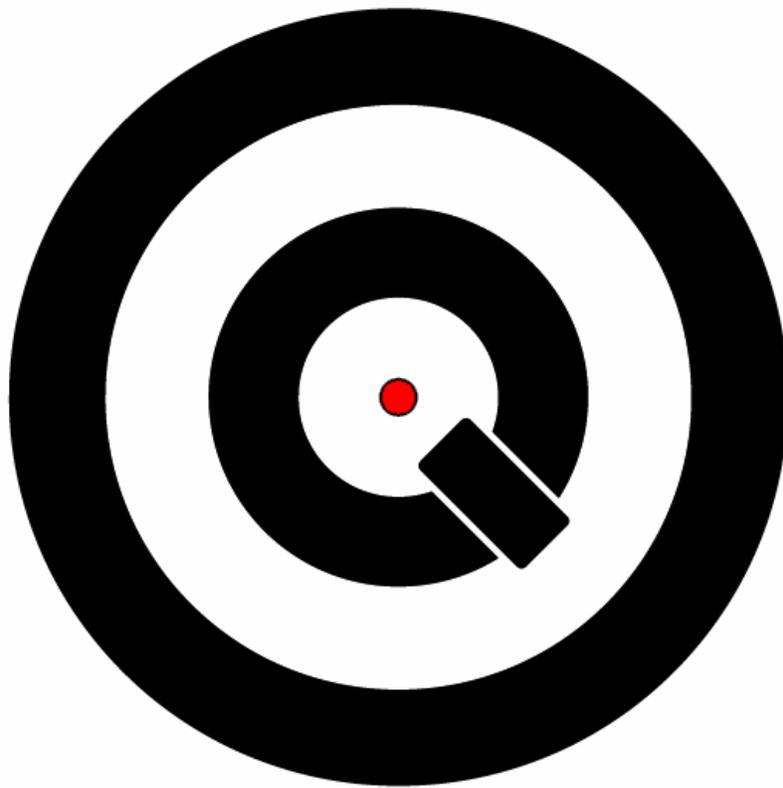


QuoteExpress

Piping



Reference Manual

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1. Installation

The Express Piping software and database are distributed on CD-ROM. This system requires the following hardware and software components:

- 1500MHz (1.5GHz) processor speed
- 256mb of RAM (512MB recommended)
- Hard drive with at least 200MB of available disk space
- XVGA color graphics display monitor
- Microsoft® Windows® 2000 or XP

1.1. QuoteExpress Piping Base System – New Install

To install QuoteExpress base system, please call a Quote Software Technician at 800-813-7020. If you must install before or after regular business hours, please perform the following steps (this setup assumes you have the 1.3 version CD):

- 1) Insert the Express Piping CD into your CD-ROM drive. A window showing you the contents of the CD should appear. If, after 10-15 seconds, it does not appear, go to step 2. Otherwise, skip step 2 and continue to step 3.
- 2) Follow these directions to start the Express Piping installation if your CD does not AutoRun:
 - a. Click on your Windows **Start** button.
 - b. Click on **My Computer**.
 - c. Find and select your CD-ROM drive (usually drive D:) to display the contents of the disc.
- 3) Double-click the file labeled **Qxp_Piping_Server.exe**. This starts the installation program.
- 4) To install to the default folders, click **Next** each time it appears. When installation program is finished, be sure that the box is checked for **Launch Workstation Installer** and then click on the **Finished** button. Skip to step 2 of the Workstation Installation.

1.1.1 Workstation Installation

To install the Workstation portion of the Express Piping program, you need to know the location of the *QpipeServ* folder that contains the data files that you would be using. Most commonly, this folder is located in *C:\Program Files*. However, if this is a networked installation, the *QpipeServ* folder may be located on your network. You should contact your network administrator for information on the exact location of this file. Once you have located this folder, follow these steps:

- 1) Find the *Installers* folder (*C:\Program Files\QpipeServ\Installers*) and locate and double-click the file labeled **QXP Piping Workstation.exe**.
- 2) To install to the default folders, click **Next** each time it appears. When the **Finish** button appears, click it to finish the installation. You should now have an Express Piping icon on your desktop.

Launch QuoteExpress by selecting it through the  menu *or* by double-clicking on the desktop icon. The QuoteExpress Title screen will appear as follows:

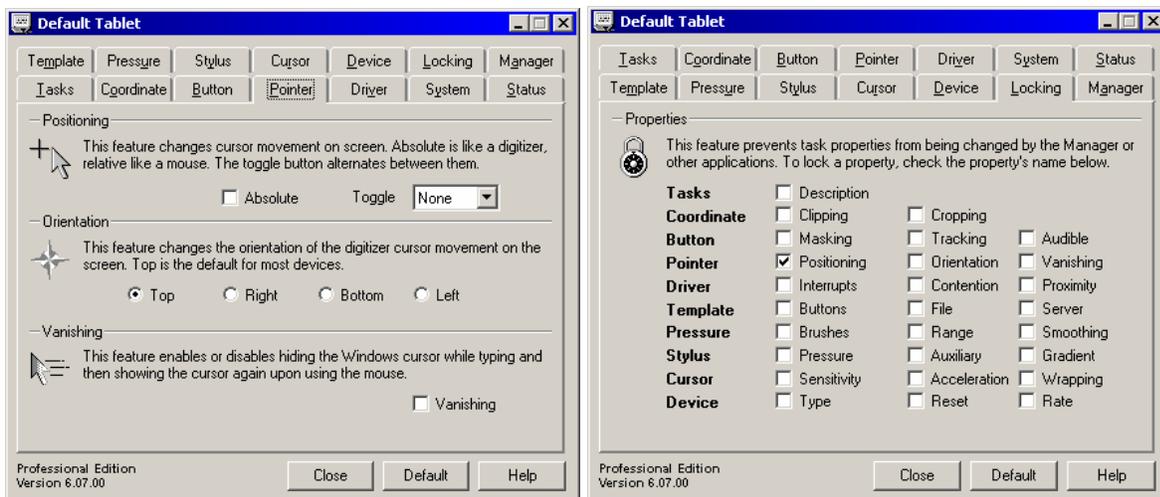


1.2. Digitizer Tablet

QuoteExpress supports input from most large-format digitizing tablets (such as GTCO) that have Wintab-compliant drivers. Depending on the type of tablet you are using, you may elect to use the manufacturer's supplied drivers or optional Virtual Tablet Interface drivers from Digitizer Technology Company. The following steps outline how to configure both the Virtual Tablet Interface and GTCO TabletWorks drivers for best use with QuoteExpress.

1.2.1. Virtual Tablet Interface (Optional)

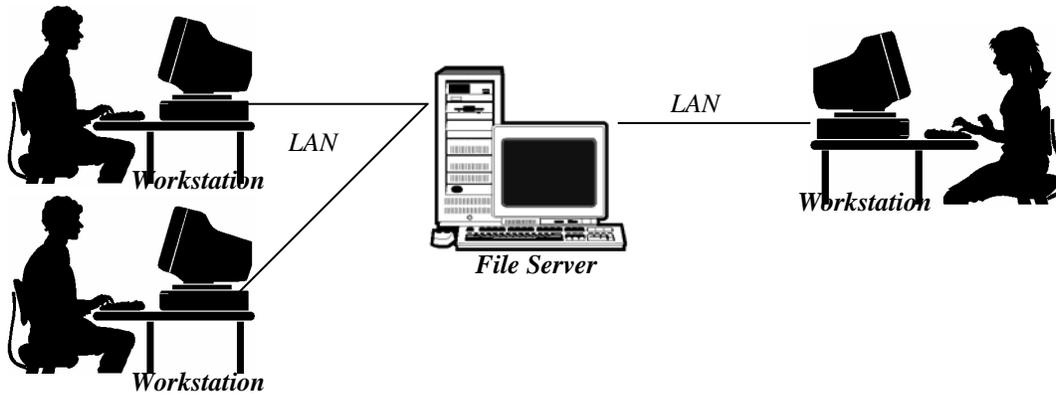
QuoteExpress is compatible with software from Digitizer Technology Company, which supports a wide range of new and existing digitizer tablets. If you intend to use the Virtual Tablet Interface drivers, you must first install the driver software. Once successfully installed, it is recommended that you configure the mouse pointer for relative positioning by unchecking the *Absolute* option (Pointer tab) and locking it by checking the *Positioning* option (Locking tab).



This configuration allows the digitizer cursor to “double-up” as both a mouse *and* a cursor, reducing the amount of motion required while using the system. Refer to Section 2.1 for additional information regarding the configuration and setup of the digitizer tablet.

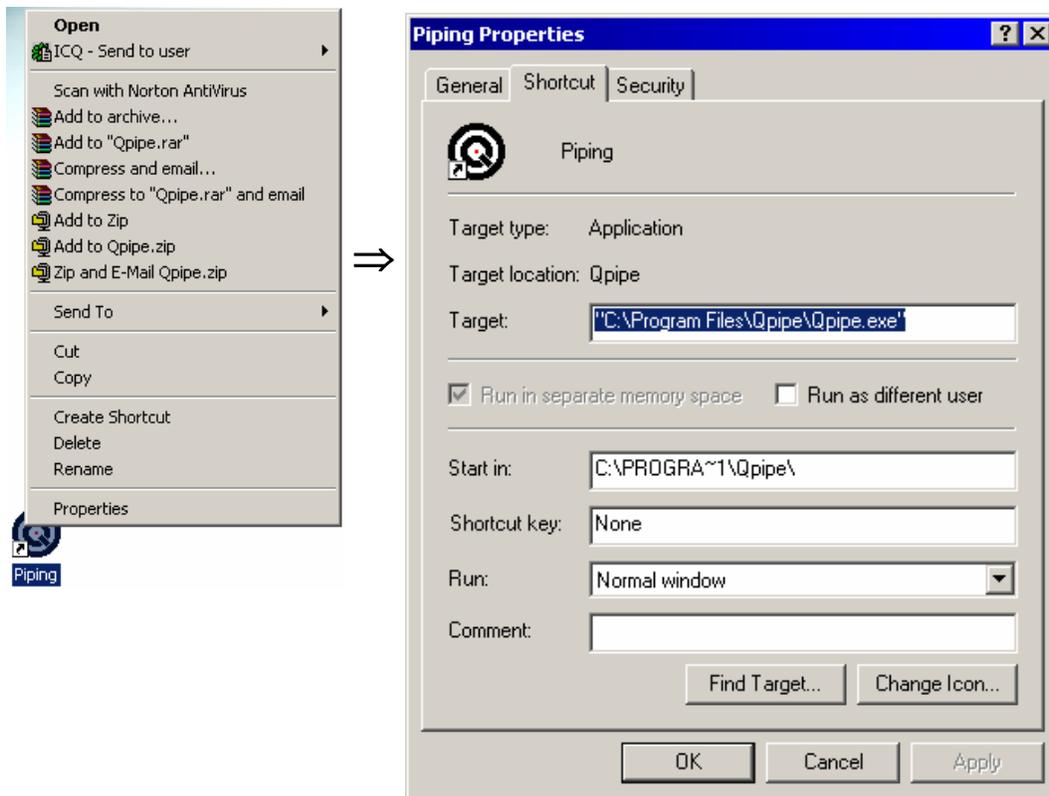
1.3. Shared Data Access Over Local Area Network (Optional)

QuoteExpress supports workgroup configurations where multiple personal computers share access to a common set of job data (typically located on a file server that is accessed over a high-speed local area network.) *This feature not available in Piping LT.*



If you wish to run in this shared access configuration, perform the following steps:

1. Install QuoteExpress on each workstation as described in Section 1.1. Make certain that each workstation is fully operational *before* proceeding.
2. Copy the QuoteExpress database directory (normally *C:\Qpipe*) onto the central file server from one of the workstations. You can use the Windows® Explorer program to do this by dragging this folder and dropping it onto the drive letter associated with the file server.
3. On each workstation, modify the QuoteExpress desktop icon to reference the newly created folder on the central file server. Do this by using the right mouse button to modify the properties of the QuoteExpress icon as follows:



For example, if your file server is referenced as drive E:, modify the QuoteExpress properties as illustrated (additional information is highlighted).

4. (Optional) You may delete the local database directory (*C:\Qpipe*) from each of the workstations to free up disk space.

Please note the following regarding the use of QuoteExpress in a shared access configuration:

∇ Shared Access To Data

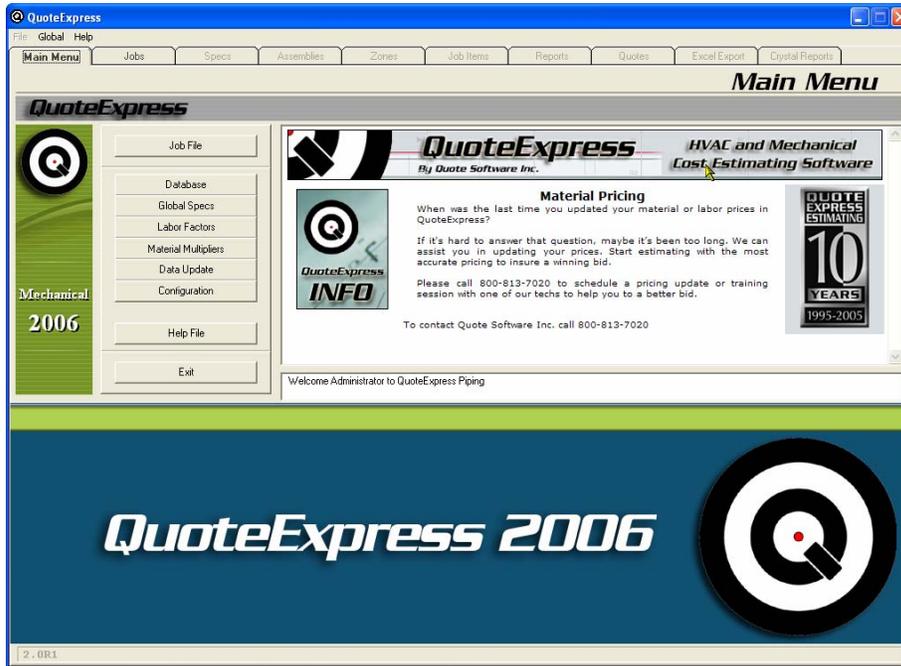
In a shared access configuration, QuoteExpress performs file locking to insure that only one workstation is performing updates on a specific Job. Periodically, you may receive a message indicating that a Job is in use by another workstation. This is normal and serves to protect integrity of the QuoteExpress database. Additionally, if any user is currently updating a Job, the Master Catalog will be locked from updates (preventing accidental changes to data in the middle of a takeoff or recalculation.) It is strongly recommended that all Master Catalog and/or program updates be performed after-hours when using the shared access configuration.

∇ Performance

QuoteExpress maintains a large amount of information in the database and the shared access performance will be heavily influenced by the speed of the Local Area Network (LAN) and central file server. It is strongly recommended that the shared access configuration only be used with LANs that provide a minimum of 10Mbit (mega-bit) transfer rates!

2. Main Menu

The first screen you will see after logging in will be the Main Menu. This truly is the center point for navigation throughout QuoteExpress. This screen will allow you to access the sections of QuoteExpress Piping. *Be sure to watch for new information! Quote Software will send you messages about program updates and other issues through the Main Menu viewer.*



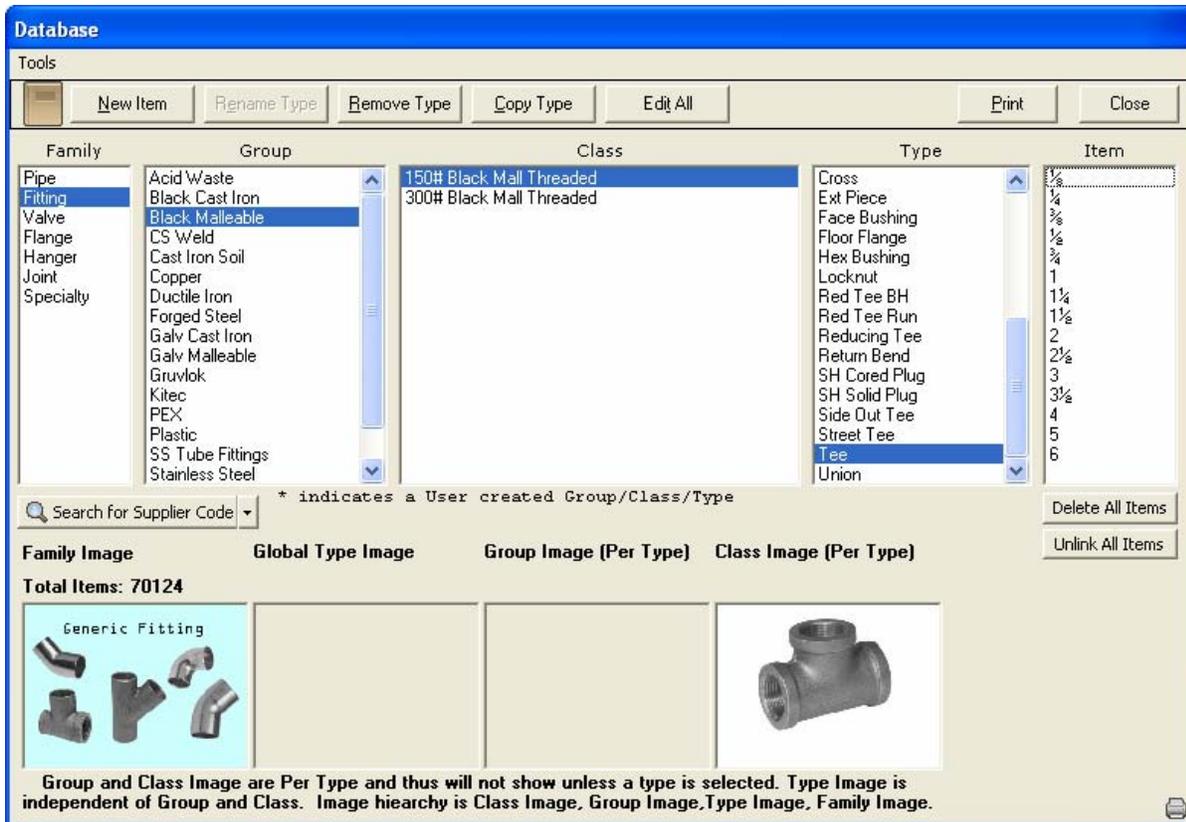
The Job File button gives you access to the list of Job in the program. This is where you add and select jobs. You can access the list of Jobs two ways: you can select  from the Main Menu or you can click on the Job Tab at the top of the screen. The Job File screen is explained in detailed later in this Reference Manual.

2.1. Database

The Database screen manages over 70,000 unique items used in the mechanical trade! For rapid lookup, each item is classified by having a unique *Family*, *Group*, *Class*, and optional *Type* genealogy. You can access the Database screen two ways: click  from the

Main Menu or click  from the Job List screen.

NOTE: When you first open the Database screen, only the *Family* is shown. The following screen is an example of how to access the *Group*, *Class*, *Type*, etc.



Across the top bar of the Item screen appears a genealogy of the item as follows:

Item[Class, Group, Family, (Type)]

Once inside the Item screen, the next and previous Items (within the same *Family*, *Group*, *Class*, and *Type*) can be accessed by selecting and respectively.

2.1.1. Viewing Items

To select an item, (e.g. a 1/2" 150# black malleable tee), select the *Family* (Fittings), *Group* (Black Malleable), *Class* (150# Black Mall Threaded), *Type* (Tee), and *Size* (1/2"). All database items are accessed in this manner, although some may require a different number of selections.

The Item screen contains the following fields:

| | |
|----------------------------------|---|
| <i>Description</i> | Size and description of item as it will appear in printouts |
| <i>Piece Count</i> | Quantity per item (Usually this is one) |
| <i>Size</i> | Up to four sizes for an item |
| <i>Show</i> | Checked box means size will be displayed |
| <i>Joint Group</i> | From the Joint Family in the Catalog ¹ |
| <i>Joint Class</i> | A subset of the Joint Group ¹ |
| <i>List Price</i> | Per the manufacturers' list shown ² (Enter 'Q' for Quoted) |
| <i>Part Number</i> | Per the manufacturers' list shown |
| <i>Units</i> | LF = lineal feet or Each |
| <i>Material Multiplier Group</i> | Name of group where list prices are discounted |
| <i>Manufacturer</i> | Company that publishes list price |
| <i>Last Update</i> | Date of manufacturer's published list |
| <i>Lock Item from Updates</i> | Check to protect user modified items |
| <i>Supplier Code</i> | Supplier code (used by Quote Software Inc. for pricing updates) |
| <i>Accounting Code</i> | Optional user code (will not be affected by updates) |
| <i>Shipping Weight (lb.)</i> | Available for most items |
| <i>Labor Hours</i> | Per unit labor rates (Enter 'N' for N/A) |
| <i>Labor Factor Group</i> | Name of group where labor rates are discounted |

Picture

Available for most items

- ¹ When **SPEC** is displayed as the *Joint Group* or *Joint Class*, the joints remain undefined until set up into a Global or Job Spec.
- ² When **QUOTED** is displayed, price will require a quoted value at the time of job recalculation.

2.1.2. Adding Items

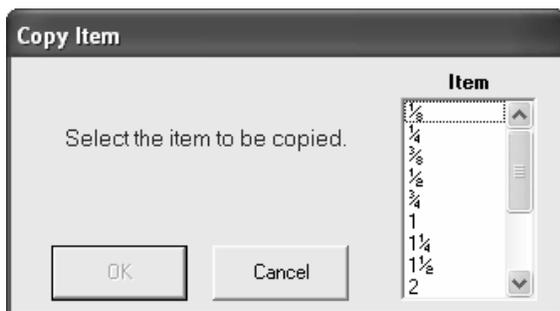
New items can be added using the Database screen as follows:

1. Select the *Family* to which the item belongs. (Note that new Families cannot be created.)
2. Select the *Group* to which the item belongs. Select to create a new one. When creating a new *Group*, you are prompted to enter the *Description*.
3. Select the *Class* to which the item belongs. Select to create a new one. When creating a new *Class*, you are prompted to enter the *Name*. (Some Families may also require a *Joints* to be entered.)
4. Select the *Type* to which the item belongs. Select to create a new one. When creating a new *Type*, you are prompted enter the *Description* and optional *Takeoff Position*.
5. Select to add the new item. Enter the item data and click . (Note that the *Description* is a required field that MUST be filled in.)

