select Run; Locate your CD ROM Drive and type in "setup.exe"  
Example "E:\setup.exe"

The first screen you will see has five buttons;

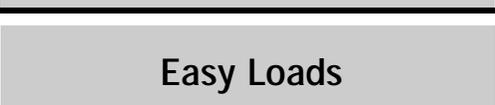
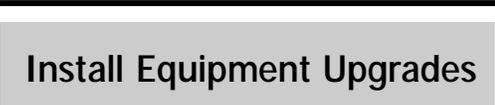
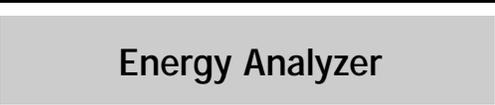
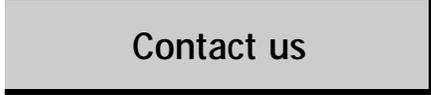
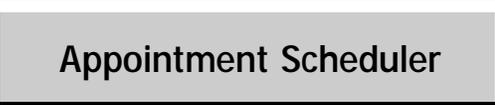
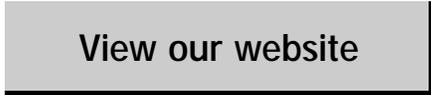
Click on the Install Products button.



The next screen allows you to select the software product you wish to install. If you want to Demo the Electronic Consultant you must install it first.



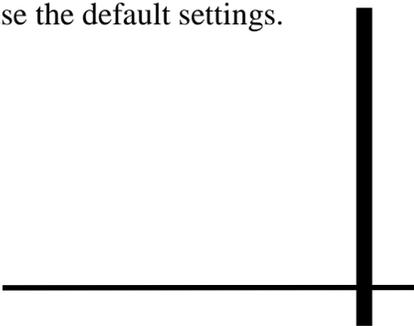
Click on the Electronic Consultant



Follow the on-screen instructions.

You may be missing required files and your computer may re-boot automatically, possibly more than once.

It is recommended to use the default settings.



## Quick Start Guide

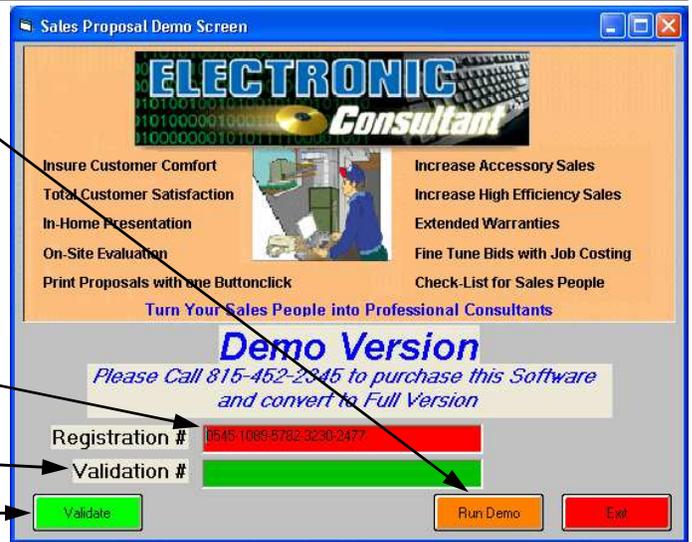
Once the software is successfully installed, the Demo screen will pop-up. Click on the Run Demo button.

You now may navigate through the program.

After you have completed the demo and want to purchase the product, call Adtek and give us the number listed in the Red box.

We will give you an unlock number to type in the Green box.

Click the Validate button to unlock the full system.



## Start up Procedure

**After reviewing all the features and benefits of the program and reading this manual, then it is time to start customizing the program for your company. We recommend you start with your Company setup.**

### **I. How to setup your company information.**

- A. General Information (p.11 to p.12)
- B. Customizing the Standard Proposal (p.13)
- C. Entering your Markups and Margins (p.14)
- D. Entering Extended Warranty promotions and Rebates (p.15)
- E. Set the default for the Financial Calculator (p.16)
- F. Add your Company Information to the Purchase Order Screen (p.17).

### **II. How to add information to the databases.**

- A. Adding or changing Data Tags (p.22)
- B. Adding Installation Items (p.23)
- C. Adding Equipment (p.24 - p.26)
- D. Adding Kits (p.27 - p.29)
- E. Adding Warranty and Rebate Information (p.30 - p.31)

### **III. How to setup your In-home Presentation.**

- A. Setting up the Customer Needs Survey (p.36 - p.37).
- B. Setting up your Presentation (p.38 - p.42).
- C. Importing Digital Pictures (p.18).
- D. Loading the Movie and Sound Files (p.43 - p.44).
- E. Backing up your files and Exporting setup files to another computer (p.11 to p.12).

### **IV. Making a Presentation.**

- A. Practice, Practice, Practice. Do role playing.

**Ask your Distributor about Training Classes from Adtek.**

# I. Understanding Computer Basics.

## *File Structure*

### File Structure

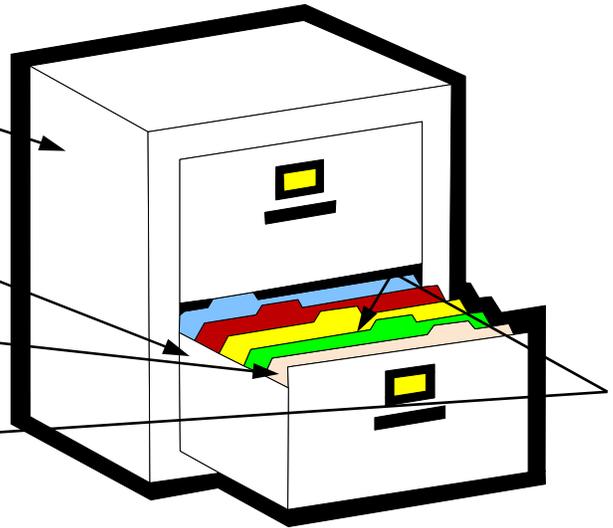
Computer = File Cabinet

Hard Drive (C:\) = File Drawer

Folders (C:\ Adtek) = Folders

Files (logo1.bmp) = Information

### Computer vs. Filing Cabinet



### File Structure (Path)

My Computer

C:\

Program Files

Adtek

Brand

Sales

bmp, avi.

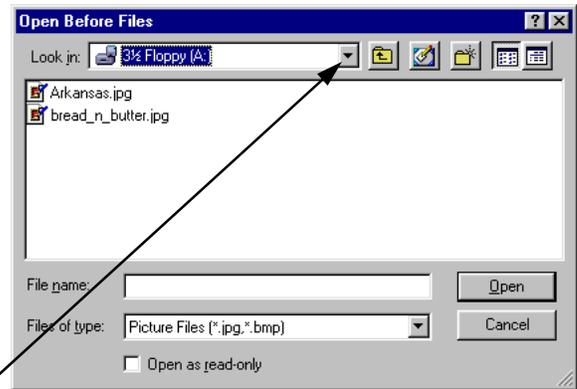
Select the file

### How to locate a file

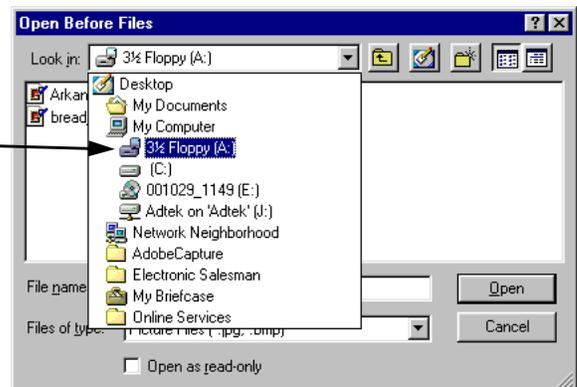
When trying to locate a file to import, follow the steps in this example (*Importing a cover picture*):

1. Select file from the menu bar.
2. Select Import Cover File.
3. Click the Locate Picture button.
4. The Look In screen will pop-up.
5. Click the down arrow by the dialog box.
6. From this list you may select the location where the desired information is stored (*example; 3 1/2 Floppy (A:)*).
7. Highlight the desired file and click open.
8. View and Save, if desired.

### Look-In Dialog Box (Windows 98)



### Look-In Screen with drop down menu.



# I. Understanding Computer Basics.

## Glossary of Terms

### Bit

Binary Digit

Megabit = 1 million bits.

Gigabit = 1 billion bits.

### CD-ROM drive

Compact Disk– Read Only Memory.

### Default settings:

A particular value for a variable that is assigned automatically by the operating system and remains in effect unless canceled or overridden by the operator.

### Defrag (Disk Defragmenter)

A process that will rearrange files and unused space on your hard drive so the programs will run faster.

### DVD drive:

Digital Video Disk Drive.

### Embed

To cause to be an integral part of a surrounding whole. (example: to embed a picture or logo into a template)

### Floppy Drive:

A removable information storage device, usually the (a) drive with storage capacity of 1.44MB.

### File extensions: Format (examples)

*.avi	= audio video interleave	= This is where you will locate the movies and sound files.
*.bmp	= bitmap	= Pictures
*.jpeg	= joint photographic experts group	= Digital picture
*.mpeg	= moving photographic experts group	= Moving digital picture
*.rtf	= rich text format	= File extension format used by some word processors, i.e. word.
*.ppt	= power point	= Power Point file (read or write)
*.pps	= power point show	= Power Point Show (read only)

### Hard Drive:

A permanently fixed information storage device, containing a magnetic disk, usually (C:, D:, or F:). Hard disks generally offer more storage and quicker access to data than floppy disks do.

### Infra-red Port:

Allows for cable-less connections to external devices (example; portable printer).

### Link

To go to another file or program to use the contents of that file or program, but not make it a permanent part of the host file or program.

### Path:

The necessary steps taken to find a file.

### RAM:

Random Access Memory.

### USB Port:

Universal Serial Bus.

# I. Understanding Computer Basics.

## Glossary of Terms, Settings and Version Number

### Wildcard character:

\* (example; \*.\* means any filename with any file extension).

### Windows® 95 or 98:

Operating systems.

### ZIP Drive:

A removable compressed information storage device, usually the (d) drive with storage capacity of 100MB or 250MB.

### Settings:

Path for setting-up your computer monitor (screen).

Example is for Windows 98. Your system may differ.

Click **Start**;

**Settings**;

**Control Panel**;

**Display**;

**Settings**; select your highest color, *example True Color 32 bit, or Best Color 16 bit* .

Continue on by clicking;

**Advanced**;

**General**;

In the Display box, you will see Font Size; Select **Small Font**.

**OK**.

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### Software and Database Version Numbers:

Click "Help" on the tool bar; then "About". This screen will popup.

The Software version number is located here.

The Database version number is located here.

### About Screen





## II. How to set up your system. “Company Information”

### Company Setup Tab

Complete the Company Information Form.

#### Company

Enter your general company information.

#### Contact

Is used for your company’s internal use only.

#### **Misc. Settings**

##### Default Salesperson

The name of the Salesperson giving the presentation.

##### Default Proposal #

You can assign a starting proposal number (numeric only) and the E/C will automatically increase that number or the last proposal number used, by one digit, each time you start a new proposal.

##### Default Proposal Number Box

Check this box if you want the software to add the proposal number to the Customer Information form. If you leave it unchecked, you must add a proposal number each time you start a new proposal.

##### Hide Cost on “Summary Screen” Box

Check this box if you do not want the customer to see any cost on the preview screen.

##### Enable Quantities on “Proposal Screen” Box

Check this box if you want to be able to add quantities to items on the proposal.

#### **Notes:**

### Company Setup Screen

#### **Customize Screen Logos**

##### Splash Screen

The “Splash Screen” is the first screen you will see when you start the program. You may add a .jpg or .bmp of your choice. As an example, you may insert a picture of your company, the brand you sell or your employees.

1. Click the button labeled “Splash Screen”
2. The Look-in Dialog Box will pop-up.
3. Locate the desired file.
4. Click insert.
5. Follow the above instructions for the buttons listed below.

##### Proposal Screen

You may insert a logo to appear on the proposal.

