

## **Initial Set-up**

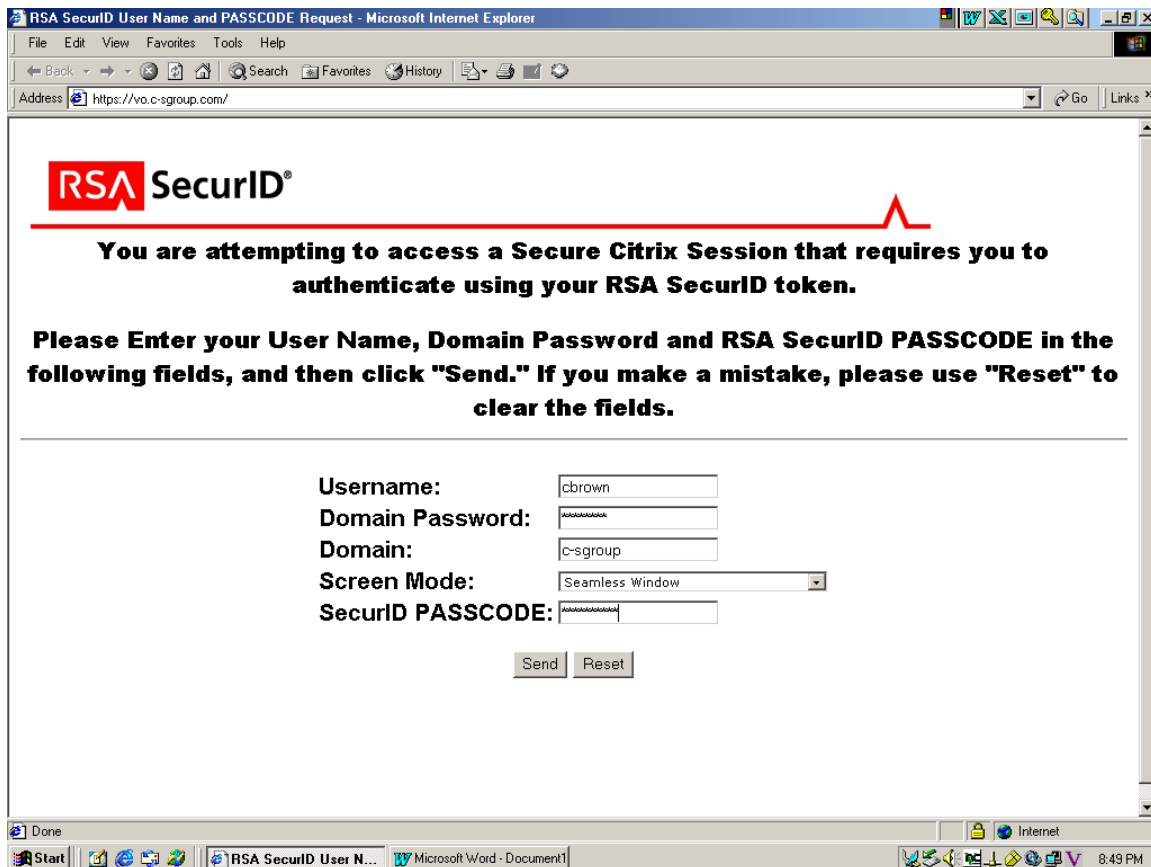
Please review the following checklist before you begin for the first time. This is a one time set up only:

- Verify that your Internet Browser is set up for “128 Bit Encryption.” See section 11, page 6.
- Download the “Citrix ICA Client” from the CD that was provided in your package. See detailed instructions in section 13.

From your Internet browser type in the following URL:  
<https://vo.c-sgroup.com>.

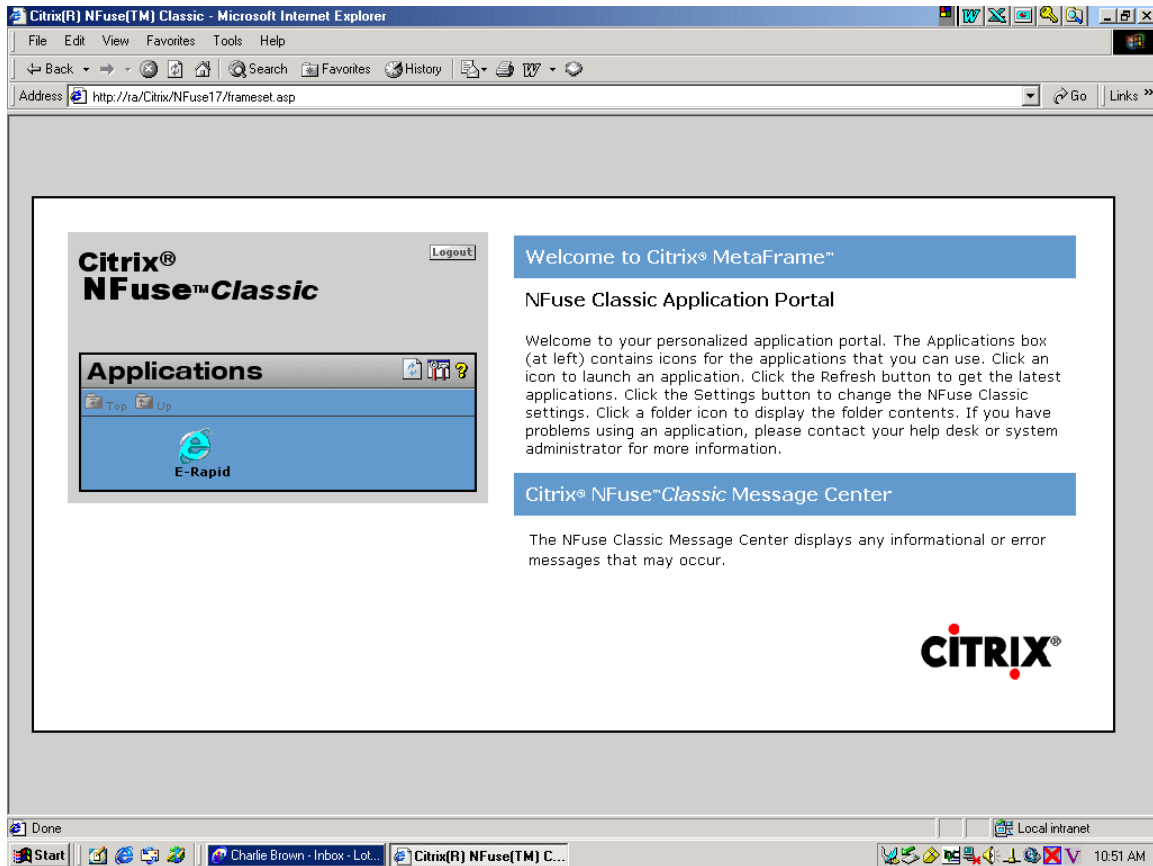
- See section 11 (Computer Settings and Shortcuts) for instructions for the following if required:
  - Page 1 for instructions on how to set up your computer display settings.
  - Page 4 for instructions on how to set up a desktop icon shortcut.
  - Page 8 if the “Internet Connection Wizard” starts.

Please proceed to page 2 to see the RSA SecureID log in screen.