2.1.3. Copying Items

If items already exist in the same *Family*, *Group*, *Class* and *Type* as the new item, then the new item can be copied from one of these as follows:

1. Select the appropriate *Family*, *Group*, *Class*, and *Type* from the Database screen.
2. Select to add the new item. From the **Item** screen, select the button, enter the size of item to copy, and select .



3. Modify the *Sizes*, *List Price*, *Labor Rates*, etc. as appropriate and select to save the new item. (Note that the size must be modified before saving.)

2.1.4. Linking Items

QuoteExpress contains a special link feature used to place an existing item multiple locations within the Database. This is done as follows:

1. Select the new *Family*, *Group*, *Class*, and *Type* location from the Database screen.
2. Select and enter the *Sizes* and *Piece Count* for the new item.
3. Select from the **Item** screen and choose the *Family*, *Group*, *Class*, *Type*, and *Size* of an existing item to link with. Select and a new item created which is a link to the existing item (with the *Sizes* and *Piece Count* modified as in step #2.)

The screenshot shows a dialog box titled "Link Item". It contains five dropdown menus for selection: "Family" (Specialty), "Group" (Sleeves), "Class" (Sheet Metal Floor), "Type" (Floor Sleeve), and "Item" (empty). Below the dropdowns is the text "Select the item to be linked." and two buttons: "OK" and "Cancel".

The primary purpose of linking items is to allow multiple size references to the same item (such as hangers, bolts, joints, etc.) Under normal circumstances, you will not have to use this feature in routine maintenance of the data.

2.1.5. Removing Items

Items you add to the Database can be removed as follows:

1. Select the *Family*, *Group*, *Class*, *Type*, and *Item* from the Database screen.
2. Select from within the Item screen. (You will be asked to confirm the removal.)

Exercise caution when removing items. Once an item has been removed, it cannot be restored. Note that those items installed by Quote Software Inc. are permanent and cannot be removed.

2.1.6. Editing All Items

QuoteExpress contains a special feature that allows you to rapidly change the price and/or labor hours of all items within a single *Family*, *Group*, *Class*, and *Type*. To use this feature, select from the Database menu.

A grid will be displayed that allows you to change information for all items from a single screen.

| Item [150# Black Mall Threaded Black Malleable Fitting (Tee)] | | | | | | | | | | | | | | | | | |
|---|-------------------|-----------|------------------------|---------------------------|--------|-------------------------|-----------------|------------------------|-------------|----------------------------|------------|---------------------------|--|-------|--|-------|--|
| Lock Item | | Lock All | | Unlock All | | Change Item Labor Group | | Change All Labor Group | | Change Item Material Group | | Change All Material Group | | Excel | | Close | |
| 15 Items | | | | | | | | | | | Quote | | | | | | |
| Size | Description | Mfgr. | Labor Factor Group | Material Multiplier Group | Part # | Supplier Code | Accounting Code | Shipping Weight | Piece Count | Unit Price | Unit Hours | | | | | | |
| 3/8 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0226 | | 0.09 | 1 | \$5,400 | 0.390 | | | | | | |
| 1/4 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0227 | | 0.15 | 1 | \$5,090 | 0.460 | | | | | | |
| 3/8 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0228 | | 0.23 | 1 | \$5,090 | 0.480 | | | | | | |
| 1/2 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0229 | | 0.36 | 1 | \$3,240 | 0.490 | | | | | | |
| 3/4 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0230 | | 0.56 | 1 | \$4,660 | 0.690 | | | | | | |
| 1 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0231 | | 0.92 | 1 | \$7,960 | 0.860 | | | | | | |
| 1 1/4 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0232 | | 1.31 | 1 | \$12,900 | 1.000 | | | | | | |
| 1 1/2 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0233 | | 1.75 | 1 | \$16,050 | 1.110 | | | | | | |
| 2 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0234 | | 2.55 | 1 | \$27,350 | 1.360 | | | | | | |
| 2 1/2 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0235 | | 4.92 | 1 | \$58,980 | 2.190 | | | | | | |
| 3 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0236 | | 7.12 | 1 | \$86,880 | 2.640 | | | | | | |
| 3 3/8 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0237 | | 9 | 1 | \$195,620 | 3.090 | | | | | | |
| 4 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0238 | | 11.31 | 1 | \$209,980 | 3.580 | | | | | | |
| 5 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0239 | | 19.4 | 1 | \$601,650 | 5.810 | | | | | | |
| 6 | 150# Blk Mall Tee | Anvil Int | mifscr : Malleable Ftg | malitit : Threaded Ma | 1105 | 005GR0240 | | 25.5 | 1 | \$664,080 | 7.040 | | | | | | |

You can change the columns in yellow by entering new values from the keyboard. As in the case of single items, a dollar amount of QUOTED can be entered using the letter 'Q'. Your default labor rate is displayed initially, but can be changed using the buttons at the top of the screen.

2.2. Global Specs

When you select this button, the system takes you to ALL the specifications that are available in the product. Quote Software has provided you 45 pre-built specifications so you can have a quick startup.

2.3. Labor Factors

To access the Labor Factor table, click  from the Main Menu or click at the top of the screen **Global** ⇒ **Labor Factors** from the Job List screen. The Labor Factors table will display a list of all labor groups in the system.

| Global Labor Factor Groups | | | | | | | | | | | | | |
|----------------------------|--|--------|--|-----------|--|------------|--|------------|--|------------|--|------------|--|
| New | | Rename | | Remove | | Titles | | Print | | Close | | | |
| Labor Source | | Quote | | | | Factor # 1 | | Factor # 2 | | Factor # 3 | | Factor # 4 | |
| Group Name | | Code | | Factor #1 | | Factor #2 | | Factor #3 | | Factor #4 | | | |
| Job Items | | jobitm | | 1.00 | | 1.00 | | 1.00 | | 1.00 | | | |
| Miscellaneous | | misc | | 1.00 | | 1.00 | | 1.00 | | 1.00 | | | |

To assign multipliers to Labor Factor Groups, click the multiplier in the appropriate group and under the desired title. Type in the new value and press **Enter**.

The following information is contained about each group:

| | |
|----------------------|--|
| <i>Group Name</i> | The name of the Labor Factor Group as it appears in the Master Catalog |
| <i>Code</i> | A six-digit reference code used in some printouts. |
| <i>Labor Factors</i> | One of up to four factors for each of four different sets of labor rates, which are applied to all items within the Labor Factor Group |

2.3.1. Adding/Renaming/Removing Labor Groups

New Labor Factor Groups can be added to the database to accommodate data added to the system. To add a new Labor Factor Group, click . Fill in the desired *Discount Group* and *Code* and then click . The new group will be added at the end of the list.

Labor Factor Groups added by the customer can be renamed as desired. To rename an existing group, select the Group Name and click . Edit the *Discount Group* or *Code* and click to save your changes.

Labor Factor Groups you add can also be removed if required. To remove an existing group, select the Group Name with the mouse and click . The program will require confirmation prior to removal.

2.3.2. Naming/Changing Group Factors

QuoteExpress contains room for up to four (4) factors for each of four (4) sets of labor rates for each Labor Factor Group. This allows you to have different multipliers for different size jobs, different crews, different types of jobs, etc. Upon receipt of your system, all multipliers are 1.0. It is your responsibility to find and enter the appropriate factors to reflect the labor rates for your firm and for your area.

When the Labor Factor Group screen is first opened, it will display the Labor Factors for Quote Software Inc. labor rates. To change to another set of labor rates, click the name of the current set and select the desired set. (Your system may have less than four sets of labor depending on how it was ordered.)

To assign names to the lists of factors, click and change the names of the titles.

Labor Factor Titles

| | | | |
|--|--|--|--|
| Factor #1 | Factor #2 | Factor #3 | Factor #4 |
| <input type="text" value="Factor #1"/> | <input type="text" value="Factor #2"/> | <input type="text" value="Factor #3"/> | <input type="text" value="Factor #4"/> |

Enter the new labor factor set titles.

To exit the Labor Factor Groups table, click and confirm whether or not to save your changes.

2.4. Material Multipliers

To access the Material Multiplier Groups screen, click  from the Main Menu or click **Global** ⇒ **Material Multipliers** from the Job List screen. The Material Multiplier Groups screen will display a list of all material groups defined in the system.

| Global Material Multiplier Groups | | | | | | | | | | |
|---|----------|--------------|------------|----------|--------------|--------|--------|--------|-----------|---|
| Material Multiplier Family: <input type="text" value="Default"/> <input type="checkbox"/> Show Hidden Material Groups | | | | | | | | | | |
| Group Name | Code | Manufacturer | Updated | Supplier | User Updated | Plan | Co | Design | Factor #4 | |
| ABS DWV Fittings | absdvw | Charlotte | 8/26/05 | | | 0.4500 | 0.5175 | 1.0000 | 1.0000 | ▲ |
| ABS DWV Pipe | absdp | Charlotte | 10/1/2001 | | | 0.6700 | 0.7705 | 1.0000 | 1.0000 | |
| ABS Foam Core DWV Pipe | absfoa | Charlotte | 8/1/05 | | | 0.8900 | 1.0235 | 1.0000 | 1.0000 | |
| AQUAPEX Plumbing | wirpex | Wirsbo | 3/1/05 | | | 0.7800 | 0.8970 | 1.0000 | 1.0000 | |
| AWWA C-900 Water Main | c900wm | FastEST | 1/15/2003 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Backflow Preventers | febbpd | Febco | 4/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Ball Valves | stball | Stockham | 8/8/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Ball Valves | nbball | Nibco | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Ball Valves | apball | Apollo | 7/18/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Beam Clamps | anvbcs | Anvil Int | 1/31/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Bolts | bolts | Bolt-Pak | 6/15/1994 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Brackets | anvbrk | Anvil Int | 1/31/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Bronze & Iron Valves | stbrnz | Stockham | 8/8/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Bronze & Iron Valves | nbbrnz | Nibco | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Butterfly Valves | nbflty | Nibco | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Butterfly Valves | stbflty | Stockham | 8/29/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Carbon Steel Butt Weld Fitting | wldfit | Weldbend | 7/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Carbon Steel Weld Fittings | hackwf | Hackney | 6/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil Hub Fittings | svftch | Charlotte | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil Hub Fittings | svclft | Tyler | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil Hub Pipe | svcpip | Tyler | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil Hub Pipe | svpich | Charlotte | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil No-Hub Fittings | nhclft | Tyler | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil No-Hub Fittings | nhflftch | Charlotte | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil No-Hub Pipe | nhcpich | Charlotte | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Iron Soil No-Hub Pipe | nhcpip | Tyler | 1/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cast Steel Valves | stsvlv | Stockham | 11/28/1994 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Chairs & Rollers | anvrol | Anvil Int | 1/31/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Cleaned & Bagged Copper Fittin | coplcb | Elkhart Prod | 7/5/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Concrete Inserts | anvrol | Anvil Int | 1/31/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| Copper Tube | coptub | Mueller | 8/17/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC FlowGuard Gold | cpvcfc | Charlotte | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC FlowGuard Gold | cpvcfn | Nibco | 9/12/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC Lab/Waste Pipe & Fittings | cpvcfw | Spears | 6/5/2002 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC Sch 40 Pressure Pipe | cpv40p | Charlotte | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC Sch 80 Fabricated Fitting | cpv80f | Spears | 12/6/04 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC Sch 80 Fittings | cpvc80 | Spears | 12/6/04 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | |
| CPVC Sch 80 Pressure Pipe | cpv80p | Charlotte | 8/1/05 | | | 1.0000 | 1.1500 | 1.0000 | 1.0000 | ▼ |

To assign multipliers to Material Multiplier Groups, click the multiplier in the appropriate group and under the desired title. Type in the new value and press **Enter**.

The following fields are provided for each group

Group Name The name of the Material Discount Group as it appears in the Master Catalog

Code A six-digit reference code used in some printouts

Manufacturer The manufacturer, whose list prices are used for all items in the group

Update The date of the last change to prices in the group (usually the date of the manufacturer's list prices)

Supplier The name of the supplier for the group name.

User Updated

Multipliers One of up to four discount factors, which are applied to all items within the Material Discount Group

2.4.1. Adding and Renaming Multiplier Groups

New Material Multiplier Groups can be added to accommodate data added to the system. To add a new Material Multiplier Group, click and enter the *Multiplier Group, Code, Manufacturer, Last Update, Supplier, and Date*. The new group will be added at the end of the list.

Material Multiplier Groups you add can be renamed (or updated) as required. To rename or update an existing group, select the Group Name and click . Change the *Group Name, Code, Manufacturer, and/or Date* as required.

2.4.1.1. Naming/Changing Group Multipliers

QuoteExpress contains room for up to four (4) multipliers for each Material Multiplier Group. This allows you to have different multipliers for large jobs, small jobs, out-of-town jobs, etc. Upon receipt of your system, all multipliers are 1.0. It is your responsibility to find and enter the appropriate multipliers to reflect the market conditions for your firm. You may also assign names to the lists of multipliers by clicking on and entering the desired names.

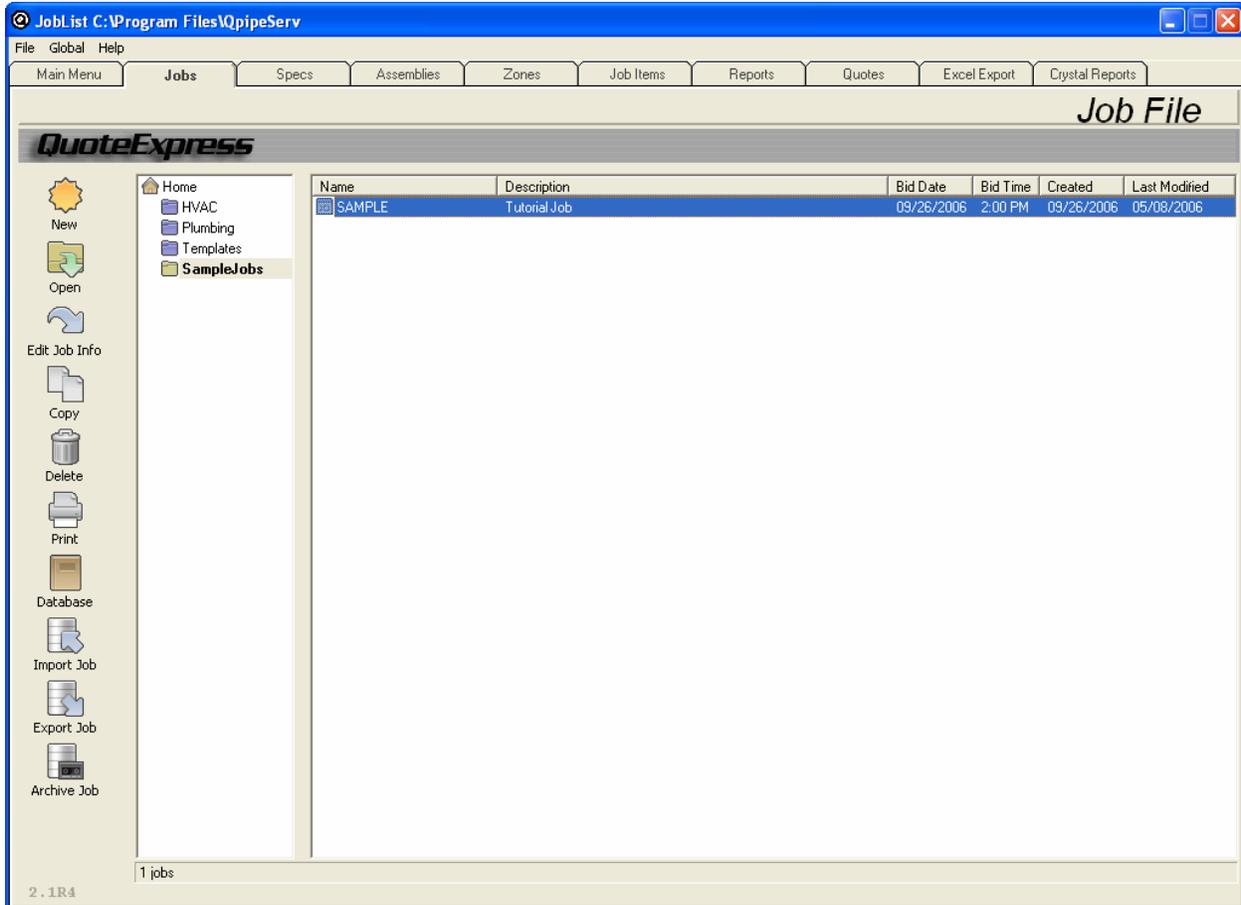


The screenshot shows a dialog box titled "Material Multiplier Titles". It features four input fields for "Title #1", "Title #2", "Title #3", and "Title #4". The first field contains the text "Factor #1". Below the input fields, there is a blue instruction: "Enter the new material multiplier set titles.". At the bottom of the dialog are "OK" and "Cancel" buttons.

To exit the Material Multiplier Groups table, click and confirm whether or not to save your changes.

3. Job File Screen

The QuoteExpress Job File screen allows you to create, modify, and delete jobs. This is also one place where you can access the Database screen.



3.1. Working with Jobs

Each job in the QuoteExpress system consists of a Name (1-16 characters), Description (1-50 characters), Bid Date, Bid Time, Created (which notes when the job was created), and Last Modified.

Note that the Job File screen (and most other screens in the QuoteExpress system) will display help information in a small pop-up box (e.g. *Select a job*). If you need a quick reminder of the purpose of a button or control on the screen, simply position the mouse cursor over the area in question and the appropriate text will appear next to the mouse cursor.

3.1.1. Adding a New Job

To create a new job, click  from the Job File screen and enter a *Name* for the new job, (e.g., JOB00001.) You should also enter a meaningful *Description* for the job (e.g. State Office Building Phase 1.) The space for this description will allow up to 50 characters.

Once you have entered this information, click . The new job will be created, and the system will automatically take you to the Spec screen (discussed in Section 2.7.) Specs are used to define pipe, fittings, valves, etc. for a particular piping system. The system takes you to the Spec screen because that is the next logical step after setting up a job.

To learn more about Jobs, return to the Job File screen by clicking on the Jobs tab.

3.1.2. Editing Job Information

To change the information for an existing job in the Job File screen, select that job name with the



mouse and click . The existing job will be opened to the Edit Job Information screen.

Change the information as needed and then click .

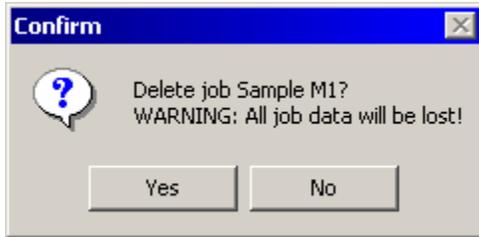
3.1.3. Copying a Job

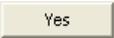
To make a duplicate copy of a job in the Job File screen, select that job name and click .

Enter the new *Name* and *Description* fields and click .

3.1.4. Deleting a Job

To remove a job from the Job File screen, select that job name and click . Note that all data associated with the job will be permanently removed, so QuoteExpress requests that you confirm the removal.



Note that the Confirm screen is a safety mechanism displayed throughout the QuoteExpress system whenever there is a risk that you could loose critical data. To confirm your request, click  or to cancel the request, click .

3.1.5. Printing the Job File screen

Finally, to print the current Job File screen, click . You'll print a list of jobs and related information.

3.1.6. Exporting and Importing Jobs

If you would like to transfer jobs from one computer to another, use the Export Job and Import

Job commands. Highlight the job you would like to export, and select . The system brings up a browse screen where you can select where you would like the exported job to go. At this time, you can select your portable drive, i.e. thumb drive, or you can use Windows Explorer to back up your job onto a portable drive.

When you are ready to import a job into QuoteExpress from another computer, use the Import Job command. Either use Windows Explorer to copy the job from a portable drive to your hard

drive OR import directly from your portable drive. Select . QuoteExpress opens a screen where you can select the folder/file you would like to import. The system tells you when the import is complete.

NOTE: Keep in mind that when you import, the system does not delete the job from the original location. We recommend that you delete the imported job from the portable drive so any confusion is eliminated in the future.

3.1.7. Archiving jobs

Archive a job when you are done working with the job. Highlight the job you would like to

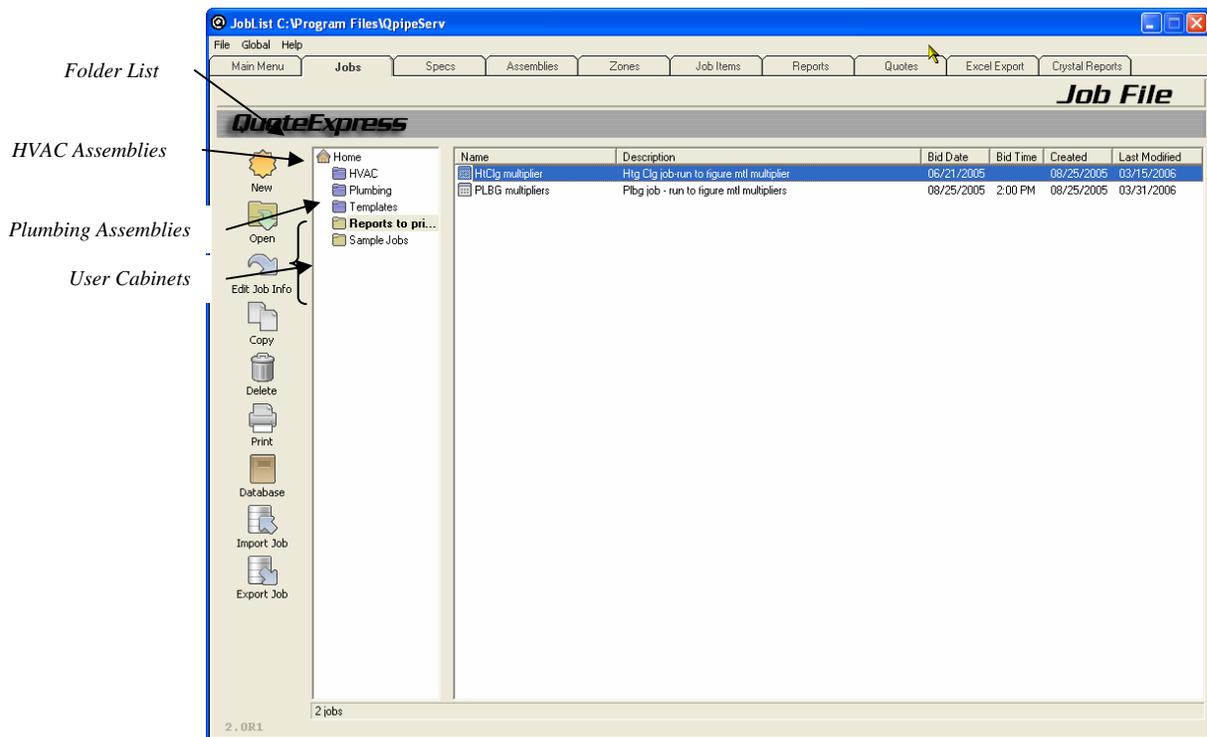
archive. Select .