##### Dealer Logo

You may insert your Company logo on the proposal.

##### Mfg. Logo

You may insert the Manufacturer’s logo on the proposal.



## II. How to set up your system. “Company Information”

### Company Information Tab (continued)

#### Customize Icon Path

#### Update Information C-I Button

This feature allows you to access another software program.

When you click on the C-1 button the “Set Program Path” Look-in Dialog Box will pop-up.

Locate the desired file and click insert.

You will be able to access that program by clicking on the C-I button located on the tool bar.

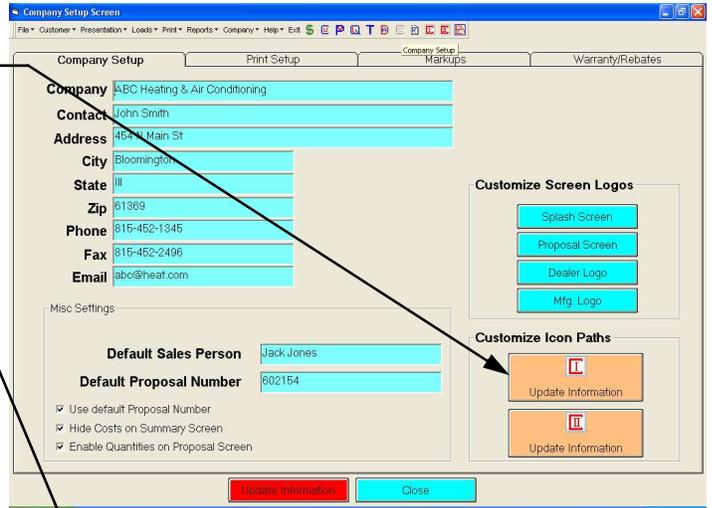
#### Update Information C-II Button

Same feature as above.

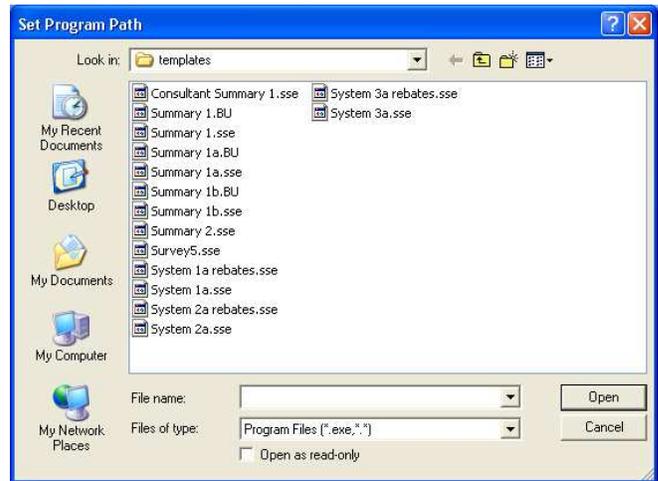
**Hint:**

**After you have completed entering all the setup information and clicked the “Update Information” button, then exit the program and re-enter to view all the changes.**

### Company Setup Screen



### Look-in Dialog Box (XP version)



**Notes:**

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### Class Exercise

1. Fill in your Company’s general information
2. Type your name in the “Default Salesperson” box.
3. Determine if you are going to use the “Default Proposal Number”. If so, add the starting number.
4. Click the update information button.
5. Insert a new picture into the “Splash Screen”



## II. How to set up your system. “Setting Up The Standard Proposal”

### Print Setup

Determine what information you want to print on the bottom of your proposal.

#### Proposal Guarantee

Enter your company’s guarantee policy.

#### Proposal Acceptance Policy

Enter the terms and conditions regulating proposal acceptance.

#### Proposal Heading

Enter any title you would like to show on the top of the proposal (*example: Spring Special*). This is optional and may be left blank.

#### Days Accepted

Enter the number of days the Customer has to accept the proposal.

#### Print control boxes

Check the boxes you want the software to default to. It is recommended to use preprinted letterhead. If you decide to use preprinted letterhead, then the logo boxes must be unchecked. Also, check the Show Signature Lines if applicable.

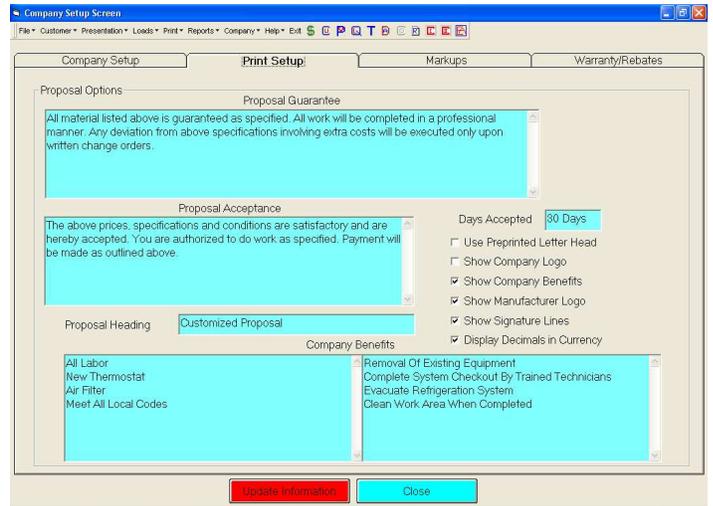
#### Company Benefits

List the items that are included in every installation. If you include something that your competition does not, then be sure to list it.

**Hint:**  
Use pre-printed letterhead to save printer ink and printing time.

**Note:**  
See the report writer Manual to design custom proposals.

### Print Setup Screen



### Notes:

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### Class Exercise

1. Change the “Days Accepted” to 29.
2. Set up the following boxes:  
 Uncheck the Use preprinted letterhead box.  
 Uncheck the Use company logo box  
 Check the rest of the boxes.
3. Add “Prompt Service” to Company Benefits.
4. Change the Proposal Header to read:  
 “Spring Special”.
5. Click the update information button.



## II. How to set up your system. “Determining Your Markup”

### Markups and Margins

Determine what gross margin of profit you want to have at the end of the year. You should monitor it regularly and adjust your gross margin as needed.

When you type in a gross margin, the multiplier will change automatically and visa-versa.

#### Material Markup

Enter the material markup or margin for each dollar level.

#### Warranty Markup

Enter the desired markup or margin for extended warranties.

#### Labor Markup

Enter the desired markup or margin. This will be applied globally.

You may enter up to three different labor rates to specific items.

#### **Example:**

Labor Unit 1 might be your top technician.  
Labor Unit 2 might be an assistant or helper.  
Labor Unit 3 might be a parts runner.

It is easy to update your labor margin because you only allocate labor units to specific equipment, so all you have to do is update the labor unit rate from this screen.

#### **Hint:**

**This system will allow you to allocate overhead at a different rate for material and labor** (example; your accounting department may determine that labor is 80% of your overhead and material is 20%).

### Markup Setup Screen

#### Edit Discount Codes

To edit customized discounts click on the yellow Edit Discount Codes button and follow the instructions on the next page.

#### Material Sales Tax Rate

Enter the total sales tax rate for your area, if more than one, add them together. (6 1/4% would be entered as .0625).

#### Labor Sales Tax Rate

If labor is taxed in your area, then enter the rate here.

Determine if you want to calculate sales tax before or after markup. Be sure to Update Information.

#### **Note:**

**The sales tax is computed after the markup is applied in versions 3.05 or less and is optional in version 3.06+.**

#### Class Exercise

1. Enter material markup for 0 to \$25 @ 50% gross margin.
2. Enter material markup for \$251 and up @ a 1.40 multiplier.
3. Enter labor markup @ 60% gross margin.
4. Click the update information button.



## II. How to set up your system. “Customize Discounts” and “Warranties & Rebates”

### Customize Discounts

This screen allows you to setup special discounts that will not show on the proposal. The discount amount will be deducted from the total sale before tax and the tax, if any, will be calculated on the discounted amount.

1. Type in the Discount Code Name
2. Use the down arrows to determine the discount multiplier (for a 10% discount enter .90).
3. Click the Add/Update button
4. Enter a Label Name, this will appear on the Customer Information Screen.
5. Click the Set as Default button. The new label and any line that is highlighted will be the new default. You will be prompted to close and re-open the program for the changes to take effect.

### Customized Discounts Setup Screen

Name	Material Disc	Warranty Disc	Labor Disc
A	1.00	1.00	1.00
B	0.90	0.90	0.90
C	0.85	0.85	0.85

### Warranty & Rebates

This screen allows you to set the start and end dates of extended warranty promotions and rebates.

#### Extended Warranties

When your supplier announces that a promotion is in effect, you should enter the start and end dates of that promotion.

#### Promotion Multiplier

Enter the cost share percentage (example; if 50% cost share, then enter .50).

The promotion multiplier is reciprocal of the cost share percentage. Together they equal 1 (Example; if the manufacturer will share 40% of the cost; then the promotion multiplier would be 60% or .60).

#### Rebates

Rebates are entered the same as extended warranties.

Note: Warranties and Rebate must be selected in the Data Tab to enable this function.

### Warranty & Rebates Setup Screen

#### **Hint:**

**You may right click on any date field and a calendar will popup.**

#### **Remember:**

**After you have completed entering all the setup information and clicked the “Update Information” button, then exit the program and re-enter to view all the changes.**



## II. How to set up your system. “The Payment Calculator”

### Finance Options

At this screen you should set the default settings for your area. When you start the program these settings will automatically come up, but may be changed at will.

#### Rate

Percent of interest currently being offered.

#### # of Payments

Number of payments for the duration of the loan.

#### Import System Costs

Check which system costs you would like to have imported into the amount field.

#### Terms

- Standard
- 90 days same as cash
- 180 days same as cash
- 360 days same as cash

If the amount is not paid within the selected terms, then interest will accrue from the first day of the note.

#### Down Payment

If the customer gives a down payment, you should enter it here. The down payment will show on the proposal.

#### Other options

Check the options you wish to use.

- Use percentage for monthly payment.  
*If your finance company uses a percentage to determine the payment, enter the percentage here.*
- Show monthly payments on proposal

**Hint:**  
**Use this screen to show different payment options to the customer.**

### Payment Calculator Screen

### Notes:

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### Class Exercise

1. Set the interest rate at 20%.
2. Set the number of payments at thirty-six.
3. Set the terms at 90 days same as cash.
4. Set the Amount to \$5,000.
5. Set the Customer down payment to zero.
6. Click the “Calculate Payment” button.
7. Click the “Save as Default” button.



## II. How to set up your system. “Purchase Orders”

### Purchase Orders

At this screen you should set the default settings for your distributor and your company. When you start the program these settings will automatically come up, but may be changed at will.

#### Buttons

Green “Set As Default”: Click to set the information on the screen as default.

Brown “Preview”: Click to preview how the information will look when printed.

Yellow “Print”: Click to print.

Light Blue “Close”: click to close this screen.

### Shipping Information Screen

### *Using the Purchase Order*

Select a System, Click the Refresh button, Highlight the labor and click Delete. This procedure will remove any unwanted items from the P.O.

Click the Add button and high-light the blank line that was added. Now you may add new items to the P.O.

The Preview/Print and Close buttons are the same as above.

### Purchase Order Screen

Qty	Part#	Description	Cost
(1)	36 x 36 pad	(1) Outdoor Unit Pad	36
(1)	3/8 x 7/8 35 ft	(1) Copper Insulated Lineset	69
(1)	Double Pipe 2 in. Up to 30 ft	(1) Flue Venting	80
(1)	10/3 - 50 ft Copper with suble	(1) Outdoor Unit wiring	65
(1)	200BPMS	(1) Square D 200 Amp Breaker Panel/New Meter Sock 1400	55
(1)	Standard Supply Plenum	(1) Supply Air Plenum	55
(1)	20 x 20	(1) Air Handler Return Air Cabinet	80

### Notes:

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### Class Exercise

1. Select the Purchase Order Screen.
2. Select System I, II, or III.
3. Enter a Purchase Order Number.
4. Check the Include Material Cost box.
5. Click on the Refresh.
6. Add 20' of 2" PVC pipe; now select and delete a row



## II. How to set up your system. “Importing Digital Pictures” and “Price Files”

### Importing The Proposal Cover

The easiest way to personalize the homeowner’s proposal is to take a picture of their home upon arrival. If you use a camera that accepts a 3 1/2” floppy disk the procedure is very efficient.