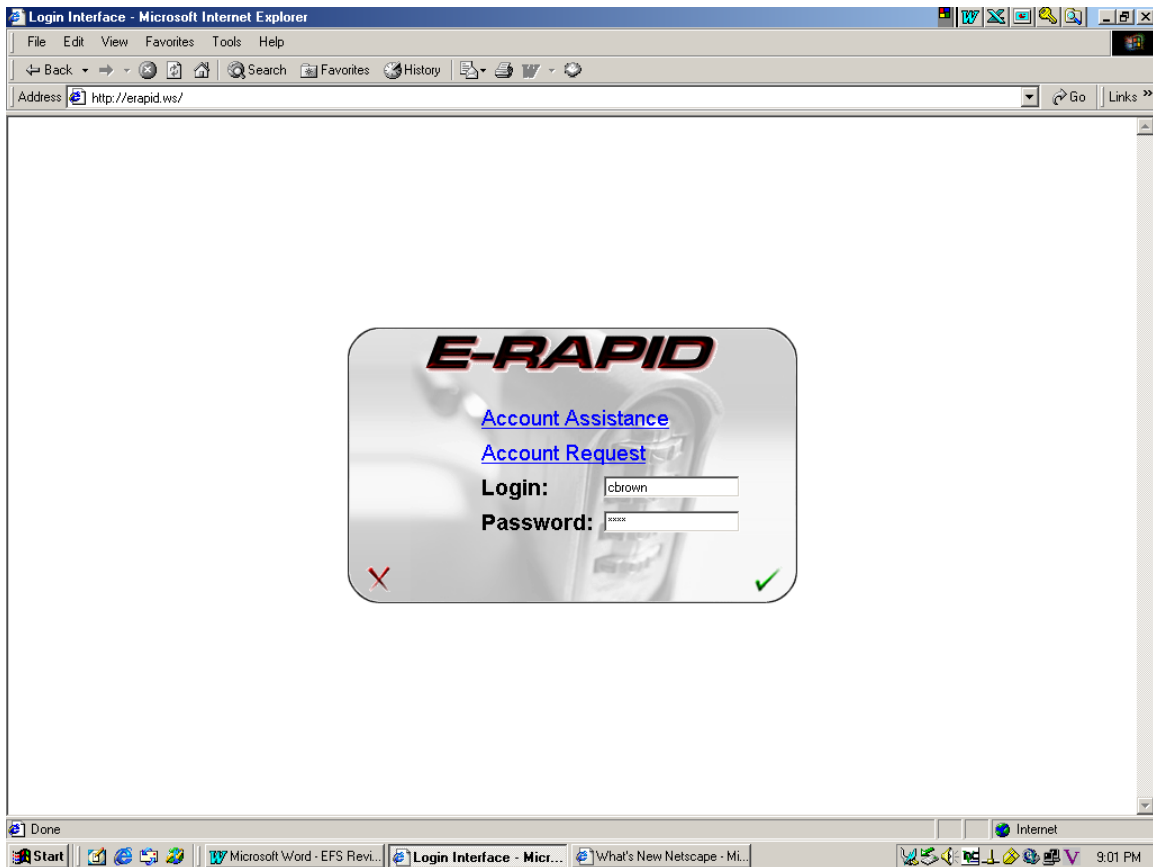


- At the “Username” prompt, enter your user name.
- At the “Domain Password” prompt, enter your password.
- At the “Domain” prompt, enter “c-sgroup”.
- At the “SecurID PASSCODE” prompt, enter your Pin number followed by the six-digit number from the RSA Secure ID FOB\*. Note that the system will lock you out if you log in incorrectly three consecutive times. Call 1-800-972-7214 ext. 4024, 5018 or 5019 if this happens.
- Click on the “Send” button at the bottom when complete.

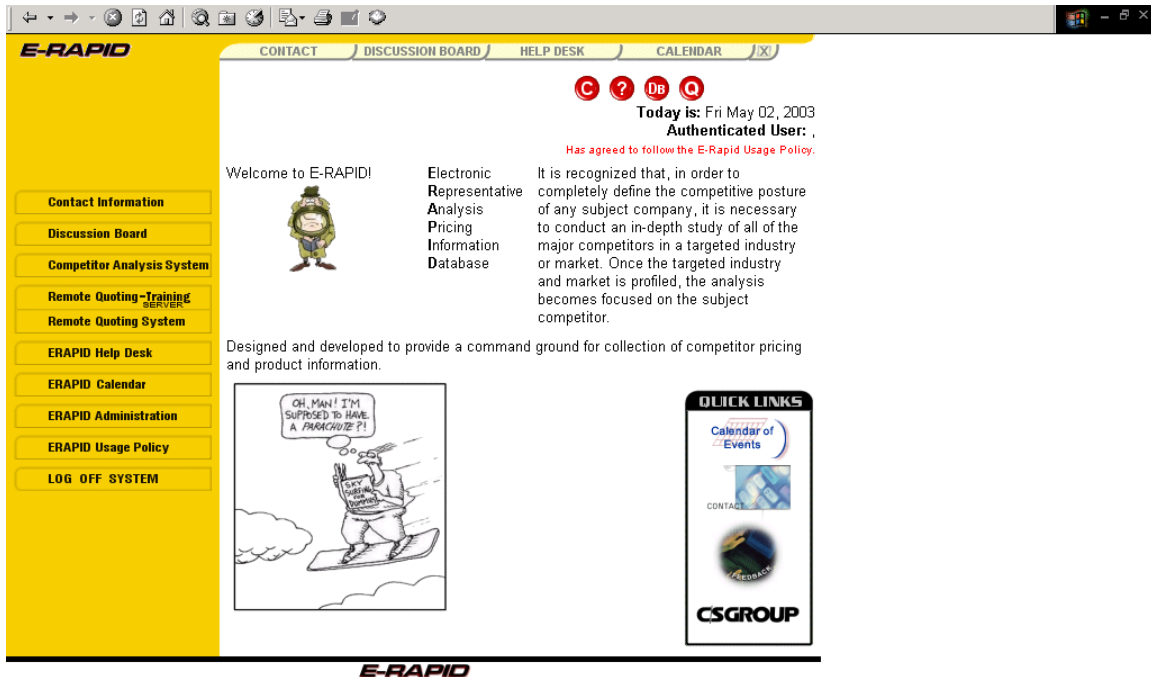
\*Note: The number on the FOB changes every 60 seconds.



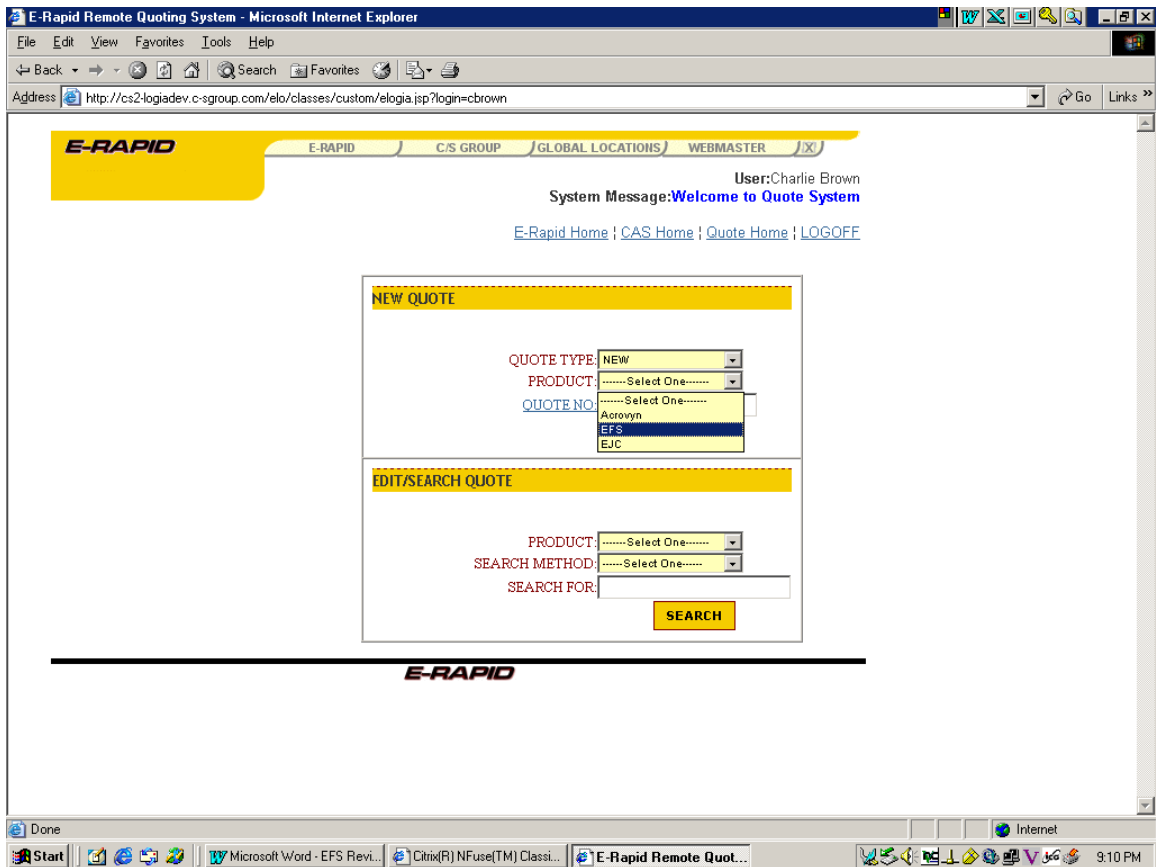
- Double click on the “E-Rapid” icon.
- If an error message comes up on the right hand side of the screen asking for the “Citrix ICA Client” please refer to section 11, page 3.