You can retrieve the job using the Import Job button. Browse to the QpipeServ\JobArchive\ to locate it. If you archive a job from the Home directory it will be in JobArchive. If you archive a job from within a sub folder, ie Temp, it will be in JobArchive\Temp\.

3.2. Folders

QuoteExpress allows you to store one or more jobs in a folder allowing you to organize your jobs based on your business needs. Active folder names are displayed on the left-hand side of the Job List screen as illustrated below.



Note that the active (selected) folder is always highlighted and the jobs for that folder are displayed in the Job List to the right. The following folders are shipped with your system



HVAC

Folder containing HVAC Assemblies. QuoteExpress ships with over 143 HVAC assemblies that are ready-to-use in your takeoffs. These include the hookups for boilers, pumps, coils, steam traps, etc.



Plumbing

Folder containing Plumbing Assemblies. QuoteExpress ships with over 65 plumbing assemblies that are ready-to-use in your takeoffs. These include lavatories, sinks, water coolers, toilets, water heaters, etc.

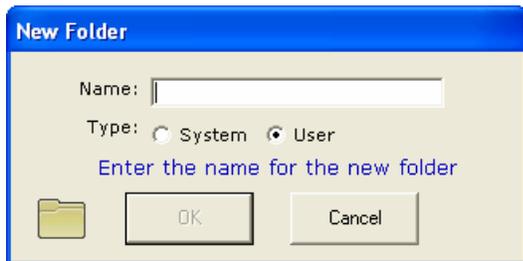


Templates

Folder containing Template Jobs. When creating a new job, QuoteExpress allows you to pre-copy the information from any job stored in the templates folder.

There are two different kinds of folders: System and User. System folders appear in purple while User folders appear in yellow. System folders always sort to the top of the lists, reducing the time it takes to copy information. When you create a new folder, you will be asked which kind of folder you would like to create. Under normal circumstances, you will want to create User folders that appear at the bottom of the list so that the system and template folders are always readily accessible.

To create a new folder, select **File** ⇒ **New Folder** from the Job List screen.



You will be asked to provide a name (up to 16 characters) and a type (System or User). These types are functionally identical except that System folders sort to the top of the list for quick access when copying specs, Zones, or job items. They are also displayed in purple to simplify screen visibility.

A folder is removed by selecting **File** ⇒ **Delete “Name of Folder”**. Note that you MUST delete or move all jobs from the folder before deleting it. This is a safety precaution to prevent accidentally deleting a large portion of a user’s work.

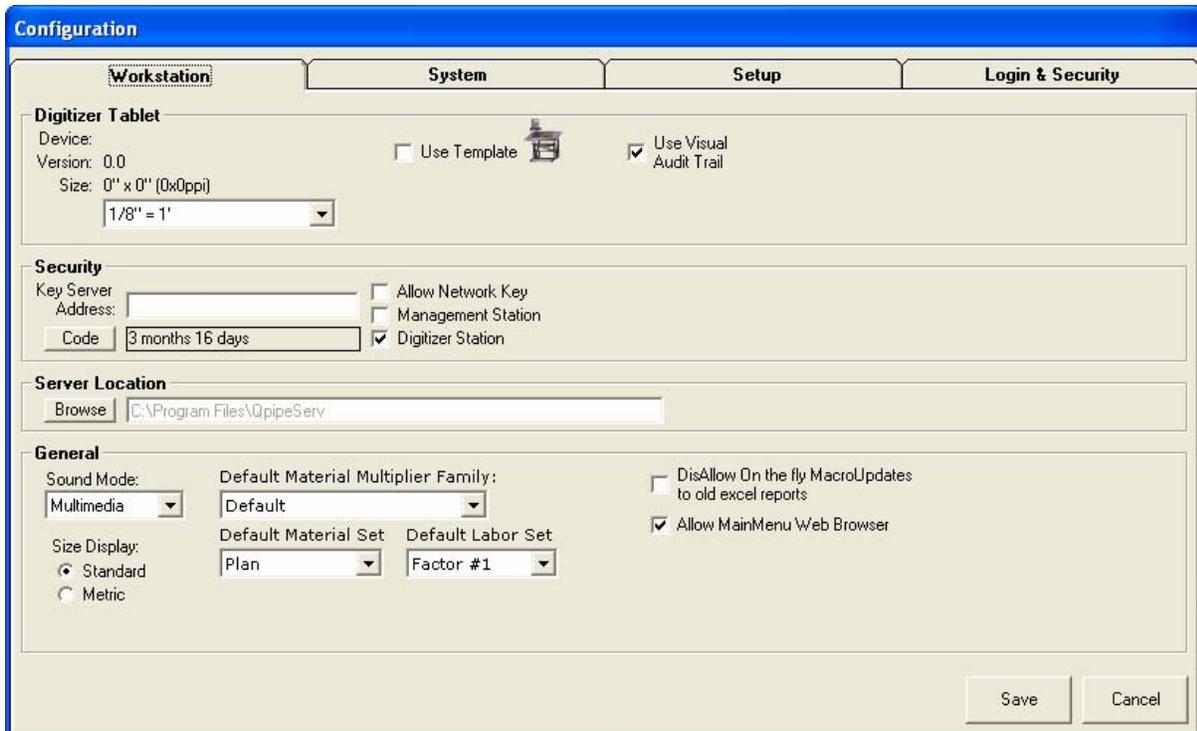
A folder is renamed by selecting **File** ⇒ **Rename “Name of Folder”**. You may change the name or type of a folder.

To move a job to a folder, click on the job name (under Job List), hold down the left mouse button, and drag it over the folder name in the left-hand column. When you have it over the correct folder (highlighted), let go of the mouse button and the job will be moved.

To copy a job to a folder, use the same procedure as moving a job to a folder, but hold down the control key (Ctrl on most keyboards). You will see a small plus sign (+) by the mouse arrow to indicate that the job is being copied, rather than moved.

3.3. Configuration

The Configuration screen allows you to establish parameters and personal preferences within the QuoteExpress program. You access the Configuration screen from the Job List screen by clicking on **File** ⇒ **Configuration**.



The fields on this screen are initially assigned by Quote Software Inc. and are defined as follows:

Workstation Tab (Digitizer Tablet Section):

Device, Version, Size Indicates the device, driver version, and working area size of an installed digitizer tablet. Note that you must have the Virtual Tablet Interface™ installed in order to use a tablet.

Scale Indicates the initial (default) scale that will be used when creating a Zone for takeoff. A large range of choices are available. Note that a value of default is equivalent to the scale of 1/8” = 1’. You should select a value that is most common for your business since it will reduce the need to change the scale during takeoff.

Use Template Indicates that you will be using the Quote Software Inc. digitizer template installed along the lower edge of the tablet.

Use Visual Audit Trail Indicates that you will use a visual audit trail.

Workstation Tab (Security Section):

Key Server Address

Code

Allow Network Key Select this option if your system is set up for a Network.

Management Station This option will be selected if your system is set up for the Management Station.

Digitizer Station This option will be selected if you are using your system with a digitizer.

Workstation Tab (Server Location Section):

Browse

Workstation Tab (General Section):

Sound Mode Specifies sound options and may be Disabled (no sound), PC Speaker (uses beeps from the internal speaker), or Multimedia (uses sounds generated from external PC speakers.) It is highly recommended that the Multimedia option be selected provided that your system has the appropriate speakers installed.

Size Display Chose from Standard or Metric

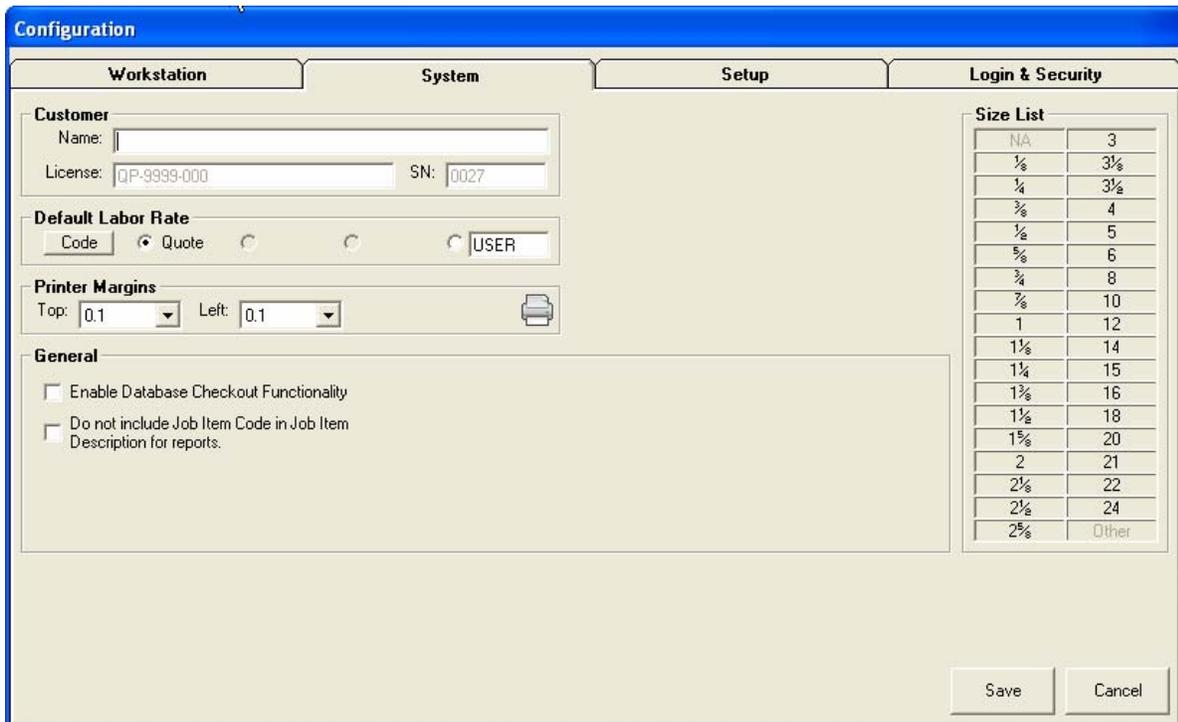
Default Material Multiplier Family Chose from Default, 1, 2, 3, or 4

Default Material Set

Default Labor Set Chose from Factor #1, #2, #3, or #4

Disallow On the fly MacroUpdates to old excel reports

Allow MainMenu Web Browser



System Tab (Customer Section):

Customer Name Customer name used on reports.

License Number Customer license number (*No modification allowed*).

System Tab (Default Labor Rate Section):

Default Labor Rate Names of labor rate sources Quote Software Inc., MCAA, PHCC, and User. The last entry (User) is for customer-supplied labor rates and is the only field that may be changed. The radio box indicates the default labor rate source used when recalculating jobs.

System Tab (Printer Margins Section):

Printer Margins The left and top printer margins. These are normally set to 0.2” but may need to be set to 0.0” for certain printers with hardware margins.

System Tab (General Section):

Enable Database ??

Checkout

Functionality

Do not include Job ??

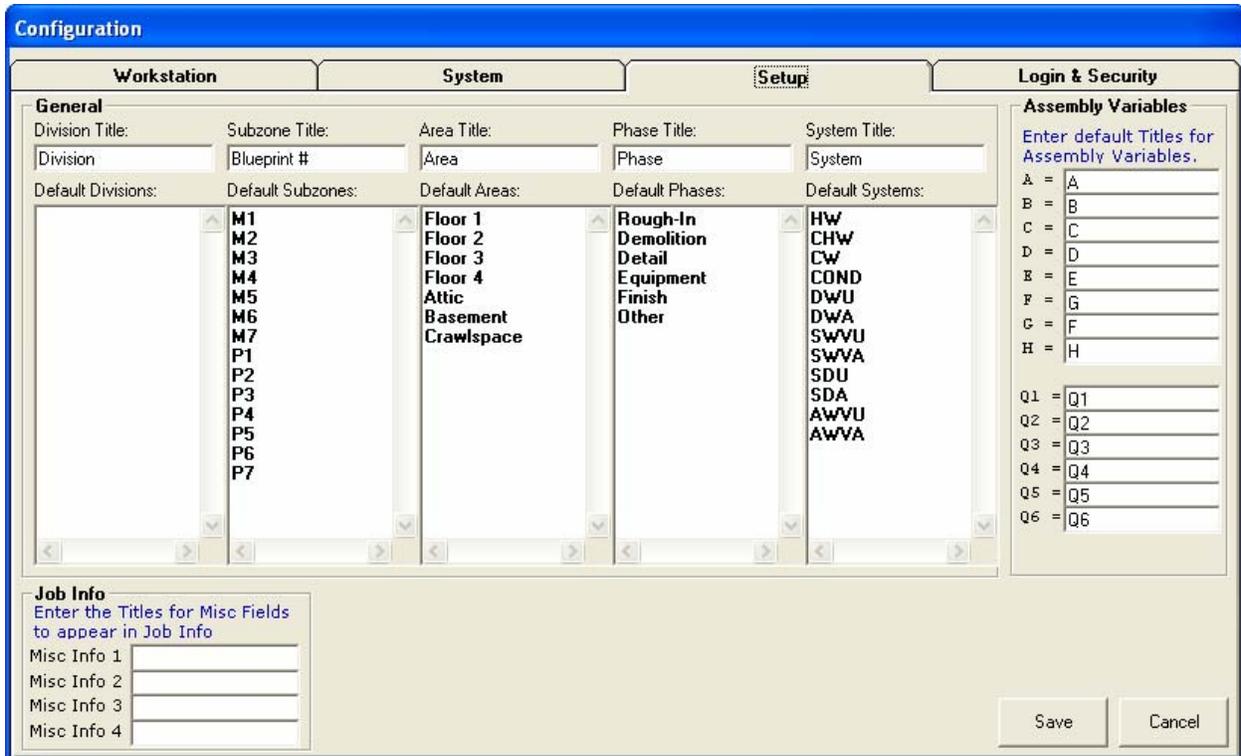
Item Code in Job

Item Description

for reports.

System Tab (Size List Section):

Default Sizes Provides the sizes that will be displayed whenever a list of sizes is displayed. It is strongly recommended that this list not be altered!



Setup Tab (General Section):

Division

Title/Default

Divisions

SubzoneTitle/Defau

lt Subzones

Area Title/Default

Areas

Phase Title/Default

Phases

System Title/Default

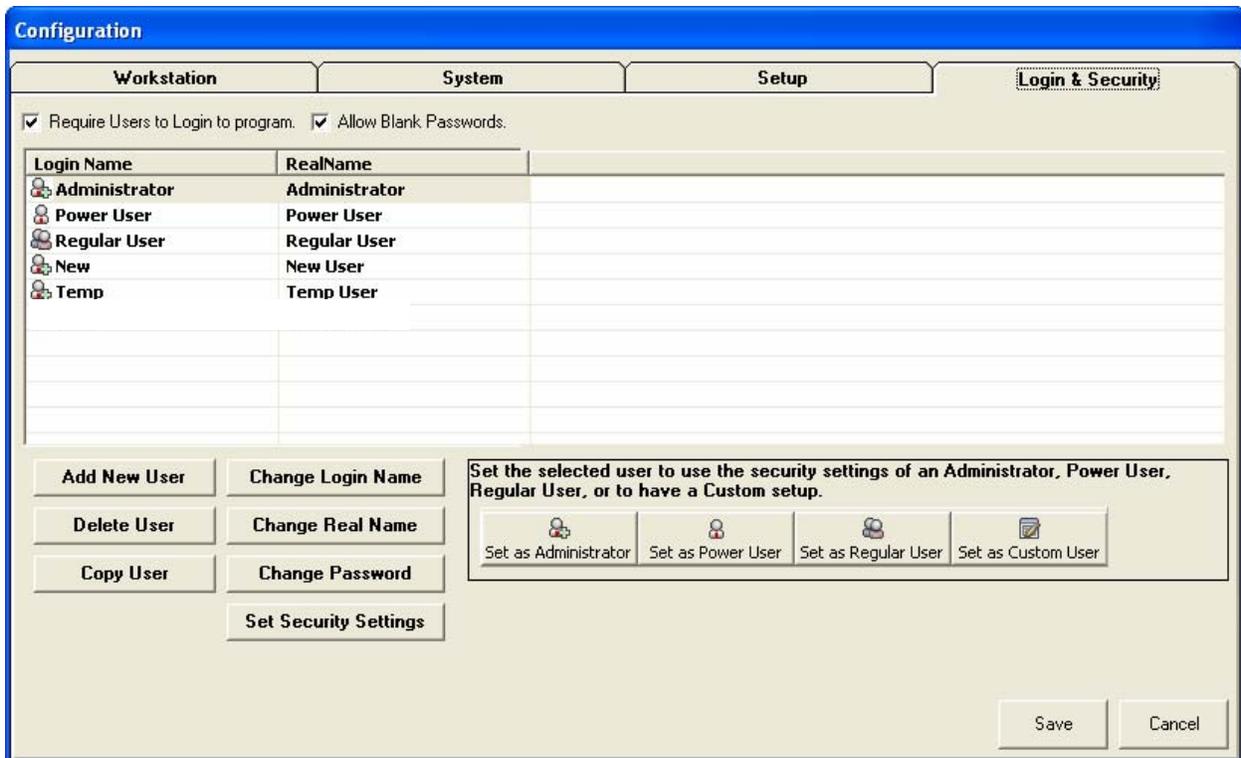
Systems

Setup Tab (Job Info Section):

Titles for Fields ?

Setup Tab (Assembly Variables Section):

Default Titles ?



Login & Security Tab:

Set Security Settings Use the information on this tab to set up your users and their passwords.

3.4. Software and Data Updates

When you enter into a maintenance agreement with Quote Software Inc., you will periodically receive updates for your QuoteExpress system. Two types of updates are provided

Software Updates New program enhancements for the QuoteExpress estimating system.

Data Updates New items of data and/or revised list pricing from Quote Software Inc., or pricing updates from Harris Publishing House.

3.4.1. Installing Software Updates

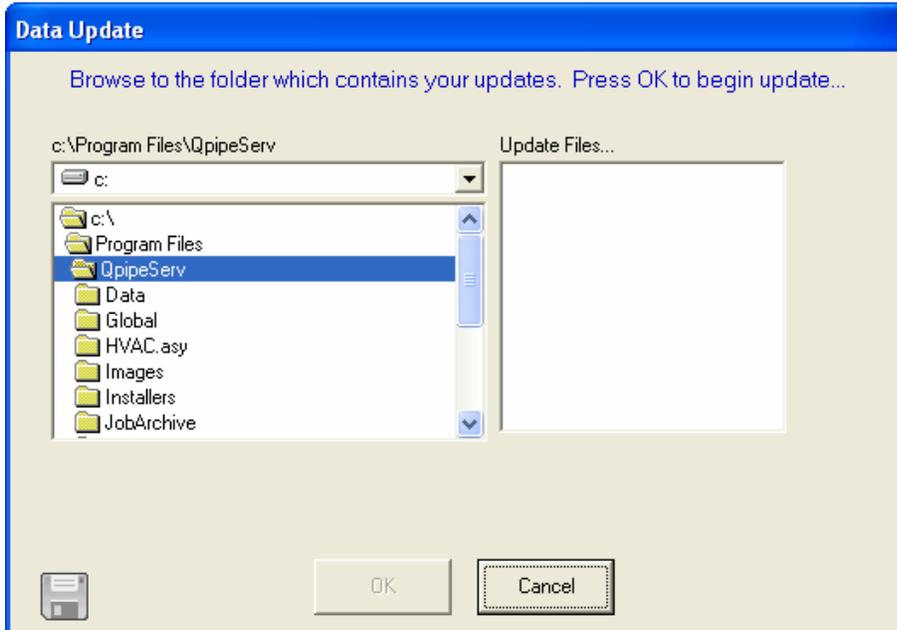
Software updates are available electronically from the Quote Software Inc. website: www.quotesoft.com (contact your sales representative or technical support for additional information.) Software updates are typically delivered with release notes that specify:

- Installation procedures
- New features, functionality, helpful hints and suggestions

Be certain to carefully read the release notes *before* installing any software updates! It is also strongly recommended that you make a full data backup prior to running these updates.

3.4.2. Installing Data Updates (Quote Software Inc.)

Quote Software Inc. data updates are normally distributed electronically. You will get an email telling you that updates are available. You will go to the website: www.quotesoft.com and download the update file. You will download it to the QpipServ folder. After downloading the file, go to the Job List screen and select **File ⇒ Data Update**.



When the Data Update screen is displayed, select the file you downloaded from the Quote Software website. Click to start the update.

When data updates are installed, a list of new and revised data will be provided. You will need to carefully review this information carefully and adjust your Global Discount tables as required (see the Global Discounts screen.)

3.4.3. Installing Data Updates (Harrison Publishing House)

QuoteExpress supports pricing updates from the Harrison pricing system. Note that these updates are obtained directly from Harrison Publishing House via the Internet and require a separate contractual agreement between you and Harrison Publishing House.

To install Harrison pricing updates, refer to the Pricing Service document included with this Reference Manual. Details for installing updates are included in that document.

