



Quick Start Guide

AutoQuotes Quickstart Guide

Welcome to the AutoQuotes network. A four-disc set should accompany this guide. This Quick Start Guide serves as a roadmap for installing AutoQuotes, performing initial program setup, and the basics on preparing and distributing a quote to your customers. A complete User Manual may be printed from the About window inside the AutoQuotes program.

Feel free to contact us with any suggestions that would improve our product.

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TABLE OF CONTENTS

INSTALLATION	2
Minimum System Requirements	2
Installation Types	2
Stand Alone Installation	3
Network Installation	3
Network Mobile Installation	3
USER SET UP	4
Entering Company Information	4
Loading Manufacturer Discounts	5
Building your Customer List	5
HOW TO PREPARE AND DISTRIBUTE A QUOTE	6
Setting up the Quote	6
Adding items to the Quote using the e-Catalog	7
The Spreadsheet	8
Printing Quotes and Reports	11
Quote Format Options (the Wrench)	12

Chapter 1: Installation

Minimum System Requirements

Pentium III w/500 Mhz processor
Windows 98 Second Edition
128 MB RAM
3 GB Free Disk Space
Installation Types

Before installing the AutoQuotes program, you should evaluate how you work and choose the installation option that works best for you:

Stand Alone – Your computer is not on a network or you run AutoQuotes from your local hard drive. The program, data, pictures and spec sheets are on your PC only.

Network – You have a file server and you want all your Client PC's to run AutoQuotes from the Shared Folder on the Network. There are two types of Client installations: Office and Mobile.

1. **Office** - You are always connected to a network and run AutoQuotes from the network. The data, pictures, and spec sheets are on the network and the program is on your PC.
2. **Mobile/Laptop** – You have a laptop computer. You want to run 'Stand Alone' when you are away from the office, but when you are in the office you want to be connected to the Network. You want your laptop to be synchronized automatically with the Network copy when you reconnect to the network.

Stand Alone Installation

1. Insert CD #1 into your CD-ROM drive. The Install program will Auto Run.
2. Select Stand Alone Installation.
3. The program will install to the **C:\Program Files\AQ** folder (recommended). Follow the onscreen prompts and replace the discs as necessary.

Network Installation

There are 3 steps to a Network Installation. First, the 4 discs must be installed to a shared folder on the Network drive. Second, each individual PC must run CLIENTSETUP.EXE.

Step One: Install to the Network Drive

Note: Run the Network Install from a PC that is connected to the Network, not from the Network PC.

1. Insert CD #1 into your CD-ROM drive. The Install program will Auto Run.
2. Select Network Installation.
3. Specify a network drive (example: X drive). By default, the program will install to the X:\QShared folder and it is recommended that you do not change the name of this folder.
4. Follow the onscreen prompts and insert the remaining discs when prompted. When the Network Installation is complete, proceed to Step Two (Client Install)

Step Two (Office PC): Install the Client Software

1. Go to each workstation
2. Open My Computer
3. Find and run ClientSetup.exe. You will find ClientSetup.exe in the x:\AQSHARED folder (substitute your Network drive letter for X).
4. Select **NO** when asked if you want a local copy of the pictures and spec sheets.

Step Two (Mobile/Laptop PC): Install the Client Software

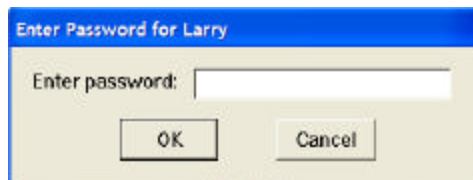
1. Laptop users can connect to the Network when in the office and run stand-alone when away from the office (and disconnected from the Network).
2. Go to each workstation
3. Open My Computer
4. Find and run ClientSetup.exe. You will find ClientSetup.exe in the x:\AQSHARED folder (substitute your Network drive letter for X)..
5. Select **YES** when asked if you want a local copy of the pictures and spec sheets.

The Clientsetup.exe program will always install Adobe Acrobat Viewer version 6.0 if you do not already have it installed. It will also detect and install certain Windows upgrades if your version of Windows is not up to date with the latest .NET programs.