- At the “Login:” prompt, enter your login name.
- At the “Password” prompt, enter your password.
- <Enter>



- Click on the “Remote Quoting System” button on the left-hand side. Note there is a button for training and a button for live quotes. Training is to be used for testing and training; no information will be used for reporting purposes.



- In the “New Quote” block, click on the down arrow on the Product box.
- Click on EFS to select.

The screenshot shows a web browser window displaying the E-RAPID application. The browser's address bar and toolbar are visible at the top. The application header features the E-RAPID logo on the left and navigation links (E-RAPID, C/S GROUP, GLOBAL LOCATIONS, WEBMASTER) on the right. A user login area on the right shows 'User: Charlie Brown' and a 'System Message: Welcome to Quote System'. Below the header, there are links for 'E-Rapid Home', 'CAS Home', 'Quote Home', 'Help', and 'LOGOFF'. The main content area is divided into two sections: 'NEW QUOTE' and 'EDIT/SEARCH QUOTE'. The 'NEW QUOTE' section contains a 'QUOTE TYPE' dropdown menu set to 'NEW', a 'PRODUCT' dropdown menu set to 'EFS', and a 'QUOTE NO.' text input field. A yellow 'START' button is positioned below these fields. The 'EDIT/SEARCH QUOTE' section contains a 'PRODUCT' dropdown menu set to '.....Select One.....', a 'SEARCH METHOD' dropdown menu set to '.....Select One.....', and a 'SEARCH FOR:' text input field. A yellow 'SEARCH' button is positioned below these fields. The E-RAPID logo is also displayed at the bottom of the page.

**E-RAPID**

E-RAPID C/S GROUP GLOBAL LOCATIONS WEBMASTER

User: Charlie Brown  
System Message: [Welcome to Quote System](#)

[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [Help](#) | [LOGOFF](#)

**NEW QUOTE**

QUOTE TYPE: NEW  
PRODUCT: EFS  
QUOTE NO.:  
**START**

**EDIT/SEARCH QUOTE**

PRODUCT: .....Select One.....  
SEARCH METHOD: .....Select One.....  
SEARCH FOR:   
**SEARCH**

**E-RAPID**

- Click on the yellow “Start” button to go to the quote header screen.

☒

**NEW QUOTE HEADER INFORMATION:**

Quote Status:	OPEN	Type:	Quote
Entry Date:	2003-04-15	Bid Date:	2003-04-15
Expiration Date:	2003-07-14	* Project Name:	
Project City:		Project State:	
Architect Name:		Architect City:	
Exclusions:		Qualifying Notes:	
Free Exclusions:		Free Qualifying Notes:	
Division:		Section:	
Free Text:		* Customer Name:	

(\*) represents mandatory fields



**Create New Quote**

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**E-RAPID**

- Note the small check box at the upper left. This is to be used to hide the display of the commission information screens. An example for using this would be, if you were in a customer's office and did not want him/her to see your commission calculations. When this box is checked the commission information is not displayed. However, commissions will apply correctly whether displayed or not.




 E-RAPID   C/S GROUP   GLOBAL LOCATIONS   WEBMASTER   

User:cbrown  
 System Message:[EFS Header Info](#)  
[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)

☒

**NEW QUOTE HEADER INFORMATION:**

Quote Status:	OPEN	Type:	Quote
Entry Date:	OPEN CLOSE	Bid Date:	2003-04-15
Expiration Date:	2003-07-14	* Project Name:	
Project City:		Project State:	
Architect Name:		Architect City:	
Exclusions:		Qualifying Notes:	
Free Exclusions:		Free Qualifying Notes:	
Division:		Section:	
Free Text:		* Customer Name:	


(\*) represents mandatory fields

**Create New Quote**

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**E-RAPID**

- Click on the drop down arrow to the right of the Quote Status field.
- This quote status field box would be used to note in the system that a quote is open or closed. This information would be useful for reporting and follow up.


E-RAPID C/S GROUP GLOBAL LOCATIONS WEBMASTER

User:cbrown  
 System Message:[EFS Header Info](#)  
[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)


☒

**NEW QUOTE HEADER INFORMATION:**

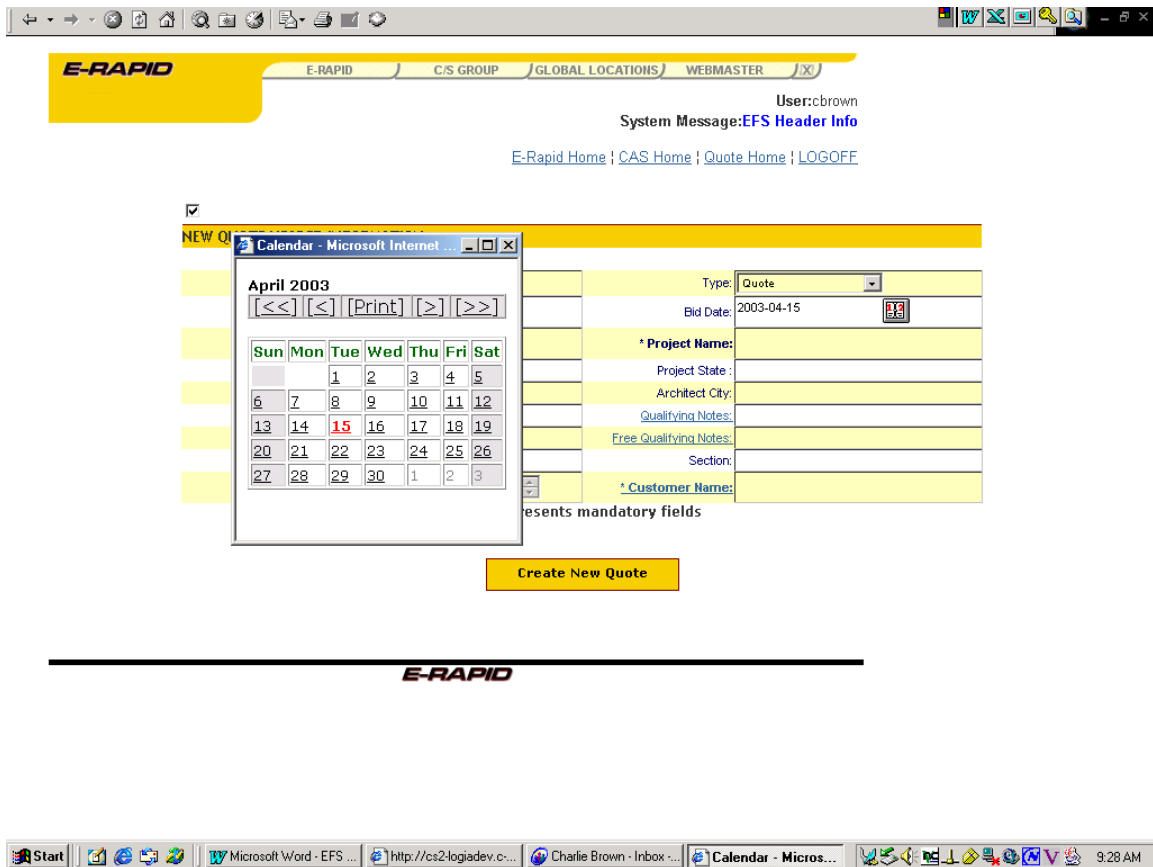
Quote Status:	OPEN	Type:	Quote
Entry Date:	2003-04-15	Bid Date:	Quote
Expiration Date:	2003-07-14	Bid Date:	Order
Project City:		Bid Date:	Budget
Architect Name:		* Project Name:	
Exclusions:		Project State:	
Free Exclusions:		Architect City:	
Division:		Qualifying Notes:	
Free Text:		Free Qualifying Notes:	
		Section:	
		* Customer Name:	

(\*) represents mandatory fields



**Create New Quote**



- Click on the drop down arrow to the right of the “Type” field.
- Select Quote, Order or Budget. Order will be used in phase II, disregard it for now. Quote and Budget will be used for reporting purposes.