3.4.4. Important Update Notes

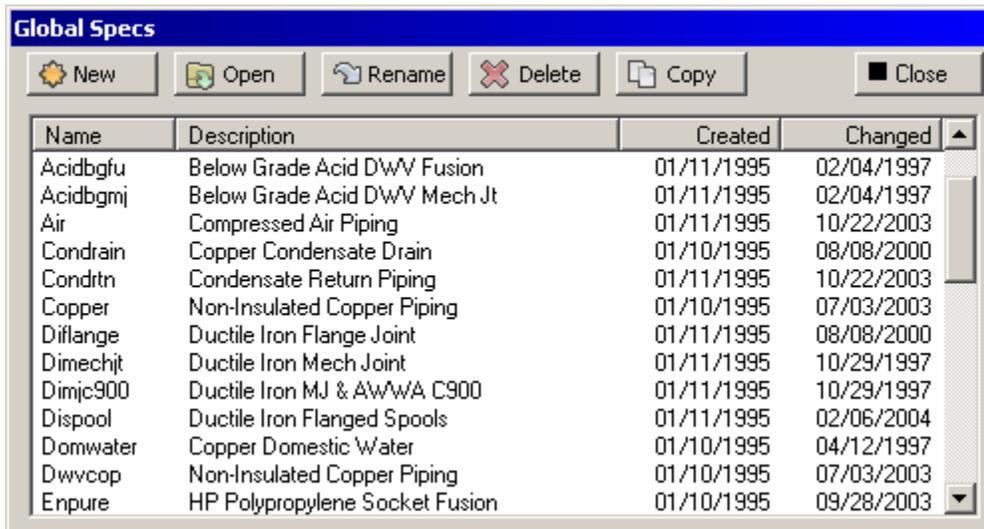
Software and data updates are delivered under the assumption that ALL prior updates have been installed. **NEVER INSTALL UPDATES OUT OF ORDER!** This can corrupt the Database or QuoteExpress Software and cause a significant downtime when restoring from backup. If you

have any questions regarding an update, please contact Quote Software Inc. or your local sales representative!

3.5. Specs

In QuoteExpress, Specs are used to define pipe, fittings, valves, etc. for a particular piping system. This information is used later during job takeoff. QuoteExpress allows you to either build customized specs or copy specs from the existing jobs (or the global Spec list.)

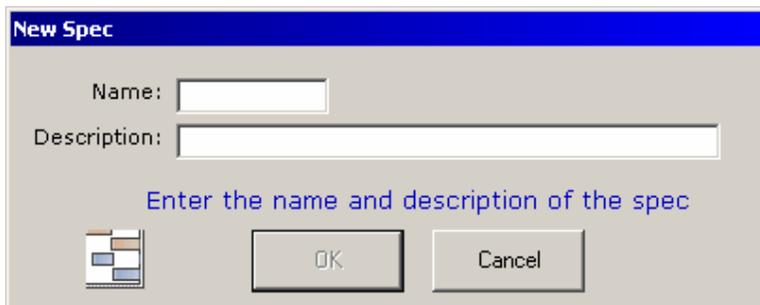
To view the Global specs, either click  from the Main Menu or click on **Global** ⇒ **Specs** from the Job List screen. The Global Specs window for this job will appear showing existing Specs.



| Name | Description | Created | Changed |
|----------|--------------------------------|------------|------------|
| Acidbgfu | Below Grade Acid DWV Fusion | 01/11/1995 | 02/04/1997 |
| Acidbgmj | Below Grade Acid DWV Mech Jt | 01/11/1995 | 02/04/1997 |
| Air | Compressed Air Piping | 01/11/1995 | 10/22/2003 |
| Condrain | Copper Condensate Drain | 01/10/1995 | 08/08/2000 |
| Condrtn | Condensate Return Piping | 01/11/1995 | 10/22/2003 |
| Copper | Non-Insulated Copper Piping | 01/10/1995 | 07/03/2003 |
| Diflange | Ductile Iron Flange Joint | 01/11/1995 | 08/08/2000 |
| Dimechjt | Ductile Iron Mech Joint | 01/11/1995 | 10/29/1997 |
| Dimjc900 | Ductile Iron MJ & AWWA C900 | 01/11/1995 | 10/29/1997 |
| Dispool | Ductile Iron Flanged Spools | 01/11/1995 | 02/06/2004 |
| Domwater | Copper Domestic Water | 01/10/1995 | 04/12/1997 |
| Dwvcop | Non-Insulated Copper Piping | 01/10/1995 | 07/03/2003 |
| Enpure | HP Polypropylene Socket Fusion | 01/10/1995 | 09/28/2003 |

3.5.1. Creating a Spec

To create a new Spec, click on  and provide a *Name* and *Description* for the new Spec. *Names* for Specs can be up to 8 characters long (letters and numbers only). *Descriptions* can be up to 30 characters long.



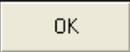
New Spec

Name:

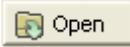
Description:

Enter the name and description of the spec

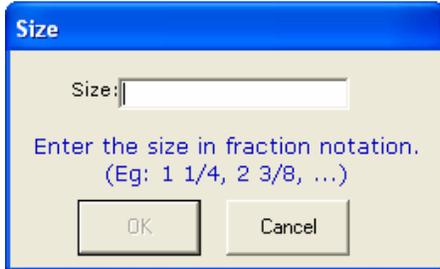
 

When the *Name* and *Description* are entered, click  and the Spec screen will appear with the name of the Spec at the top.

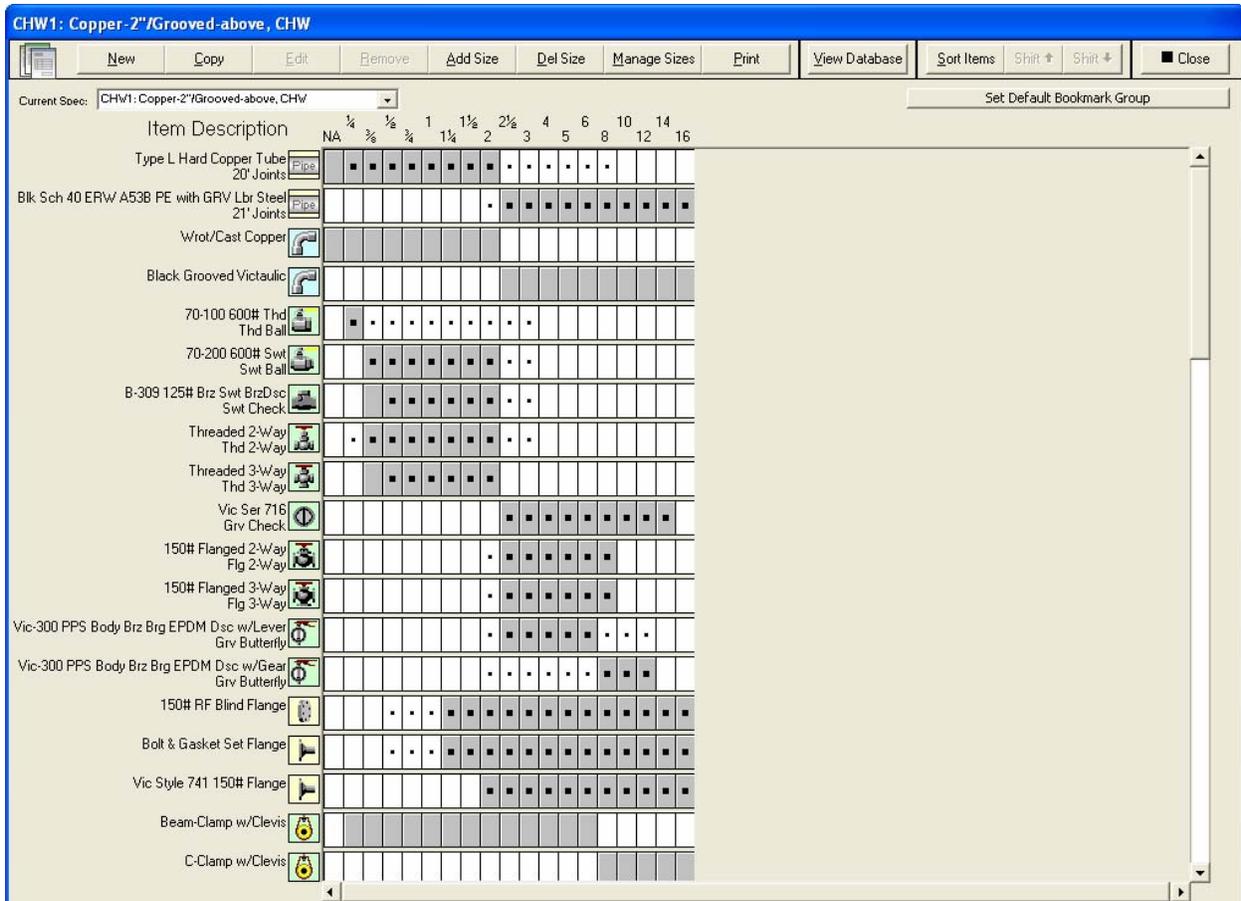
3.5.2. Changing the Information in a Spec

From the main Global Spec screen, there's two ways to open a spec you would like to edit: either highlight the spec and click  or double click on the spec you would like to edit.

Sizes can be added or deleted to conform to desired Spec requirements. To add a size, click on



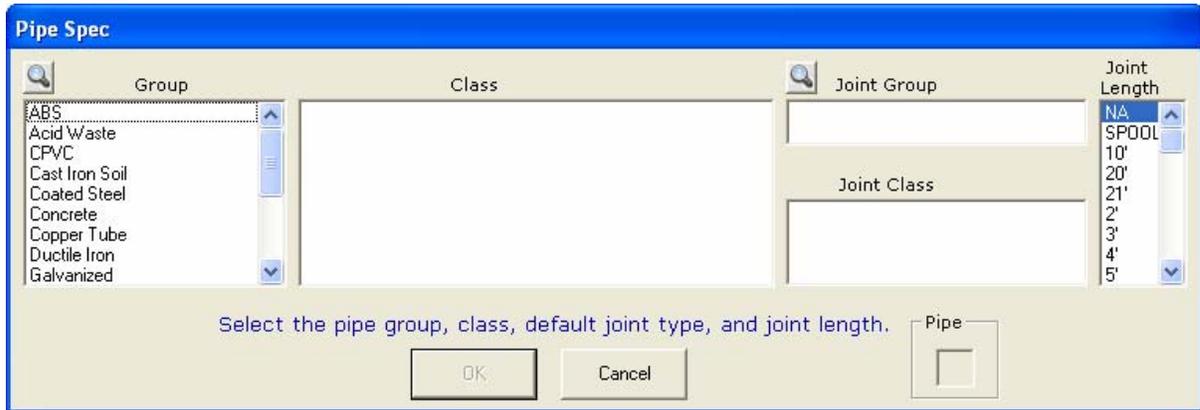
Key in the desired size as shown in the *Size* box. To delete a size, click  and select the size to be deleted. Note that it is not recommended that the size NA ever be deleted, as it may be required for specialty items.



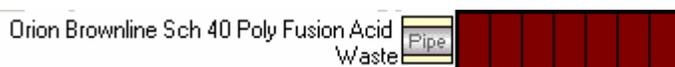
Classes of data from the different families in the Database can be selected for use in a Spec as described in the following Zones.

3.5.2.1. Pipe

1. To add a particular Class of pipe to the Spec, click on  ⇒ **Pipe**.



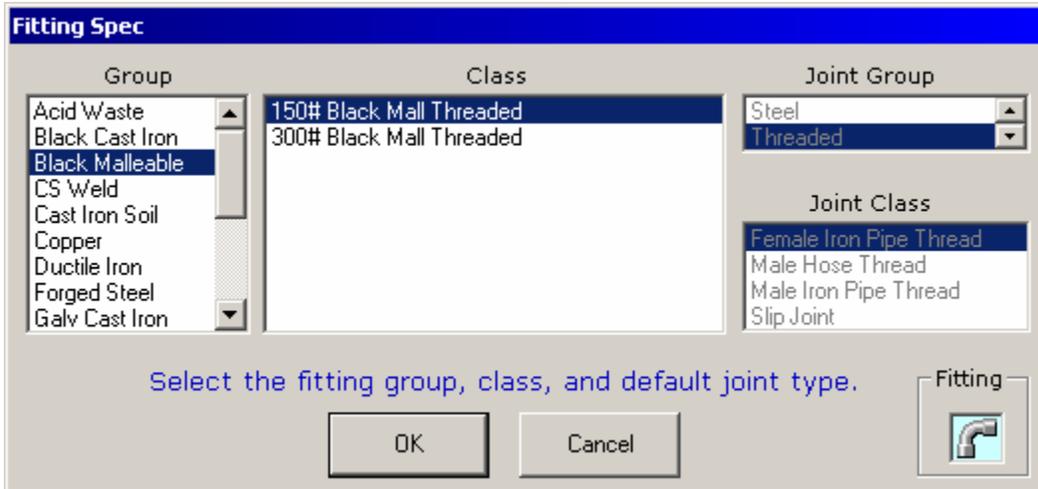
2. Select the Group and Class to which the desired pipe belongs.
3. Select the Joint Group and Joint Class for automatic generation of joint quantities. Note that you should always select a coupling for types of pipe that require couplings. Any solder or other pipe joint material will be added automatically with the coupling. In some classes of pipe, Joint Groups, Classes or both may be automatically selected by default.
4. Select the Joint Length as desired for this Spec. Most of the time this should be the length of the pipe as purchased, but can also be shorter to reflect a job condition that limits the handling of full lengths.
5. Once the Pipe Group and Class, the Joint Group and Class, and the Joint Length are selected, click . This selection will appear under Item and Description on the Spec screen.
6. Select the size range for this particular Pipe Class by clicking on the first size in the desired range, and while holding the left mouse button down, slide the mouse to the last size in the range and release the button. (To delete sizes from the desired range, follow the same procedure using the right mouse button.)



Using the above steps, any number of pipe selections can be made for a particular Spec, provided that the size ranges do not overlap.

3.5.2.2. Fittings

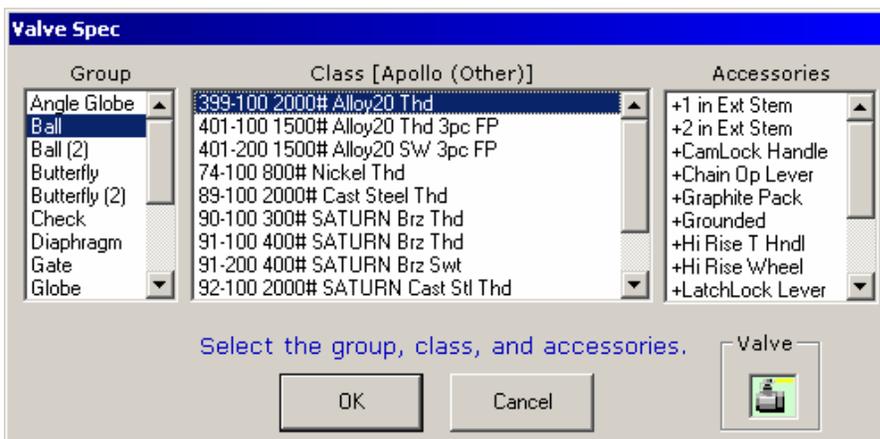
1. To add a particular Class of fittings to the Spec, click on  ⇒ **Fitting**.



2. Select the Group and then the Class to which the desired fittings belong.
3. Select the Joint Group and Joint Class for the selected fittings for automatic generation of joint quantities. In some classes of pipe, Joint Groups, Classes or both may be automatically selected by default. When joints for fittings are selected, this selection will also apply to valves, flanges, and specialties in the same size range, whose joints are not defined in the Master Catalog.
4. Once the Fitting Group and Class, and the Joint Group and Class are selected, click . This selection will appear under Item and Description on the Spec screen.
5. Select the size range for this particular Fitting Class as explained above in step 6 for Pipe. Since the SPEC for joints is used for specialties, it is recommended to include NONE as a size for one of the fitting Specs.
6. Any number of fitting selections can be made for a particular Spec, provided that the size ranges do not overlap.

3.5.2.3. Valves

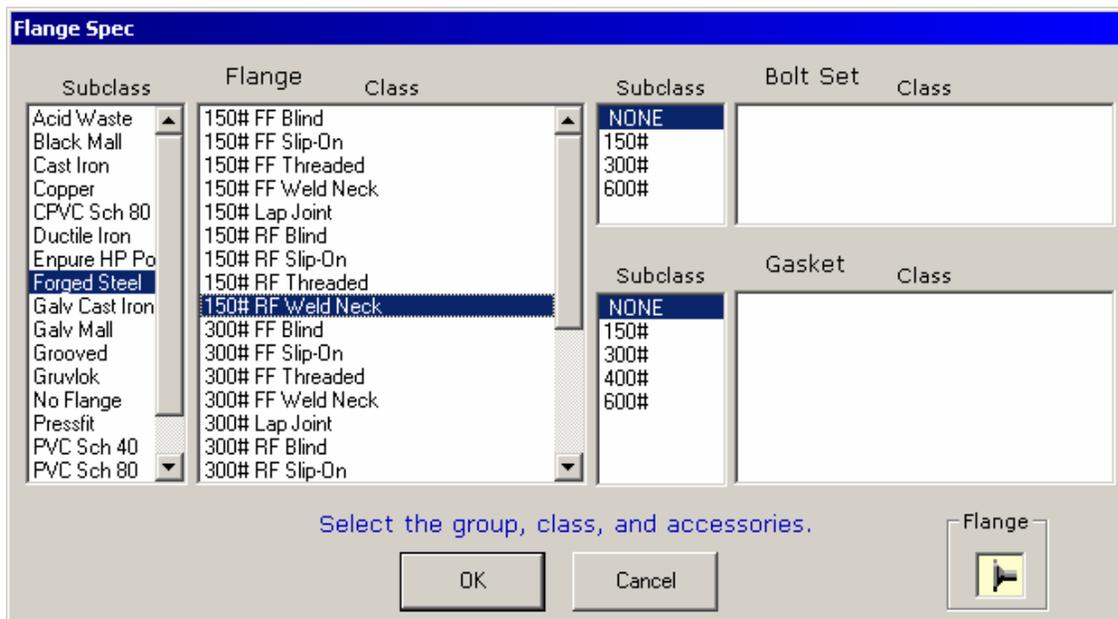
1. To add a particular Class of valves to the Spec, click on  ⇒ **Valve**.



2. Select the Group, Subclass (if required), and Class to which the desired valves belong.
3. Select any accessories, if desired, as required for this piping Spec.
4. Once the Valve Group, Subclass, and Class, and any accessories have been selected, click . This selection will appear under Item and Description on the Spec screen.
5. Select the size range for this particular Valve Class as explained above in step 6 for Pipe.
6. Any number of valve selections can be made for a particular Spec, provided that the size ranges for *each* type of valve do not overlap. This allows you to select many different types of valves, i.e. ball, gate, globe, etc., in a single piping system.

3.5.2.4. Flanges

1. To add a particular Class of flanges to the Spec, click on  ⇒ **Flange**.

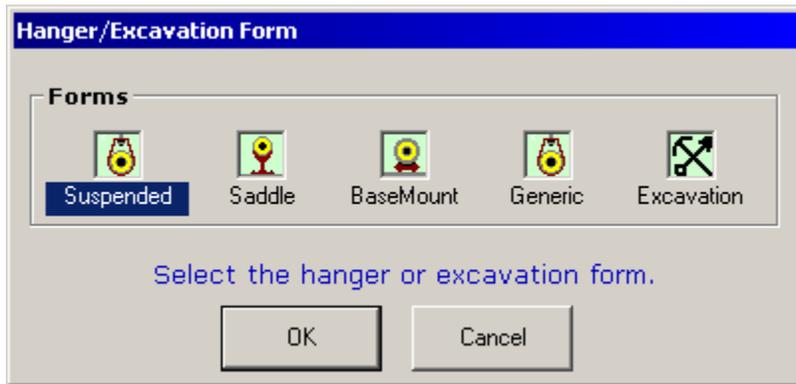


2. Select the Group and then the Class to which the desired flange belongs.
3. Select any Bolt Sets and/or Gaskets, if desired, as required for this piping Spec.
4. Once the Flange Group, Class, and accessories have been selected, click . This selection will appear under Item and Description on the Spec screen.
5. Select the size range for this particular Flange Class as explained above in step 6 for Pipe.
6. Any number of Flange selections can be made for a particular Spec, provided that the size ranges for *each* type of flange do not overlap. This allows you to select many different types of flanges, i.e. weld neck, threaded, blind, etc., in a single piping system.

3.5.2.5. Hangers & Excavation

1. To add a particular hanger to the Spec, click on  ⇒ **Hanger**.

2. Select the desired Hanger Form from the Hanger Form window and click OK.



3. A screen will appear for the specific Hanger Form.

| Component | Qty/Len |
|---------------|---------|
| Upper | 0 |
| Rod | 0 |
| Spring | 0 |
| Coupling | 0 |
| Hanger | 0 |
| Shield/Saddle | 0 |
| Threaded Acc | 0 |

Hanger Size

Pipe Size

Insulation Size

4. Select the desired Components. Some components will require an extra selection if the Group has a Subclass in the Catalog. (If the Generic Hanger Form is selected, the Group must also be selected.)
5. Enter the quantity of each Component, by clicking on the up/down arrow to the right of each component. (A quantity of one will automatically be entered for each component.)
6. Once all of the Components have been selected, select the Hanger Size in the box at the lower right of the Hanger Form screen. If **Pipe Size** is selected, hangers and other components will be sized to fit the pipe, when selected during takeoff. If **Insulation Size** is selected, hangers and other components will be sized to fit outside the insulation, when selected during takeoff.
7. Once the above steps have been completed, click . This selection will appear under Item and Description on the Spec screen.

8. Select the size range for this particular Hanger Form as explained above in step 6 for Pipe.

Any number of Hanger selections can be made for a particular Spec, provided that the size ranges for *each* Hanger Form do not overlap. This allows you to select many different types of hangers for a single piping system.

Note that excavation is treated as a special case of a Hanger Form. This implementation was chosen so that you can automatically estimate excavation costs as you take off pipe (by using the **FastHanger** option during takeoff).

| | Component | Width | Depth |
|-------------|----------------------------|-------|-------|
| Surface: | Asphalt Cut and Patch | 1 | |
| Excavation: | Excavation | 1 | 1 |
| Backfill: | Sand Backfill | 1 | 1 |
| Shoring: | Shoring per Foot of Trench | 1 | |
| Bedding: | Concrete Bedding 4 in Deep | 1 | |

Select the required components for excavation.

OK Cancel

Excavation hanger forms are nearly identical to other hanger forms with the following exceptions

∇ No Hanger Spacing Required

If you select to automatically takeoff excavation using the FastHanger option, you need not supply a hanger spacing in the spec. All excavation is assumed to have a spacing of 1 foot.

∇ Depth Dimension for Excavation and Backfill

The excavation and backfill components of the Excavation hanger form support an extra quantity for depth. During job calculation, the total quantity of the associated item is equal to Width times Depth times number of feet of pipe (giving total cubic feet of excavation or backfill). Items in the database are defined using cost/hours per cubic foot).