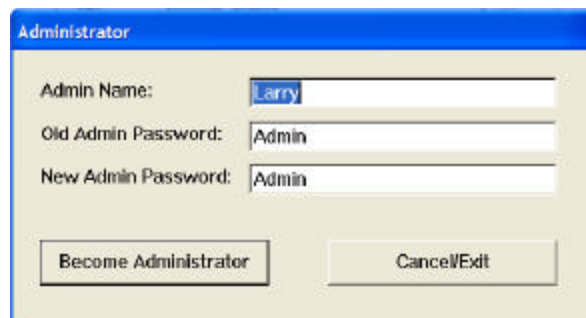
Step Three: Assign the Administrator

By default, the first PC to run ClientSetup becomes the Administrator. When you open AutoQuotes on the administrator PC, it checks the Internet and updates the data on the network as necessary for use by all other AutoQuotes PC's on the network. You no longer have to go online and click the Update button, just run AutoQuotes on the Administrator PC at least once per day so the network remains up to date.

There can be only ONE administrator on the network. If you need to change the Administrator to another PC for any reason, open AutoQuotes on the PC that you want to make the administrator, and click the Admin button on the Start toolbar. Enter the password 'ADMIN' and click OK.



Enter your name, the old password, and a new password in the spaces provided and click 'Become Administrator' to assign Administrator status to the PC.



If you lose or forget your password, just go to the AQSHARED folder on the network and open the file AQLOCK.INI using your text editor. Listed in AQLOCK.INI is the current Name and Password.

Chapter 2: User Setup

While it is possible to begin using the AutoQuotes program immediately for quoting jobs, some initial program setup is advisable. Take a couple of minutes to enter your unique company information, load your manufacturers' discounts and build your customer database. Set up the global parameters that are applicable to all job quotes while you're at it. You can edit these items at any time.

Double click the AutoQuotes icon on your desktop to start the AutoQuotes program (Startup requires 20-30 seconds). Make sure AutoQuotes is in the correct USER MODE (**Dealer, Factory Rep, Consultant, Manufacturer**). To change the User Mode, just click on the User Mode button on the toolbar. The date and time on the bottom of the Window indicates the last time that you successfully updated your copy of AutoQuotes from the Internet.



Start Menu

If you have an Internet connection, AutoQuotes will connect to the Internet to make sure you have the most up-to-date program and data available. The updates will run silently in the background while you work. As long as you have an Internet connection, you never have to worry about out-of-date pricing again.

Entering Company Information

To enter your company information, click Set Up on the Start screen, click Your Company Information, and complete all the company information fields. When entering phone numbers on the Company Information screen, enter numbers only (Do not enter dashes or parentheses. The program will format the numbers for you). If you know your serial number, enter it in the field provided. Be sure to enter your current email address.

A screenshot of the AutoQuotes Company Information window. The window title is "AutoQuotes version 5.001 - [Company Information]". The form contains the following fields:

- Company Name: Kent Motes
- Address 1: 11111
- Address 2: 222222
- City State Zip: Jacksonville FL 33211-0000
- Phone: (999) 999-9999 800 (888) 888-8888
- Fax: (333) 333-3333
- Serial #: 92642542
- E-Mail Address: kent@aqnet.com

On the right side, there is a "User Mode" section with radio buttons for:

- Dealer (selected)
- Rep
- Consultant
- Manufacturer

Loading Manufacturer Discounts

Name and Address	Notes	Discounts	User
Nick Name:		Number	9
Name:	A. J. Antunes & Co.		
Address 1:	180 Kehoe Blvd.		
Address 2:	PO Box 87700		
City State Zip:	Carol Stream	IL	60188-7700
Phone:	(630) 784-1000	Fax:	(630) 784-1650
800:	(800) 253-2991	Extra:	
Force Packsize:	<input type="checkbox"/>		

To enter your manufacturers' discounts, select the Set Up option on the Start screen, highlight Setup Vendors and Discounts. Type in the desired manufacturer, click the Edit button, highlight the Discounts tab, press % and enter the applicable discount.

