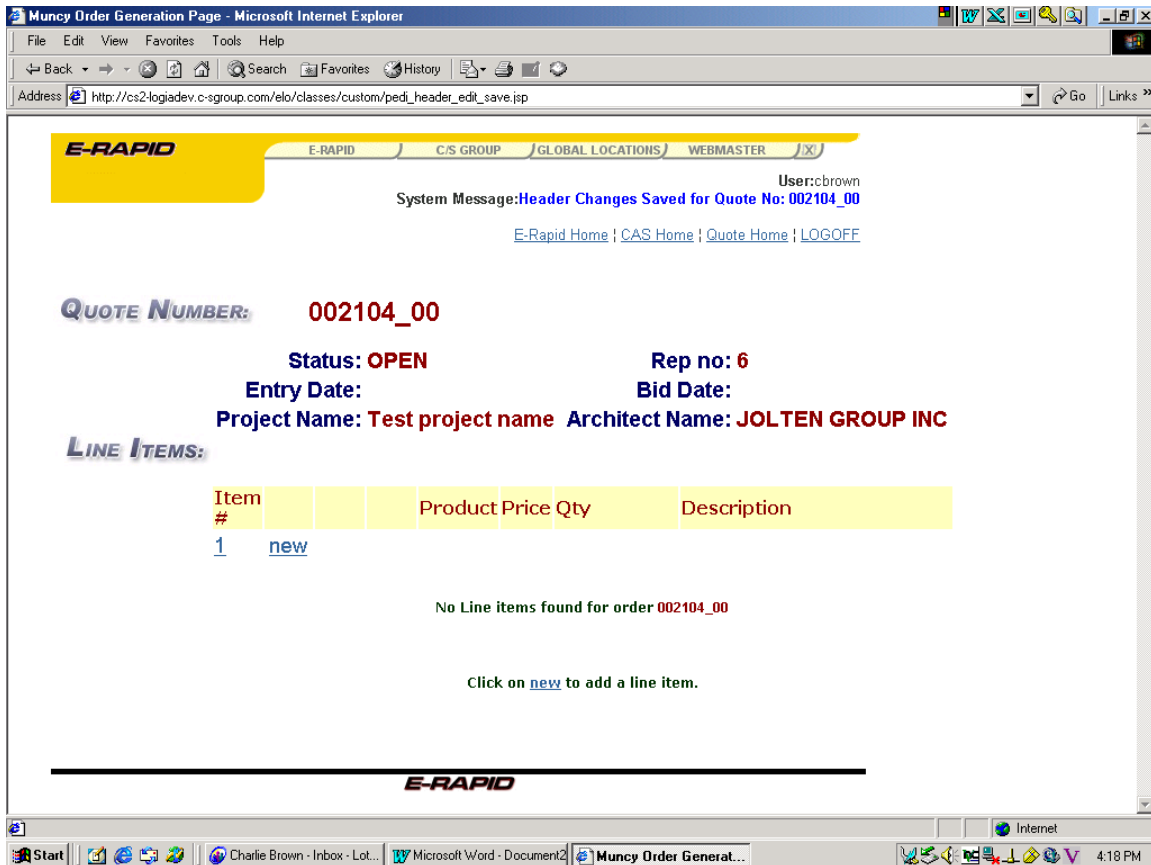# Configurator–Typical Pedimat Configuration