- Click on the small red and gray calendar icon to the right of the Entry Date.
- The entry date defaults to the current date. This date can be changed by going into this calendar and selecting a different date.
- Click on the small red and gray calendar icon to the right of the Bid Date.
- The bid date defaults to the current date. However, it can be changed with the calendar.
- Be sure to close the calendars when complete.


 E-RAPID   C/S GROUP   GLOBAL LOCATIONS   WEBMASTER   

User:cbrown  
 System Message:[EFS Header Info](#)  
[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)

☒

**NEW QUOTE HEADER INFORMATION:**

Quote Status:	OPEN	Type:	Quote
Entry Date:	2003-04-15 	Bid Date:	2003-04-15 
Expiration Date:	2003-07-14 	* Project Name:	
Project City:		Project State:	
Architect Name:		Architect City:	
Exclusions:		Qualifying Notes:	
Free Exclusions:		Free Qualifying Notes:	
Division:		Section:	
Free Text:		* Customer Name:	

(\*) represents mandatory fields

[Create New Quote](#)

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**E-RAPID**

- The Expiration date can also be changed using the calendar. The expiration date defaults 90 days out from the current date.
- At the “Project Name:” prompt, enter the project name. This is a mandatory field. Note that the project name and customer fields are the only required fields for the quote header.

Order Entry Head - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Go Links

Address http://cs2-logiadev.c-sgroup.com/elo/classes/custom/product\_transfer.jsp?re\_no=6&rep\_type=cs&qtype=1&product=2&q\_no=&cmd=alt&order\_no=&smt=%A0%A0NEW%A0%A

**E-RAPID** E-RAPID C/S GROUP GLOBAL LOCATIONS WEBMASTER

User:cbrown  
System Message: [EFS Header Info](#)

[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)

☒ **NEW QUOTE HEADER INFORMATION:**

<b>Quote Status:</b> OPEN	<b>Type:</b> Quote
<b>Entry Date:</b> 2003-04-08	<b>Bid Date:</b> 2003-04-08
<b>Expiration Date:</b> 2003-07-07	<b>Project Name:</b> Test project name
<b>Project City:</b> Lebanon	<b>Project State:</b> NJ
<b>Architect Name:</b>	<b>Architect City:</b>
<b>Exclusions:</b>	<b>Qualifying Notes:</b>
<b>Free Exclusions:</b>	<b>Free Qualifying Notes:</b>
<b>Division:</b>	<b>Section:</b>
<b>Free Text:</b>	<b>Customer Name:</b>

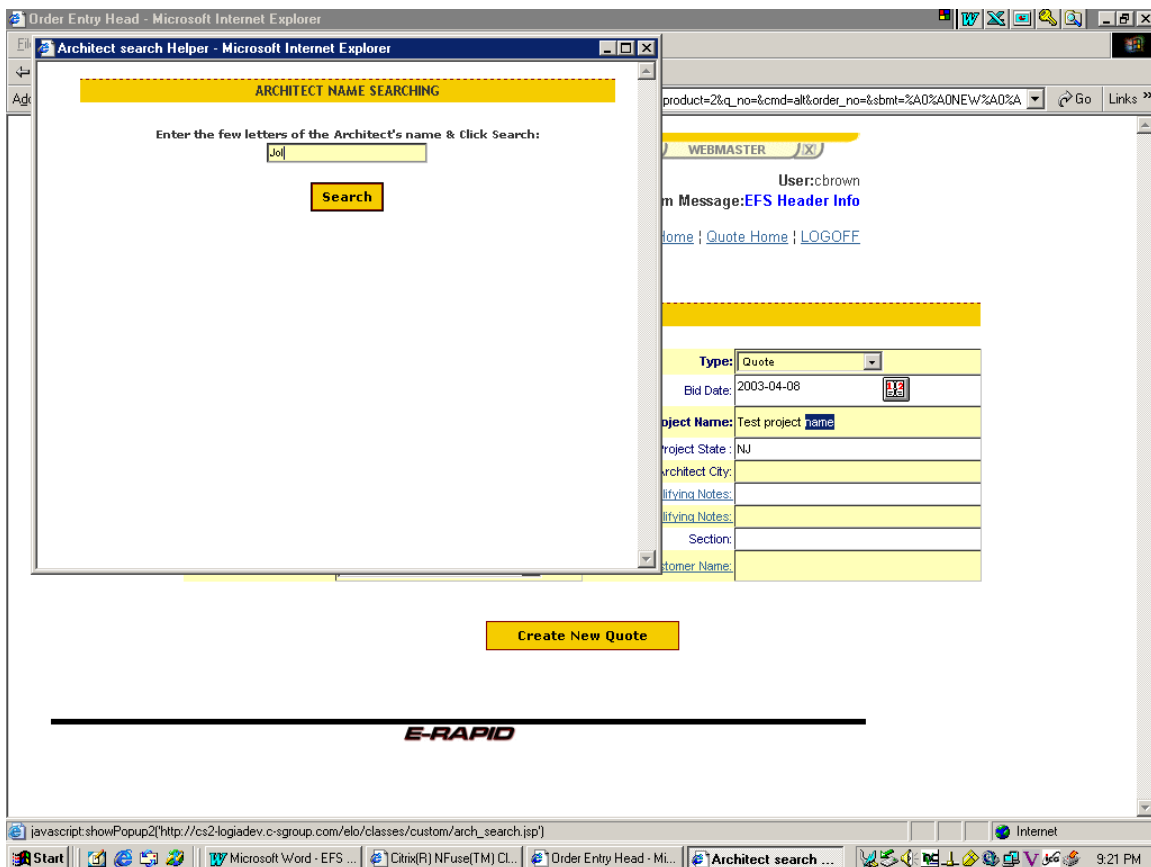
**Create New Quote**

**E-RAPID**

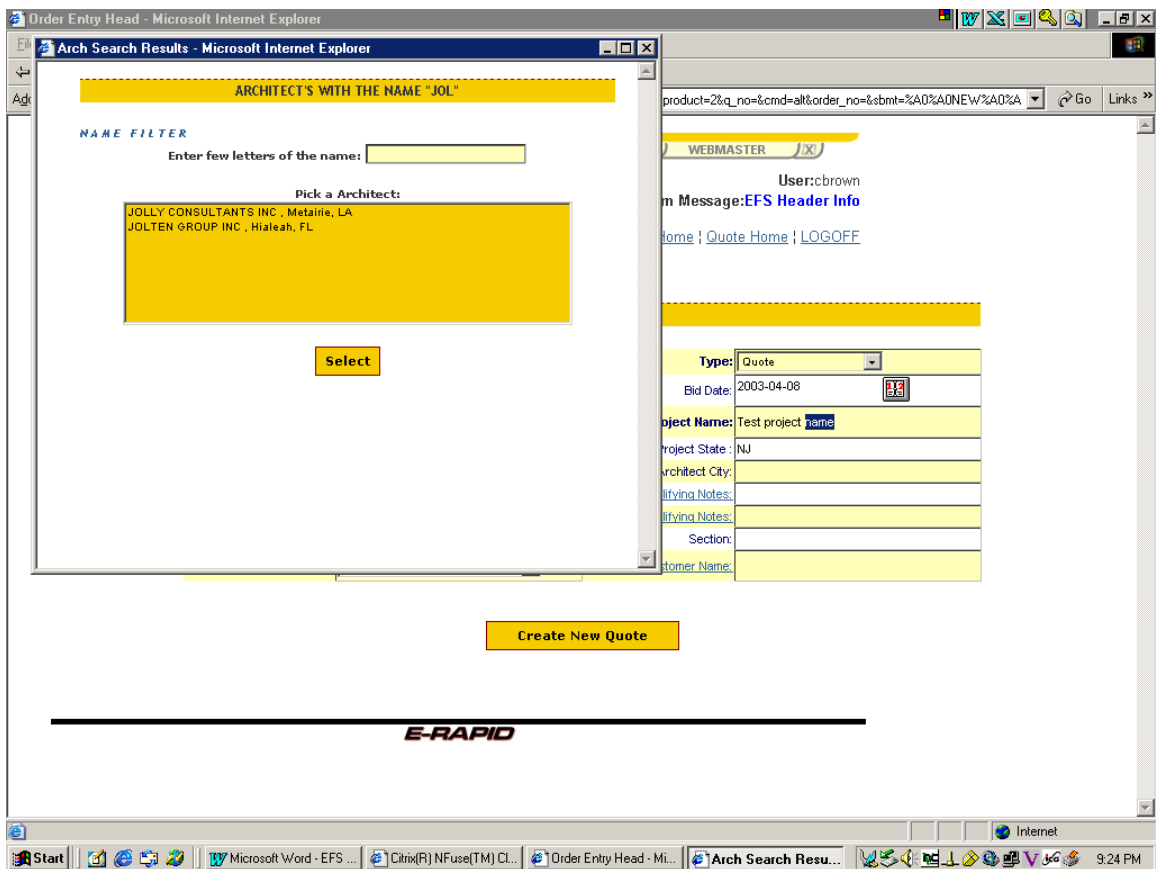
javascript:showPopup2('http://cs2-logiadev.c-sgroup.com/elo/classes/custom/arch\_search.jsp')