The steps for importing files is similar throughout the software. From the *File* drop down menu, select *Import Cover File*.

#### Locate Picture

Click the yellow button **Locate Picture**. A box will pop-up and ask, *look in*, if you are using a 3 1/2” floppy disk, then look-in your (a) drive. Open the folders or files that contains your picture.

Go to page seven (7) if additional help is needed.

#### View Picture

The picture will be displayed, if correct, continue.

#### Re-name file

You may type in a new file name if you wish.

#### Save Picture

Click the green button **Save Picture**. When imported, a box will say imported successfully.

### Importing Proposal Cover File Screen



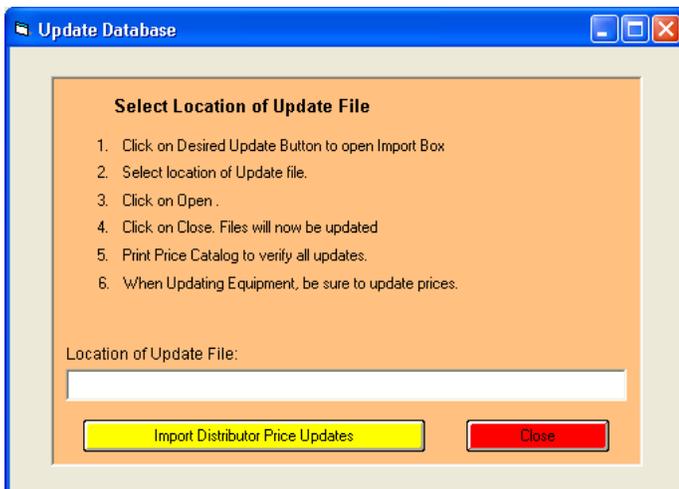
#### Printing Cover Picture

Un-check the **Do Not Print Cover Picture** box to Print a cover picture.

#### Close

Click the red button **Close** to exit this screen.

### Importing Price Update File Screen



### Updating Price Files

Your distributor may supply you with a 3 1/2” floppy disk containing your current cost on the items he sells.

#### Open Update Box

Click the yellow button **Import Distributor Price Updates**. A box will pop-up and ask, *look in*, go to the location of your update file (*usually A:\*).

#### Open File

Highlight the Update1.mdb file and click the **open** button on the pop-up screen. When you open this file your prices will automatically be updated.

#### Close

Click the red button **Close** to exit this screen.

#### Verify

Print a catalog and verify the prices have been updated.

#### Updating Equipment

Be sure to update pricing when updating equipment.



## II. How to set up your system. “Setting Up Multiple Computers, Exporting, Backup”

### Exporting Setup Files

If you decide to install the software on more than one computer, this step will save you time. Be sure the Electronic Consultant Software is installed and unlocked on all computers you wish to import to, before proceeding.

Setup your system completely on one computer; then send to a floppy disk. Usually your (a:) drive.

The procedure for exporting files is as follows:

#### Company Setup Files

Check the **Company Setup Files** box (use one disk for each checked box).

#### Send To

Click the down arrow and select the drive you wish to export to (usually a:).

#### Backup

Click the green button **Backup** to begin the backup process. When the process is finished a pop-up box will say Backup completed.

#### Close

Click the red button **Exit** to close this screen.

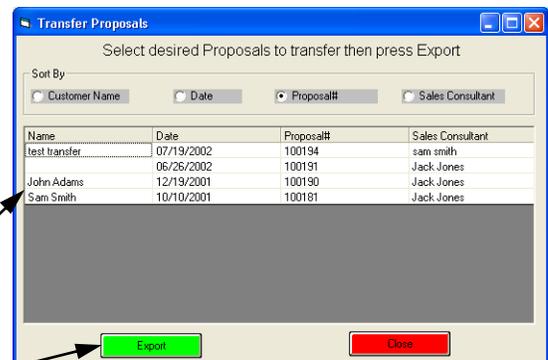
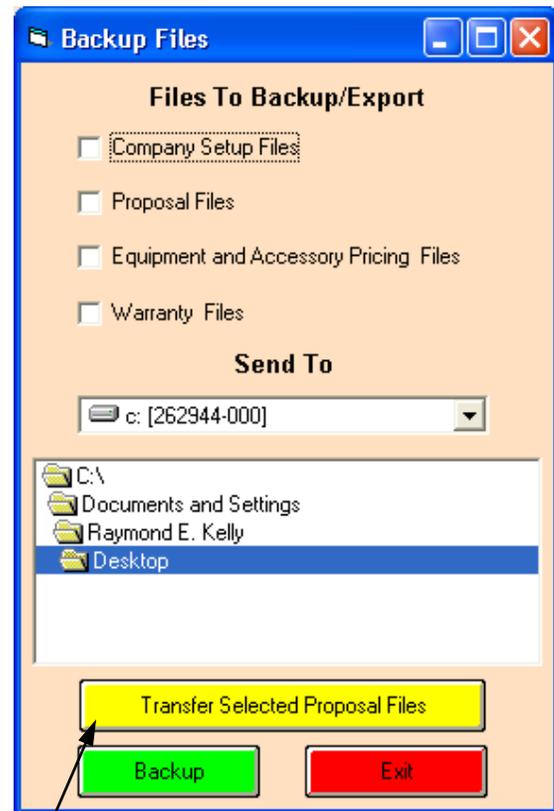
#### **Hint:**

**Use this procedure to backup your files for storage. Regular backups are recommended.**

#### Transferring Proposals

1. Click the yellow button to select proposals you wish to transfer. A pop-up screen will list all your proposal.
2. Highlight the proposals you wish to export.
3. Click the green **Export** button to copy.
4. When completed a “Proposal Transferred” box will popup.

### Backup/Export Screen



## II. How to set up your system. “Setting Up Multiple Computers, Importing”

### Restoring Setup Files

Insert the floppy disk into your floppy drive.

The procedure for Restoring files is as follows.

#### Company Setup Files

Check the appropriate files box.

#### Import From

Click the down arrow and select the drive you wish to import from (*usually a:*).

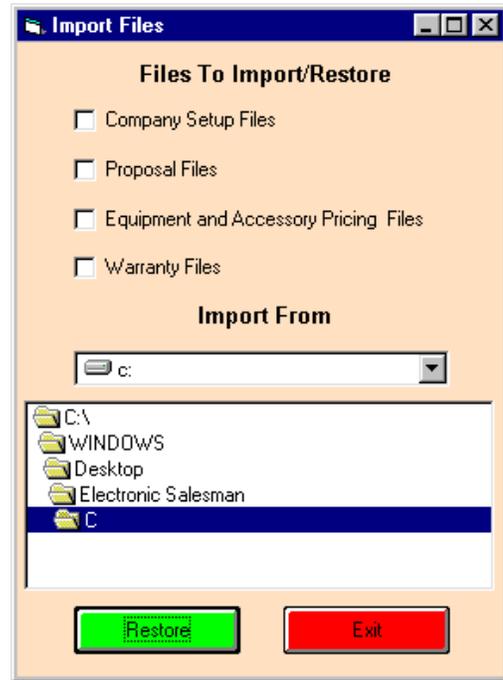
#### Restore

Click the green button **Restore** to begin the process. When the process is finished a pop-up box will say Restore completed.

#### Close

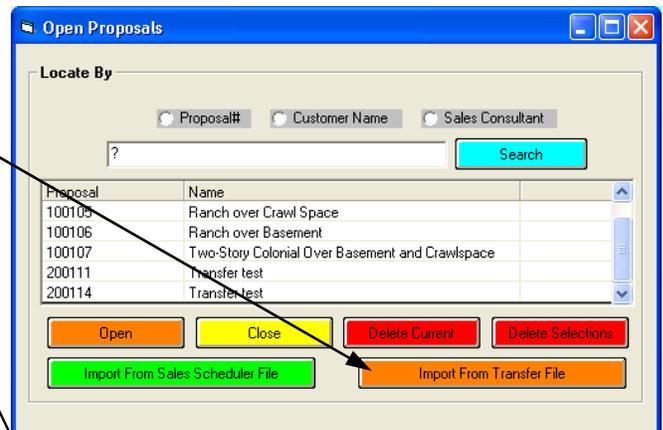
Click the red button **Exit** to close this screen.

### Import/Restore Screen



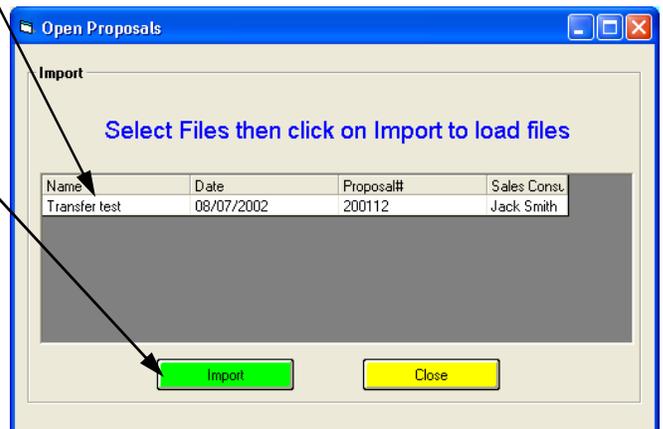
### Importing Proposals from the Transfer File

1. Click on “File”.
2. From the drop down menu select “Open Proposals”.
3. Click on the “Import From Transfer File” button.
4. The Open Proposal Screen will popup
5. Highlight the proposals you wish to import.
6. Click the “Import button.
- 7.



### Class Exercise

1. Click on Company Setup Files.
2. Locate your (*a:*) drive.
3. Click on backup.
4. Close.
5. Now Restore the file.





### III. How to set up your Databases. “Adding Items To The Database”

#### Installation Data

This screen allows you to add items to whichever database you select, even if you entered a new tag in the A thru N boxes on the Job Screen (tag is the term used to label or describe what is in the database). Follow the steps listed below to add items to any database.

#### Installation Data Screen

**Step 1:** Select a database tag or type the new name into the Tag field if you entered a new tag in the Description/Tag Screen.

**Step 2:** Enter the Material and/or Labor cost if applicable. The selling price will be calculated by the software. If you want to see what the selling price will be, then click “View Selling Price”.

**Step 3:** Enter the manufacturer (optional), a unique part number, and a description.

**Step 4:** Click Add Record button.

Repeat this procedure for each part you enter.

**Remember** to click the Add Record button when adding a new part and click the Update Record button when changing an existing part.

#### Graphical Data Screen

The Tags in the Graphical Screen cannot be changed, but you may add equipment or parts to the existing databases by following the above steps.

#### **Remember:**

**The Part # must be unique and the description you select will be printed on the proposal.**

#### Installation Data Screen

Part#	Description	Material Net	Labor Net
2250	High Efficiency Air Cleaner	200.00	.00

#### **Hint:**

**You may type in as many Tag/ Descriptions as desired. These can be viewed in the manual entry screen by clicking the yellow “Add Manual Mat/Labor” button located on the Proposal Builder Screen.**

#### Class Exercise

1. In the Customize Data Screen, in the Tag Box, type in Boiler.
2. Type in the material cost.
3. Type in the Mfg., a unique part number, and a description.
4. Click the Add Record button.







## III. How to set up your Databases. “Entering Associated Parts”

### Accessories

Click the pink button **Go To Accessories** to bring up this screen .

The Equipment Data Accessories Screen will allow you to enter parts associated with a given model #.

### Add to the Associated Parts list.

To associate a part with a particular model, follow these steps:

1. Click on Tag to select the unit type (air conditioner, furnace, etc.).
2. Click on Model # to select the model. You may select multiple models.
3. Highlight the accessory from the accessories database (the bottom grid).
4. Click the green up arrow (+) to add the accessory to the associated parts list.