## *Instructions for creating a new quote – Part II.*

- This is the line item list. This screen directly follows the header screen. As products, or different line items are created, they are added to this list.
- Press the F11 function key to get a full screen mode.
- To return to the header screen click on the item # (number 1 in this example).
- Write down the quote number for future reference.
- Click on the blue "new" text to go to the configurator screen.
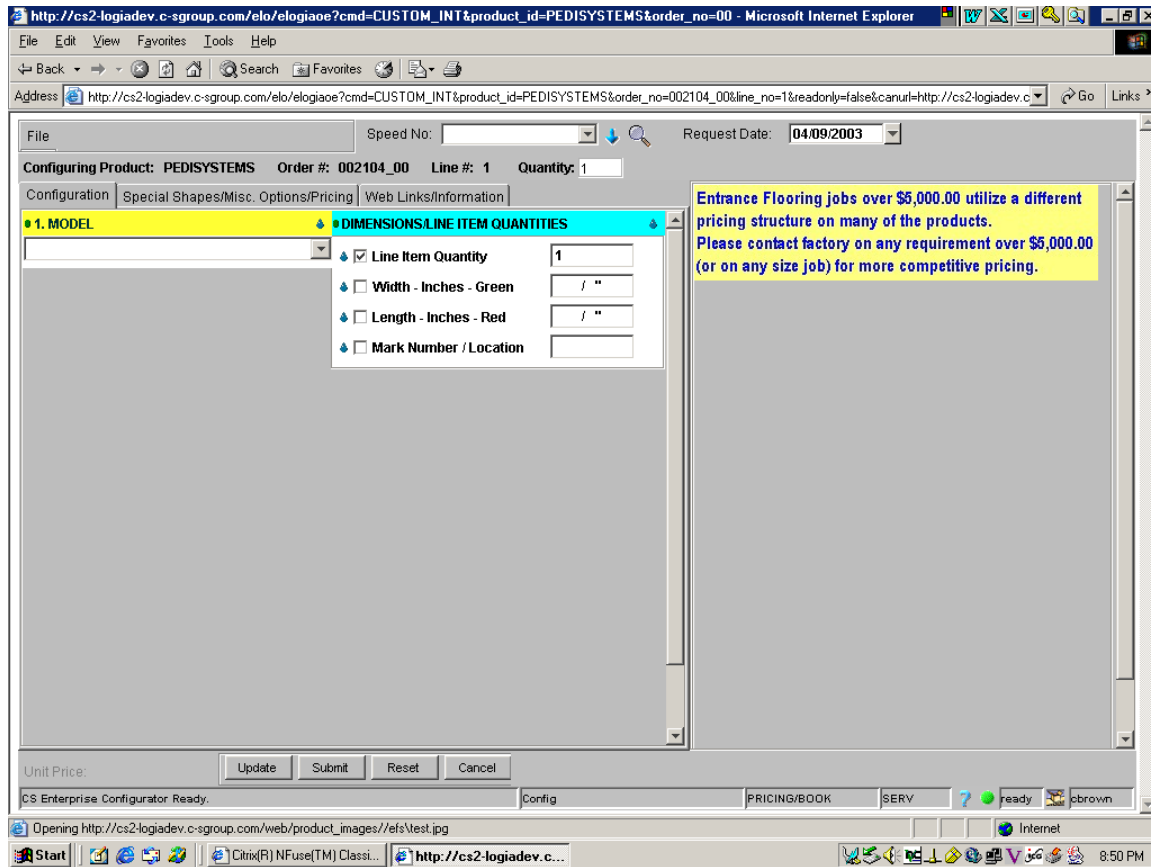
Note the three tabs at the top of the screen:

- **<u>Configuration</u>** – This is the area in which specific product information is added. For example model number, quantity, size etc.
- **<u>Special Shapes/Misc. Pricing/Options</u>** – This is the screen in which special shape, logo and insert color information is added. Also, pricing discounts are selected..
- **<u>Web Links/Information</u>** – This is the screen in which product information and tear sheets can be brought in.
- Note the screen that appears at the right of the screen with a yellow background. This is an area where images, text or pictures, relating to quoting are displayed.
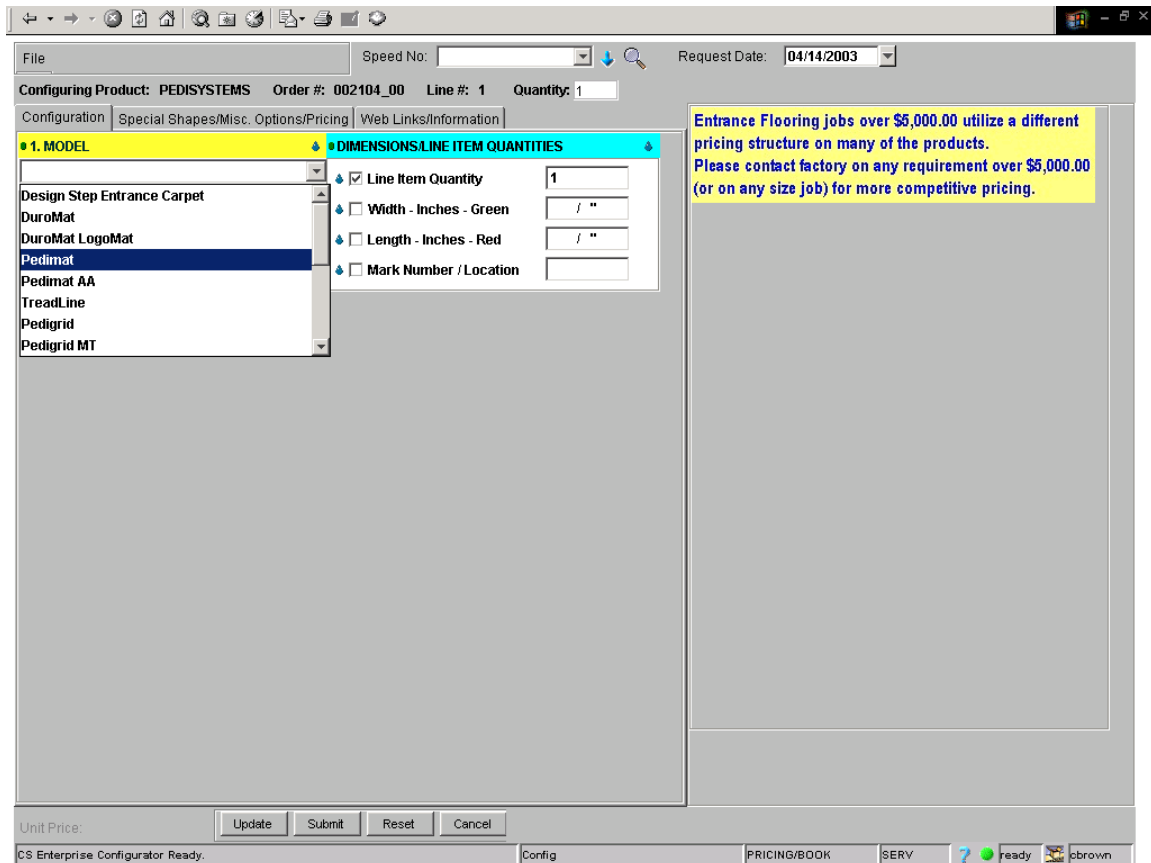
- Click on the drop down arrow at the right end of the Model block.