Building your Customer Database

Company	Contact
Dubin Paper Co.	Abitz, Wade
Dubin Paper Company	Abourisk, Steve
Dudley Kil Sales Agency, Inc.	Abraham, Armin
Dudson USA, Inc.	Abraham, Brandi
Duffy's Equip. Svc. - Sauquoit	Abraham, Brian
Duffy's Equip. Svc. - Endicott	Abraham, Chns
Duffy's Equip. Svc. - Watertown	Abraham, Jack
Duffy's Equip. Svc. - Rush	Abraham, Kathy
Duffy's Equip. Svc. - Liverpool	Abramovich, Mike
Duga Associates	Abrams, Marc
Duga Associates	Abrams, Norman
Dukane	Abrams, Ric
Duke Manufacturing	Abrams, Richard
Dumont Marketing Group	Abramson, David R
Duncan Supply Co. Inc. - Kokomo	Abrenica, Amel
Duncan Supply Co. Inc. - Muncie	Abreu, Anthony A.
Duncan Supply Co. Inc. - Champaign	Absher, Brian
Duncan Supply Co. Inc. - Blooming	Accardi, Larry
Duncan Supply Co. Inc. - Indianap	Accetta, Carol J.
Dunhill	Accounts, Customer
Duni Corp	Aceituno, Walter

Dubin Paper Co.
PO Box 37505
Philadelphia, PA 19148
Phone: (215) 462-7900
Fax: (215) 463-0210
(Dealer)

Phone (215) 462-7900

To build your Customer base, return to the Start screen and select **Address Book**. Click the drop down list to browse Mfr, **Dealer**, **Rep**, **Consultant**, and **Customer** lists. Highlight a Company Name and right click the mouse

to bring up the Edit Menu to **Add or Edit** a new customer on your customer list. Left Click on the right side of the menu to **Add** new contacts

Chapter 3: How to Prepare and Distribute a Quote

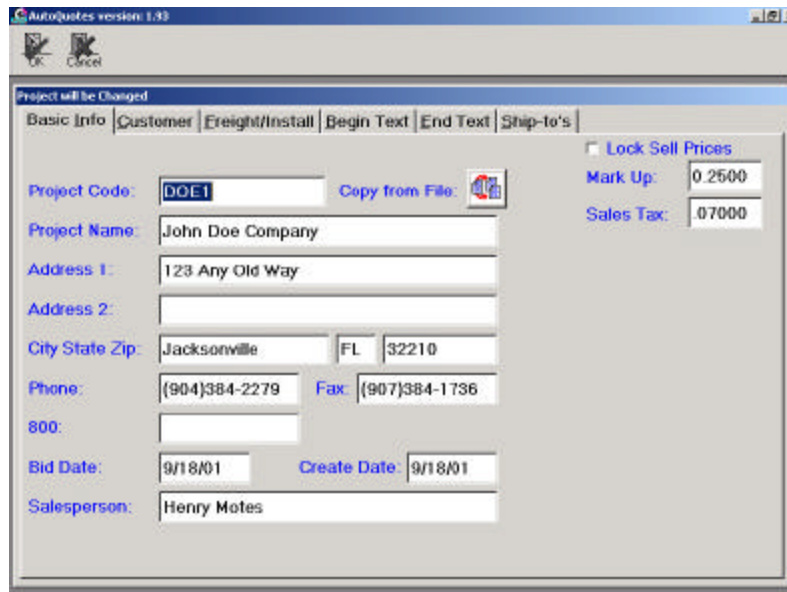
After Installation and Setup, you are ready to start quoting. The quotation process can be summed up as follows:

1. setting up the quote
2. adding items to the quote
3. distributing the quote.

First you must specify a Customer, a Project Name, and Contact information. Let's do that now:

1. Start AutoQuotes.
2. Select **Work on a Project**. The Project List screen is a list of all quoted Projects
3. Click the **Add** button (hotkey: **Insert**) on the upper toolbar to Add a New Project.
4. Select a Customer from the Addressbook. Highlight a Customer name and click **Select** (hotkey: **Enter**). If the Customer is a new prospect and does not exist in your Customer list, add the prospect to your Customer list at this time by right clicking and selecting **Add** from the Menu. Once added to the Customer list, highlight the new Customer and click **Select** (hotkey: Enter).
5. Enter a **Project Code**. The Project Code must be a unique 8-character short name for the Project.
6. **Set up the Project Defaults**. Values entered into the Project Defaults form will be automatically added to each new Project. Here is a list of Default values available
 - a. Freight estimates (freight cost in dollars per 100 lbs.)
 - b. Installation (percentage of merchandise cost)
 - c. Beginning Text prints at the beginning of your Quote report
 - d. Ending Text is footnotes at the end of the quote, for special notes
 - e. Ship To is the Project defaults for Purchase Orders
7. Click **OK** to save the Project Info. The Project Name will now be listed on the Project list screen