Start Microsoft Word - EFS Rev... Citrix(R) NFuse(TM) Class... Order Entry Head - Mi... 9:17 PM

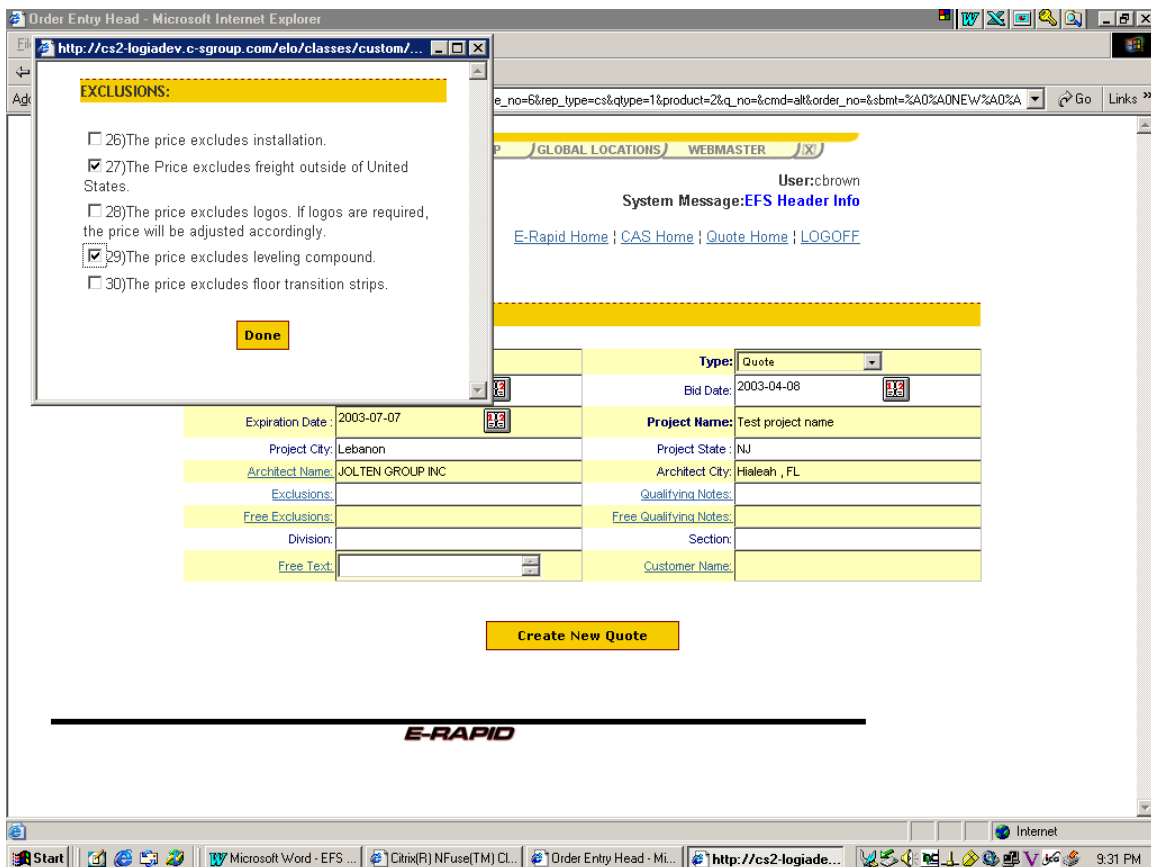
- Tab to get to the next field.
- Enter the “Project City.”
- Tab over and enter the “Project State.”
- Click on the “Architect Name” label.



- Enter the first two, three or more letters of the Architect's name.
- Select the Search button.
- Note that the “%” can be used as a wildcard. Placed in front of the search criteria the search would look for any letters in the middle of the Architect's name. Without the “%” in front it would look for names starting with the sequence of letters. For example, to search for “Raphael Franco Associates” you could enter “Raph” or “%Franco.”

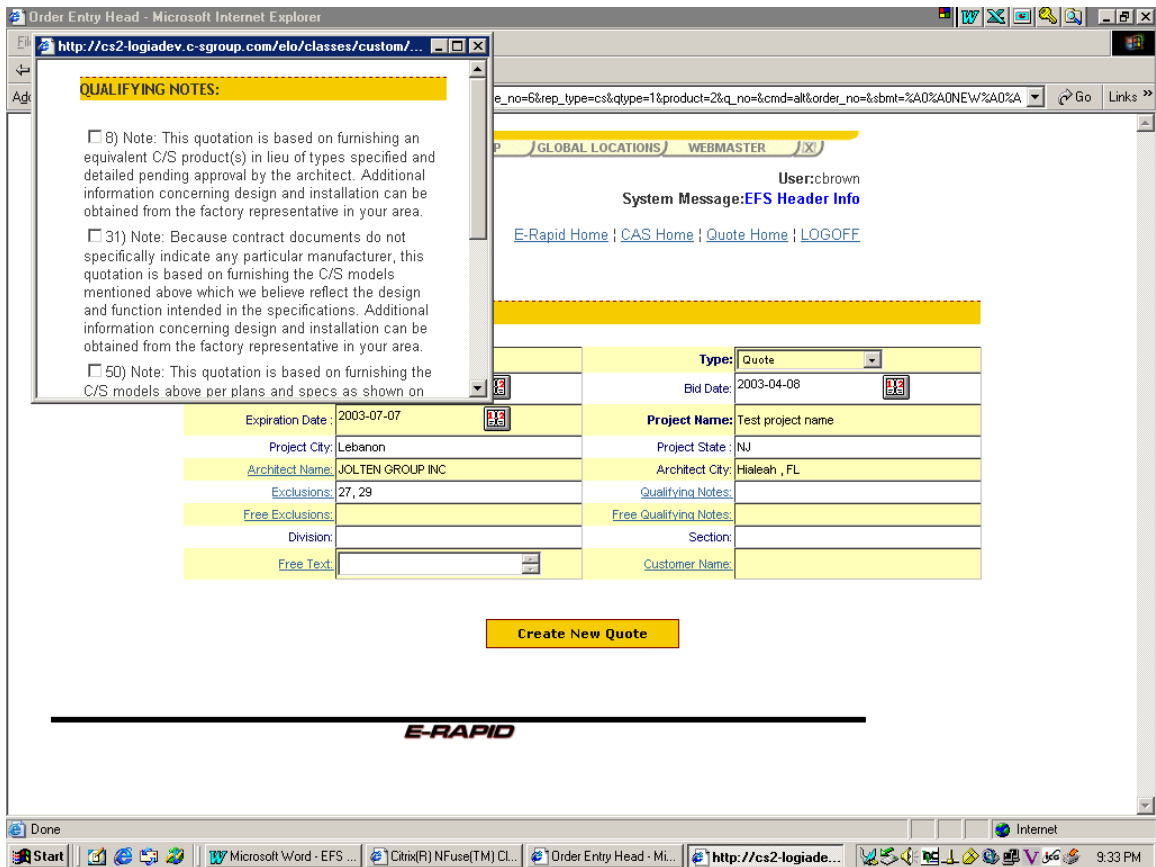


- Highlight the desired Architect by clicking on it.
- Click on the yellow “Select” button to select it and return to the header screen.