- Highlight and click on one of the 14 EFS models listed.
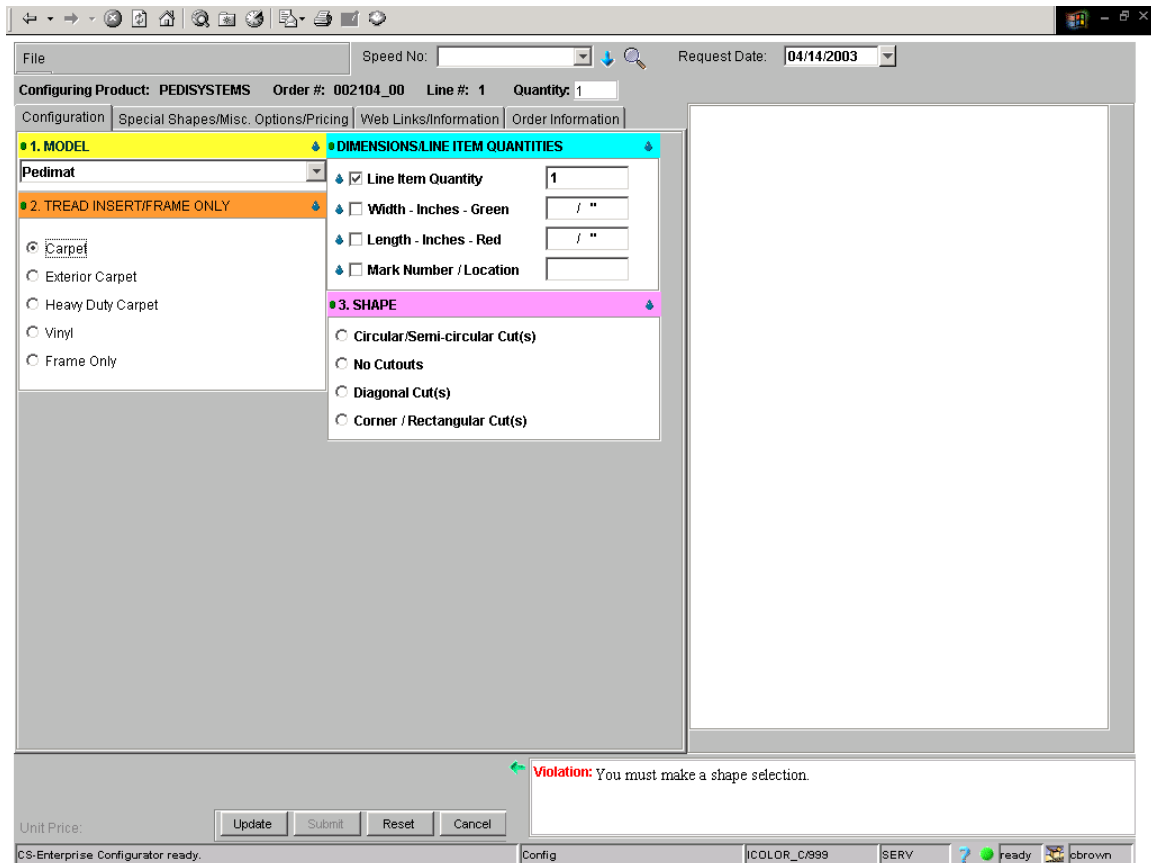
- Select one of the tread options (if applicable).
- Note the Violation box at the bottom right hand side of the screen. This is the area where violations or exceptions will appear. This box is also an instruction set to help you move through the program. Generally this box will spell out the next selection required.
- Note that as you select the tread insert the next selection screen will appear.
- Select the "No Cutout" shape option for standard, square or rectangular units.