### To remove a part from the Associated Parts list.

1. Highlight the part in the Associated Parts list.
2. Click the red down arrow (-) to remove the part .

### To add an accessory to the accessories database:

**Step 1:** Enter a Part #

**Step 2:** Enter the material and labor cost, if applicable.

**Step 3:** Enter the Description.

**Step 4:** Click the **Add Record** button.

Click the **Go To Equipment** button to return to the previous screen.

### Accessories: Associated Parts Screen

### Notes:

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***Hint:***  
**When you click on an item in the Associated Parts box or an item in the Database box, the description and cost will be listed in the Accessories fields.**

### Class Exercise

1. Associate an LP kit to a furnace.
2. Now remove it.



## III. How to set up your Databases. “Building Kits”

### Kit Builder

This feature allows you to group material and labor used on most jobs (*example: air conditioner, coil, pad, lineset, labor, etc.*). This will save time in the home when building the proposal.

**Step 1:** Click on **Clear Screen** (*optional*).

**Step 2:** Check the boxes that apply.

- Include Manufacturer Name with equipment description
- Include Model # with equipment description
- Include Capacity and Efficiency with equipment description
- Show quantity on Description
- Itemize on Proposal  
(If you do not itemize on the proposal, then the description line will be printed on the proposal).

**Step 3:** Check the Database box that applies.

- Equipment Database
- Accessory Database
- Parts Database
- Warranties

**Step 4:** Go to the Tag dialog box and click the down arrow. From the drop down menu select the database Tag; then the Family; then the item you wish to add to the kit; then add the quantity of that item; then click the green down arrow (+) to add. Click the red up (-) to remove an item.

**Step 5:** Repeat Step 4 for each item you wish to add.

**Hint:**  
Be sure you have entered a part into your new kit before assigning a Kit Part # and Description.

### Kit Builder Screen

**Step 6:** Go to Kit Database; Category. Type in a category (*example; Air Conditioner or Furnace*); then click the Kit Part # data entry box and type in a unique part number; then click the Description data entry box and type in the description that you want to show on the proposal.

**Step 7:** Click the green button **Add/Update Kit** to save.

(continued on next page)

**Hint:**  
It will be easier to manage your Kit Database if you begin the kit part # with “AC” for air conditioners, “HP” for heat pumps, etc. Kit part #'s are alphabetized in the proposal screen

### Notes:

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### III. How to set up your Databases. “Building Kits (continued)”

#### Kit Builder (continued)

#### Other Buttons:

**Add/Update Kit:** To add or remove an item of an existing kit, select the Kit Part# that you want to edit and repeat step 4; then click the green **Add/Update Kit** button.

**Update Prices:** When new prices have been imported or you have manually changed prices in any of the databases, you must click the orange **Update Prices** button, if you want the new prices applied to your kits.

**Copy:** After you have built a kit you may select several line items and copy them to clipboard.

**Paste:** When building a new kit you may paste the items you saved in the clipboard.

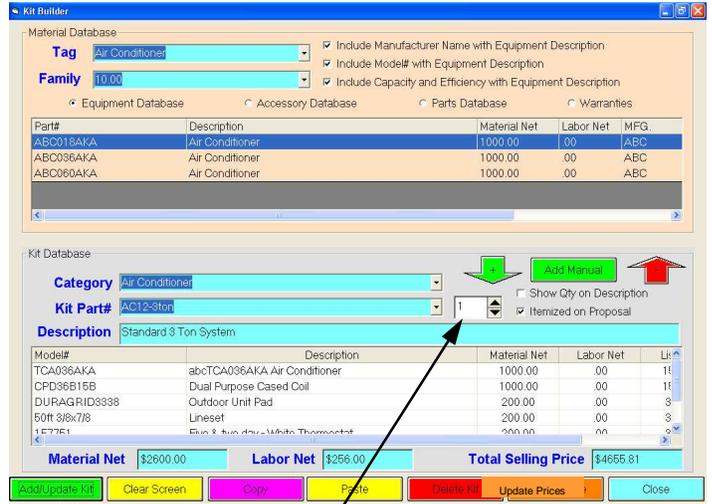
**Delete a Kit:** To remove a kit from the Kit Database click the red **Delete Kit** button.

**Close:** To close the Kit Builder screen click the light blue **Close** button.

#### Note:

To change the order of any line item in the kit database, just drag the line with your mouse.

#### Kit Builder Screen



Enter quantity here

#### Notes:

#### Hint:

**If you want to include the manufacturer's name and a model # in the description, then be sure to check**

- Include Manufacturer Name with equipment description
- Include Model # with equipment description
- Include Capacity and Efficiency with equipment description

**before you add that item to your new kit.**

**To reverse an entry, delete the part and re-enter. Then Update Kit.**

#### Class Exercise

- Build a kit with an A/C, coil, lineset, pad, and labor.
- Click “Include Manufacturer Name with description”.
- Click “Itemize on Proposal”.
- Add the kit to the Kit Database.



### III. How to set up your Databases. “Building Kits: Manual Entry”

#### Manual Kit Builder

When you click the Add Manual button from the Kit Builder Screen, this screen pops up. This will allow you to enter parts that are not in the database. Be sure to add the material and the labor cost. This information will be used when analyzing your profits. You may establish the selling price for any part you add manually.

You may adjust a kit selling price by entering an amount into the Selling Price field.

*Example:* By adding (-100) in the selling price field and clicking the green down arrow, the amount in the Total Selling Price field will be decreased by \$100. Click “Update Kit” to save.

#### To Add A Part Manually:

1. Enter a Part #
2. Enter the material and labor cost.
3. Enter the Description.
4. Click the “Calculate Selling Price from Mark-ups” button or enter the desired selling price into the Selling Price field.
5. Click the green down arrow (+) to add the part to the kit.
6. Repeat Steps 1 through 5 for each item you wish to add.
7. Click the green button **Add Kit** to save if your building a new kit and **Update Kit** if you are adding to an existing kit.
8. Click the light blue button in the upper screen to **Close** the Manual Kit Builder Screen.

#### Kit Building: Manual Screen

Note:

When you enter an item into the Manual Entry screen

And click on the green (+) down arrow

it will be entered into the kit database.

#### Notes:

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#### Class Exercise

1. Add a part manually.
2. Calculate the selling price.
3. Change the selling price to \$100
4. Click on the green down arrow (+)
5. Return to the Kit Builder Screen.



## III. How to set up your Databases. “Entering Warranty Data”

### Extended Warranties

*Entering an Extended Warranty into the database.*

1. Type in a unique part number.
2. Enter net cost.
3. Type in a description.
4. Click **Add Record**.

*Including an Extended Warranty in a promotion.*

1. Click on the warranty you want to include.
2. Check the box **Include in Promotion**.
3. Click **Update Record**.

This will add cost depending on promotion multiplier and date fields in the Company setup.

### Rebates

*Entering a Rebate into the database.*

1. Type in a unique part number.
2. Enter the Rebate cost.
3. Enter the Rebate amount.
4. Type in a description.
5. Click **Add Record**.

*Including a Rebate in a promotion.*

1. Click on the rebate you want to include.
2. Check the box **Include in Promotion**.
3. Click **Update Record**.

***Hint:***  
In the “Inc” column the 0 changes to a 1 if included in a promotion.

### Warranty Screen

### Rebate Screen

### Class Exercise

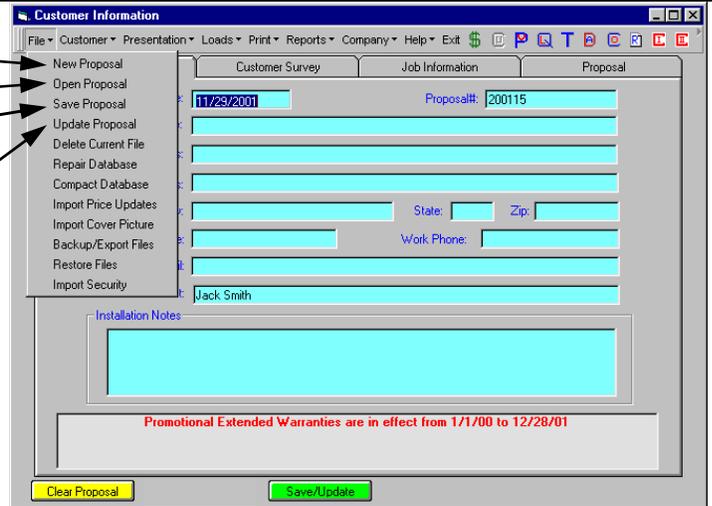
1. Enter “RB123” for a Part Number.
2. Enter “Spring 12 SEER Rebate” as a Description.
3. Enter \$75 for the Net Cost.
4. Enter \$150 for Rebate to Customer.
5. Click on the Add Record button.
6. Select a warranty to be included in a promotion.





## IV. Steps of the In-Home Presentation Process. “Pre-Call Preparation”

- To start a new proposal, click here.
- To open an existing proposal, click here.
- To save a new proposal, click here.
- To save (update) an existing proposal, click here.



### Opening An Existing Proposal

To open a proposal, first, Click “File” then; “Open Proposal” from the drop down list. Select the proposal you want to work with from the list shown. The Customer Information Screen, shown below, will appear.

### Notes:

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### Saving a Proposal

To save a new proposal, click “Save Proposal” from the drop down list. If you are working with an existing proposal, then click “Update Proposal”.

### Pre-call Preparation:

The first step in the selling process is to fill-in the Customer Information Form before you arrive at the prospect’s home. This will save valuable selling time.

#### Date

The date will be entered by your computer.

#### Sales Tax

Check this box if this is a taxable sale.

#### Proposal #

You can assign a proposal number or the E/C will do it for you, automatically, increasing one digit each proposal. (see *Company Setup of this workbook, for details*).

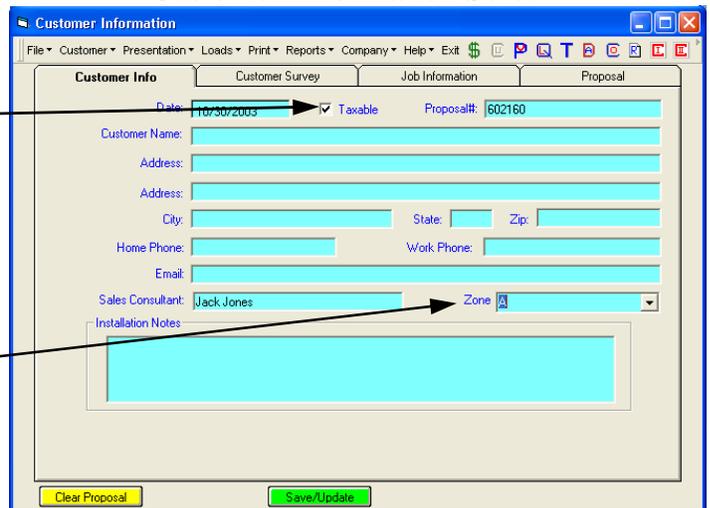
#### Price Code

Select the price code for this proposal (see pages 14 & 15, on customized discounts).

#### Installation Notes

Type in information specifically intended for the use of the Consultant. (example: *Homeowner works nights, call only after 2 P.M.*).

### Customer Information Screen



### Class Exercise

1. Fill in the Customer Information Screen.
2. In the Installation Notes box type in a statement that might be beneficial to a Consultant.



## IV. Steps of the In-Home Presentation Process. “Importing The Proposal Cover”

### On Arrival:

Using a digital camera, take a picture of the customer’s home upon arrival (*a camera that uses a 3 1/2” floppy disk, is recommended*). Insert the floppy into your (a:) drive.

If you need additional help with importing a picture, turn to page eighteen (18) of this manual.

### Importing the Proposal Cover

From the *File* drop down menu, select *Import Cover File/Dealer Logo*.

### Locate Picture

Click the yellow button **Locate Picture**. A box will pop-up and ask, *look in*, select your a: drive, open the file that contains your picture.

### View Picture

The picture will be displayed on the left side of the screen, if O.K., continue.

### Save Picture

Click the green button **Save Picture**. Once the picture is imported, a box will say imported successfully.

### Printing Cover Picture

Un-check the **Do Not Print Cover Picture** box to Print a cover picture.