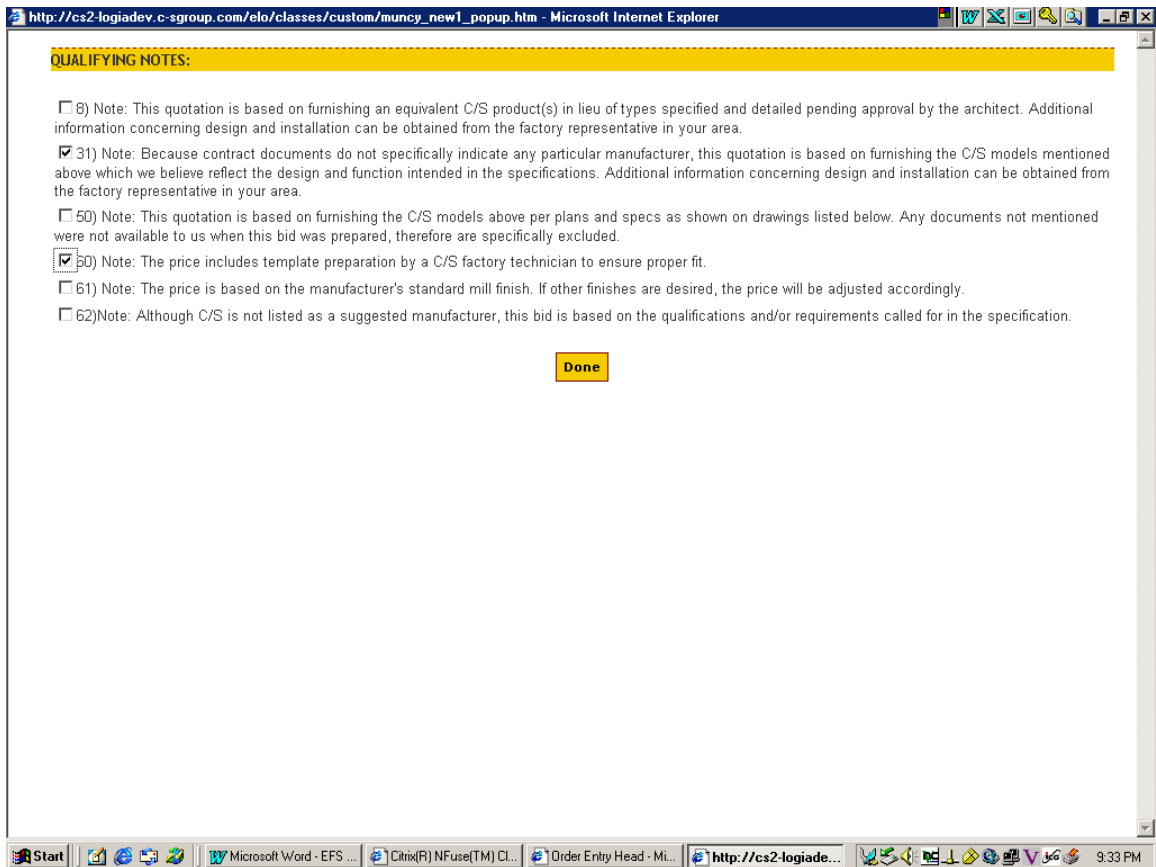


- Click on the “Exclusions” label.
- Click on the box in front of the standard exclusions that you would like to have display on the quote. We suggest that you do not over-use these. Use only if the customer requests them.
- Click on the yellow “Done” button when complete.

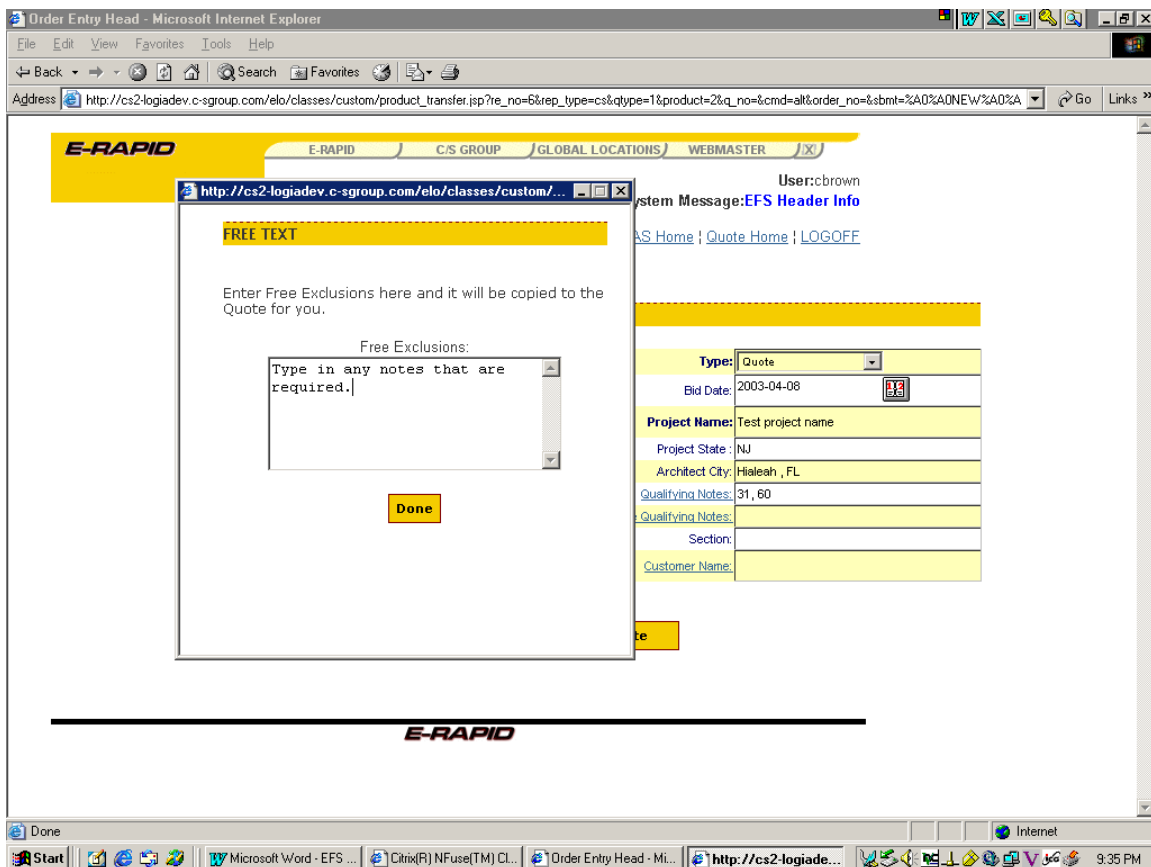




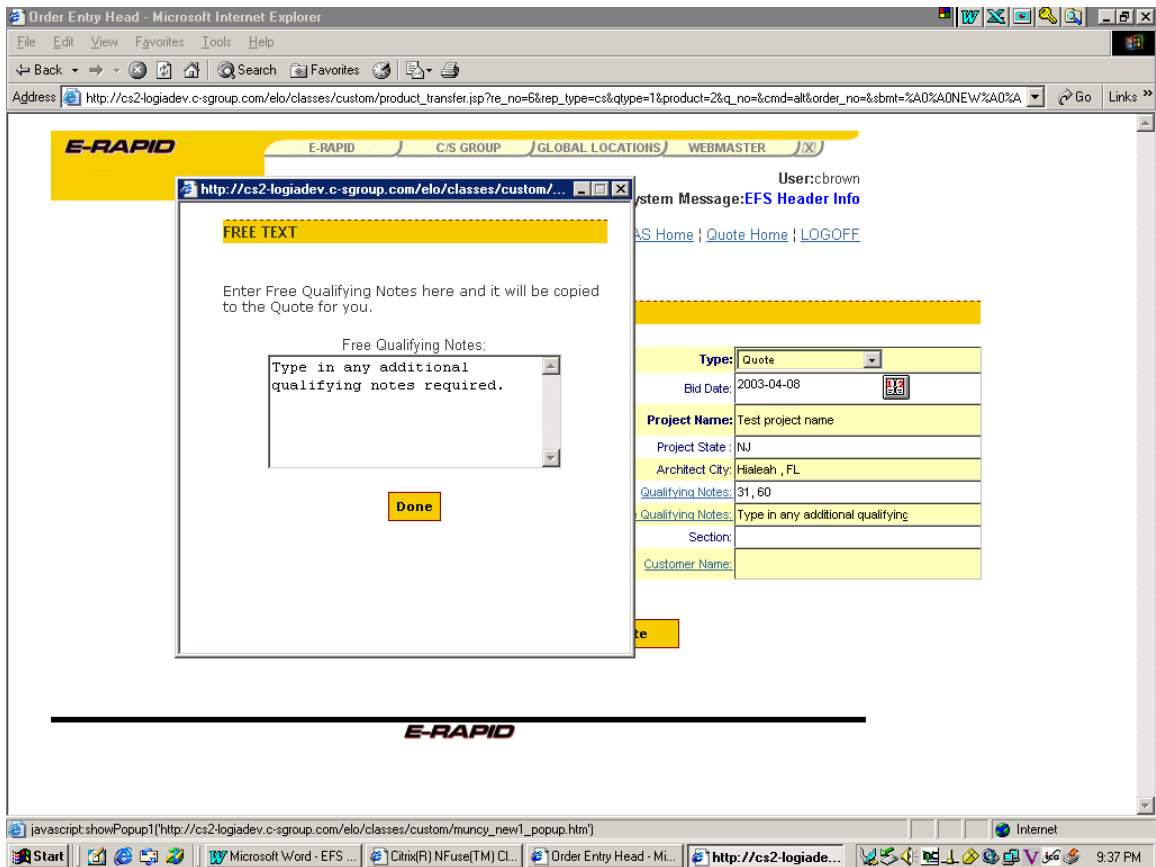
- Click on the “Qualifying Notes” label.
- Maximize the pop up screen to see all of the Qualifying Notes.