- Continue to select frame and finish as the selection boxes appear.
- Change the quantity required as necessary.
- Enter the Width and Length in inches. To enter a whole number, enter the inches then tab or use the mouse to click to the next field. To enter a fraction, for example 48 ½"; type in 48, space bar, 1, space bar, 2.
- To correct a width or length entry, click in the width or length box and reenter the data. Or click on the width or length description to delete the entry and reenter as above.
- When complete, the violation or instruction box at the lower right will disappear.
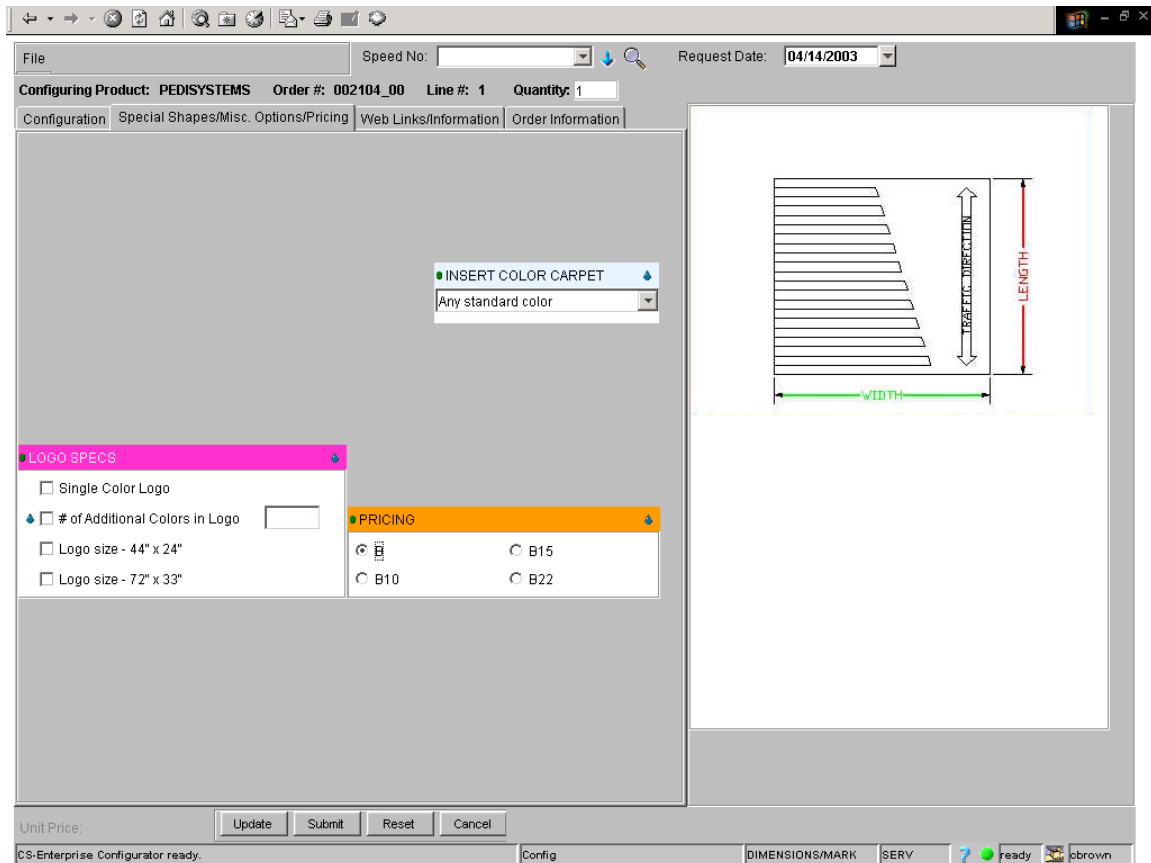
- Click on the **Special Shapes/Misc. Options/Pricing** tab (the tab at the top).
- Select insert color if known.
- Select Logo if required.
- Select special discount pricing if available for that model. The number following the B is the special discount percentage.
  - B = Book   Full book price – Pays 15% commission.
  - B = Book-   10%   – Pays 12% commission.
  - B = Book-   15%   – Pays 10% commission.
  - B = Book-   22%   – Pays 8% commission.
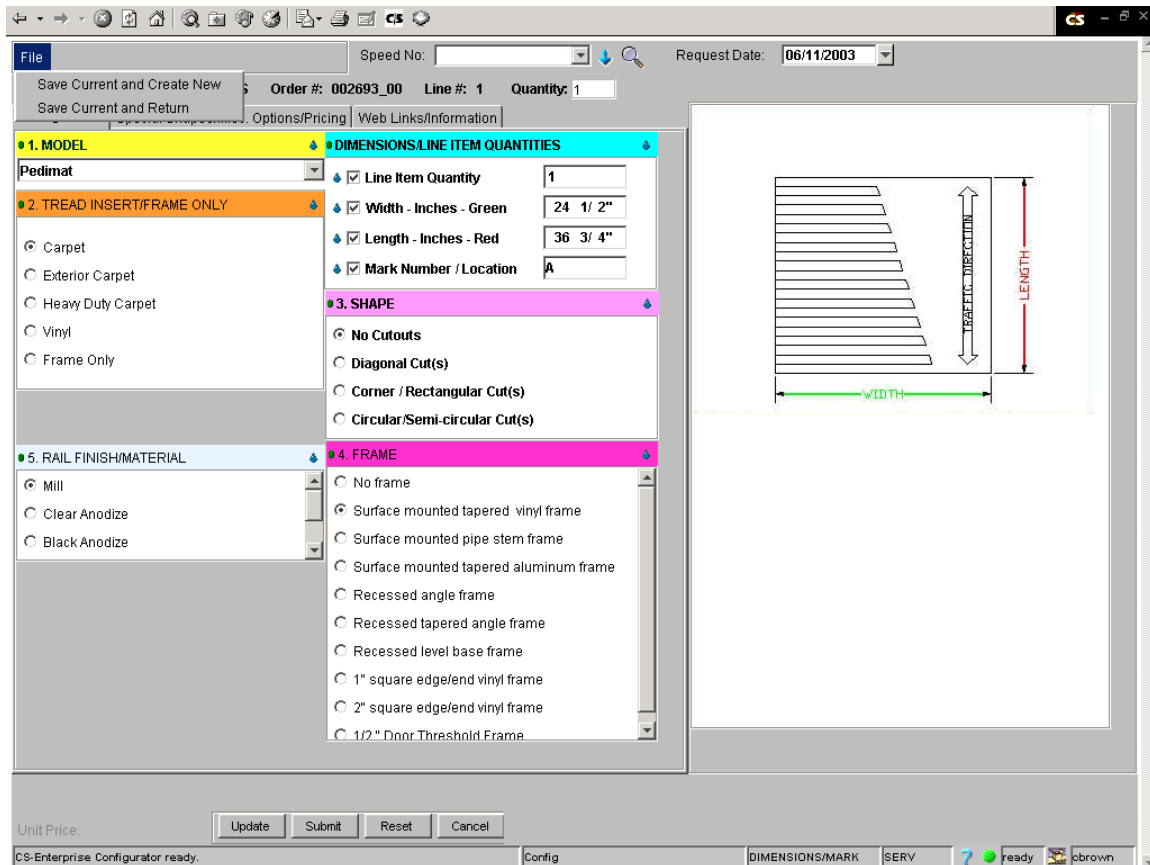
- After the configuration is complete, with no violations appearing, click on "File" immediately above the words "Configuring Product".
- Two options are available:
  1. <u>Save Current and Create New</u> – Click on this to save the current configuration (model, quantity, size etc) and continue to enter additional configurations. The line number is incremented. **<u>Be sure to hit the "Reset" button on the lower part of the screen when changing models.</u>**
  2. <u>Save Current and Return</u> – Click here to save this configuration and return to the line item screen to complete the quote process.