As with other hanger forms, the same graphical view of the excavation spec is available during both specification and takeoff. The width and depth components are included to add clarity to the dimensions.

3.5.2.6. Hanger Spacing

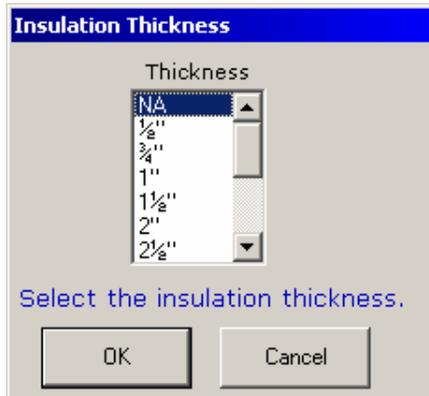
1. To define hanger spacing for the Spec, click on  ⇒ **Hanger Spacing**.



2. Select the desired spacing from the Hanger Spacing window.
3. Select the size range for this particular Hanger Spacing as explained above in step 6 for Pipe.
4. Any number of Hanger Spacing selections can be made for a particular Spec, provided that their size ranges do not overlap. This allows your Spec to have varying spacing for different pipe sizes for a single piping system.

3.5.2.7. *Insulation*

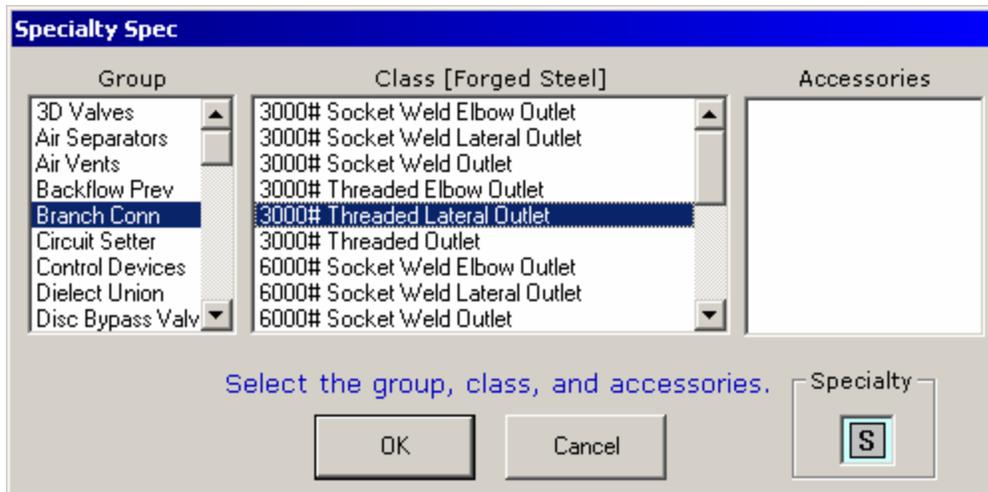
1. To define insulation thickness for the Spec, click on **New** ⇒ **Insulation**.



2. Select the desired insulation thickness from the Insulation Thickness window.
3. Select the size range for this particular Insulation thickness as explained above in step 6 for Pipe.
4. Any number of Insulation Thickness selections can be made for a particular Spec, provided that their size ranges do not overlap. This allows your Spec to have varying insulation thicknesses for different pipe sizes for a single piping system.

3.5.2.8. *Specialties*

1. To add a particular Class of specialties to the Spec, click on **New** ⇒ Specialty.



2. Select the Group, the Subclass (if required), and then the Class to which the desired specialties belong.
3. Select any available accessories, if desired, as required for this piping Spec.
4. Once the Specialty Group, Subclass, and Class, and any accessories have been selected, click **OK**. This selection will appear under Item and Description on the Spec screen.
5. Select the size range for this particular Specialty Class as explained above in step 6 for Pipe.
6. Up to 16 specialty selections can be made for a particular Spec, provided that the size ranges for *each* type of specialty do not overlap. This allows you to select many different types of specialties in a single piping system.

Once all of the components desired for the Spec are selected, you can go back to the Specs list screen by clicking **Exit**. A window will appear to confirm that you want to save any Spec changes. Do so by clicking on **Yes**.

3.5.3. Other Spec Features

QuoteExpress contains features that enable you to easily copy, edit, and/rename Specs. Your system is also equipped with several Specs to get you started in building an easily maintainable catalog of Specs.

3.5.3.1. Renaming a Spec

Any Spec can be renamed as follows:

1. Select the Spec you desire to rename. Click on it and click **Rename**.
2. Make revisions to the Name or Description as desired, and click **OK**.

3.5.3.2. Editing a Spec

Any existing Spec can be changed using the following steps.

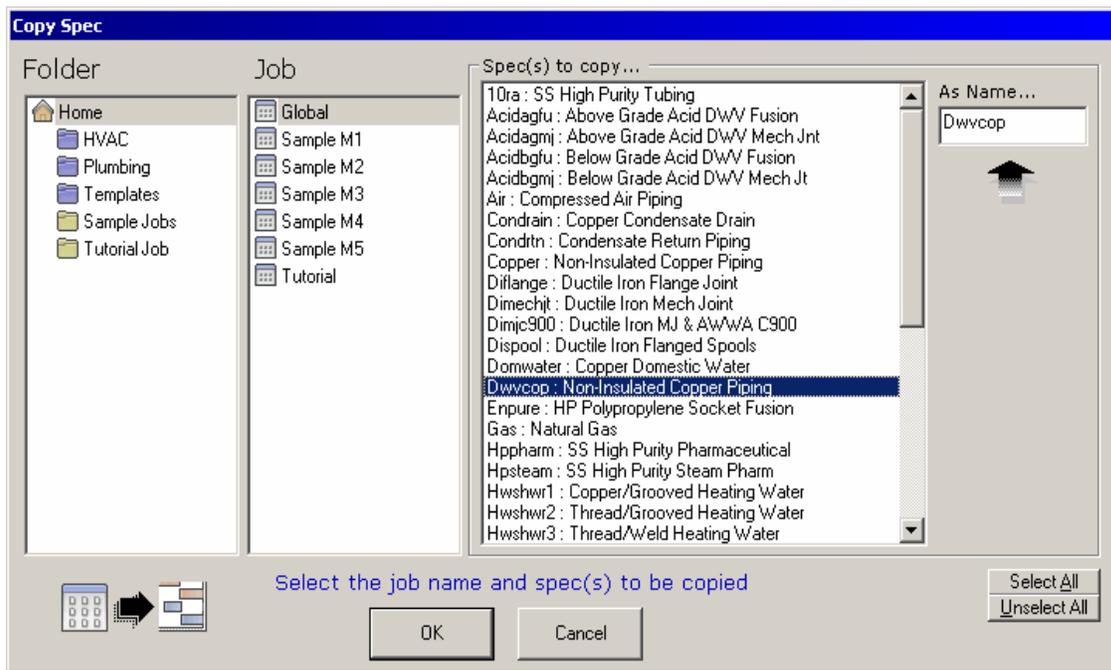
1. Select the Spec you desire to edit. Click on it and click **Open**.

2. Click on the Spec component you desire to edit, and click on **Change**.
3. Simply re-select the Spec item as was done when the Spec was created.
4. Make as many component revisions, new selections, or size range changes as desired.
5. When all desired changes have been made, click **Exit**. Confirm saving changes by clicking on **Yes**.

3.5.3.3. Copying a Spec

QuoteExpress allows you to copy a Spec from any existing job to the Global Spec list as follows:

1. Click **Copy From**.



2. At the Copy Spec window, select the folder and job from which you would like to copy a Spec.
3. Select the desired Spec (Multiple Specs may be selected by holding down the control key). Note that ALL specs can be selected by clicking on **Select All**.
4. Edit the Spec Name (if desired) by clicking on the name shown under *As Name...* and revising the text.
5. Click **OK** to save the Spec. It will now appear in the list alphabetically.

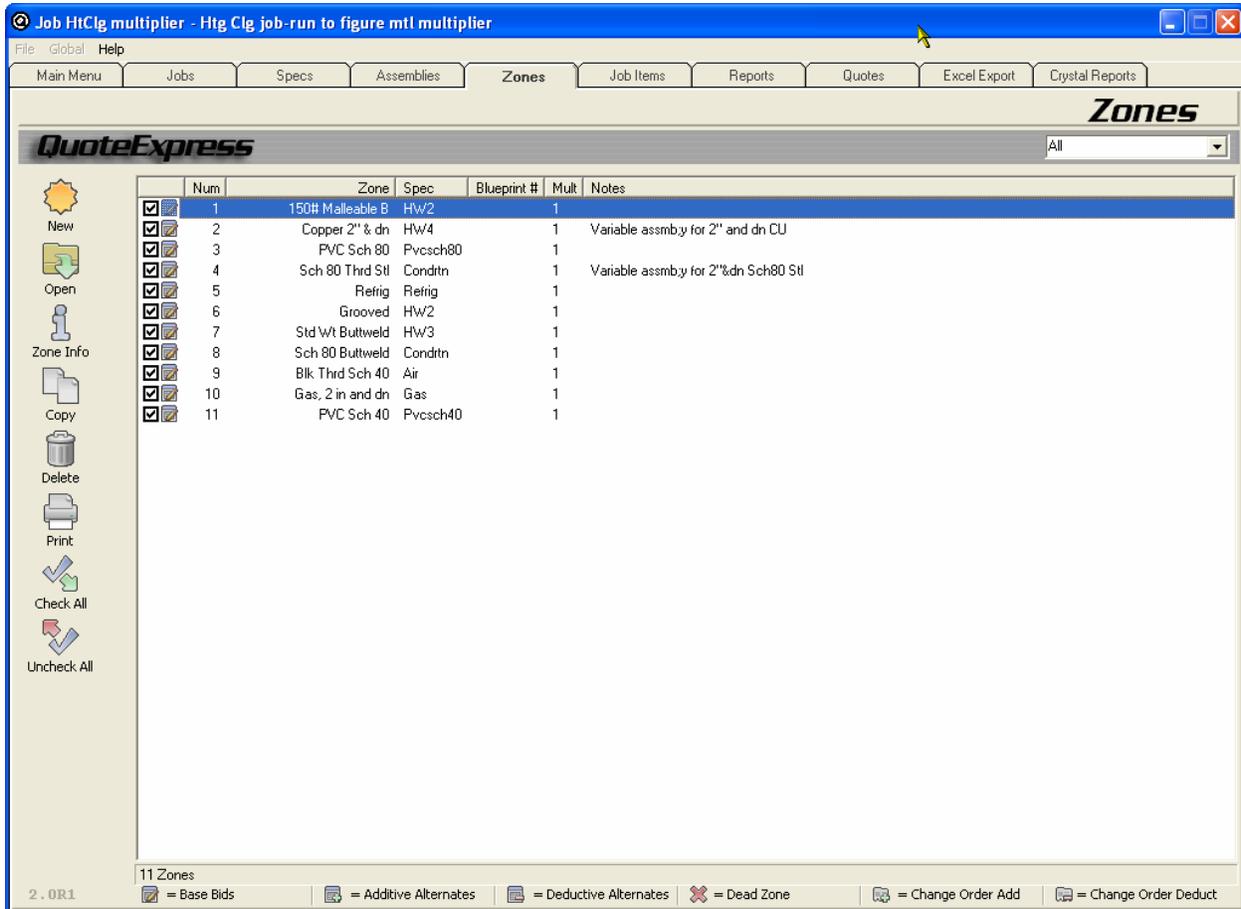
3.5.4. Printing a Spec

A Spec may be printed as desired for reference as follows:

1. Select the Spec you desire to print, click on it and click **Open**.
2. While on the Spec screen, click on **Print** (make sure the printer is ready).

4. Job Screen

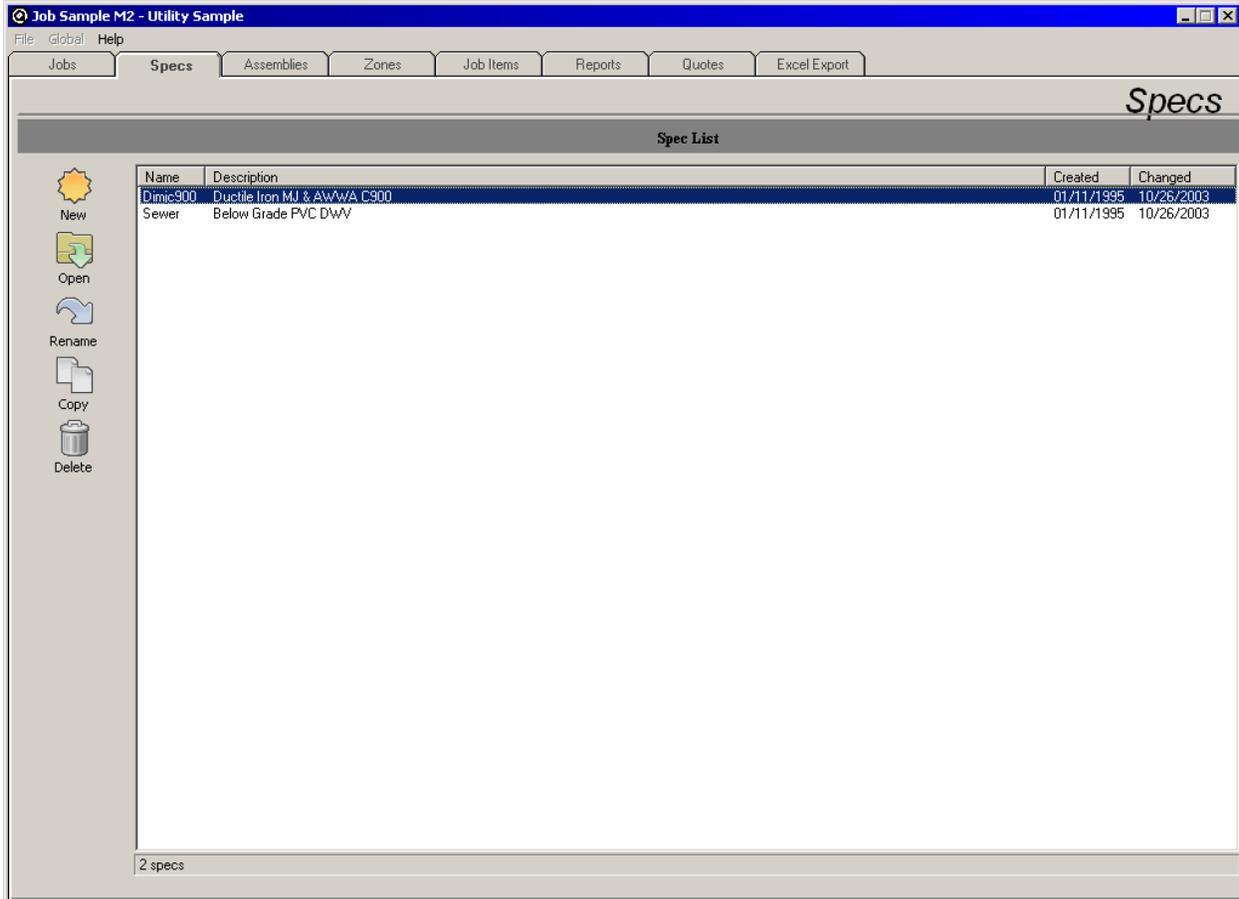
All Spec data, Takeoff, Calculation, and Reports for a particular job are accessed from the Job screen. To go to the Job screen for a particular job, select the job from the Job List and click **Open Job**. (If a new job is created, the program will automatically go to the Job screen for that job.)



A QuoteExpress job is comprised of Specs, Takeoff (Zones), Job Items, Reports (Material & Labor), Quotes (Price quotes provided by a supplier), and Worksheets (used for final reports). Each of these components is listed across the top of the Job screen on tabs from left to right. To access a specific component, simply click on the appropriate tab and the page for the corresponding components will be displayed (in the above display, the Takeoff tab is selected). Note that you can exit the Job screen at any time by clicking **Close Job** from within any component tab.

4.1. Spec Tab

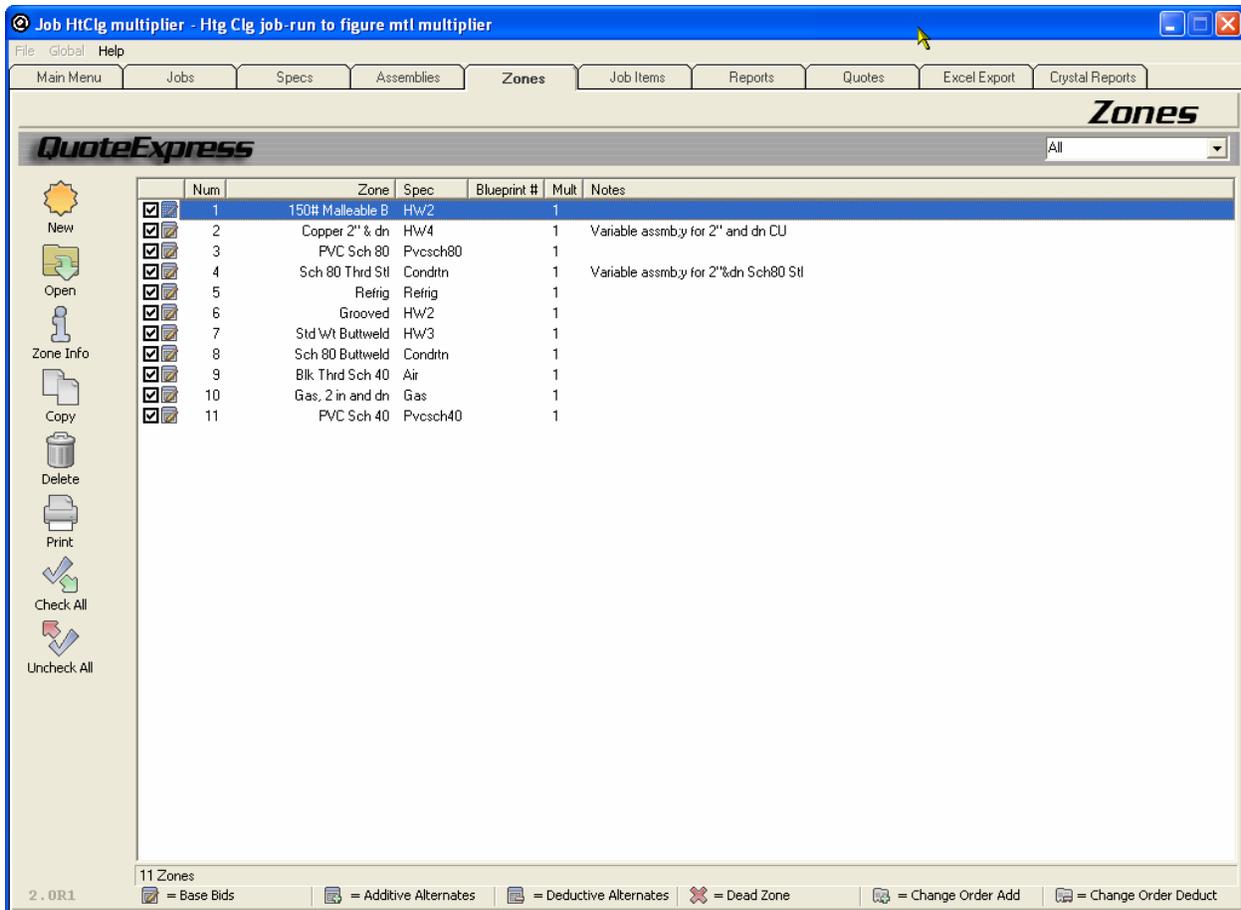
The first step to estimating a job with QuoteExpress is to set up Specs specifically for that job. Specs can be created from scratch, copied from Global, or copied from the Specs list of any other job in the same manner as shown above. It is usually easier to copy Specs and modify them than to set them up from scratch.



It is also helpful to rename the Specs to reflect the actual systems for a particular job. It is even acceptable to have exactly identical Specs with different names and descriptions to help organize your Takeoff. The amount of detail and the number of valves and specialties you put into a Spec will affect Takeoff speed and the usefulness of your Specs for ordering materials and figuring change orders.

4.2. Zone Tab

QuoteExpress gives you the ability to break a job takeoff into as many Zones as desired. Jobs can be taken-off by piping system, area, plan pages, drawing details, or installation conditions. Zones can also be used to designate alternate bids and change orders.



4.2.1. Creating a Zone

A Zone can be created at the by clicking on . A dialog box will appear requesting information about what Zone you are taking off.

The "New Zone" dialog box is shown with the following fields and options:

- Multiplier:** A numeric spinner box set to 1.
- Spec Name:** A dropdown menu showing "Dimjc900 : Ductile Iron MJ & AWWA C900".
- Zone Name:** A dropdown menu showing "Site".
- Zone Type:** A dropdown menu showing "Outside".
- Notes:** An empty text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

Below the dialog box, there is a small icon representing a zone and the text "Enter the header information for this zone".

Select the Spec by clicking on the down arrow (or colored bar) and the name of Spec. Define an Area Name by clicking on the box and typing in a name. Finally, list any remarks by clicking on the box and typing in comments you wish to apply to this Zone.

Note that for each Zone you create, a Spec and Area Name must be filled in, while any remarks are optional. The multiplier (which is normally one) can be increased for Zones with identical piping, such as heating water coils, pumps, or domestic water drops to fixtures. Once all of the appropriate Zone information is complete, click **OK** to move into the Takeoff Screen for this Zone. (Click **Close** to return to the Job screen.)

Zone headers can be edited by selecting the desired Zone and clicking on **Header**. You can then edit the Multiplier, Spec, Area Name, or Remarks as desired. (Zone numbers cannot be changed.)