Project Setup



The screenshot shows the 'Project Setup' dialog box in the AutoQuotes software. The window title is 'AutoQuotes version: 1.33'. The dialog has a title bar 'Project will be Changed' and several tabs: 'Basic Info', 'Customer', 'Freight/Install', 'Begin Text', 'End Text', and 'Ship-to's'. The 'Basic Info' tab is selected. The form contains the following fields and values:

- Project Code: DQE1
- Project Name: John Doe Company
- Address 1: 123 Any Old Way
- Address 2: (empty)
- City State Zip: Jacksonville FL 32210
- Phone: (904)384-2279
- Fax: (907)384-1736
- 800: (empty)
- Bid Date: 9/18/01
- Create Date: 9/18/01
- Salesperson: Henry Notes

On the right side of the dialog, there are three checkboxes and two input fields:

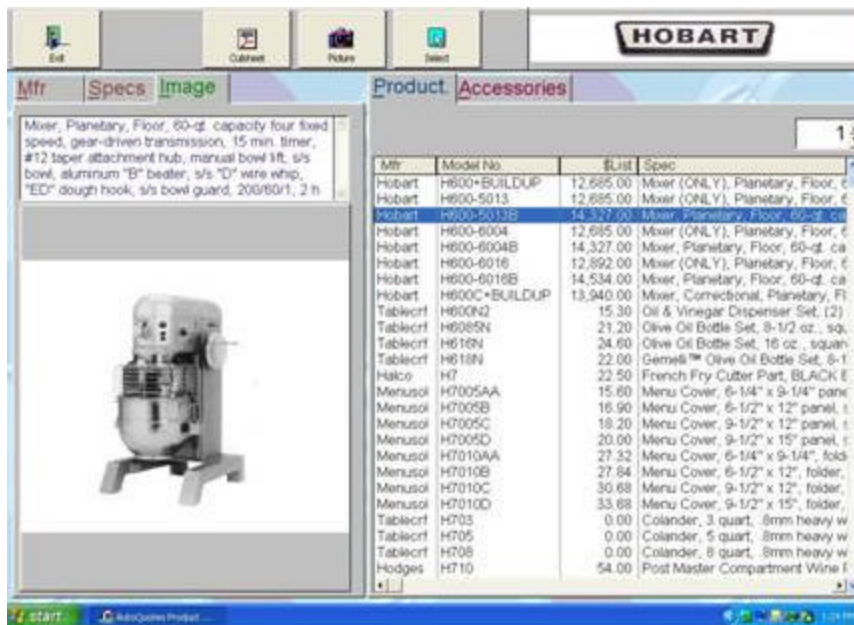
- Lock Sell Prices
- Mark Up: 0.2500
- Sales Tax: .07000

To set these options for every new project, click on the Defaults button on the toolbar on the Project List window

Adding items to the Quote using the e-Catalog

Now that you have created your project, it's time to add items to it. The spreadsheet is your work area for preparing quotes.

1. To begin working on your newly created project, highlight the Project Name and press <Enter> (or click the Spread button on the toolbar).
2. The e-Catalog opens automatically prompts you to search the product database for items to add to the spreadsheet. The e-Catalog screen contains a left panel of manufacturers and a right panel of model numbers. There are techniques for searching.
 - a. **If you know the model number-** Lets say you want to quote a **Hobart H600 Mixer**. Make sure **All Manufacturers** is highlighted on the left panel, click (or use your right arrow key) anywhere in the right panel, and type **H600**. Another way would be to type **Hobart** while the left panel is highlighted, click (or use your right arrow key) anywhere in the right panel, and type **H600**.