Choices for the next step:

- Click on the 1 or 2 in the "Item #" column to return to the header.

- Click on the "new" to enter a new configuration (model, quantity, size etc).

- Click on the "config" to edit an existing line or configuration.

- Click on the "Quick Quote" to continue to the calculation screen.

Reference Page: Error Messages

- If you see the red "Abort" error, as in line two above, the line has a major error and is not included in the quoted sale price. Aborts should be corrected before proceeding.

Reference Page: Error Messages
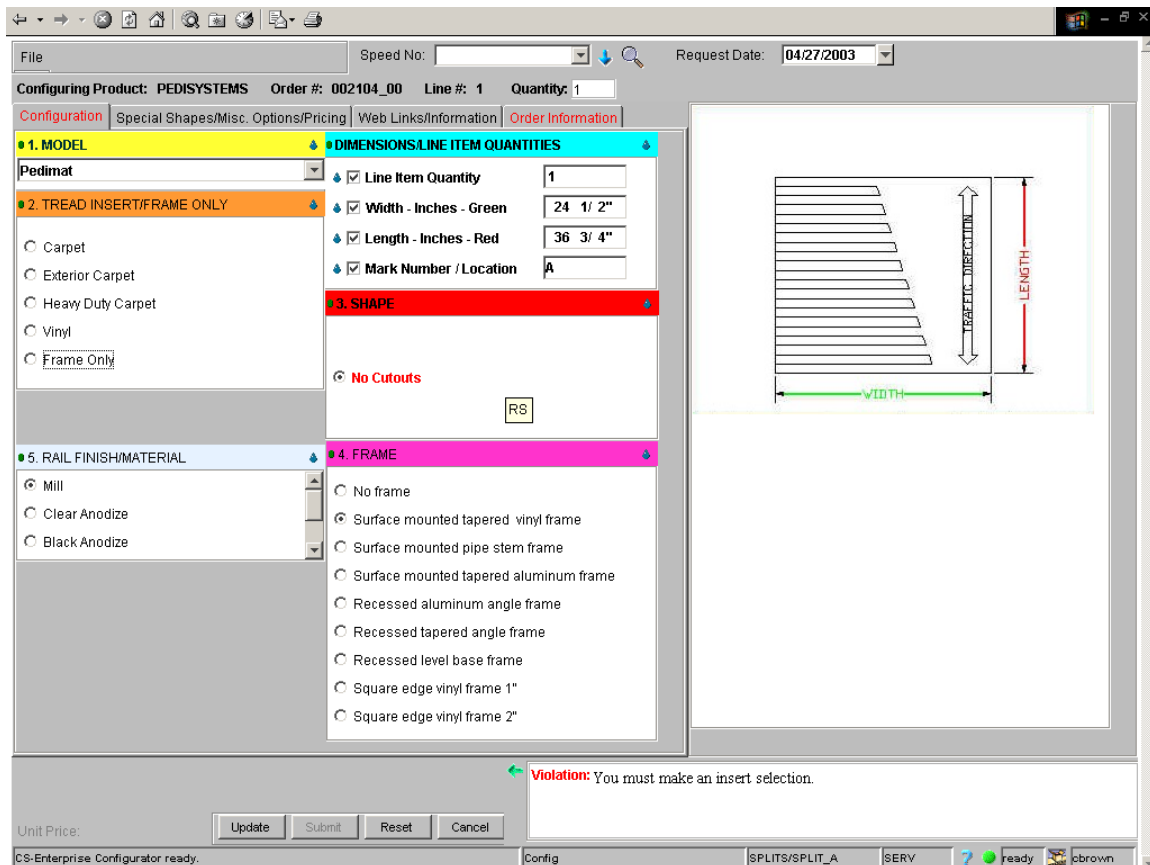
- Any red in the tab at the top or a specific block, indicates an error. In the example above, an insert was not selected, indicated by the violation in the message box at the bottom right. Selecting an insert will fix this error.