### Close

Click the red button **Close** to exit this screen.

### Class Exercise

1. Locate (*file*) on your Adtek tutorial floppy (*see page 18 of this workbook for details*).
2. View and save picture.

### Importing Digital Files Screen



**Hint:**  
**For Help press F1 or click the “?” Button.**

### Notes:

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## IV. Steps of the In-Home Presentation Process. “Entering Job Information”

### Appraise the Existing Conditions:

Establish a comfortable procedure when arriving at the prospect location. Look at the existing equipment, take measurements and pictures. Collect the information needed for the loads program. *(Use the input form that you printed prior to arrival).*

Set-up your printer and your computer. Start printing the cover page. While the cover page is printing, do your loads calculation.

Next, complete the Job Information form.

1. Click on the type of Exterior the building has.
2. Click on the Indoor Unit Location.
3. Type in the Outdoor Unit Location.
4. Type in the dimensions of the;
  - Existing Indoor Unit.
  - Supply Air Plenum.
  - Return Air Plenum.
5. Type in Special Instructions for the installers *(example; Locate condensate drain near water heater.)*.

**The above information will print out on the Installers Guide.**

### Post Sale Information, Enter:

Which system that was sold  
Call Back Date and any Comments  
Closing Date and any Comments

### Job Information Screen

### Import Picture of Existing System:

Click the yellow button and follow the instructions on the following page.

### Notes:

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### Class Exercise

1. Fill in the Job Information.
2. Click on the “Import Existing System”.

(continue on next page to finish this exercise.)





## IV. Steps of the In-Home Presentation Process. “Customer Involvement”

### Taking the Customer Survey.

This creates interaction with the customer.

When the home owner answers positively to a survey question, the answer will result in a recommendation for the necessary equipment to fulfill the need.

Example: Does anyone suffer from hay fever or allergies? The recommendation will be an Electronic Air Cleaner.

Thus, the customer is helping to select high efficiency equipment or accessories.

Let the customer click on the screen, get them involved. People support what they create.

### Customizing the Customer Survey

Click on the “Customize” button to customize a survey.

Select the Survey Question Number.

Type in the Survey Question.

Then the Results for High, Medium, and Low priority.

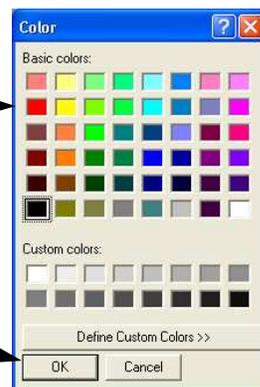
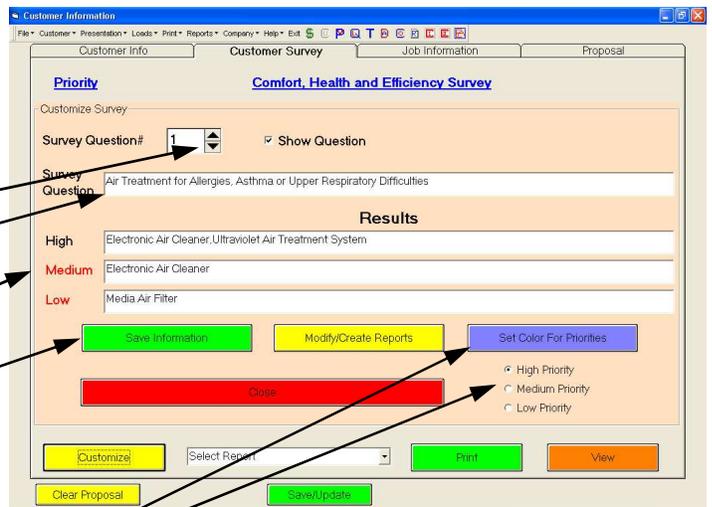
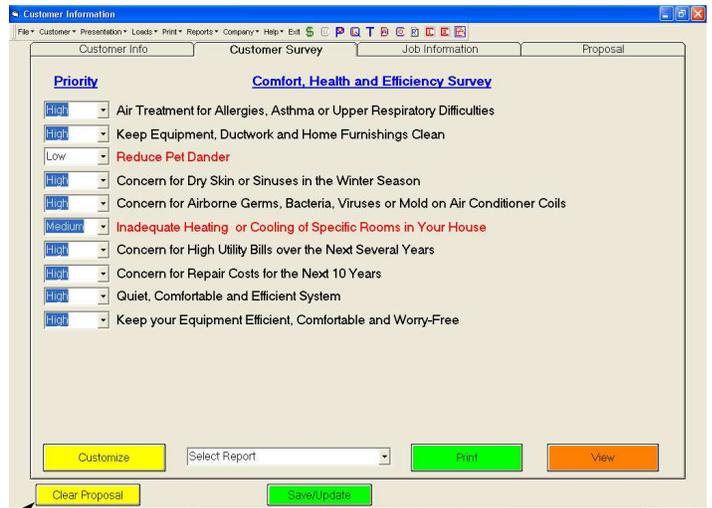
Save your information.

To set a color for each priority check which priority and click on the “Set Color For Priority” button.

Select the color of your choice

Click OK

### Customer Survey Screen



## IV. Steps of the In-Home Presentation Process. “Customer Involvement”

### Viewing the survey questions and the results.

When you click on the “View” button on the previous screen, this screen will popup.

### Customer Survey View Screen

### Previewing and Printing a report.

Select the Survey Template from the menu by clicking on the down arrow and highlighting the Survey Template.

Click on the “Print” button and you will be able to Preview the “Survey Results” form.

To print the Survey,  
Click on Print from the Menu Bar

Select Entire File.

Click OK.

Be sure you have selected a printer and setup the printer properties for that printer.

**Note:**  
You may customize the survey form.  
See the Report Writer Manual for additional details.







## IV. Steps of the In-Home Presentation Process. “Showing Your Quality Work”

### Before and After Pictures.

Take digital pictures of the existing equipment and completed jobs.

When viewing the before and after pictures with the homeowner, show a testimonial letter relating to the pictures.

To set up your Before and After Pictures, Click the **Customize** button and follow the steps listed below.

### Notes:

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### How to customize the Job Screen.

1. Click the yellow **Customize** button.
2. This will bring up the Import Digital Files screen.
3. Click the yellow **Locate Picture** button on the “Before” side (left).
4. Select the file you wish to import (.jpg or .bmp file extension).
5. If this is the picture you want to import, then Click the **Save Picture** button.
6. Repeat this process for the “After” side (right).

***Hint:***  
Be sure the new file name “before4” matches up with the “after4” to assure they are both from the same job.

### Company Jobs Screen



Click the “Installation” button to view different installation types.

### Class Exercise

1. Locate a before picture on your training disk.
2. Save it.
3. Locate an after picture on your training disk.
4. Save it.

### Company Jobs Setup Screen



## IV. Steps of the In-Home Presentation Process. “Showing Your Quality Work”

### Installations.

Take digital pictures of different types of installations. You may insert up to eighteen installation examples.

When viewing the installation examples with the homeowner, show a testimonial letter relating to those jobs.

To set up your Installations, Click the **Customize** button and follow the steps listed below.

### Notes:

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### How to customize the Installations Screen.

1. Click the yellow **Customize** button.
2. This will bring up the Import Digital Files screen.
3. Select the button # you wish to set up.
4. Type a description in the “Button Caption” field.
5. Click the yellow **Locate/View File** button.
6. Select the file you wish to import (.bmp or .jpg file extension).
7. If this is a picture of the installation you want to import, then Click the **Import File/Save Changes** button.
8. Repeat this process for each button.
9. Click “Close” when finished.

### Installations Screen



Click the “Before/After” button to return to the Before/After screen.

### Installations Setup Screen



### Notes:

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## IV. Steps of the In-Home Presentation Process. “Presenting Your Products”

### The Product Presentation.

You want the fifteen buttons to list the equipment you want to sell, the accessories you offer, and the type of installations you do.

#### Example:

1. 14 SEER Air Conditioner
2. 12 SEER Air Conditioner
3. 10 SEER Air Conditioner
4. Electronic Air Cleaner
5. Thermostat
6. Variable Speed 94% Furnace
7. 80% Furnace
8. 14 SEER Heat Pump
9. 12 SEER Heat Pump
10. Air Handler
11. Standard 90% Furnace
12. Standard 80% Furnace
13. Package Unit
14. Manufactured Cooling Only Unit
15. Typical Installation

#### ***Hint:***

**Remember, The Homeowner helped pick out the products they desire with the customer survey.**

**Show your quality installations, it will add value to your presentation**

To set up your Equipment show, Click the **Customize** button and follow the steps listed on page 38 of this manual.

#### ***Hint:***

**Equipment digital files can be located on the Electronic Consultant CD-ROM in the Bmp directory.**



### Equipment Presentation Screen



#### Notes:

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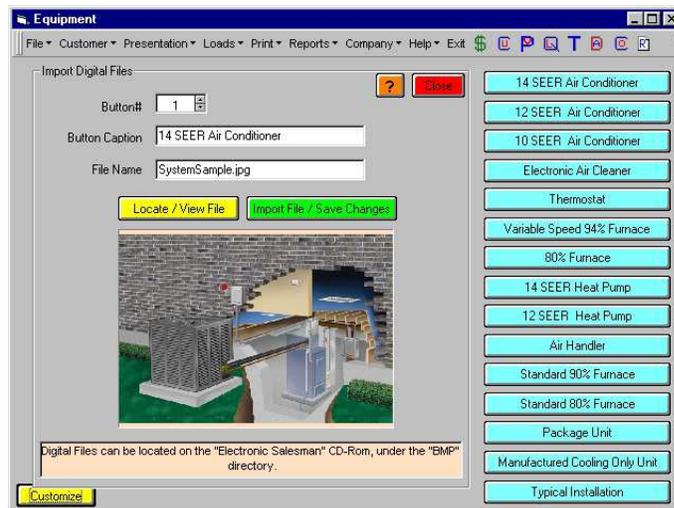


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### Equipment Presentation Setup Screen





## IV. Steps of the In-Home Presentation Process. “Audio & Visual Setup”

### Setting up your Videos.

From the Video Presentation Screen click the yellow “Customize Movies” button. The screen on the right will pop-up.

### How to customize the movie presentation buttons.

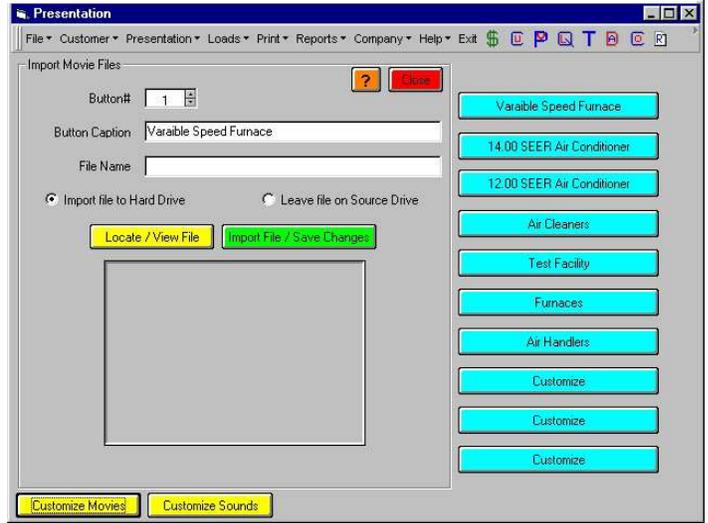
1. Select the button # you wish to set up.
2. Type a description in the “Button Caption” field.
3. Check the “Import file to Hard Drive” box or the “Leave file on Source Drive”. It is recommended to “Import file to Hard Drive” if space allows.
4. Click the yellow **Locate/View File** button.
5. Select the file you wish to import (.avi file extension).
6. If this is the video you want to import, then Click the green **Import/Save Changes** button.
7. Repeat this process for each button.
8. Click Close to return to the Video Presentation Screen.