- Select the qualifying notes that you would like to appear on the printed quote.
- Click on the yellow “Done” button when complete.



- Click on the “Free Exclusions” label.
- Type in any additional exclusion notes that you might want to include.
- Click on the yellow “Done” button when complete.



- Click on the “Free Qualifying Notes” label.
- Click in text box and type in any additional qualifying notes that you might want to include.
- Click on the yellow “Done” button when complete.

Order Entry Head - Microsoft Internet Explorer

Address: http://cs2-logiadev.c-sgroup.com/elo/classes/custom/product\_transfer.jsp?re\_no=6&rep\_type=cs&qtype=1&product=2&q\_no=&cmd=alt&order\_no=&smt=%A0%A0NEW%A0%A

**E-RAPID** E-RAPID C/S GROUP GLOBAL LOCATIONS WEBMASTER

User: cbrown  
System Message: EFS Header Info

[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)

☒ **NEW QUOTE HEADER INFORMATION:**

<b>Quote Status:</b> OPEN	<b>Type:</b> Quote
<b>Entry Date:</b> 2003-04-08	<b>Bid Date:</b> 2003-04-08
<b>Expiration Date:</b> 2003-07-07	<b>Project Name:</b> Test project name
<b>Project City:</b> Lebanon	<b>Project State:</b> NJ
<b>Architect Name:</b> JOLTEN GROUP INC	<b>Architect City:</b> Hialeah, FL
<b>Exclusions:</b> 27, 29	<b>Qualifying Notes:</b> 31, 60
<b>Free Exclusions:</b> Type in any notes that are	<b>Free Qualifying Notes:</b> Type in any additional qualifying
<b>Division:</b> 10	<b>Section:</b> 200
<b>Free Text:</b>	<b>Customer Name:</b>

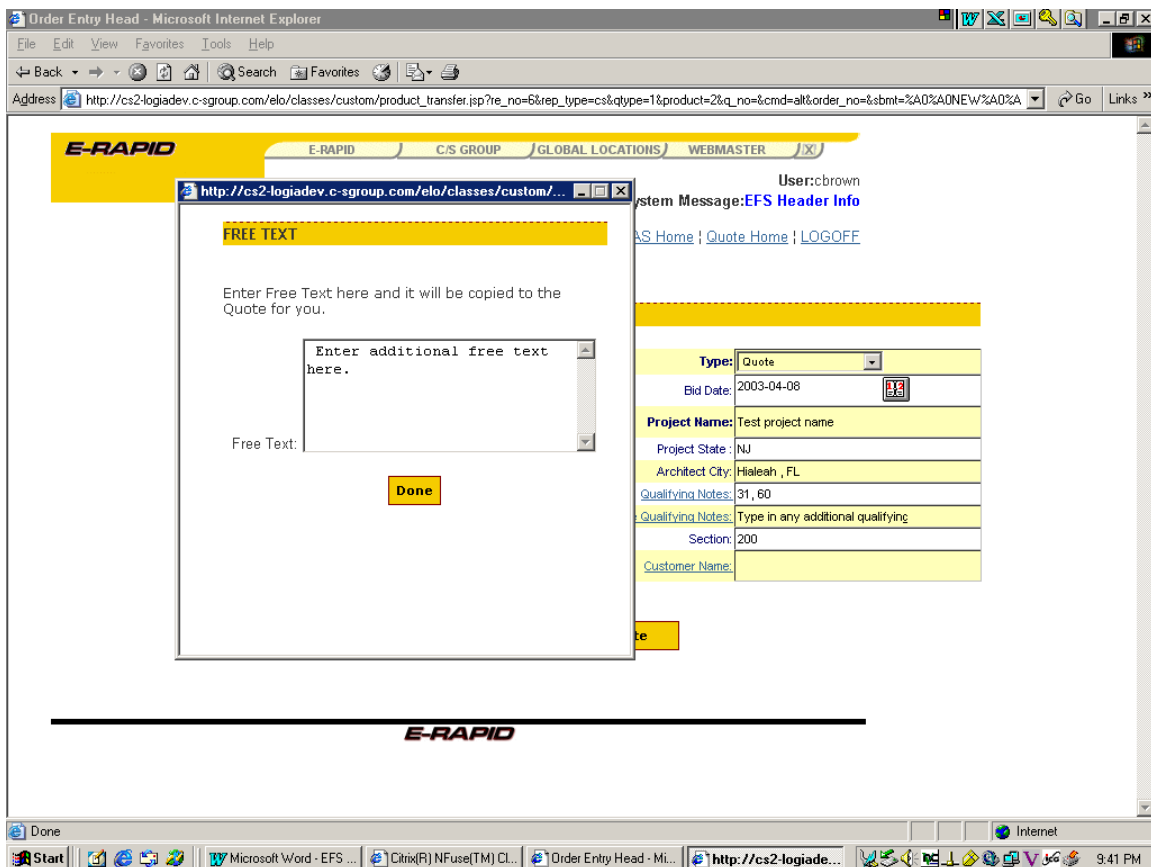
**Create New Quote**

**E-RAPID**

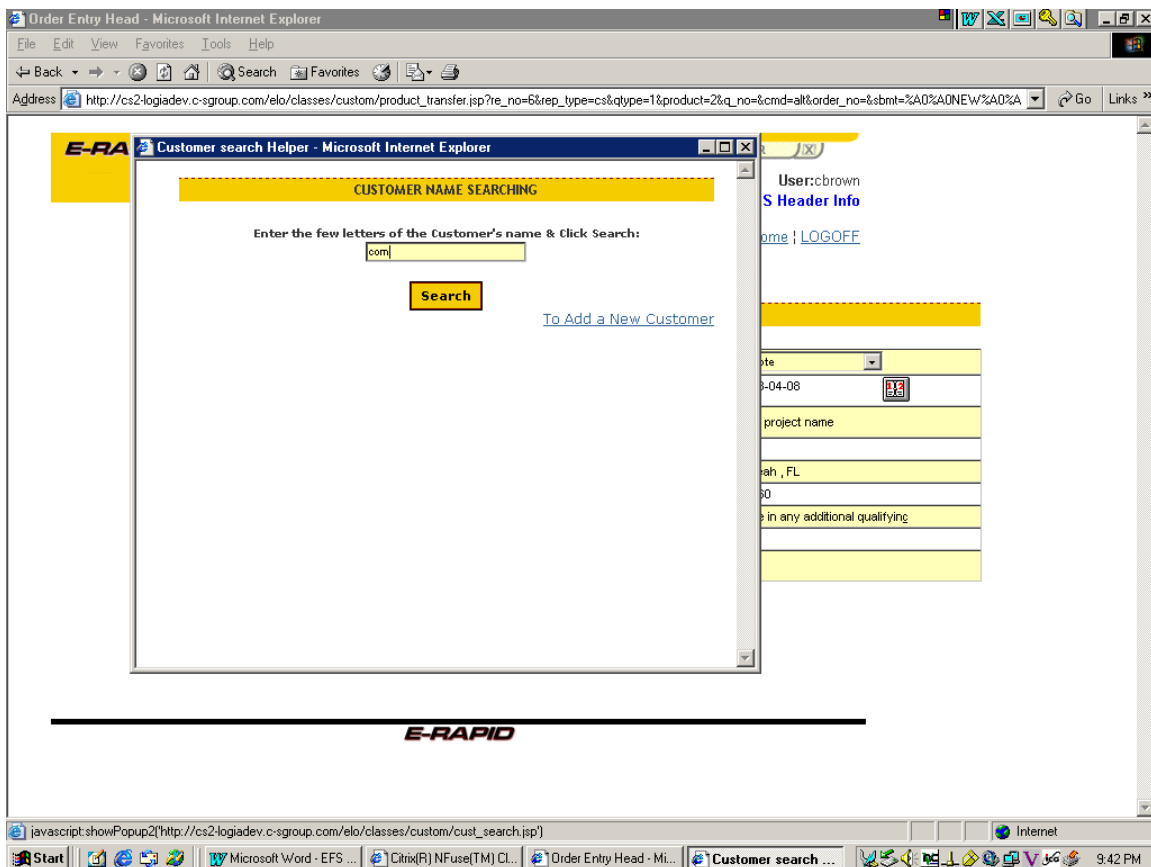
javascript:explain('Free Text', 'opener.document.caltorm.free\_text.value', 'Free Text');