- Often, clicking within the red block will be required to select or deselect an option to correct the "red" error. Responding to the Violation message will often also fix this error.
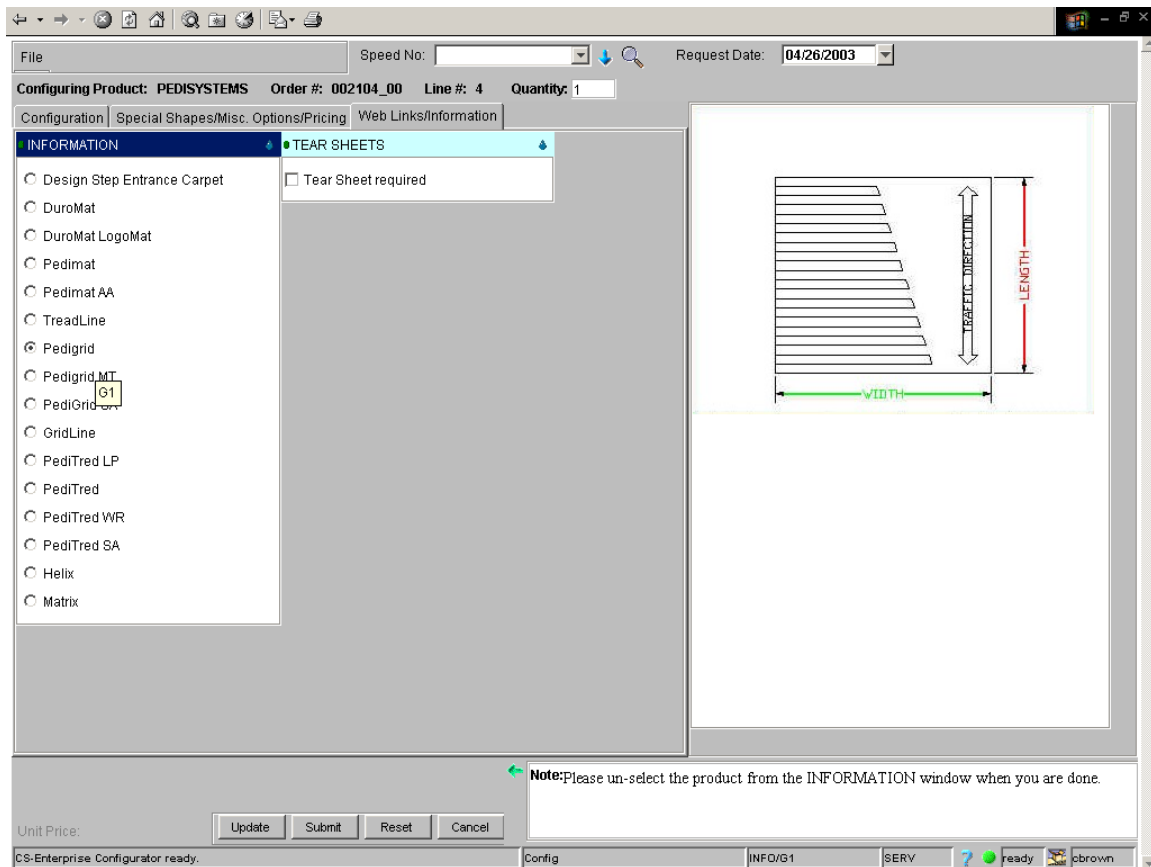
# *To obtain Tearsheet or Product information:*
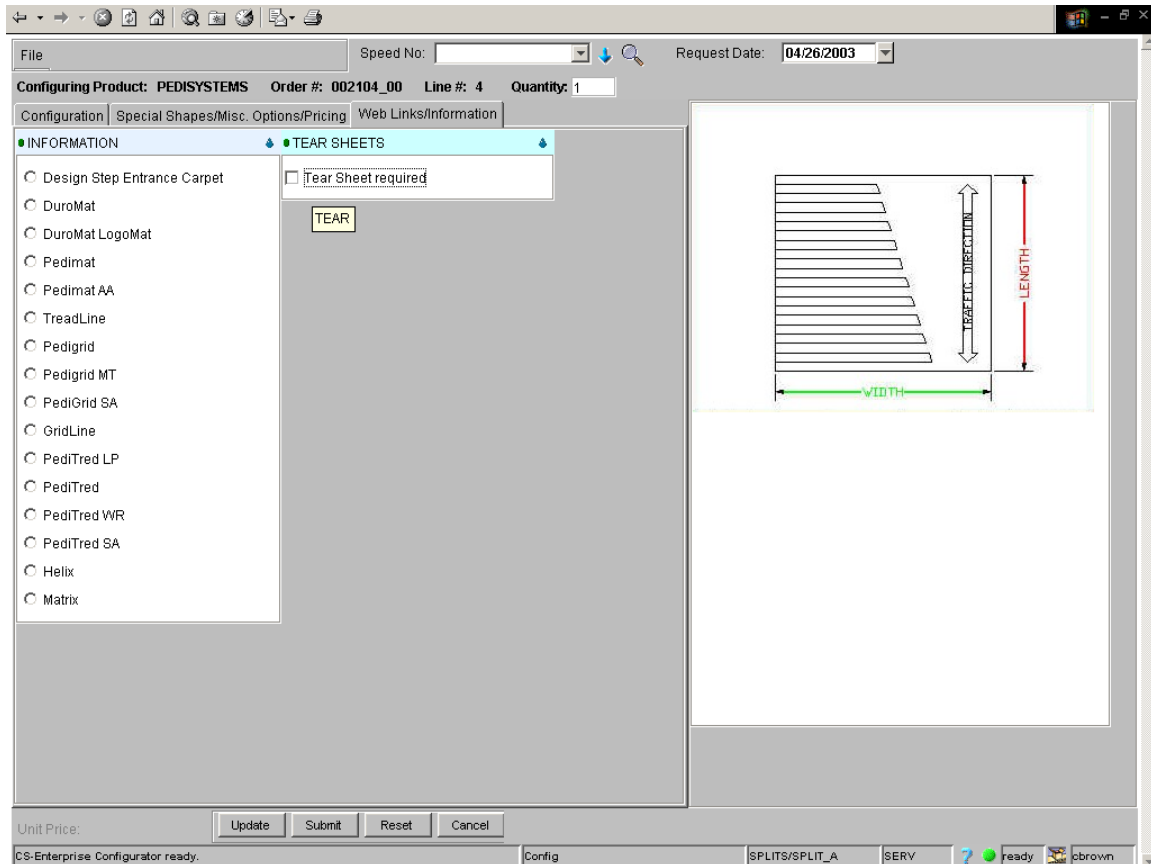
- From the configuration screen click on the third tab at the top: "Web Links/Information."