### Setting up your Sound Comparisons.

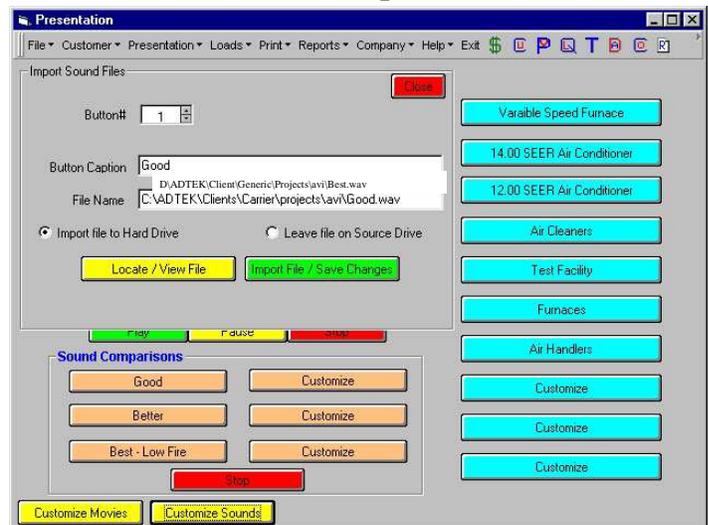
To set up your Sound Comparison buttons, Click the **Customize Sounds** button and follow the instructions listed above.

The sound comparisons should be used to show the difference in acoustical values of different types of equipment.

**Video Setup Screen**



**Sound Setup Screen**



**Notes:**

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**Hint:**  
Sound files can be located on the Electronic Consultant CD-ROM in the Avi (audio visual interlace) directory (Good, Better, and Best files).



## IV. Steps of the In-Home Presentation Process. “Power Point Presentations”

### Using the Powerpoint Screen.

This features allows you to add up to twenty-one powerpoint presentations. After you have developed a powerpoint presentation (.ppt), you will need to “Save As” a powerpoint show (.pps).

Some powerpoint presentations may be available from your equipment manufacturer or distributor.

This tool is only limited by your imagination.

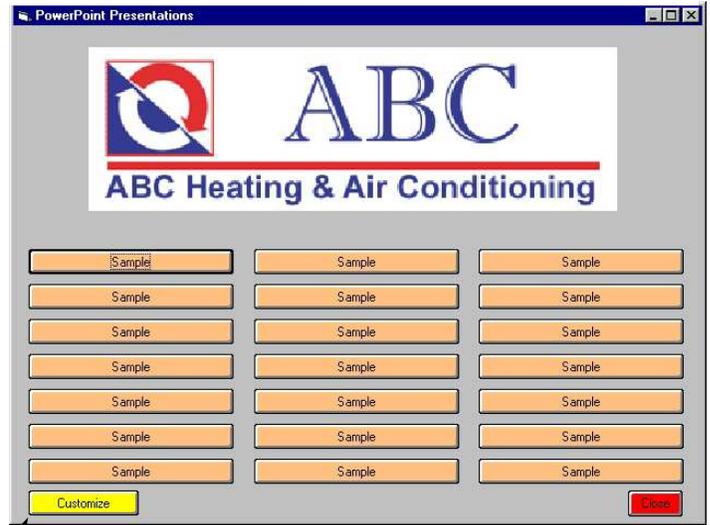
### Examples of powerpoint topics:

1. Your Company History or Company Story.
2. How different types of equipment operates.
3. Maintenance agreements or Pre-season checks.
4. Warranty details and procedures.
5. Packages:
  - Clean-air Package
  - Landscape Package
  - Comfort Package
6. Unique or specialty installations.
7. Other services you offer.

### How to customize the power point presentation buttons.

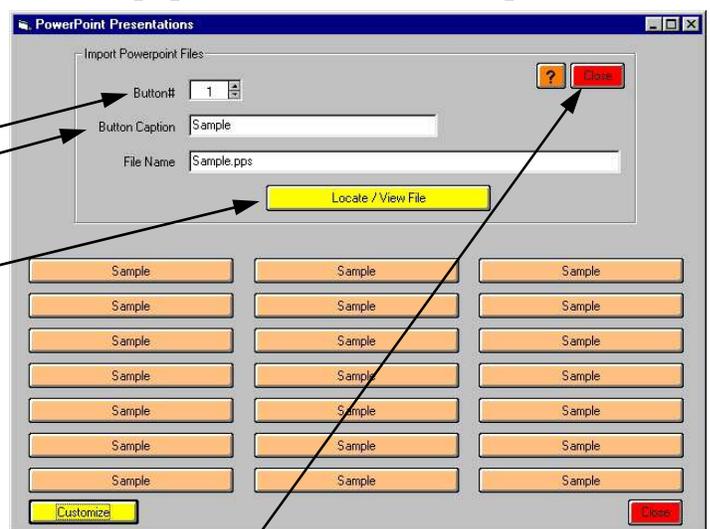
1. Click the yellow **Customize** button.
2. This will bring up the Import Powerpoint Files screen.
3. Select the button # you wish to setup.
4. Type a description in the “Button Caption” field.
5. Click the yellow **Locate/View File** button.
6. Select the file you wish to import (.pps file extension).
7. Click the “open” button.
8. A box will pop-up and tell you the file was imported.
9. Repeat this process for each button.
10. Click “Close” when finished.

**Powerpoint Screen**



**Note:**  
You will need Microsoft Power Point installed on your computer to use this feature.

**Equipment Presentation Setup Screen**



## IV. Steps of the In-Home Presentation Process. “Building the Proposal”

### Building a Proposal.

The graphical pictures at the right are linked to a database.

When you click on the Outdoor Unit or the Furnace in the graphical screen, you will be asked to select the outdoor unit tonnage or BTU’s; then the Family /SEER; then the Model #. This process will look at the database and limit your choices to only the models that will meet that criteria.

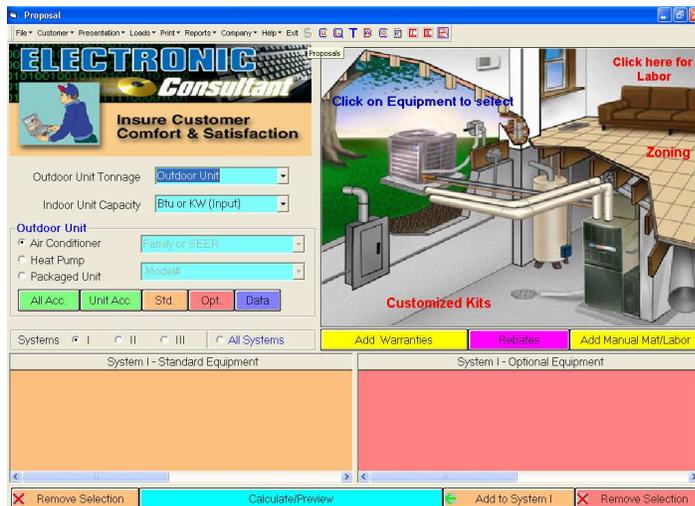
When you click on all other items on the graphical screen, a list of the items in that database will pop-up in the upper left hand corner of the screen.

### Example:

1. Click on the Outdoor Unit.
2. Select the tonnage; then the Family/SEER; then the Model #.
3. Click the “**Std**” button to add to the proposal.
4. You may want to add any unit accessories at this time (see page 86 for details).
5. Click on the Furnace.
6. Select the BTU’s/KW; then the Family/SEER; then the Model #.
7. Click the “**Std**” button to add to the proposal.
8. Add any unit accessories.
9. Check the Indoor Coil box.
10. Select the tonnage; then the cased/uncased; then the Model #.
11. Click the “**Std**” button to add to the proposal.
12. Add linesets, pads, flues, etc. in the same manner by clicking on the items in the graphical picture.

Options may be added by clicking  
the “**Opt**” button.

### Proposal Builder Screen



### **Hint:**

**When building a proposal, start with the major pieces equipment first for each system you wish to quote. Check the “All Systems” box to add items that are common to all systems.**

### **Notes:**

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### Class Exercise

Add the following items as Std.

1. 3 Ton 16 SEER A/C
2. Cased coil
3. 90% furnace
4. Pad
5. Lineset

Add the following items as Opt.

1. Electronic air cleaner.
2. Setback thermostat



## IV. Steps of the In-Home Presentation Process. “Building the Proposal”

### Building a Proposal.

Using the Customized Kit feature is a quick and easy way to build a proposal. It is recommended to start with Kits containing High-efficiency equipment .

### To add a Kit to the Proposal:

Click on “Customized Kits”

Your kits are stored by category.

First select the category type.

A list of available kits will be listed in the upper left hand corner of the screen.

Highlight the kit you want to add to the proposal and click on the “Add to System” button.

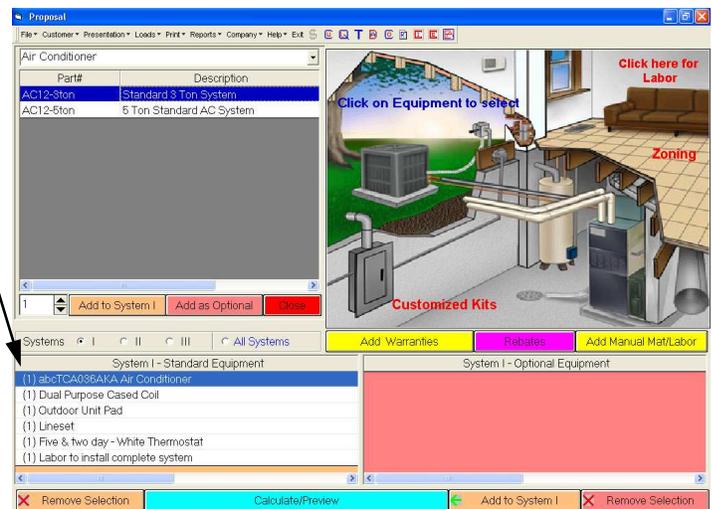
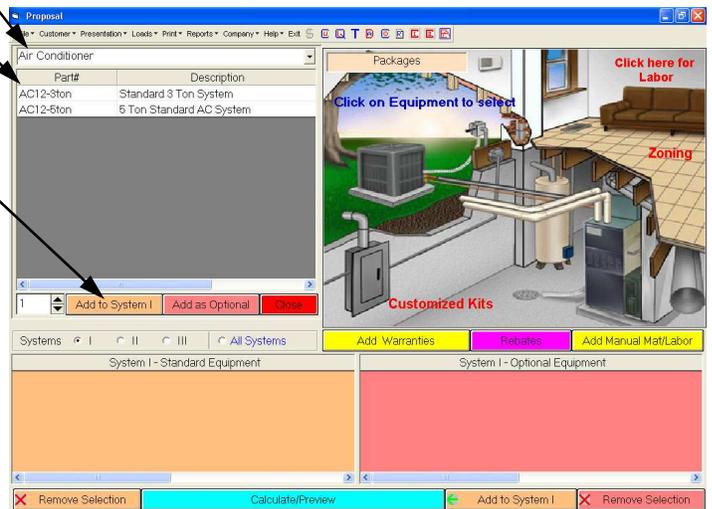
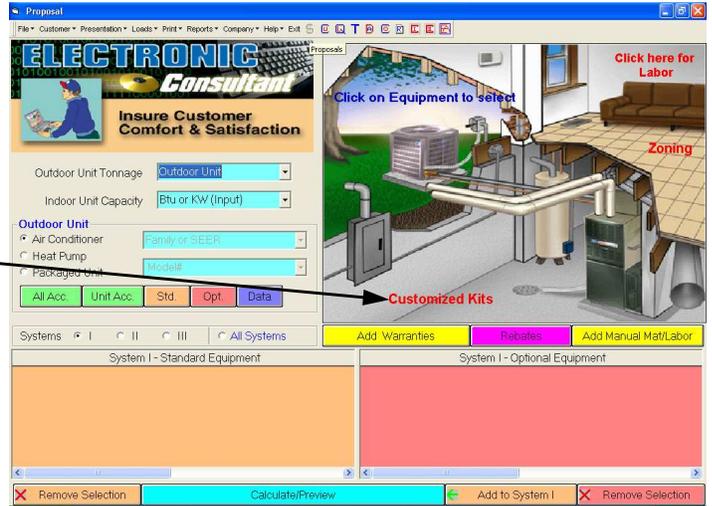
The Kit will be listed in the Standard Equipment dialog box. When the Kit was built, if you checked the ‘Itemized on Proposal’ box, then all items in that kit will be listed. Otherwise, just the kit description will be listed.