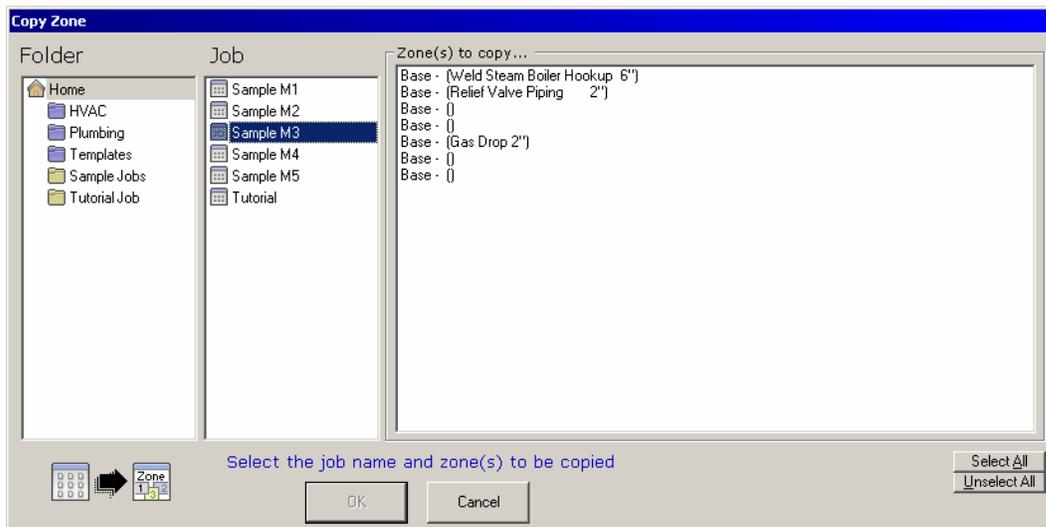
Zones can be removed by clicking on **File** ⇒ **Remove Zone**. The program will require confirmation prior to removing any Zone.

4.2.2. Copying Zones

One of the most useful features of QuoteExpress is the ability to copy Zones from the current job, another job, or one of the assembly jobs provided by Quote Software Inc., Inc. When Zones are copied, any takeoff data associated with that Zone is also copied. This allows you copy piping details from previous jobs to save time in estimating.

To copy a Zone, do the following:

1. Click on **Copy**.

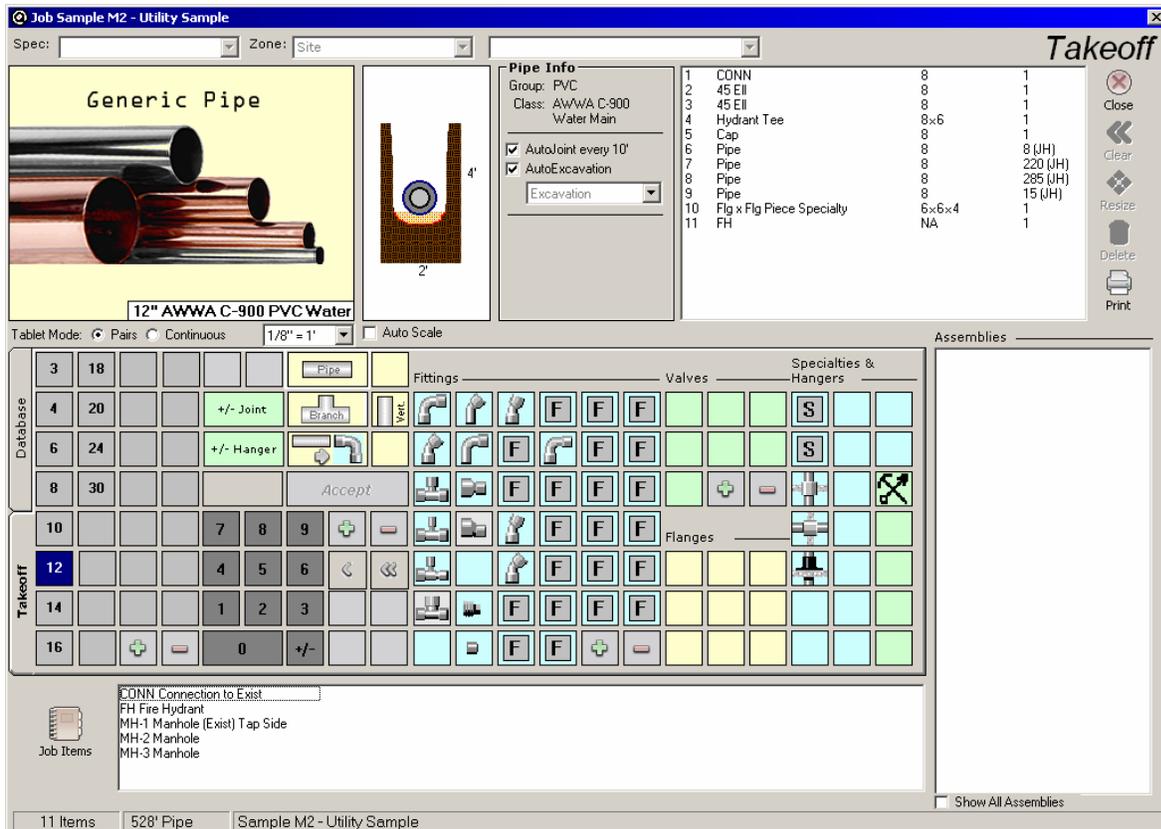


2. Select the Folder and Job Name of the job from where you desire to copy a Zone.
3. Select the Zone that you wish to copy and click **OK**. (Multiple Zones may be selected by holding down the control key).
4. Edit the Header or the Takeoff as desired.

Note that Quote Software Inc., Inc. assemblies are stored in assembly folders named *HVAC* and *Plumbing*. Assemblies are broken down by job name within these folders based on the type of equipment (e.g. Boilers, Chillers, etc.) These assemblies have graphical diagrams to assist you in selecting the correct components during the copy. You may also wish to build your own collection of piping details to simplify the takeoff procedure. We recommend creating a personal or company-wide assembly folder with one or more jobs to store these details. You can use the Remarks in the Header to clearly define the contents of each assembly Zone.

4.2.3. Taking Off Zones

To access the Takeoff screen for a particular Zone, click on that Zone and click **Takeoff**. You may return to the Job screen at any time prior to or following the takeoff of items by clicking **Exit**. The system will ask you if you want to save any changes to the original Takeoff.



The Takeoff Screen for a Zone is built using the Spec for that Zone. The information in the Header of the Zone is in the upper left hand corner of the screen. The sizes, types of pipe, fittings, valves, hangers, and specialties displayed on the screen are from the Spec for the Zone.

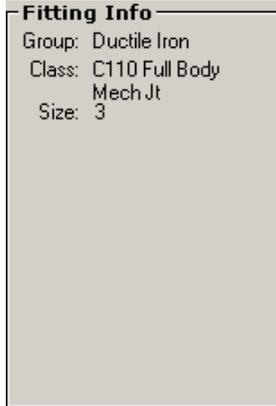
4.2.3.1. Fittings, Valves, Flanges, and Specialties Takeoff

Using the QuoteExpress Computerized Estimating System, it is easiest (but not necessary) to take off fittings, valves, and specialties first, and then take off the pipe. These items can be taken

off with the mouse and keyboard, or with the Digitizing Tablet (optional). Marking items as they are taken off is recommended.

Take off the fittings, valves, flanges and specialties for a Zone as follows:

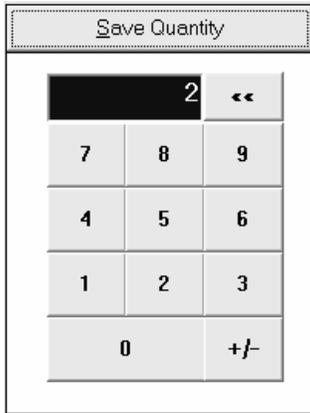
1. Click on the size (when taking off the first item of a given size.)
2. Click on the desired type of fitting, valve, flange, etc. Note that information about the item from the Spec appears in the Information Box in the upper right hand corner of the screen.



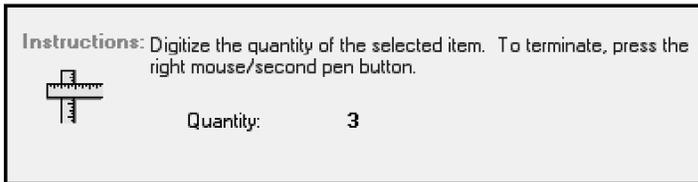
When there is more than one of a select item in the Catalog with the same first size, a list of the sizes available will appear on the screen. The proper size must be selected before a count can be taken.

3. *[Mouse and Keyboard]* Count up the quantity of item in one of the following ways:
 - ✓ *Type in the count using the keyboard and press **↵Enter** or click on **Save Quantity** or the next item to be taken off.*
 - ✓ *Click on the keypad at the lower right hand of the Takeoff screen and press **↵Enter** or click on **Save Quantity** or the next item to be taken off.*
 - ✓ *Click the right mouse button and press **↵Enter** or click on either **Save Quantity** or the next item to be taken off. Note that it is not important where the mouse cursor is positioned on the Takeoff screen when counting with the right mouse button.*

The count is logged in the blue box of the keypad at the lower right hand corner of the screen.



4. [Digitizer Tablet] Count up the quantity by clicking on **Tablet**. Once the digitizer takeoff screen is displayed, you may count items by clicking on the left mouse button.



Once you have counted the necessary items, terminate digitizer takeoff mode by clicking on the right mouse button (or pressing the **Esc** key on the keyboard.)

5. You can move on to the next item by clicking on that item. The previous item will be logged into the Takeoff List in the lower left hand corner of the screen. A beep will sound to confirm that the previous item was inserted into the Takeoff List. (You can also enter an item into the Takeoff List by clicking on **Save Quantity**).

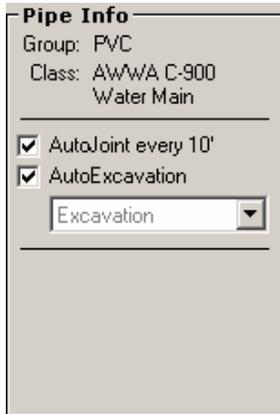
| | | | |
|----|---------------|-----|----------|
| 2 | 45 Ell | 8 | 1 |
| 3 | 45 Ell | 8 | 1 |
| 4 | Hydrant Tee | 8x6 | 1 |
| 5 | Cap | 8 | 1 |
| 6 | Pipe | 8 | 8 (JH) |
| 7 | Pipe | 8 | 220 (JH) |
| 8 | Pipe | 8 | 285 (JH) |
| 9 | Pipe | 8 | 15 (JH) |
| 10 | Tee | 3 | 1 |
| 11 | FH | NA | 1 |
| 12 | Conc Reducer | 3x2 | 1 |
| 13 | 45 Ell | 3 | 1 |
| 14 | 90 Street Ell | 3 | 1 |
| 15 | 90 Ell | 3 | 1 |
| 16 | 90 Ell | 3 | 1 |
| 17 | Pipe | 4 | 5 (JHX) |
| 18 | 45 Ell | 4 | 1 |

6. Change sizes by clicking on the new size. (The screen may pause briefly to reload Spec definitions for this new size.)

4.2.3.2. Pipe Takeoff

Pipe can be taken off with the mouse and keyboard, or with the Digitizing Tablet (optional). Details of using the Digitizing Tablet are in the following Zone. Even with the Digitizing Tablet, you will use the mouse when taking off risers, “not to scale” details, and other times when scale is not available. Do the following to take off a length of pipe:

1. Click on the size to be taken off and then click on **Pipe**. Note that the Information Box now contains Pipe Info from our Spec.



Pipe Info
Group: PVC
Class: AWWA C-900
Water Main

AutoJoint every 10'
 AutoExcavation

Excavation

As was the case for fittings, this information includes the Group and Class of the pipe. But the takeoff of pipe also has the following additional features:

FastJoint - The system will automatically include the joint defined in the Spec at the spacing shown as pipe is taken off. FastJoint will automatically be engaged when you click on pipe, but can be disabled by clicking on the check box on the screen (or **OFF** on the digitizer template). When activated FastJoint will provide for calculation as many joints required for the length of pipe taken off.

FastHanger - The system will automatically include a hanger contained in the Spec at the spacing shown as pipe is taken off. The type of hanger is shown in the window inside the Information Box. If a Spec contains more than one type of hanger for a given size, you can choose the hanger you wish to have automatically taken off by clicking on the down arrow button and selecting from the list. FastJoint will automatically be engaged when you click on pipe, but can be disabled by clicking on the check box (or **OFF** on the digitizer template). When activated FastJoint will provide for calculation as many hangers (rounded to the nearest hanger) required for the length of pipe taken off.

2. To continue with pipe takeoff, enter the desired length in feet. This can be done in the following ways:
 - ✓ Type in the length using the keyboard and press **Enter** or click on **Save Quantity** or the next item to be taken off.
 - ✓ Click on the keypad at the lower right hand of the Takeoff screen and press **Enter** or click on **Save Quantity** or the next item to be taken off.

✓ Click the right mouse button and press **↵Enter** or click on either **Save Quantity** or the next item to be taken off. (This method will only be good for short lengths of pipe, since each click will only enter one foot of pipe.)

- Once a length of pipe is taken off, it will be logged into the Takeoff List in the lower left hand corner of the screen.

| | | | |
|----|---------------|-----|----------|
| 2 | 45 Ell | 8 | 1 |
| 3 | 45 Ell | 8 | 1 |
| 4 | Hydrant Tee | 8x6 | 1 |
| 5 | Cap | 8 | 1 |
| 6 | Pipe | 8 | 8 (JH) |
| 7 | Pipe | 8 | 220 (JH) |
| 8 | Pipe | 8 | 285 (JH) |
| 9 | Pipe | 8 | 15 (JH) |
| 10 | Tee | 3 | 1 |
| 11 | FH | NA | 1 |
| 12 | Conc Reducer | 3x2 | 1 |
| 13 | 45 Ell | 3 | 1 |
| 14 | 90 Street Ell | 3 | 1 |
| 15 | 90 Ell | 3 | 1 |
| 16 | 90 Ell | 3 | 1 |
| 17 | Pipe | 4 | 5 (JHx) |
| 18 | 45 Ell | 4 | 1 |

A beep will sound to confirm that the previous item was inserted into the Takeoff List. When FastJoint is activated, a circle with a J in it will appear in the Takeoff List following the pipe taken off. When FastHanger is activated, a circle with an H in it will appear in the Takeoff List following the pipe taken off. (Do not be alarmed that the length is not long enough to require a hanger and/or joint; the calculation of this feature occurs later and will generate a joint quantity of 0.)

4.2.3.3. *Fittings, Valves, Flanges, and Specialties Takeoff (with Digitizing Tablet)*

When furnished with the Digitizing Tablet, QuoteExpress allows takeoff of items using the digitizer template. Takeoff fittings with the Digitizing Tablet as follows:

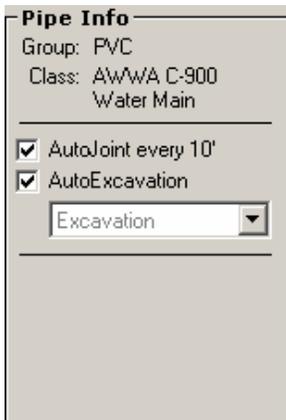
- Select the size using the digitizer cursor (if the cursor is the pen type, just press the tip on the desired size. If the cursor is the mouse type, line up the cross hairs on the desired size and press the left mouse button). There should be a short beep to acknowledge successful selection.
- Select the item (such as 90 Ell) to be taken off using the cursor. The computer will beep to acknowledge your selection. When there are multiple items in the catalog with the same first size, the system will generate a unique tone indicating that you will need to specify the additional sizes (in order) to fully define the item. Once the item is fully defined, the system will beep to acknowledge successful selection.
- Count the desired number of the selected item by using the cursor in the area. Each beep (mouse click) will increase the quantity by one.
- The quantity can be logged in to the **Takeoff List** by selecting the size or type of the next item for takeoff or by selecting the **Save Quantity** button on the template. Alternatively, you may also press the **↵Enter** key on the keyboard.

5. Any time you wish to return to using the mouse on the screen, click with the right button on the digitizing mouse. Your mouse will now again control the cursor on the screen. Continue takeoff by selecting a catalog item, changing the scale, etc.

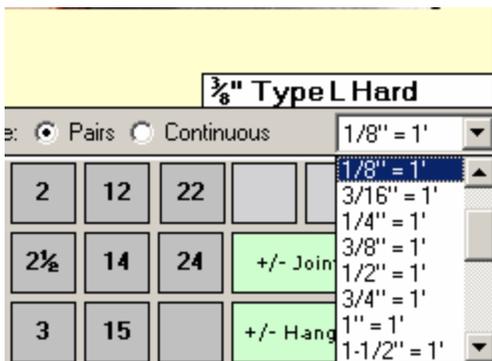
4.2.3.4. Pipe Takeoff (with Digitizing Tablet)

When furnished with the Digitizing Tablet, QuoteExpress allows takeoff of pipe on scale drawings without the use of the mouse. This can increase pipe takeoff speed and accuracy. Takeoff pipe with the Digitizing Tablet as follows:

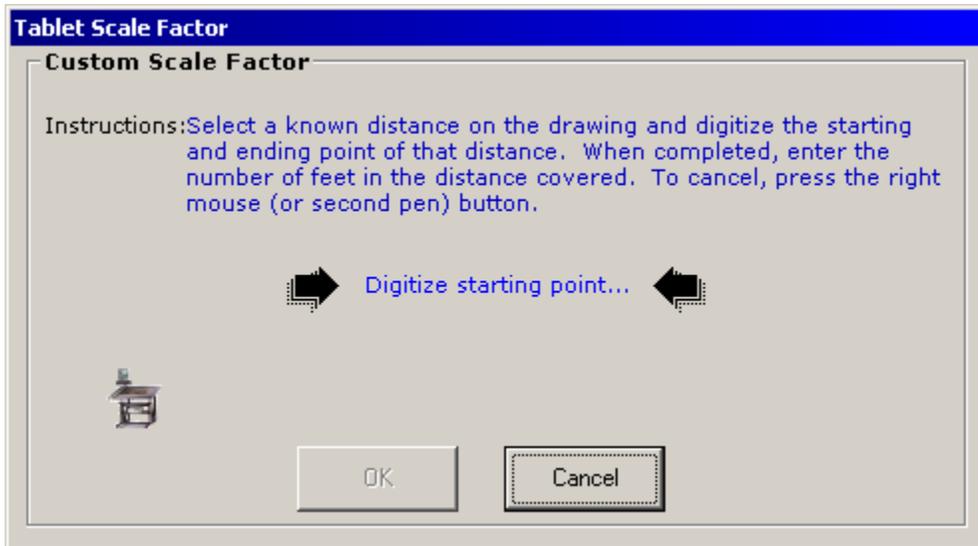
1. Define the scale as follows:
 - a. Determine the scale of the drawing from which you are going to takeoff.
 - b. Using the mouse, select the desired size and click on **Pipe**.



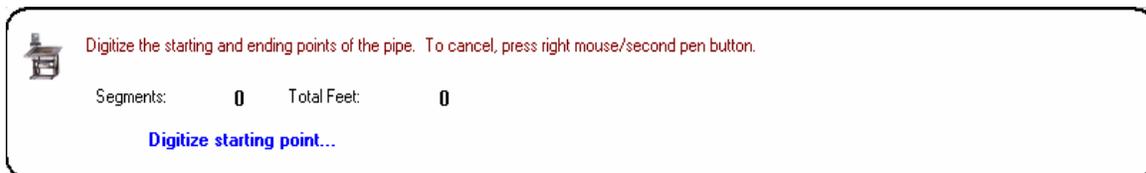
- c. In the Information box, click on **Scale**.



- d. Either select from the list of pre-loaded drawing scales or create a customized scale by clicking on **Custom**.
 - e. If a custom scale is chosen, you must set up the scale based on a known dimension from the drawing from which you are going to takeoff. Click on the beginning point and then the ending point of this known straight length. Then with the keyboard, enter the known distance (in feet) to establish the scale. The scale will be shown as **1" = x'**.



2. Once the scale is established, choose the desired size and select  Pipe with the digitizer cursor. The window shown below will appear. The digitizing tablet is active and you are ready to takeoff pipe. (Your digitizer mouse will no longer control the cursor on the screen.)



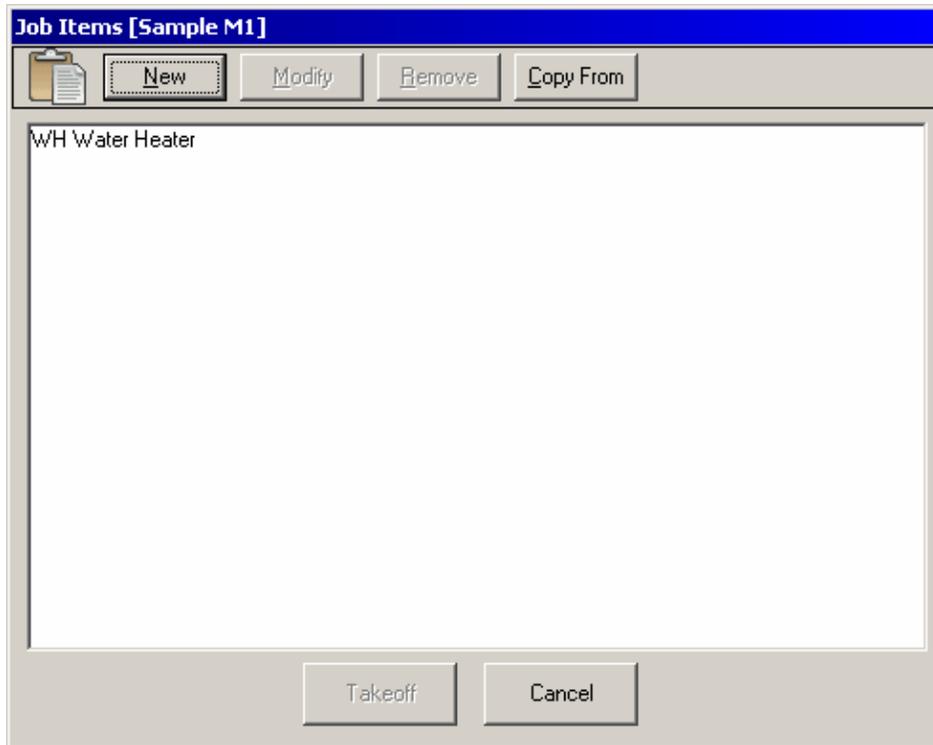
3. Using the digitizer mouse, click on the starting point of a straight length of pipe. Then click on the ending point. The length will be logged into the Takeoff List.
4. Continue in this manner to takeoff as desired. The total length will be displayed in the window on the screen, while each length will be logged into the Takeoff List. ***It is important to note*** that each segment of pipe from fitting to fitting should be taken off individually for accurate counting of hangers and joints. For example, a 60' length of piping with 6 tees in it may not require any couplings.
5. Any time you wish to return to using the mouse on the screen, click with the right button on the digitizing mouse. Your mouse will now again control the cursor on the screen. Continue takeoff by selecting a catalog item, changing the scale, etc.