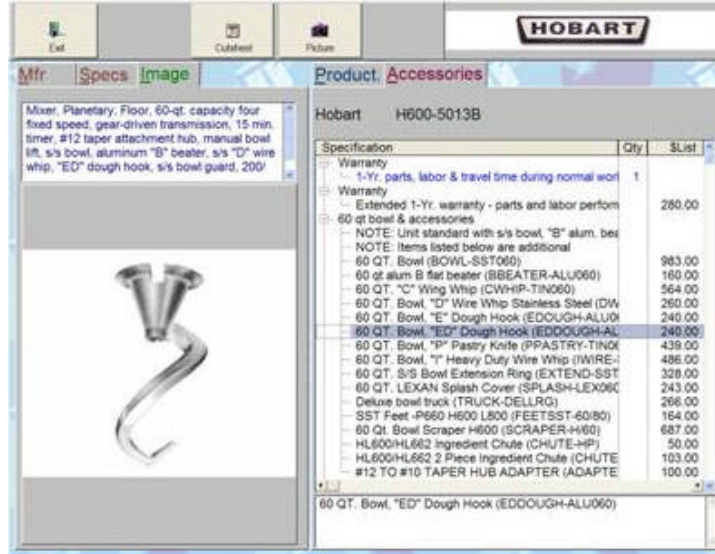


- b. **If you know the product description-** Let's say you want to quote a range. Highlight All manufacturers, click the + box (or press Enter), and type RANGE to view ranges for every manufacturer in the database. Typing Vulcan Hart, clicking the + box (or pressing Enter) and typing RANGE will show a list of the ranges manufactured only by Vulcan Hart.
- c. **If you know the BRAND or PATTERN name-**This is especially useful for smallwares or tabletop items. Let's say you're looking for Libbey Gibraltar. Highlight All manufacturers, click the + box (or press Enter), and type Gibraltar. You could also type Libbey, click the + box (or press Enter), and type **Gibraltar**.

The e-catalog contains detailed **specs, images and spec sheets** all accessible from the e-catalog window. The spec sheets can be viewed and printed directly from the e-catalog or attached to the quote when you're ready to distribute the quote to your customer. The images in the e-catalog may be viewed and printed directly from the e-catalog or used in a flyer for your customers. Clicking on the company logo on the toolbar will take you to the company's website if you have an online connection.

1. Locate the item you wish to quote and add it to the spreadsheet. To **ADD** the item to the spreadsheet, highlight it and click **Select** on the toolbar or just press **Enter**. (HOTKEY: the <right arrow> button). Select the required accessories to build out the item before it is added to the spreadsheet. To adjust the option quantities, use the plus (+) or minus (-) keys on your keyboard. To add an item to the spreadsheet, click Select (hotkey: right-arrow).

2. Enter the Project item number, the markup, and the quantity in the fields provided.



Don't worry if you make a mistake adding an item to the spreadsheet. All fields in the spreadsheet can be edited as necessary.

The Spreadsheet

Once you have selected and configured an item, click the Select button (or press the <right arrow> key) to add the item to the spreadsheet. First you will be prompted to add an item number, a markup, and a quantity.



Once entered, you can edit the item in the AutoQuotes spreadsheet. The AutoQuotes spreadsheet works just like any other Windows spreadsheet. You can scroll up and down. Press <enter> to select a field to edit.

Click the ADD button (or press the <Insert> key) to return to the e-Catalog to select another item.

Item#	Qty	Mfr	Model	Specification	\$Sell	Markup
100	1	CLEVELAND	TKET-12-T	Kettle, Electric, Table Top, twin 12 gal. capacity,	8,058.00	0.2086
	1	CLEVELAND		1-Year Limited Warranty, standard		-1.0000
	1	CLEVELAND	208/240/3	208-240 volts, 60-hz, 3-ph, field adjustable to 1-p		-1.0000
	2	CLEVELAND	316G12	316 S/S liner (12 gallons)		-1.0000
	2	CLEVELAND	CL12	Lift off cover 12 gallon		-1.0000
	1	CLEVELAND	DPK	Double pantry faucet w/ 3/4" spout		-1.0000
	1	CLEVELAND	FBKT	P/N KE54159 Faucet bracket (req'd for mounting fauc		-1.0000
101	6	METRO	SHELVING	To include the following: (4) Posts, (4) Tier Zinc		-1.0000
	4	METRO	2448BR	Super E	31.00	0.1810
	16	METRO	2460BR	Super E	39.00	0.2093
	4	METRO	2442BR	Super E	31.00	0.2157
	24	METRO	74P	Super E	9.00	0.2000
102	1	CMF	TROUGH	Floor We	790.00	0.0102
103	1	UNIVSTNS	7-SL-SLSB-30	Work Ta	605.00	0.2096
	17	UNIVSTNS	TAC-ME	Marine E	15.00	0.1691
	1	UNIVSTNS	TAC-1618	Sink Bov	267.00	0.2104
	1	T&S	B-0231	Sink Mix	83.00	0.2108
	1	T&S	B-3913	Twist We	25.00	0.2042
104	1	TRUE	TSSU-72-30M-B	Mega To	2,506.00	0.2223
	1	TRUE		Warrant		-1.0000
105	1	CLEVELAND	ST55	Equipme	1,367.00	0.1654
		Cleveland		Use with		-1.0000
106	2	INVENT	SS-8ULTD	Wells Fo	213.00	0.2102
	2	INVENT	21562	120v, 1p		-1.0000
		INVENT		Build into Chef's Counter Item 45		-1.0000

