

## **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.
- Install the “Citrix ICA Client” from the C/S Group Citrix web site. 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.

Citrix Metaframe log in screen.

**Citrix MetaFrameXP™**

**Login** ?

- Username
- Password
- Domain: c-sgroup

**Log In**

**Welcome**

**Please log in**

To log in to MetaFrame XP #1, enter the credentials required, and then click Log In.

If you do not know your login information, please contact your help desk or system administrator.

**MetaFrame XP Message Center #1**

The MetaFrame XP Message Center displays any informational or error messages that may occur.

**CITRIX®**

- 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.



- Click on the “eRapid Quotes” 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.
- Select the desired user if you have multiple options or click your user ID button.

[Quote Home](#) | [Help](#) | [Contacts](#) | [LOGOFF](#)

**TRAINING SYSTEM**

NEW QUOTE	EDIT/SEARCH QUOTE
<p>QUOTE TYPE: NEW <span style="float: right;">▼</span></p> <p>PRODUCT: .....Select One..... <span style="float: right;">▼</span></p> <p style="text-align: center; margin-top: 10px;"><b>START</b></p>	<p>PRODUCT: .....Select One..... <span style="float: right;">▼</span></p> <p>SEARCH METHOD: .....Select One..... <span style="float: right;">▼</span></p> <p>SEARCH FOR: <input style="width: 100%;" type="text"/></p> <p>FACTORY ORDERS: <input type="checkbox"/></p> <p style="text-align: center; margin-top: 10px;"><b>SEARCH</b></p>
CUSTOMER MASTER	MISCELLANEOUS
<ul style="list-style-type: none"> <li>■ <a href="#">Edit a customer</a></li> <li>■ <a href="#">Create new customer</a></li> </ul>	<ul style="list-style-type: none"> <li>■ <a href="#">Quote Request Form</a></li> </ul>

**E-RAPID**

- In the “New Quote” block, click on the down arrow on the Product box.
- Click on the desired product to select.
- Click on the “Start” button to go to the quote header screen.



\* Quote Type:

### NEW QUOTE HEADER INFORMATION TEST

Quote Status:	OPEN	Type:	Quote
Entry Date:	2006-07-26	Bid Date:	2006-07-26
Expiration Date:	Oct 24, 2006	* Project Name:	
Project City:		Project State:	
Architect Name:		Architect City:	
Exclusions:		Qualifying Notes:	
Free Exclusions:		Free Qualifying Notes:	
Division:		Section:	
Free Text:		* Customer Name:	
Section Desc:		Contact Name:	

\* Represents mandatory fields

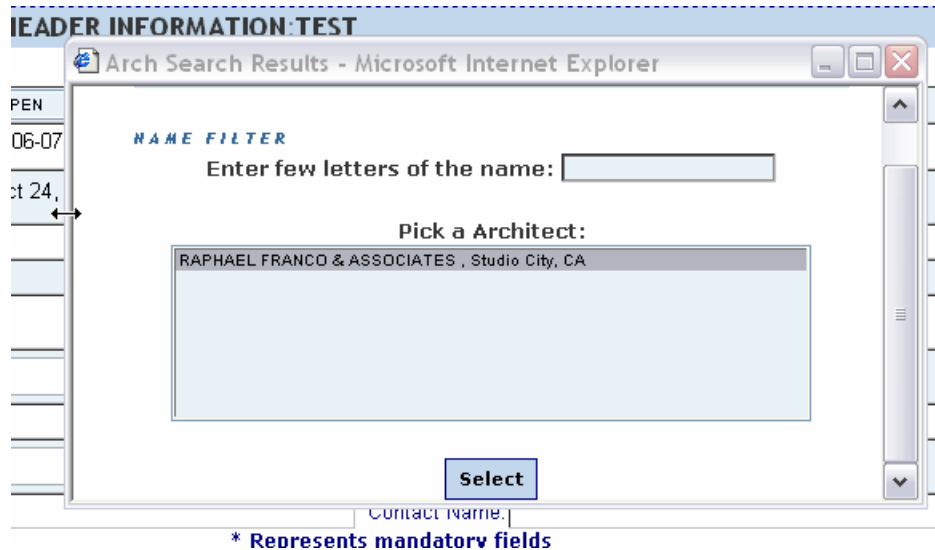
Create New Quote

- 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.
- Click on the drop down arrow to the right of the "Quote Type" field, if applicable.
- Select either "Trade (C/S)" or "DecoGard(DG)" as needed.
- 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.
- 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.