- Click on the "Tearsheet required" block to pull up a tearsheet for the product you have just configured.
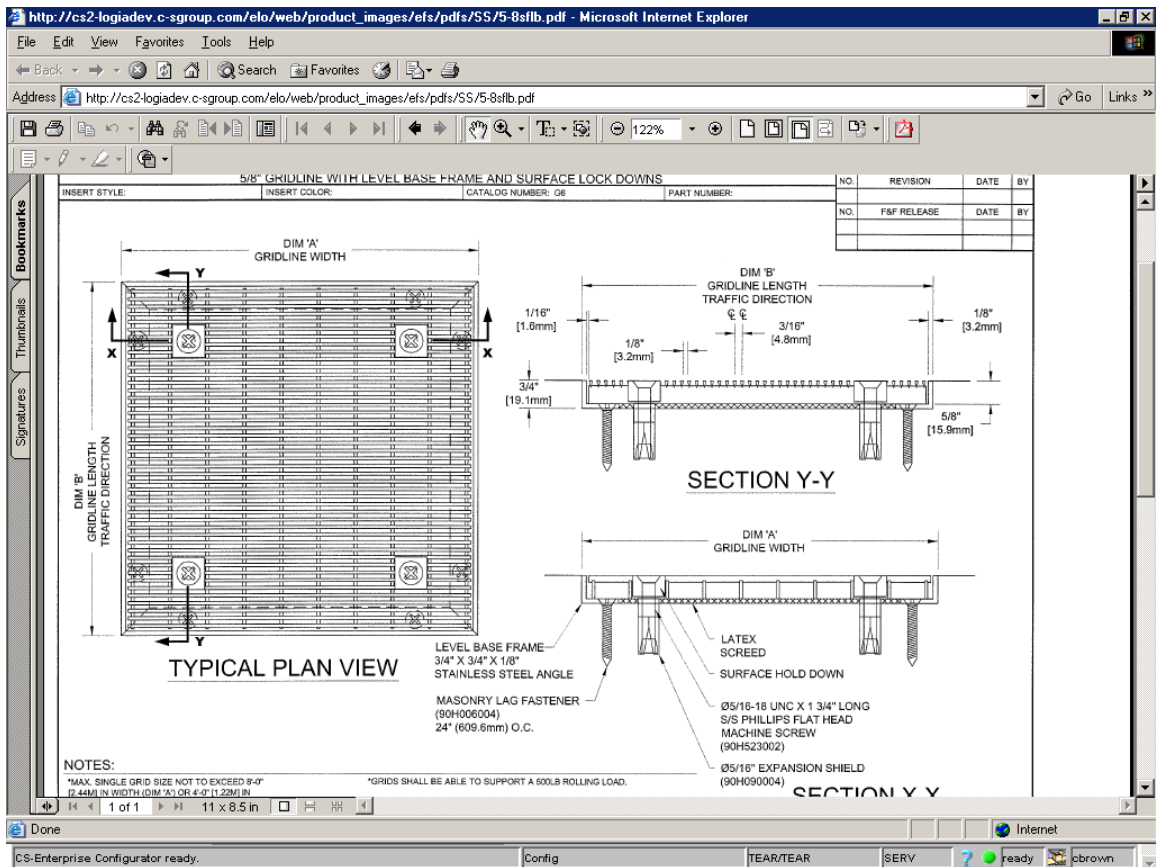
- Be patient as the tearsheet loads, it is a complex, detailed drawing that will take a minute or two to load.