AutoQuotes Spreadsheet

Right-click on your mouse to view the Hot Keys menu. Use these hotkeys to speed up editing of the AutoQuotes spreadsheet. Below is a description of each hotkey function

Insert Add a new item

Delete Delete an Item

A - Add an Accessory

Press **A** to return to the Tree of accessories for the item selected.

B - Add an Accessory from the e-Catalog

Press **B** to select an item from the e-Catalog as an accessory to the main item. For example, you may wish to select a Dormont hose for a Vulcan range. Instead of the <insert> key, use the **B-key**

C - Enter a Comment

Comments are free form text that you can add to an item. Sometimes the comments are just reminders. On the Print Menu you can specify if you want your comments to print.

D - Duplicate (Copy) a line

E - Express Insert

The E-key is just like the <Insert> key, except that the e-Catalog opens to the immediately previous item that was selected. If you just selected a Vulcan 36L, then the E key opens the e-Catalog with the 36L highlighted.

F - Additions to the Cover Sheets for the Spec Book

Press **F** to add comments to the Cover Sheet that prints on the Cut Sheet report,

G - Global toggle to Activate/inactivate lines of the spreadsheet

Press **G** to globally 'activate' or 'inactivate' items in the spreadsheet. Inactive (gray color) items do not print

and are not included in Project totals. The G-key is used together with the **I-key** (see below) to change the print status of items on the Spreadsheet. Example: You want to print out only the Vulcan items on a Project Solution. Press the **L-key** to sort the Project by Mfr, press the **G-key** to globally inactivate all items, then go to the Vulcan items and activate each one individually using the **I-key**.

I - Item Status toggle (Active/Inactive/Alternate/Optional)

Active (white or blue) – Prints and is included in Project Dollar totals (default)

Inactive (grey) will not print or be included in dollar totals

Alternate (green) not included in dollar totals, prints with 'Alternate' tag

Optional (yellow) not included in dollar totals, prints with 'Optional' tag

J - Jump to a specific Item number

L - Sort by Item Number/by Mfr toggle

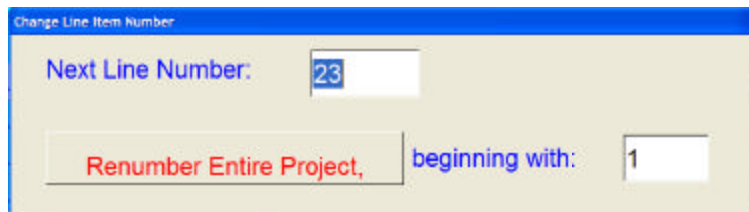
Press L key to (temporarily) change the spreadsheet sort order - by Item Number/By Mfr

M - Manufacturer Summary window

Press **M** to display the Project Summary Spreadsheet by Manufacturer. The Project Summary is

N - Number or Renumber Spreadsheet

Press **N** to reset the default for the Next Item Number, or to Renumber the entire spreadsheet



O - Add a Custom Accessory

Press **O** to create your own accessory. Use the O-key when you wish to add an accessory that is not available from the e-Catalog

P - Detail Pricing of a line item

Press **P** for the pricing detail form. This form displays all the calculations that contribute to the Selling Price for the Item highlighted

Q - Rearrange Accessories

Press **Q** if you want to change the order in which the accessories are listed and printed

Z - Special Pricing

Press **Z** if you wish to replace the Selling Price for an item with a Label (Choose from NIC, See Above, Included, Future, Lease, TBD, Existing, Other, Owner, No Charge, Spare Number)