4.2.3.5. Job Items

stPIPE gives you the ability to create items that are unique to each specific job. Normally, these items are fixtures such as water closets, floor drains, etc. If you have defined Job Items (see next Zone), they will be displayed in the lower right-hand corner of the takeoff screen.



To begin takeoff, simply click on a Job Item from the Quick-Pick list and begin counting in the same way you would for fittings, valves, flanges or specialties. Additionally, you can enter new job items by clicking on **Job Items** at the top of the screen. You will be presented with a list of all items currently defined for this job.

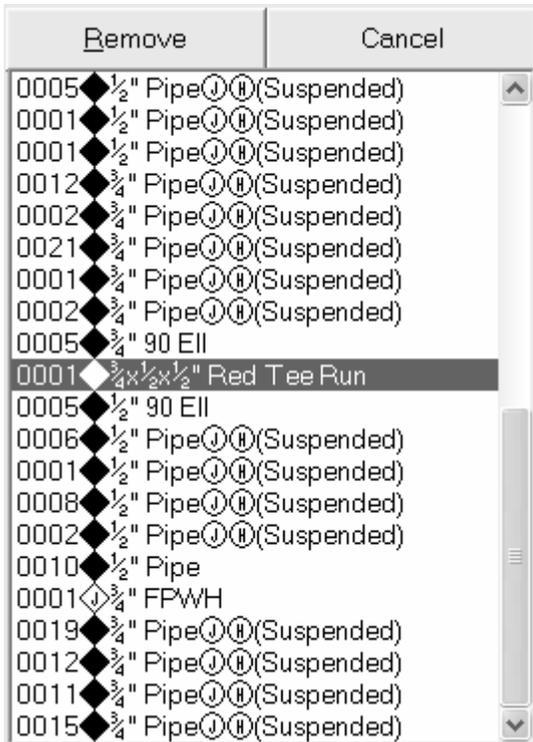


If you forget a job item, you can also add one “on-the-fly” by selecting **New**.

4.2.3.6. Other Takeoff Features

Note the following features, which can be used during takeoff.

1. If an item or items are taken off by mistake, they can be removed by clicking on the line item in the Takeoff List and then clicking on **Remove**.



2. If you wish to take off an item not in the Spec for this Zone, click on **Job Items**. Simply select the Family, Group, Class, Type, and Size of the item desired for takeoff. The Catalog Item Info will be shown in the Information Box. Enter the quantity in the same way described for fittings above.
3. When items are defined in the Spec, but not available in the Catalog in a certain size, their title will dim to a gray shade. This will prevent the takeoff of items not available from vendors.
4. When there is not enough room on the Takeoff screen to list all the types of a certain Family, a series of buttons (**a**, **b**, **c**, etc.) will appear to the right of the Family title. By clicking on one of those buttons, you can see the remainder of types in that family arranged alphabetically. Note that we have attempted to place the most commonly used items on the front of the Takeoff screen.

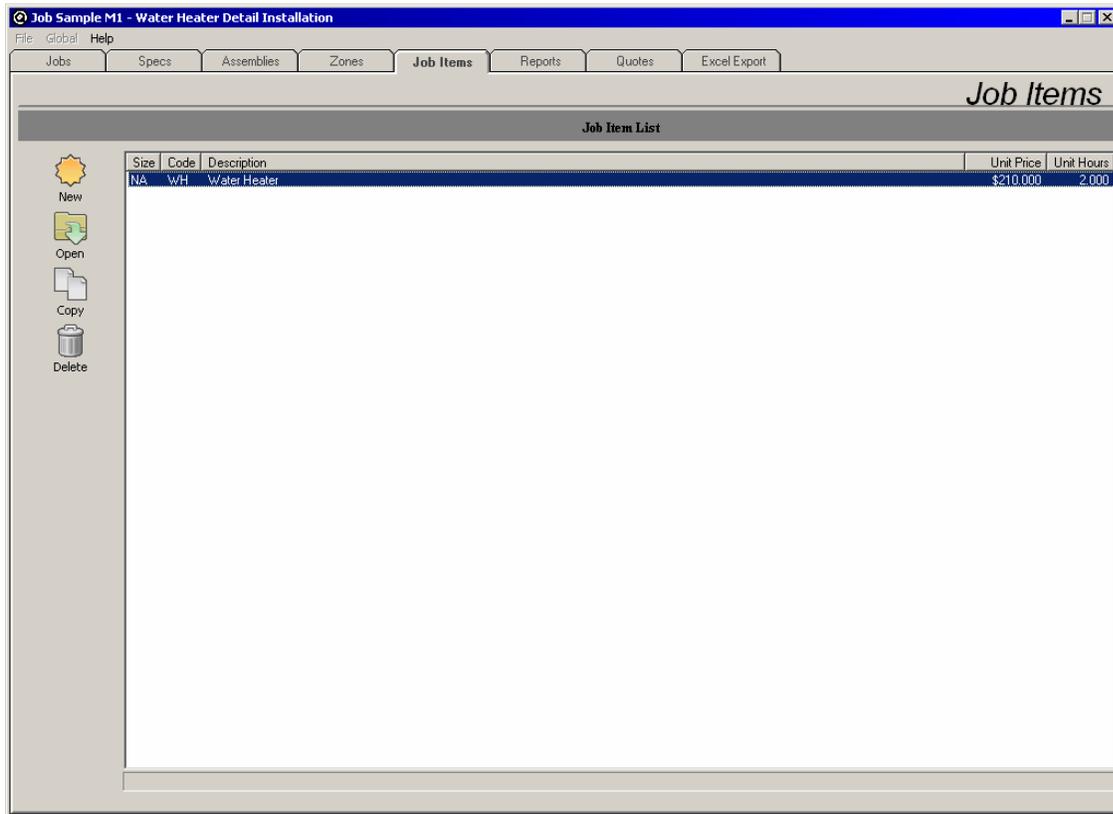


5. Valves and Specialties that are taken off will automatically include any accessories defined in the Spec.
6. Flanges that are taken off will automatically include gaskets and bolt sets as defined in the Spec.
7. Hangers that are taken off will include all components as defined in the Spec. To view the hanger, click on the **View Hanger** button in the Hanger Info box.
8. The takeoff can be printed at any time by clicking on **Print**.

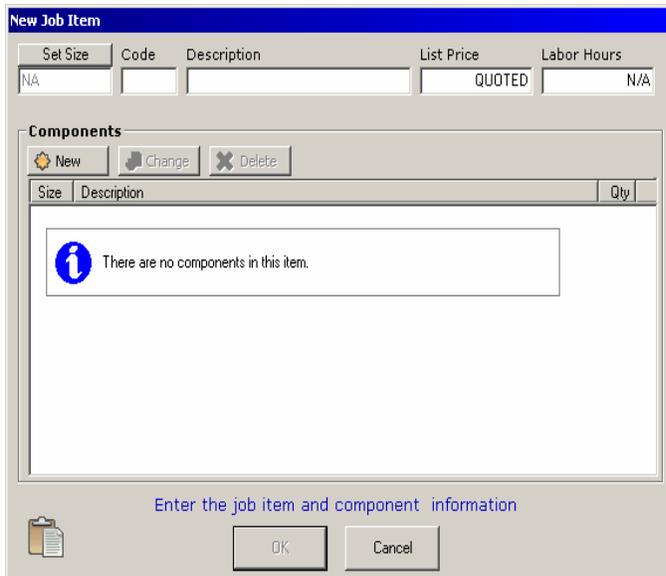
4.3. Job Items Tab

QuoteExpress gives you the ability to create items that are unique to each specific job. Normally, these items are fixtures such as water closets, floor drains, etc. To define these items, select

Job Items from the Job Screen.



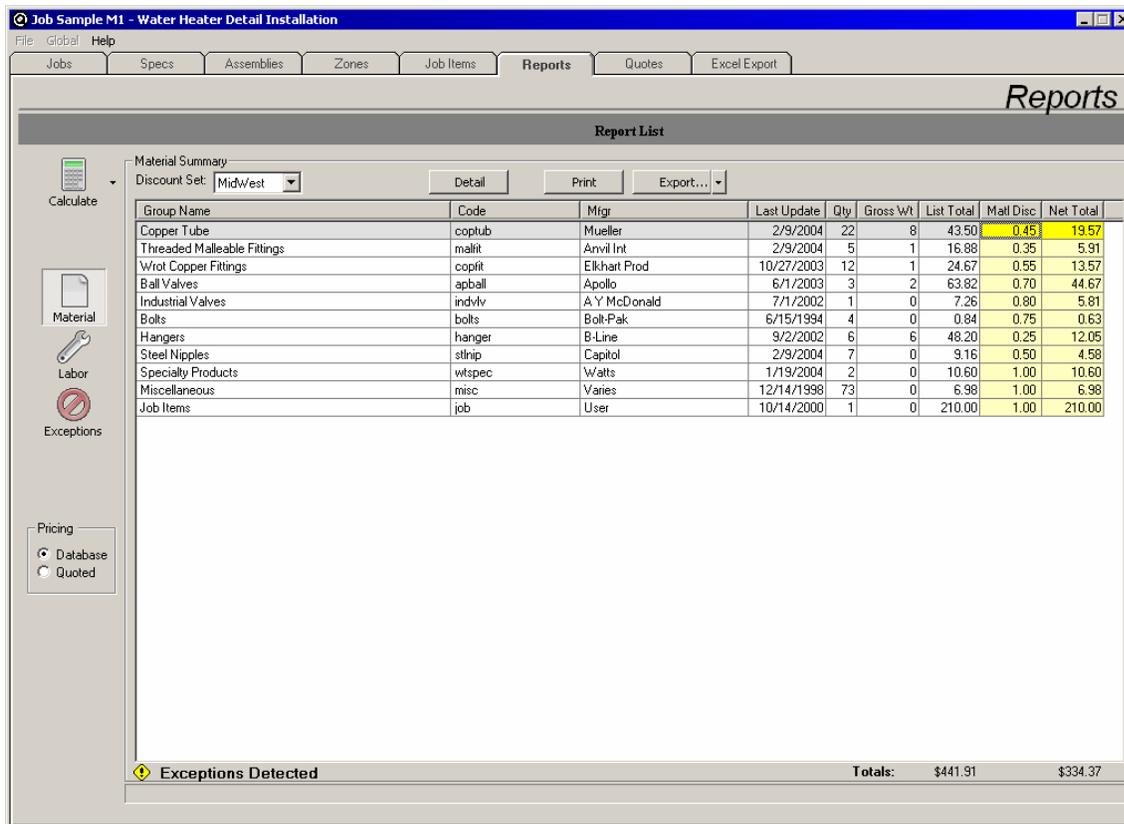
Within this screen, you can define the *Size*, *Code*, *Description*, *Unit Price*, and *Unit Hours* associated with each job item by selecting **New Item** or **Change**.



You can also copy job items from other jobs you have already created by selecting . Once you have defined these job items, they are available as part of your normal takeoff process.

4.4. Reports Tab

Select the Reports tab to calculate the material and labor costs associated with a job.



4.4.1. Job Calculation

You can generate a job calculation as follows:

1. It is best to calculate the entire project using the Catalog Pricing to review any exceptions. To do so, click on the rightmost down-arrow of the Recalc button and select All (note that this is the same as simply clicking on Recalc).



The progress of the calculation is illustrated by the blue band that moves across the Calculating Labor and Material Summaries window.



First, the calculation of labor is performed on each individual Zone; then, the materials are calculated for the job as a whole. If there are any exceptions, the quantity will be displayed on the Exception Status window.

The calculation of labor and materials estimates is one of the most complex (and important) steps performed by QuoteExpress. Although it is not essential to understand this process in detail, each step is documented here in order to aid in understanding how the estimates are computed.

The following steps are performed for each Zone included in the calculation to determine material costs and quantities of labor hours:

1. All Zone takeoff items (from the Takeoff Screen) are sorted and merged into a single list. Common items (such as Pipe, Fittings or Valves) having the same size are combined and quantities are summed up in order to reduce the overall computation time. This is done for each Zone.
2. Each item in the merged takeoff list from Step #1 is converted into a detail record by pulling information from both the Spec and Master Catalog. For instance, if the takeoff item was **1" 90 Ell**, the system will look in the Spec for that Zone for the Group and Class of fittings in the 1" size. The information you entered there (such as **Wrot/Cast Copper**) will be read to locate the exact item from the Master Catalog.
3. Each detail record created in Step #1 is processed to determine the total labor hours for each Zone for the active labor source as set up in the Configuration. The Global Labor Discounts are provided for each of four sets of labor factors, so that multiple options of labor factors will be available for the job.
4. Each detail record created in step #1 is processed to determine the total material cost for each discount set (#1..#4). Note that the material cost is normally taken from the Master Catalog, but quoted costs may also be used. When the Use Quoted Prices is selected (from the Reports menu), all catalog items are copied to the quoted price list. The system then refers to

the quoted price list for all calculations (bypassing any global or job discounts). The quoted price list may then be updated with actual supplier costs in order to compute accurate material costs. For more information, see Using Catalog or Quoted Prices.

5. A detail record list is built for each Material Discount Group (Copper Pipe, Steel Pipe ...) so that these may be viewed or printed.

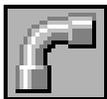
Each type of takeoff item in the Takeoff List is converted to a detail record as follows:

Pipe



Each takeoff item, which is Pipe, is resolved against the spec to determine the Group and Class of Pipe in this size. This Group and Class are used to locate the specific catalog item. The catalog information is added to the detail record list. If either *FastJoint* or *FastHanger* were specified, these are also processed. Quantities are determined by Hanger Spacing and Joint Length in the Spec. These are added to the detail record list (see *FastHanger* and *FastJoint* below).

Fitting



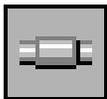
Each takeoff item, which is a Fitting, is resolved against the spec to determine the Fitting Group and Class for that size. This Group and Class are used to locate the catalog item. The catalog information for this added to the detail list. The joints for a fitting are resolved by using the Joint Group and Joint Class fields of the fitting's catalog entry. If these are set to a specific Joint Group and Class, this will be used to determine the type of joint. If these are set to SPEC, then the Joint Group and Joint Class are taken from the Spec for the fitting. See the Master Catalog and Spec Zones for more information on specifying the Joint Group and Joint Class fields.

Valve



Each takeoff item, which is a Valve, is resolved against the spec to determine the Valve Group, Class, and accessories for that size. This Group and Class are used to locate the catalog item. The catalog information for the valve (along with all joints) is added to the detail list. (Note that the Joint Group and Class are taken from the Spec definition for fittings of the same size, if they are not specifically defined in the Master Catalog). If accessories were defined, these items are also added to the detail list.

Joint



Each takeoff item, which is a Joint, is resolved against the spec to determine the Joint Group, Class, and accessories for that size. This Group and Class are used to locate the specific item in the catalog. The catalog information for the joint is added to the detail list.

Flange



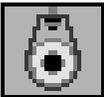
Each takeoff item, which is a Flange, is resolved against the Spec to determine the Flange Group, Class, and accessories for that size. The catalog information for the flange (along with all joints) is added to the detail list. (Note that the Joint Group and Class are taken from the Spec definition for fittings of the same size, if they are not specifically defined in the Master Catalog). If accessories were defined, these items are also added to the detail list.

Specialty



Each takeoff item, which is a Specialty, is resolved against the spec to determine the specialty Group, Class, and accessories for that size. The catalog information for the Specialty (along with all joints) is added to the detail list (Note that the joint Group and Class are taken from the Spec definition for fittings of the same size, if they are specifically defined in the Master Catalog). If accessories were defined, these items are also added to the detail list.

Hanger

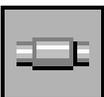


Each takeoff item, which is a Hanger, is resolved by searching the Spec for the Hanger Form (i.e., Suspended, Base Mount,...) corresponding to the size taken off. Each component, as defined in the Spec, is resolved against the Master Catalog based on the component Group.

For components in hanger groups Base Plate, Base Stand, Base Support, Dbl Rod Hanger, Guides/Anchors, Hanger, J-Hooks, Pipe Extension, Saddle Support, and Shield/Saddle, the takeoff size plus insulation thickness (if required by the Spec) is used when searching the Master Catalog. In order to assure that an adequate sized hanger component is chosen, the system will select the first catalog item that is at least as large as required for the given size. If more than one catalog item has the same size, then the item having a second size at least as large as the pipe size is chosen.

For the remaining hanger groups (such as Rod, Coupling,...) the takeoff size without the insulation thickness is used when searching the Master Catalog. Again, in order to assure that an adequate sized hanger component is chosen, the system will select the first catalog item that is at least as large as required for a given size.

FastJoint



The joints for a Zone of pipe are resolved by using the Joint Group and Joint Class fields of the pipe's catalog entry. If these are set to a valid Joint Group and Class, this will be used to resolve the specific type of joint. If these are set to SPEC, then the Joint Group and Joint Class are taken from the Spec for the pipe. The quantity of Joints is determined from the Joint Length defined in the Spec for this size and length of Pipe. If the joint for a pipe connection is a coupling, which requires joint material for installation, both the coupling and associated joints will be added to the detail list.

FastHanger

The FastHangers for a Zone of pipe are resolved in the same method as normal Hangers (see above), except that the pipe size is used as the takeoff size and the quantity of Hangers is determined from the Hanger Spacing defined in the Spec for this Hanger Size and Hanger Form.

Catalog Items

When items (not in the Spec) are taken off from the Catalog, they also are added to the detail list. NO joints associated with these items will be taken off.

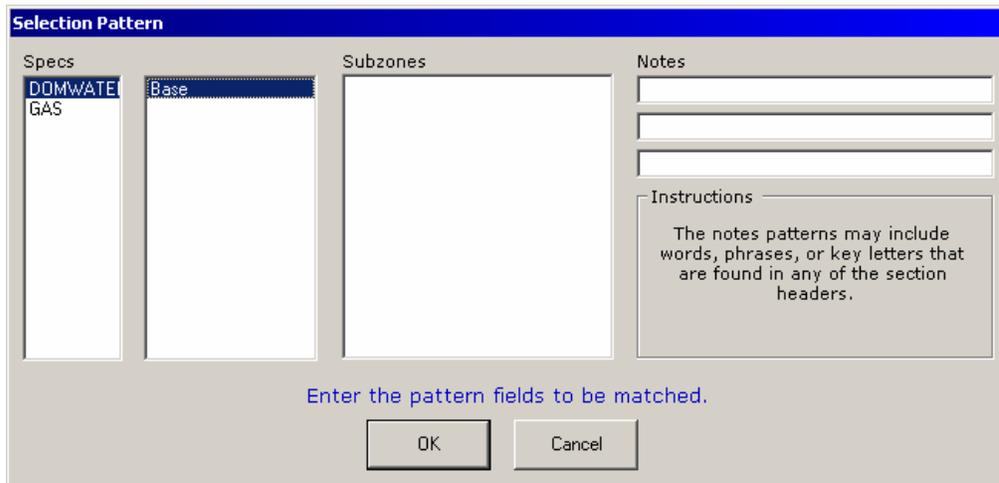
4.4.2. Re-Calculation By Pattern

Reports in QuoteExpress can be calculated for the entire job or for any portion of job as follows.

1. Click on the rightmost down-arrow of the Recalc button and select **By Pattern...**



- 2.
3. To select the pattern desired, we can select by Zones, Specs, Areas, or Remarks.



- ✓ *If selecting a Pattern by Zone, click on one or more of the Zones.*
- ✓ *If selecting a Pattern by Specs, click on one or more of the Spec Names.*
- ✓ *If selecting a Pattern by Area, click on one or more of the Areas.*
- ✓ *If selecting a Pattern by Remarks, click on one of the blank provided and key in text common to the desired pattern. A Zone will be included in the pattern if the text is contained within the Remarks of that Zone.*

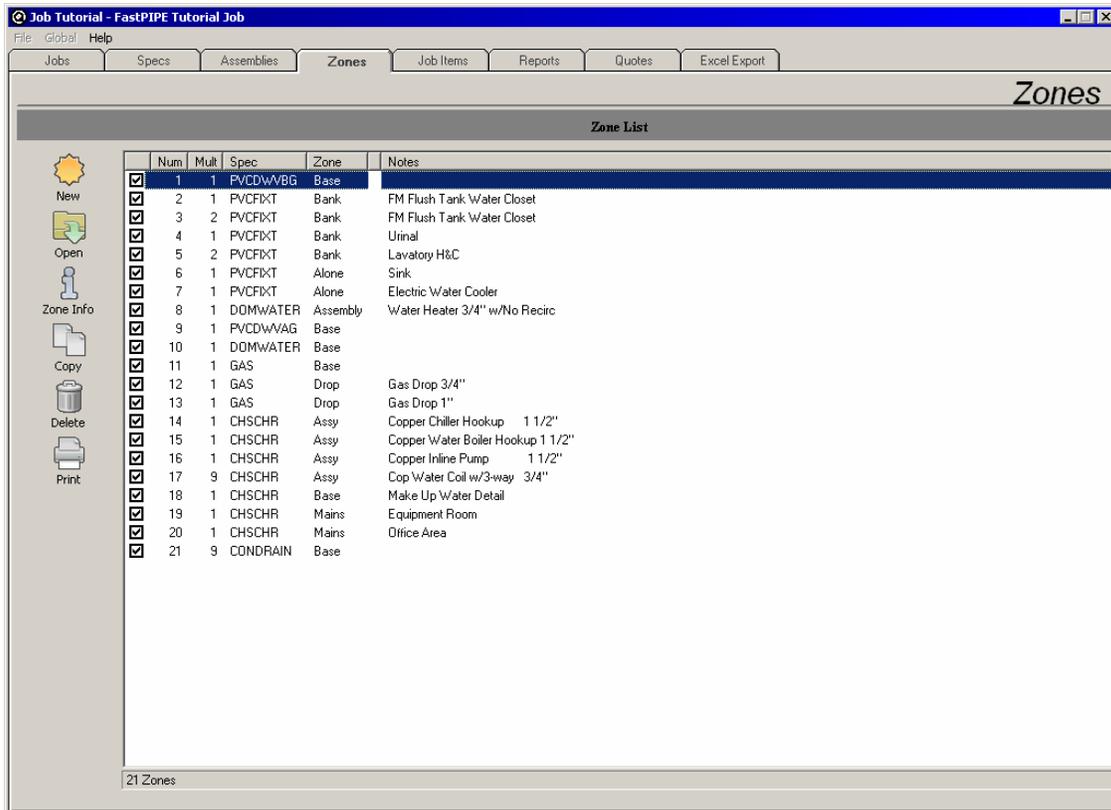
Note that if multiple selections are made within one category (e.g., Specs), all Zones with any of the selected Specs will be included in the calculation. If selections are made across two or more categories, all Zones that satisfy all selected categories will be included in the calculation.