**Note: You may add/delete from the Standard Equipment list by highlighting the item and clicking Remove Selection; then re-enter the new item.**

### Example:

1. Click on Customized Kits.
2. Select a Kit containing 16 SEER equipment.
3. Click Add to System.
4. The Kit will be listed.
5. Compare 14 SEER equipment as optional.
6. See next page for instructions.

### Proposal Builder Screen



## IV. Steps of the In-Home Presentation Process. “Comparing Equipment Prices”

### Equipment Comparison Screen.

To compare the price of one piece of equipment to another, you will want your kit itemized. Follow the steps listed below.

### Procedure for comparing equipment prices:

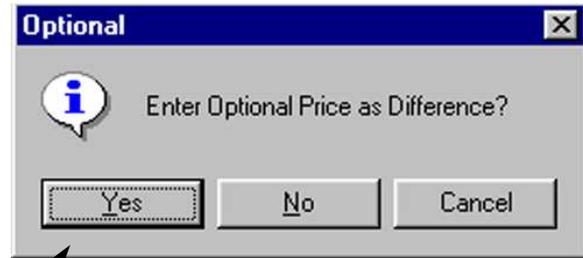
1. Select the Standard piece of equipment (follow steps listed on the previous page).
2. Click on the piece of equipment you want to compare as optional. Select the tonnage or capacity; then the Family/SEER; then the Model #.
3. Click the “**Opt**” button to add to the proposal. A box will pop-up asking if you want the price difference (click Yes) or show the full price of the optional equipment (click No).
4. Then a box will pop-up asking you to click on the equipment to compare too. **Be sure to highlight the item you want to compare.** Click “O.K.” or “Cancel”.
5. A box will pop-up verifying your selection, “Yes” or “No”.

Your selection will be listed in the “Optional Equipment” box on the Proposal Builder screen and on the Proposal.

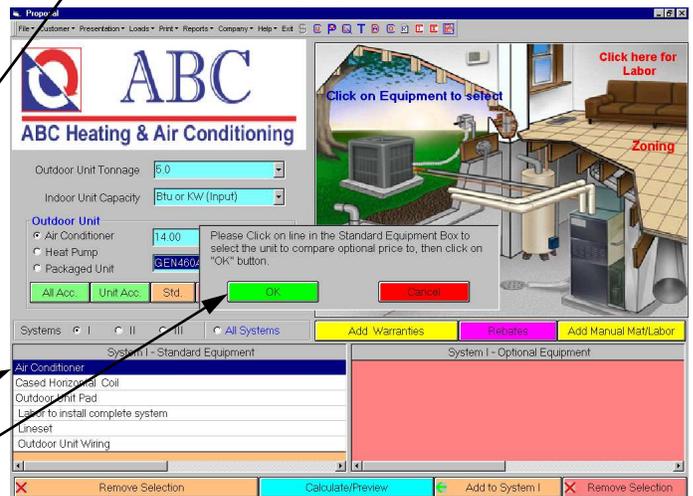
### Class Exercise

1. Compare a 16+ SEER to a 14 SEER.
2. Show as price difference.
3. Preview on the Proposal.

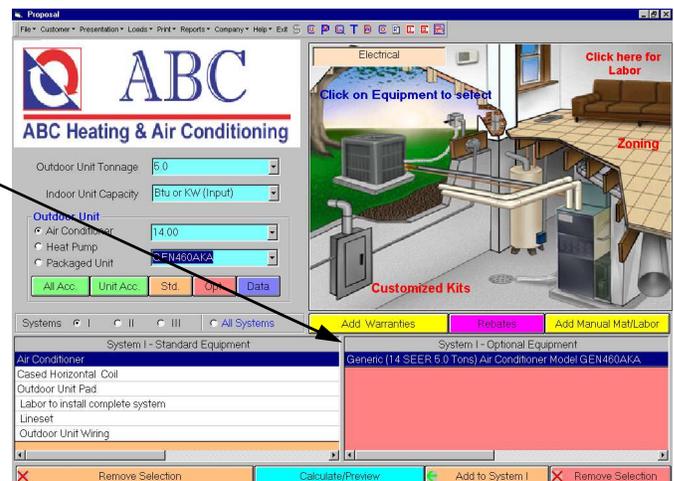
### Optional Price Screen



### Select Equipment Screen



### Compare Equipment Screen



## IV. Steps of the In-Home Presentation Process. “Equipment Specifications and Features”

### Viewing the Product Specification.

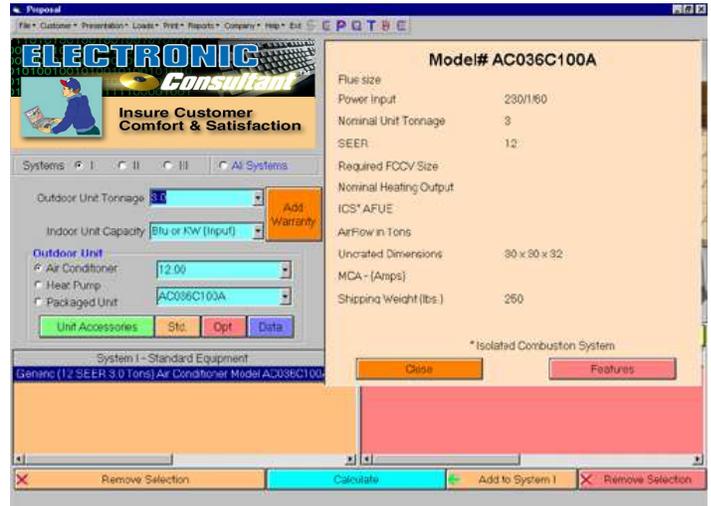
After you have selected a piece of equipment, you may click the “Data” button.

The screen to the right will pop-up illustrating that model’s nomenclature.

This information comes from the “Equipment Data” tab (*see page 23 in Section III “How to set up your Databases”*).

From this screen you can click the “Features” button and the Features Screen will pop-up (*see below*).

### Data Screen



### Notes:

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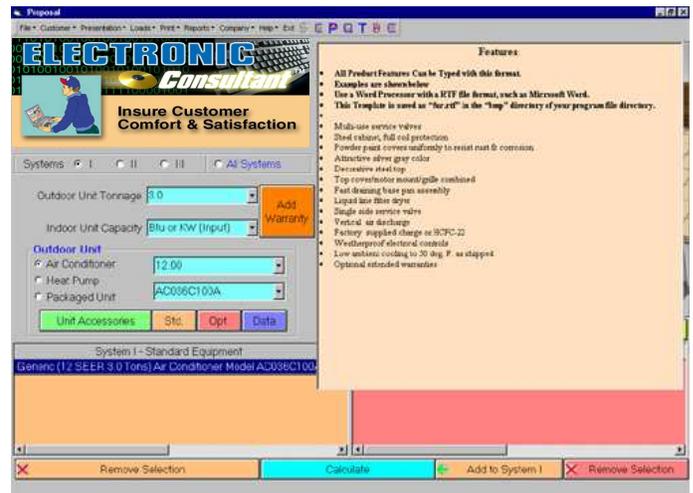
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***Hint:***  
**You may wish to check the unit dimension before adding size dependent equipment or accessories.**

The Features screen serves as a reminder of the features and benefits of the product you are explaining to the homeowner.

You may edit this file (*see page 24 in Section III “How to set up your Databases”*).

### Features Screen



### Class Exercise

1. Select a piece of equipment.
2. Click on the Data button.
3. Click on the Features button.
4. Click anywhere on the Features screen to close.

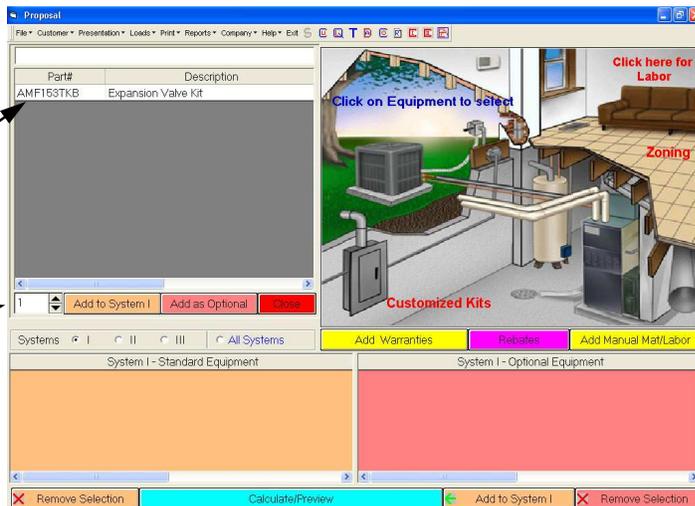


## IV. Steps of the In-Home Presentation Process. “Adding Associated Parts and Manual Entries”

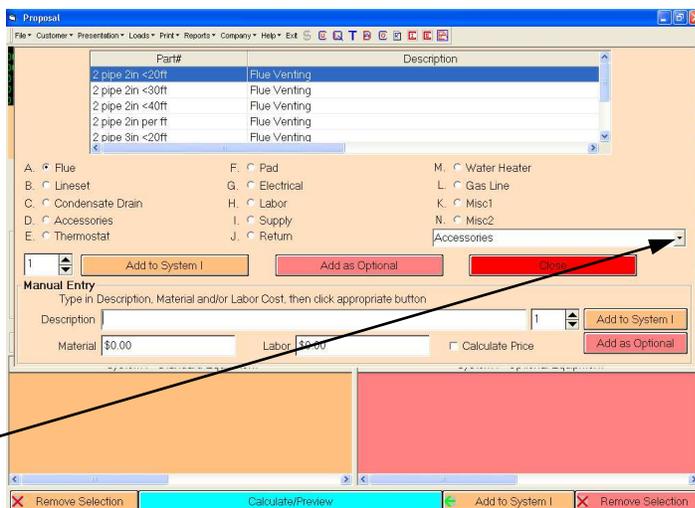
### Adding An Associated Part.

1. Select a piece of equipment.
2. Click the “Unit Acc.” button.
3. The accessories box will open, listing all the parts associated with the piece of equipment you selected.
4. Highlight the parts you wish to add to the proposal and click Add to System or Add as Optional. You may set the quantity here.
5. Repeat these steps for each associated part you wish to offer.
6. If the part is not listed, click the “All Acc.” Button for a complete list of all parts.
7. Click Close when complete.

### Unit Accessories Screen



### Manual Entry Screen



### Using the Manual Entry Screen.

This is a very important screen. The Manual Entry Screen allows the Dealer to add specific options such as Duct Cleaning. See “How To Set up Your Databases” beginning on page 21.

### Manual Entry Method: Example

1. Click on “ Add Manual Mat/Lab” button.
2. You may select from “A-N” or Accessories to list the selected information, which will appear at the top of the screen. You may also click on the down arrow for more selections.
3. Click on the line item you want to add.
4. Determine the quantity.
5. Click on “Add to system” or “Add as optional” to add to the Proposal.
6. You may add an entry not listed in the database in the “Manual Entry Frame”. Just type in the description and Material and/or Labor Net Cost, then add as standard or optional.

***Hint:***  
Check the “Calculate Price” box if you want the system to add profit to the amount you entered.

***Hint:***  
You may show a discount by typing a negative number in the material or labor fields in the Manual Entry box.