Ctrl -N Alternate Model Numbers

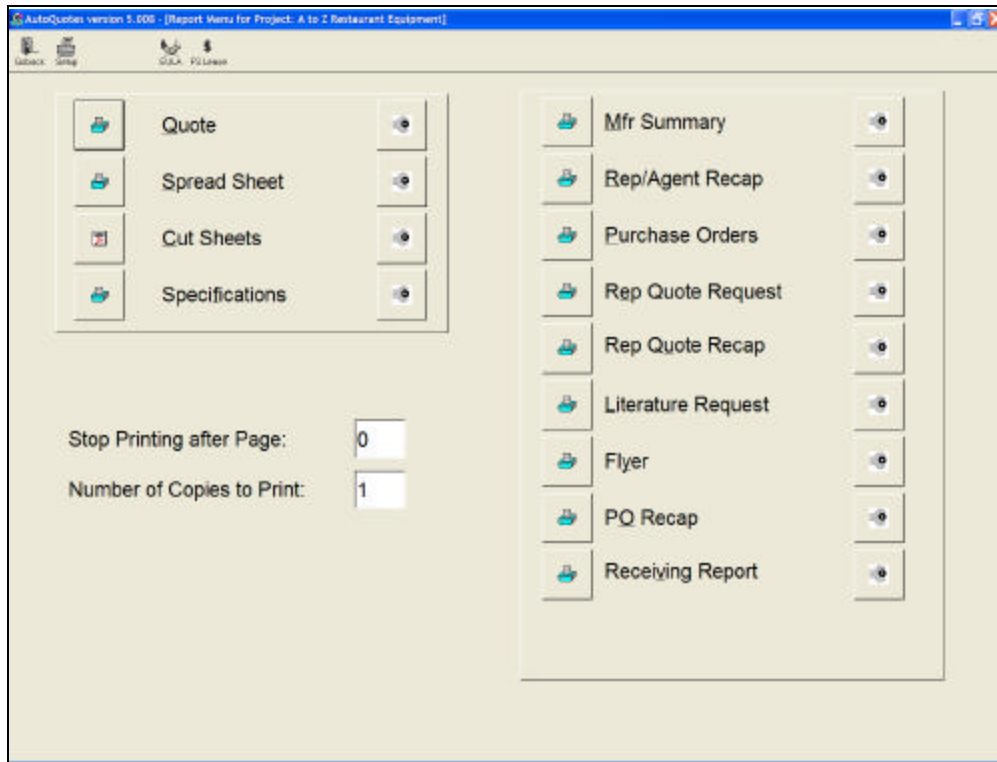
Sometimes Item Numbers are too long or otherwise inappropriate for use in the Spreadsheet (example: Item numbers that have prefixes like KIT- or SERVERY-). Press **Ctrl-N** and you can add longer names and Item Numbers. These Names and Numbers will not appear on the spreadsheet but will print on the Quote in place of the item number on the spreadsheet

Printing Quotes and Reports

After you have finished adding all necessary items to the spreadsheet, you're ready to send the Quote to your customer. Our pre-configured reports allow the information in the spreadsheet to be formatted in a variety of ways.

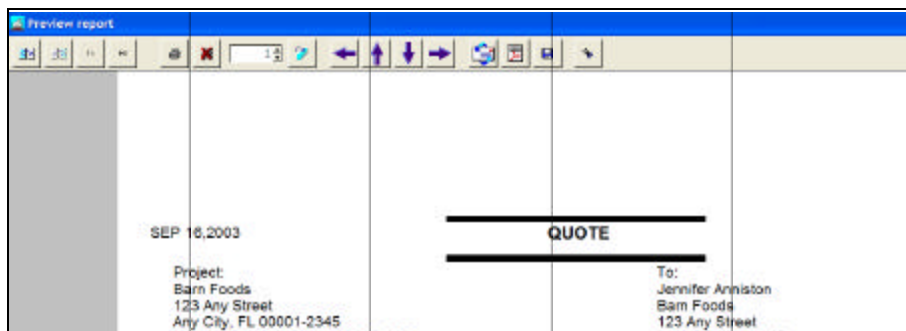
Click the Reports button on the toolbar to go to the **Reports Menu**. There are several reports formats to choose.

There are formatting options for each report which can be accessed by clicking on the wrench  button next to the Report.



The Reports Menu

Click on the button next to the **Quote report** to preview the Quote. You can print or e-mail the quote to your customer using the buttons on the toolbar.