- Close this window to return.

- To obtain product information, click on the product in the "Information" block.
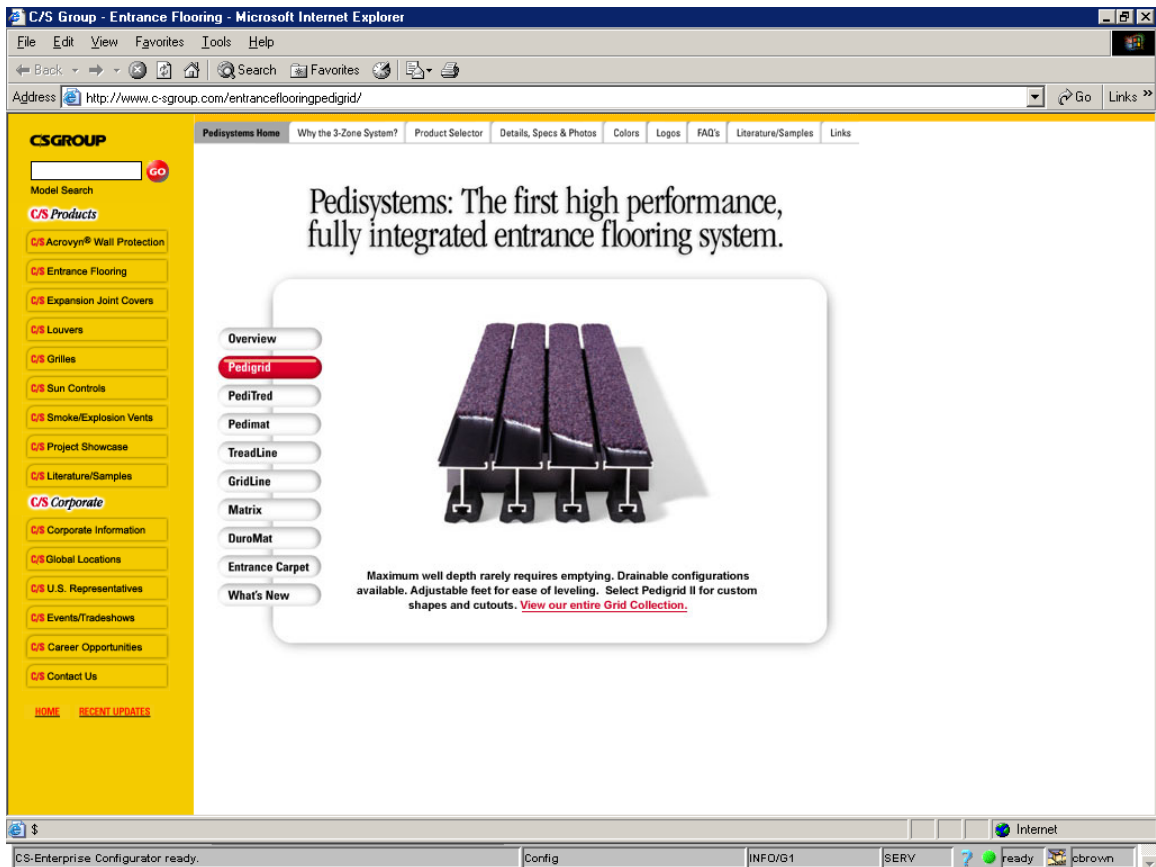
- Product information will be retrieved/linked from the C/S
  Website.

- Close this window to return.
-

End Section

See Calculations and Printing to continue (section 3).