### Class Exercise

1. Add a Spring Rebate of \$150 to the proposal.
2. Click “Calculate”.
3. Preview it on the proposal.

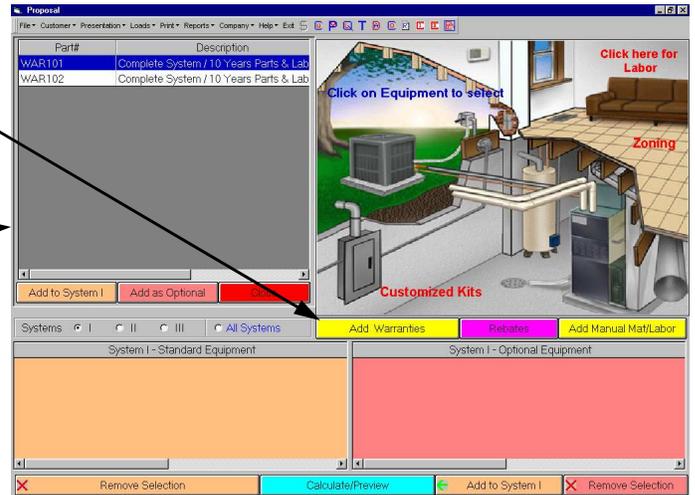


## IV. Steps of the In-Home Presentation Process. “Adding An Extended Warranty”

### Using the Manual Warranty Screen.

1. Click the “Add Warranties” button.
2. The Select Unit Warranties box will popup (below).
3. Click on the “Add Manual Warranties” button. The warranty box will open listing all the warranties in the database.
4. Highlight the warranty you wish to add to the proposal and click the “Add to System” or “Add as Optional” button.
5. Click “Close” when completed.

### Manual Warranty Screen

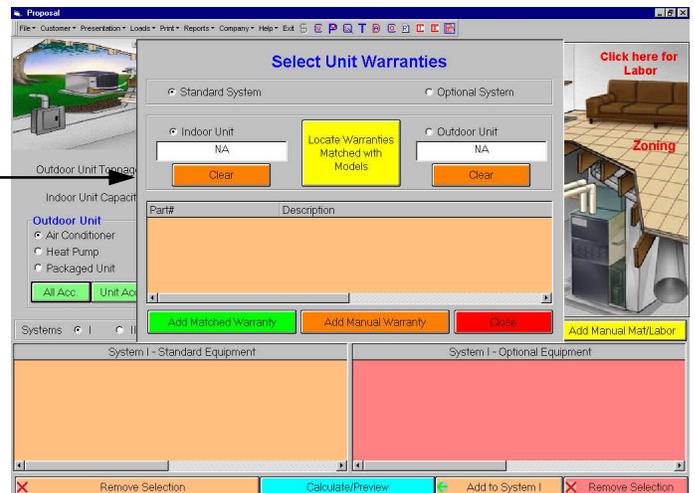


### Warranty Match Screen

#### Warranty Matches

To add a warranty that matches both the indoor and/or outdoor equipment, follow these steps:

1. Click the “Add Warranty” button. The Warranty Match screen will pop-up.
2. Click on the Outdoor Unit listed on the proposal. The Part # will be added to the Outdoor Unit field.
3. Click on the Indoor Unit.
4. Click the “Locate” button.
5. If there is a match, the warranties will be listed. Select the one you want and click “Add Warranty”.



### Notes:

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#### ***Hint:***

**To set up the Warranty Match Database, review page 30, in the “How to Set up your Database” Section.**

### Class Exercise

1. Match a piece of equipment to a warranty.



## V. Printing Your Documents. “Previewing and Printing the Proposal”

### Preview.

When you click “Calculate” on the Proposal Builder screen, the Preview screen will appear.

You can preview each system. Just click the appropriate tab, I, II, or III.

The selling price will appear as the system investment, plus the price for the options offered. Also, any “Rebates” that might be offered.

### ***Hint:***

**You can click on the Standard box and type in additional information or change the description.**

### Print.

When you click the “Print Proposal” button, the “Preview/Print Proposal” screen will pop-up, allowing you to either preview or print each system.

Click on the System you want to Preview or Print.

Click Include Cover Sheet if desired.

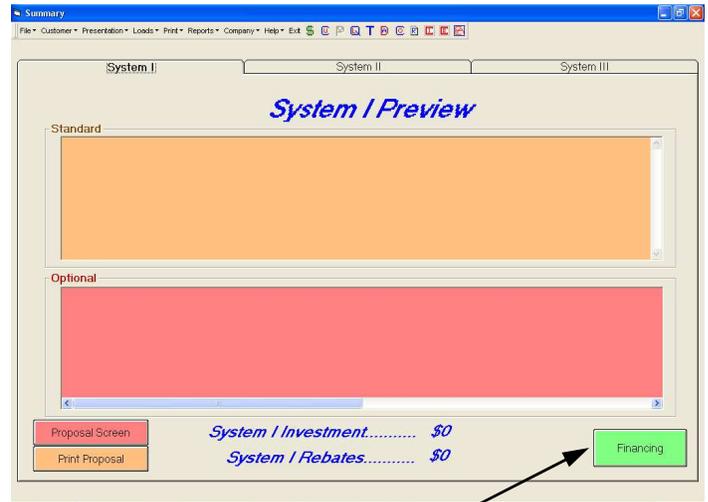
You can either print or preview from this screen.

### Customized Proposals.

From this screen you may edit, view, or print a Custom Proposal.

1. Click on the down arrow to view the Proposal Templates.
2. Select the desired proposal.
3. Click “Customized Reports Edit Screen” or “Customized Reports View Screen”.
4. You will be able to print from the view screen.

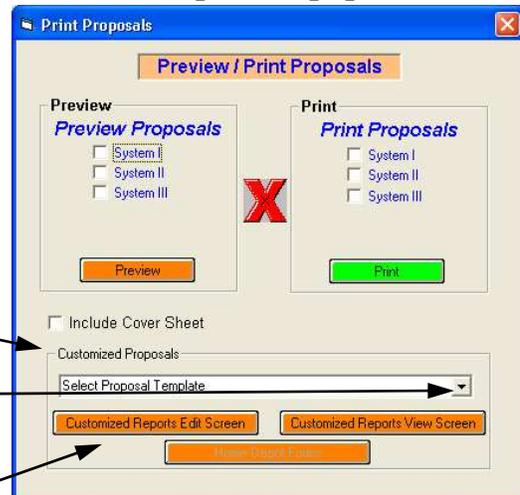
### Preview Screen



### Payment Calculator.

New short cut key to the Payment Calculator. Click the “Financing” button and the Payment Calculator will pop-up.

### Print Proposal Popup Screen



### Class Exercise

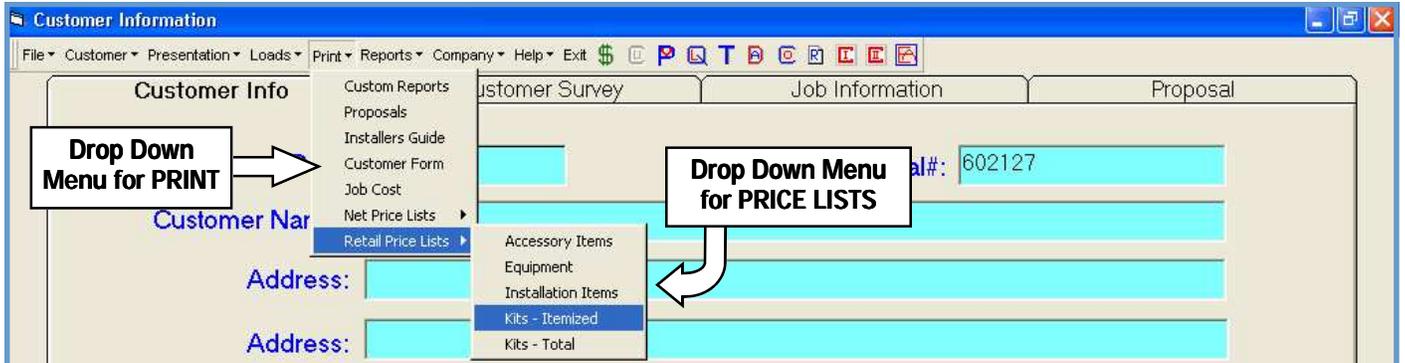
1. Check the Include Cover Sheet box.
2. Check System I under Preview.
3. Click the “Preview” button.

Continued on next page





## V. Printing Your Documents.



You may print many additional items by selecting the "PRINT" dropdown menu. Items such as:

1. Proposals:

2. Installers Guide:

3. Customer Form:

Prints a blank form for collecting job information.

4. Job Cost:

5. Net Price Lists:

a. Equipment

b. Installation Items

c. Accessory Items

6. Retail Price Lists:

a. Accessory Items

b. Equipment

c. Installation Items

d. Kit-Itemized

Prints the retail selling price for each line item included in the kit.

e. Kit-Total

Prints total retail selling price for the complete kit.

### Class Exercise

1. Select "Print" from the Menu bar.
2. Select "Price List".
3. Then "Equipment"
4. Preview your equipment cost.



# V. Printing Post Sale Information.

## Job Costing Informational Sheet

**Name:** Mr. & Mrs. Anderson  
**Address:** 123 N. Main St.  
**City, State, Zip:** Chicago, IL 61333  
**Phone:** 312 - 123-4567

**Sales Consultant:** Jack Smith  
**Proposal #:** 100100  
**Date:** 10/1/2000

### System I

Total Selling Price	<u>\$8,958.00</u>	Selling Price before Rebate	<u>\$ _____</u>
Net Parts	<u>\$4,679.53</u>		
Net Labor	<u>\$1,000.00</u>		
Rebate Cost	<u>\$ _____</u>		
Net Tax	<u>\$438.71</u>		
Total Cost	<u>\$6118.24</u>		
Gross Profit	<u>\$2,839.77</u>		
Gross Margin	<u>31.7%</u>		

### System II

Total Selling Price	<u>_____</u>	Selling Price before Rebate	<u>\$ _____</u>
Net Parts	<u>_____</u>		
Net Labor	<u>_____</u>		
Rebate Cost	<u>_____</u>		
Net Tax	<u>_____</u>		
Total Cost	<u>_____</u>		
Gross Profit	<u>_____</u>		
Gross Margin	<u>_____</u>		

***Hint:***  
**When the job is completed, Compare the Job Costing Informational Sheet with the actual job cost. Then adjust your gross margin to the desired percentage.**

### System III

Total Selling Price	<u>_____</u>	Selling Price before Rebate	<u>\$ _____</u>
Net Parts	<u>_____</u>		
Net Labor	<u>_____</u>		
Rebate Cost	<u>_____</u>		
Net Tax	<u>_____</u>		
Total Cost	<u>_____</u>		
Gross Profit	<u>_____</u>		
Gross Margin	<u>_____</u>		

**Notes:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Questions and Answers

### Most Frequently Asked Questions.

**Question.** Where can I put comments on just one proposal?

**Answer.** To add comments to any proposal, just click on the standard dialog box in the Preview Screen and type in your comment. *See page 51 in this manual.*

**Question.** How can I give a discount without re-doing the proposal?

**Answer.** From the Proposal screen, click the “Add Manual Mat/Labor” button. In the Manual Entry screen type in a description and a negative number in the material or labor field. If you do not check calculate price, the amount you type in will be deducted from the proposal. *See page 49 in this manual.*

**Question.** When I install an upgrade will I lose my pricing or other data? Will I need to call for an unlock?

**Answer.** No, you will not lose your data or need to call for an unlock.

**Question.** Why don't my kit prices update when I change my prices in the database?

**Answer.** Many Dealers do not want their kit prices updated automatically. To update your kit prices, click the “Update Prices” button on the Kit Builder screen. *See page 27 in this manual.*

**Question.** What is the difference between Installation Data and Equipment Data? How do I know where to enter?

**Answer.** Equipment data would be your primary brand of equipment and may include air conditioners, coils, furnaces, heat pumps, air handlers, etc. These items require a detailed description such as Model #, Capacity, Efficiency, and Family.

Installation data would include supplemental or optional items. This list may include a secondary line of equipment and items such as air cleaners, linesets, pads, or labor. *See page 22 and 23 in this manual.*

**Question.** Is the tax computed before or after the markup is applied?

**Answer.** The tax is computed after in versions 3.05 or less and optional in version later than 3.05.

**Question.** How do I Export Kits after I have built them?

**Answer.** By Exporting your Equipment and Accessories Pricing Files. That is where your kits are stored. *Review pages 19 - 20 in this manual.*

**Question.** What is the recommended hardware requirements?

**Answer.** *See list on page 2 in this manual.*



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Graham Roberts-Phelps

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