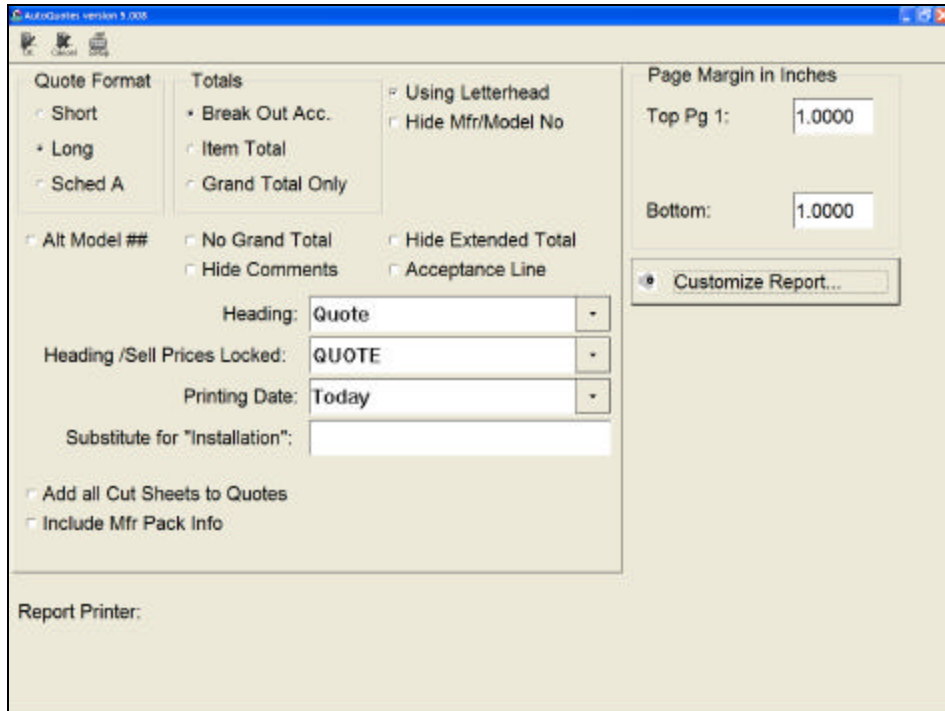


Note the Print, Cancel, email, PDF, and Save buttons on the toolbar

Quote Format Options (the Wrench)

Reps and Dealers have a slightly different list of reporting options, and a different format for the Quote report. Below is a summary of the major dealer reports.

Quote – Standard Quote report. On the  wrench there are several formatting options.



The screenshot shows the 'AutoQuotes version 3.000' window with the 'Quote Format Options' dialog box open. The dialog is divided into several sections:

- Quote Format:** Radio buttons for 'Short', 'Long' (selected), and 'Sched A'.
- Totals:** Radio buttons for 'Break Out Acc.' (selected), 'Item Total', and 'Grand Total Only'.
- Using Letterhead:** Checkboxes for 'Using Letterhead' (checked) and 'Hide Mfr/Model No'.
- Page Margin in Inches:** Input fields for 'Top Pg 1:' (1.0000) and 'Bottom:' (1.0000).
- Other Options:** Checkboxes for 'Alt Model #', 'No Grand Total', 'Hide Extended Total', 'Hide Comments', and 'Acceptance Line'.
- Heading:** A dropdown menu set to 'Quote'.
- Heading /Sell Prices Locked:** A dropdown menu set to 'QUOTE'.
- Printing Date:** A dropdown menu set to 'Today'.
- Substitute for "Installation":** An empty text input field.
- Additional Options:** Checkboxes for 'Add all Cut Sheets to Quotes' and 'Include Mfr Pack Info'.
- Buttons:** A 'Customize Report...' button.
- Report Printer:** A label at the bottom of the dialog.

Customizing Options for the Quote report (accessed via the Wrench button)

1. **Quote Format** – Select from a short spec, a long spec, and a Sched A (very short spec) option.
2. **Totals** – Break Out prints individual selling prices for each accessory, Item total shows only the combined sum total of an item and its accessories.
3. **Heading** – There are several alternative Quote headings (e.g. Invoice, Sales Order, Change Order, etc. or just type your own).
4. **Add all Cut Sheets to Quotes**. Select this choice and the Quote will print, followed by all the cut sheets available for the Quote.
5. **Customize Report**. Click on this button to modify fonts, line widths, or to add your own logo to the top of the printed quotation.

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