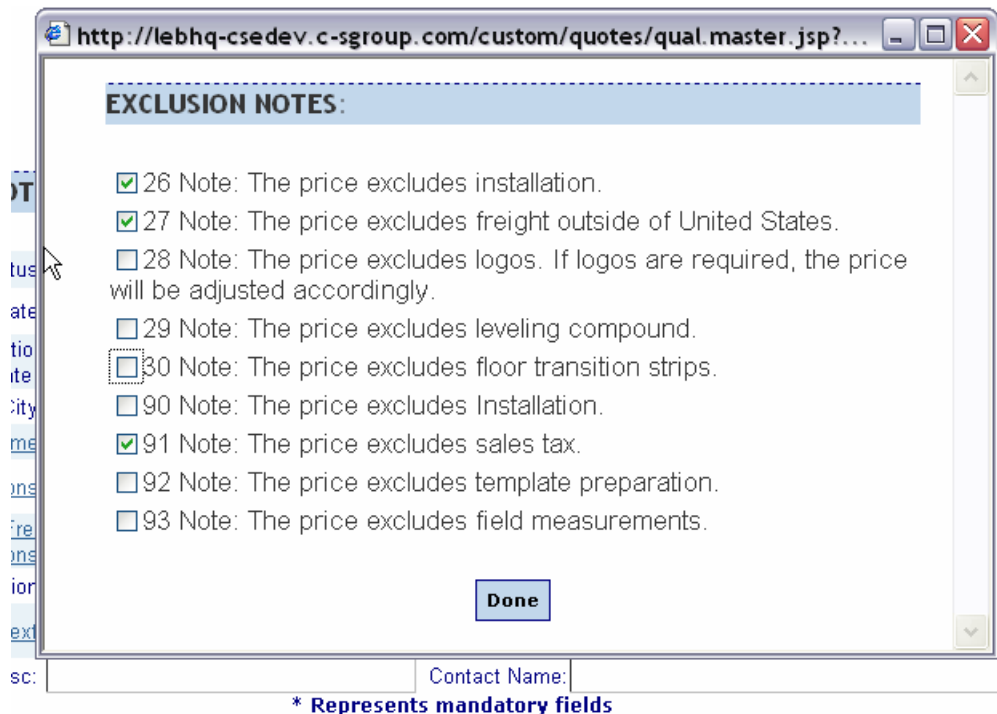
- The entry date defaults to the current date. This date can be changed by going into this calendar and selecting a different date.
- Click on the small red and gray calendar icon to the right of the Bid Date.
- The bid date defaults to the current date. However, it can be changed with the calendar.
- Be sure to close the calendars when complete.
- 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, unless quote type applies to you.
- Tab to get to the next field.
- Enter the “Project City.”
- Tab over and enter the “Project State.”
- Click on the “Architect Name” label.

The screenshot shows a web form titled "NEW QUOTE HEADER INFORMATION:TEST". The form contains several fields: "Quote Status" (set to OPEN), "Type" (set to Quote), "Entry Date" (2006-07-28), "Expiration Date" (Oct 24), "Project City", "Architect Name", "Exclusions", "Free Exclusions", "Division", "Free Text", and "Section Desc". A "Name:" field is also visible. A pop-up window titled "Architect search Helper - Microsoft Internet Explorer" is overlaid on the form. The pop-up has a header "ARCHITECT NAME SEARCHING" and a prompt "Enter a few letters of the Architect's name & Click Search:". Below the prompt is a text input field and a "Search" button. A note at the bottom of the form states "\* Represents mandatory fields".

- 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.
- 
- 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.

The screenshot displays a software interface with a quote form on the left and a 'Customer search Helper' window on the right.

**Quote Form Fields:**

- Quote Status: OPEN
- Entry Date: 2006-07-26
- Expiration Date: Oct 24, 2006
- Project City:
- Architect Name: RAPHAEL
- Exclusions: 26, 27, 91
- Free Exclusions:
- Division:
- Free Text:
- Section Desc:

**Customer search Helper - Microsoft Internet Explorer**

CUSTOMER NAME SEARCHING/EDITING

Enter a few letters of the Customer's name & Click Search:

art

Enter a few digits of the BPCS Customer number & Click Search:

Search

[To Add a New Customer](#)

- Click in the open box and type in the first few letters of the customer's name; press the “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.

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

\*Quote Type: Trade(C/S) ▼

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**NEW QUOTE HEADER INFORMATION:TEST**

Quote Status:	OPEN ▼	Type:	Quote ▼
Entry Date:	2006-07-26 	Bid Date:	2006-07-26 
Expiration Date :	Oct 24, 2006 	* Project Name:	Test quote
Project City:		Project State :	
Architect Name:	RAPHAEL FRANCO & AS	Architect City:	Studio City , CA
Exclusions:	26, 27, 91	Qualifying Notes:	
Free Exclusions:	<input type="text"/> ▲ ▼	Free Qualifying Notes:	<input type="text"/> ▲ ▼
Division:		Section:	
Free Text:	<input type="text"/> ▲ ▼	* Customer Name:	Artronics Corp.
Section Desc:		Contact Name:	

\* Represents mandatory fields

Create New Quote

End section.

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