Start Microsoft Word - EFS Revi... Citrix(R) NFuse(TM) Classi... Order Entry Head - Mi... 9:39 PM

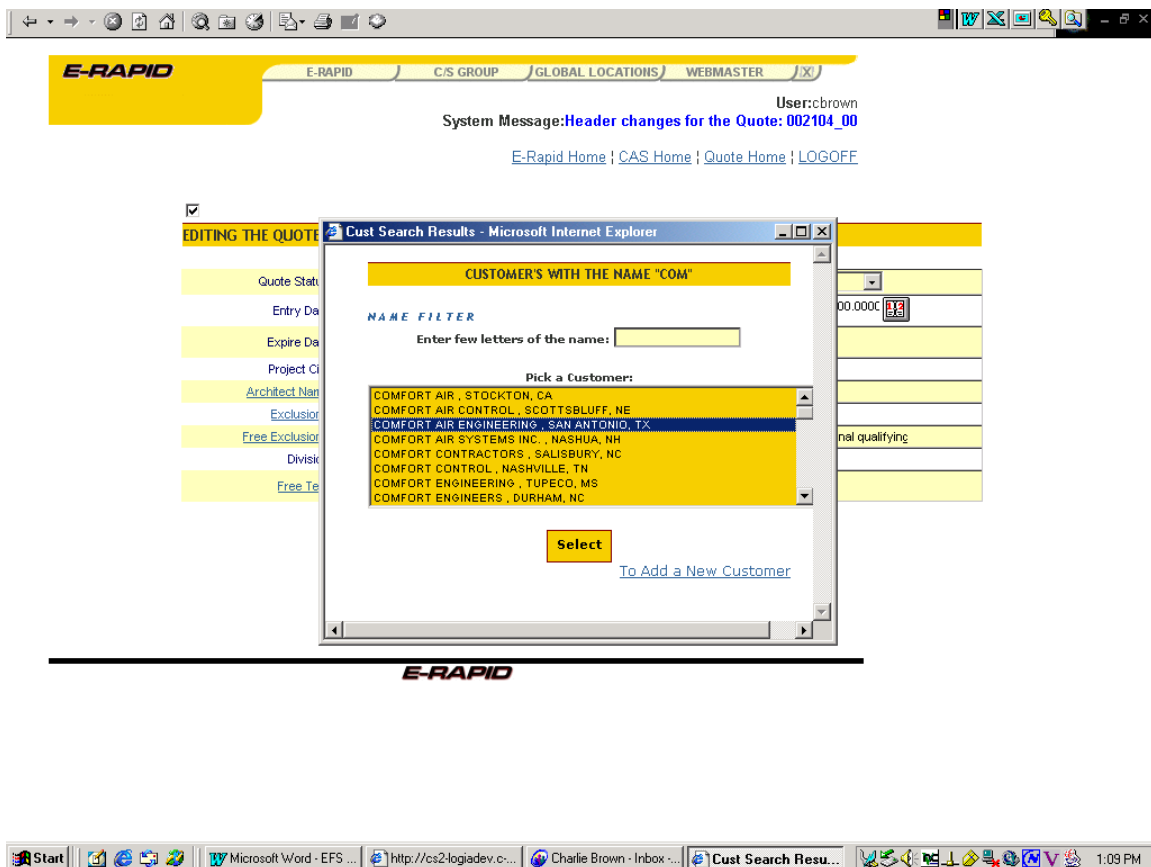
- In the “Division” field, enter the specification division. This entry can be any text. For example a typical entry may be simply “12” for division 12. Or enter “12 Flooring” to have both the number and description appear on the quote.
- In the “Section” field, enter the specification section number. This entry can be any text. For example, a typical entry may be simply “12692” or as noted above, text can be added.



- Click on the “Free Text” label.
- Enter free text as required.
- Click on the yellow “Done” button when complete.



- Click on the “Customer Name” label.
- Click in the open box and type in the first few letters of the customer’s name; press the yellow “Search” button.



- Initially the customer database will be blank. Each representative will enter customers over time. This customer list will only be available to the rep that entered it.

*Assuming that there are customers existing:*

- Highlight to select the desired Customer by clicking on it.
- Click on the "Select" button to select it and return to the header screen. Verify the correct city is reflected, if not create a new entry with the correct address.
- To enter a customer not in the database click on the blue "To Add A New Customer" text on the lower right of the screen.



**E-RAPID** Adding a New Customer - Microsoft Internet Explorer

**ADD A CUSTOMER NAME**

Customer Name:

Address1:

Address2:

City:

State:

Zip:

Phone:

Fax:

Email:

**Add**

(\*) represents mandatory fields

**Save**

**EBMASTER**

User: cbrown  
Quote: 002104\_00  
[Quote Home](#) | [LOGOFF](#)

Type: Quote  
Date: 2003-04-08 00:00:00.0000  
Name: Test project name  
State: NJ  
City: Hialeah, FL  
Notes: 31, 60  
Action: 200  
Customer Name: New Customer

- Fill in the fields as required. Then click on the yellow “Add” button to add this customer to your quote and to your (representative) database.
- Note that customers added to your database are only seen and accessed by you.

Order Entry Head - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Search Favorites Go Links

Address http://cs2-logiadev.c-sgroup.com/elo/classes/custom/product\_transfer.jsp?re\_no=6&rep\_type=cs&qtype=1&product=2&q\_no=&cmd=alt&order\_no=&smt=%A0%A0NEW%A0%A

**E-RAPID** E-RAPID C/S GROUP GLOBAL LOCATIONS WEBMASTER

User:cbrown  
System Message: [EFS Header Info](#)

[E-Rapid Home](#) | [CAS Home](#) | [Quote Home](#) | [LOGOFF](#)

☒ **NEW QUOTE HEADER INFORMATION:**

<b>Quote Status:</b> OPEN	<b>Type:</b> Quote
<b>Entry Date:</b> 2003-04-08	<b>Bid Date:</b> 2003-04-08
<b>Expiration Date:</b> 2003-07-07	<b>Project Name:</b> Test project name
<b>Project City:</b> Lebanon	<b>Project State:</b> NJ
<b>Architect Name:</b> JOLTEN GROUP INC	<b>Architect City:</b> Hialeah , FL
<b>Exclusions:</b> 27, 29	<b>Qualifying Notes:</b> 31, 60
<b>Free Exclusions:</b> Type in any notes that are	<b>Free Qualifying Notes:</b> Type in any additional qualifying
<b>Division:</b> 10	<b>Section:</b> 200
<b>Free Text:</b> Enter additional	<b>Customer Name:</b> COMFORT AIR ENGINEE

**Create New Quote**

**E-RAPID**

Done

Start Microsoft Word - EFS Rev... Citrix(R) NFuse(TM) Class... Order Entry Head - Mi... Internet 9:44 PM

- When all entries are complete click on the “Create New Quote” button to go to the configurator.

End section.

**See Configurator – Typical Pedimat Configuration (section 2) to Continue.**