- When the selection has been made, click **OK**. The program will now Re-Calculate only the Zones that meet the selections made.

4.4.3. Re-Calculation By Selected Zones

Reports in QuoteExpress can be calculated for selected Zones within a job. This provides a convenient method of selecting a small group of Zones for recalculation.

- Select (check mark) the desired Zones using the left-hand column of the job screen



- Click on the rightmost down-arrow of the Recalc button and select **Selected Zones...**



The program will now Re-Calculate only the Zones that have check marks in the left-hand column of the job display.

4.4.4. Re-Calculation Using Quoted Prices

Under normal circumstances, you will recalculate each job using pricing provided in the Catalog. However, if you would prefer, QuoteExpress can also force all items in the job to a Quoted Price list that will allow you to enter exact prices from your supplier (See Quotes Tab Zone below). To force all items to a Quoted Price list, select Quoted (rather than Catalog)

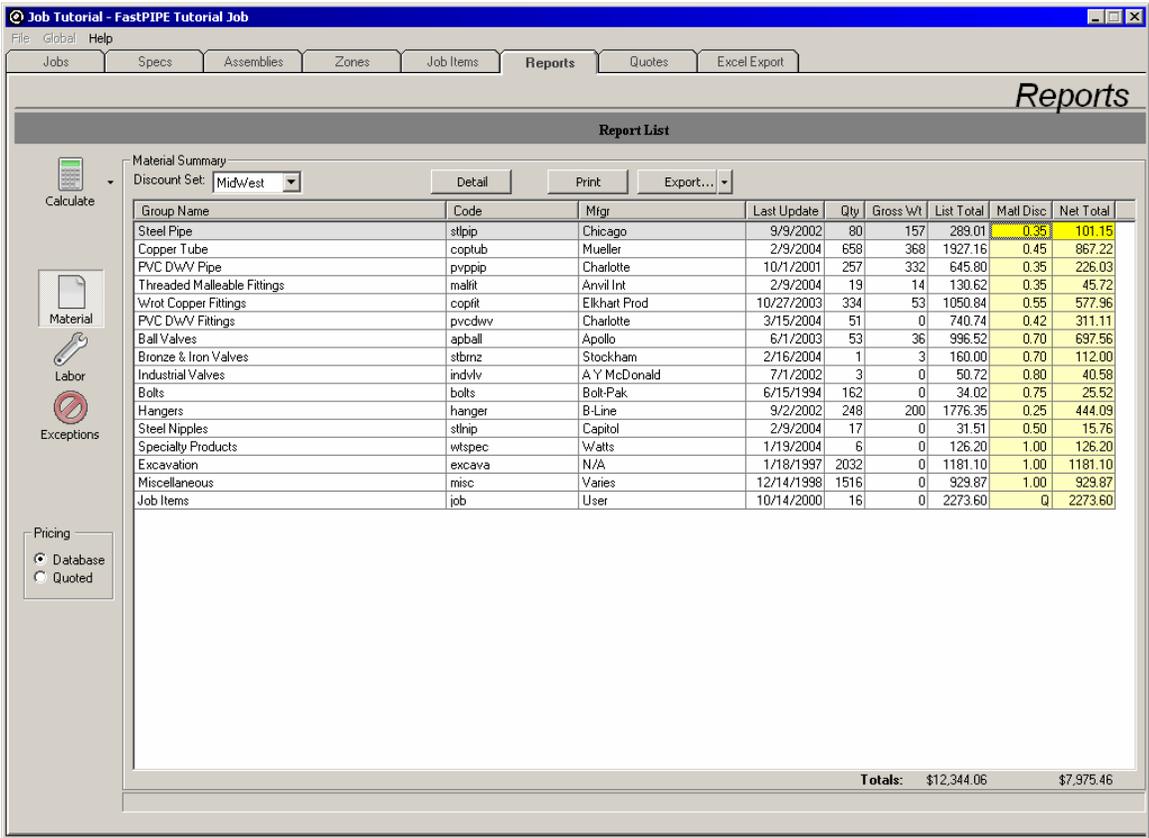
Catalog Quoted

Note that you will be asked to confirm this change. Should you wish to return to Catalog pricing, simply delete all quoted prices under the Quotes Tab, select Catalog pricing, and then recalculated.

4.4.5. Material Report

All materials contained in a selected re-calculation will be sorted into the Material Cost Sheet by Material Discount Groups. This allows for adjustment of multipliers of these groups. Material lists can be printed by groups or in an itemized list. To view exceptions, click on the

Material button of the Reports Tab



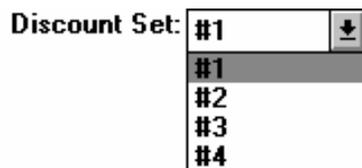
All materials for the job are arranged on the Material Cost Sheet by Material Groups, which are stored in Global Material Discounts Table. Listed on the Material Cost Sheet are the following:

- Discount Set** One of four sets of material discounts from the Global Material Discounts Table (at the top of the screen in the center)
- Group Name** Name of the Material Group
- Code** A six-digit reference code of the Material Group
- Mfgr** The manufacturer whose list pricing is used
- Last Update** Date of the list price used for the Material Group

| | |
|-------------------|---|
| Qty | Total piece count or footage of items in this Material Group |
| Gross Wt | Total weight of items in this Material Group (Weights are not available for all Catalog items.) |
| List Total | Total cost of all items in the Material Group based on using list prices. (The total of all groups is at the bottom.) |
| Matl Disc | Multiplier of the list prices in the Material Group |
| Net Total | Total net cost of all items in the Material Group based on list prices multiplied by the Material Discount. (The total of all groups is at the bottom.) |

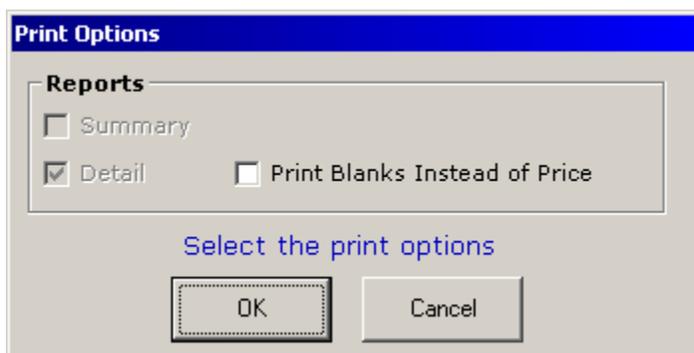
Features of the Material Cost Sheet are as follows:

1. The Discount Set can be changed to one of four stored in the Global Material Discounts Table.



2. Material Discounts (Matl Disc) for a Material Group can be adjusted by simply clicking on the appropriate Matl Disc and keying in a new factor. This is a factor, or multiplier, of the list prices in the Material Group used to obtain the Net Price. Once a Material Discount has been overridden, then the value in the box will be followed by an asterisk. This value will be retained for later calculations.

3. The Material Cost Sheet has three print options which can be viewed by clicking



- ✓ *The Material Summary Report will print the Material Cost Sheet arranged by Material Group (similar to what appears on the screen).*
- ✓ *The Material Detail Report will print each and every item from every group in the list.*
- ✓ *The Material Detail Report can be printed with prices for each item or with blanks for quotations from vendors.*

To select the reports you want, enable the appropriate check boxes and click or press **Enter**. (Make sure your printer is on and the paper is ready.)

- An itemized list of the items contained in a specific Material Group can be viewed by clicking on the Group Name and then on . The Material Detail Screen shows the name of the Material Group across the title bar and also contains the following information:

| Material Detail [Job Items] | | | | | | |
|--|------|---|--------------|--------------------------------------|--------------------------------------|------------|
| Discount Set: <input type="text" value="MidWest"/> | | Factor: <input type="text" value="1.00"/> | | <input type="button" value="Print"/> | <input type="button" value="Close"/> | |
| Qty | Size | Description | Gross Weight | List Price | Net Price | Net Total |
| 1 | 2 | FCD Floor Cleanout | 0.00 | 42.00 | 42.00 | 42.00 |
| 1 | 4 | FCD Floor Cleanout | 0.00 | 56.00 | 56.00 | 56.00 |
| 1 | 2 | FD Floor Drain | 0.00 | 44.60 | 44.60 | 44.60 |
| 1 | ¾ | FPWH Freeze Proof Wall Hydrant | 0.00 | 65.00 | 65.00 | 65.00 |
| 1 | 4 | GCD Grade Cleanout | 0.00 | 56.00 | 56.00 | 56.00 |
| 1 | NA | P-1 Floor Mt Tank Water Closet | 0.00 | 144.00 | 144.00 | 144.00 |
| 2 | NA | P-2 Floor Mt Tank ADA w/tr Clst | 0.00 | 163.00 | 163.00 | 326.00 |
| 1 | NA | P-3 Wall Mt Flush Valve Urinal | 0.00 | 168.00 | 168.00 | 168.00 |
| 1 | NA | P-3C Urinal Carrier | 0.00 | 72.00 | 72.00 | 72.00 |
| 2 | NA | P-4 Countertop Lavatory | 0.00 | 141.00 | 141.00 | 282.00 |
| 1 | NA | P-5 Countertop Sink | 0.00 | 189.00 | 189.00 | 189.00 |
| 1 | NA | P-6 Wall Electric Water Cooler | 0.00 | 489.00 | 489.00 | 489.00 |
| 1 | NA | P-6C Water Cooler Carrier | 0.00 | 122.00 | 122.00 | 122.00 |
| 1 | 30 | WH-1 Electric Water Heater (gal) | 0.00 | 218.00 | 218.00 | 218.00 |
| Total: | | | | | | \$2,273.60 |

- Discount Set** One of four sets of material discounts from the Material Discounts Table
- Factor** The multiplier of list prices for this Material Group
- Qty** The total piece count or footage of items in this Material Group
- Size** The size of the item
- Description** The name of the item as it appears in the Catalog
- Gross Wt** The unit weight of items in this Material Group (not available for all items.)
- List Price** The unit cost of the item based on using list prices
- Net Price** The price of the item obtained by multiplying the List Price by the Factor from the Discount Set for this Material Group
- Net Total** The total price of the quantity of items shown based on the Net Price. (The total of all items is at the bottom.)

The values on the Material Detail Screen can be viewed, but cannot be altered. Click **Print** to get a printed Report of the Material Detail Screen. (Make sure your printer is on and the paper is ready.) To return to the Material Costs Screen, click **Exit**.

4.4.6. Labor Report

All items contained in a selected re-calculation will be sorted into the Labor Hours Sheet by Zones. This allows for adjustment of labor factors of any Zone on a job. Labor Reports can be printed by Zones or any Zone can be printed as an itemized list. To view the labor report, click on the **Labor** button of the Reports Tab

| Spec | Zone | Notes | Mult | Base Hours | Adjust Hours | Job Factor | Job Hours |
|----------------|----------|-----------------------------------|------|------------|--------------|------------|-----------|
| PVCFIXT | Alone | Sink | 1 | 13.6 | 9.5 | 1.00 | 9.5 |
| PVCFIXT | Alone | Electric Water Cooler | 1 | 11.6 | 8.1 | 1.00 | 8.1 |
| DOMWATER | Assembly | Water Heater 3/4" w/No Recirc | 1 | 10.4 | 7.3 | 1.00 | 7.3 |
| CHSCHR | Assy | Copper Chiller Hookup 1 1/2" | 1 | 23.6 | 16.5 | 1.00 | 16.5 |
| CHSCHR | Assy | Copper Water Boiler Hookup 1 1/2" | 1 | 17.7 | 12.4 | 1.00 | 12.4 |
| CHSCHR | Assy | Copper Inline Pump 1 1/2" | 1 | 11.6 | 8.1 | 1.00 | 8.1 |
| CHSCHR | Assy | Cop Water Coil w/3-way 3/4" | 9 | 85.2 | 59.7 | 1.00 | 59.7 |
| PVCFIXT | Bank | Lavatory H&C | 2 | 19.5 | 13.6 | 1.00 | 13.6 |
| PVCFIXT | Bank | FM Flush Tank Water Closet | 1 | 9.9 | 6.9 | 1.00 | 6.9 |
| PVCFIXT | Bank | FM Flush Tank Water Closet | 2 | 22.8 | 16.0 | 1.00 | 16.0 |
| PVCFIXT | Bank | Urinal | 1 | 12.1 | 8.5 | 1.00 | 8.5 |
| CHSCHR | Base | Make Up Water Detail | 1 | 10.3 | 7.2 | 1.00 | 7.2 |
| CONDRAIN | Base | | 9 | 29.4 | 20.6 | 1.00 | 20.6 |
| DOMWATER | Base | | 1 | 37.3 | 26.1 | 1.00 | 26.1 |
| GAS | Base | | 1 | 15.1 | 10.6 | 1.00 | 10.6 |
| PVCDWVAG | Base | | 1 | 10.0 | 7.0 | 1.00 | 7.0 |
| PVCDWVBG | Base | | 1 | 30.1 | 21.1 | 1.00 | 21.1 |
| GAS | Drop | Gas Drop 3/4" | 1 | 3.6 | 2.5 | 1.00 | 2.5 |
| GAS | Drop | Gas Drop 1" | 1 | 4.2 | 2.9 | 1.00 | 2.9 |
| CHSCHR | Mains | Office Area | 1 | 24.7 | 17.3 | 1.00 | 17.3 |
| CHSCHR | Mains | Equipment Room | 1 | 24.7 | 17.3 | 1.00 | 17.3 |
| Totals: | | | | 427.5 | 299.3 | 1.00 | 299.3 |

The Labor Hours Screen contains the following information:

- Source** Source of labor rates from the Catalog. These can be changed in the Configuration file.
- Set** One of four sets of labor factors from the Global Labor Factors Table
- Set** Zone number from the Job Screen
- Spec** Name of the Spec for this Zone
- Area/Remarks** Area and any Remarks for this Zone
- Mult** Multiplier for this Zone
- Base Hours** Total hours for all items in the Zone based on the source labor rates. (Total of Base Hours is at the bottom.)

| | |
|---------------------|---|
| <i>Adjust Hours</i> | Total net hours for all items in the Zone based on the source labor rates multiplied by the factors in the set shown above. (Total of Adjusted Hours is at the bottom.) |
| <i>Job Factor</i> | Adjustment factor to reflect job conditions, such as working up high, in tunnels or crawl spaces, etc. (The Job Factor for all Zones is at the bottom.) |
| <i>Job Hours</i> | Total hours of the Zone based on Adjusted Hours multiplied by the Job Factor. (Total of Job Hours is at the bottom.) |

Features of the Labor Hours Sheet are as follows:

1. The discount set can be changed by clicking on the Set name or down arrow and selecting the appropriate set.
2. Both the Job Factor and Job Hours can be adjusted by clicking on the appropriate box and keying in either a new factor or the total hours. The Job Factor is always 1.0 unless changed on this screen. This factor can be adjusted upward or downward to reflect job conditions. The Job Hours can also be changed by overriding the quantity of hours. When either value is adjusted, the other is automatically recalculated. Total values at the bottom of the screen are also revised.
3. The Labor Hours Sheet can be printed by clicking . (Make sure your printer is on and the paper is ready.)
4. An itemized list of the items contained in each Zone can be viewed by clicking on the Zone and then on . The Labor Detail Screen shows the name and number of the Zone across the title bar and also contains the following information:

| | |
|----------------------|--|
| <i>Labor Source</i> | Source of labor rates from the Catalog. These can be changed in the Configuration file. |
| <i>Set</i> | One of four sets of labor factors from the Global Labor Factors Table |
| <i>Qty</i> | Total piece count or footage of items in this Zone |
| <i>Size</i> | Size of the item |
| <i>Description</i> | Name of the item as it appears in the Catalog |
| <i>Labor Group</i> | Six-digit reference code of the Labor Factor Group |
| <i>Unit Hours</i> | Unit hours based on using the source labor rates. |
| <i>Global Factor</i> | Multiplier of the unit hours from the Labor Factor Group. |
| <i>Adjust Hours</i> | Net hours of the quantity of items shown based on the source labor rates and the Global Labor Factors. (The total of all Adjusted Hours is at the bottom.) The values on the Labor Detail Screen do not reflect any Job Adjustments on the Labor Hours Screen. |

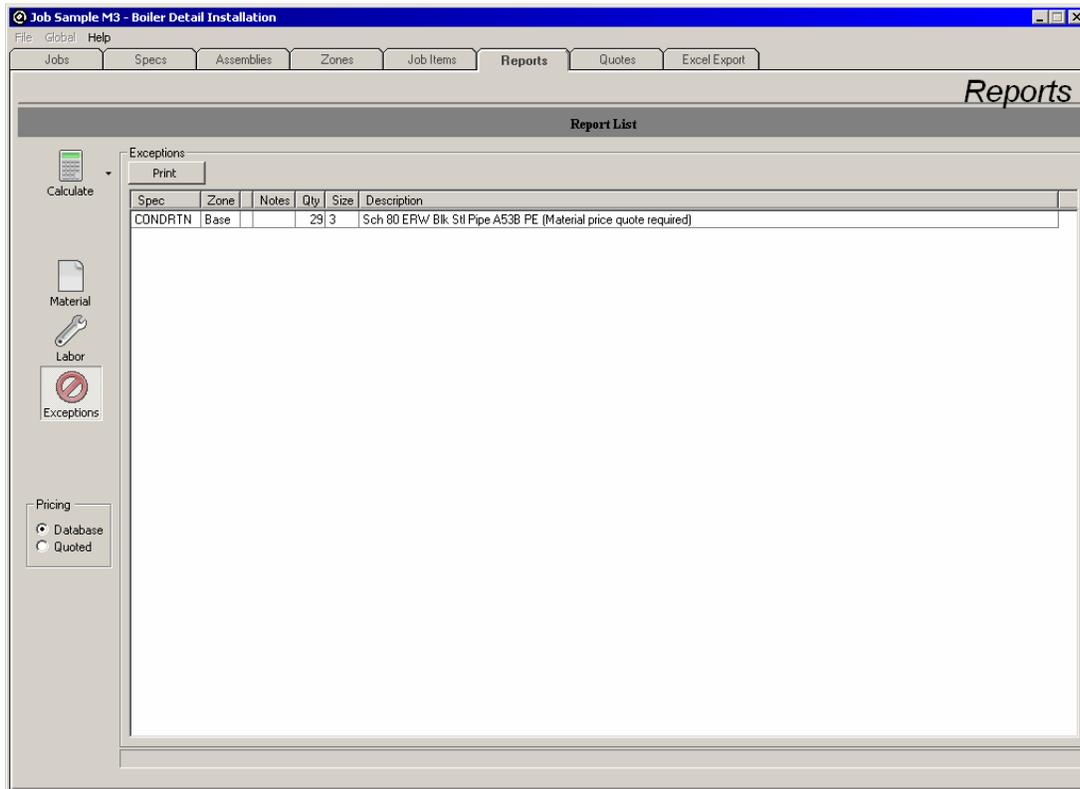
The values on the Labor Detail Screen can be viewed, but cannot be altered. Click  to get a printed Report of the Labor Detail Screen. (Make sure your printer is on and the paper is ready.)

4.4.7. Exception Report

During calculation, exceptions may occur resulting from the takeoff, Spec, or catalog items. When this occurs, the system will flag the offending takeoff item and continue on with the remaining items.



To view exceptions, click on the **Exceptions** button of the Reports Tab. You exceptions will be displayed in Summary form or By Zone based on your preference.



WARNING! No data for exceptions will be incorporated into the Material Cost Sheet and Labor Hours Sheet until they are resolved.

The following is a list of possible exceptions and steps required to correct them.

∇Material price quote required

An item was encountered that requires a quoted material price. These items are automatically added to the Quoted Price List.

Resolution: Enter the quoted material price using Price Quote Sheet option of the Reports menu.

∇No spec definition for size

A takeoff size was encountered that did not have a definition in the Spec. The takeoff screen will not allow takeoffs of invalid sizes; however, if you switch Specs for a Zone, or modify a Spec after you have performed the takeoff, it is possible that existing takeoffs may no longer be valid.

Resolution: Locate the offending takeoff item and make certain that there is a corresponding size for it in the Zone Spec.

∇Spacing not defined in spec

FastHangers were taken off (with Pipe), but no hanger spacing was defined in the Zone Spec.

Resolution: Define the hanger spacing in the Spec.

∇Accessory not found in catalog

An accessory item for a valve, flange, or specialty was not found in the Master Catalog. This will only happen if items were deleted from the Master Catalog (strongly discouraged).

Resolution: Add the deleted accessory item back into the Master Catalog or remove the accessory from the Zone Spec.

∇No corresponding fitting spec

A joint for a valve, flange, or specialty requires a fitting definition in the Spec.

Resolution: Add the fitting definition to the Spec in the size of the offending item.

∇Item not found in catalog

A resolved takeoff item was not found in the Master Catalog. This should only happen if the Spec for the Zone has been changed, or items were deleted from the Master Catalog (strongly discouraged), or unusual size combinations are encountered.

Resolution: Add the item to the Master Catalog.

∇ Joint length not defined in spec

No joint length was specified in the Spec definition for pipe, but FastJoints were requested. This will only occur if the Spec is modified or replaced after the takeoff is complete.

Resolution: Set the joint length in the Spec definition for pipe.

∇ Labor group not defined or

∇ Material group not defined

A Master Catalog item's labor or material group was not defined. This should not occur unless entries in the global labor or material table have been deleted or new items have been added without defining labor or material groups.

Resolution: Define the correct labor group or material group for the Master Catalog item.

∇ Labor rate not available

The labor for an item is defined as N/A in the Master Catalog. This should not occur if you are configured to use a valid labor source (such as Quote Software Inc., MCAA, PHCC, or USER).

Resolution: Make certain the labor source is set correctly in the configuration screen or add the appropriate labor hour estimate to the item in the Master Catalog.

∇ No acceptable item size

An item was requested for which no acceptable size was found in the database. This will only occur on unusual hanger component sizes.

Resolution: Adjust the Spec hanger definition to use the next larger size for this component or add an appropriately sized item to the Master Catalog.

∇ Type not defined in catalog

A family Type could not be resolved through the Master Catalog. This should only occur if Types have been deleted from the Master Catalog (strongly discouraged).

Resolution: Add the required Types back into the Master Catalog.

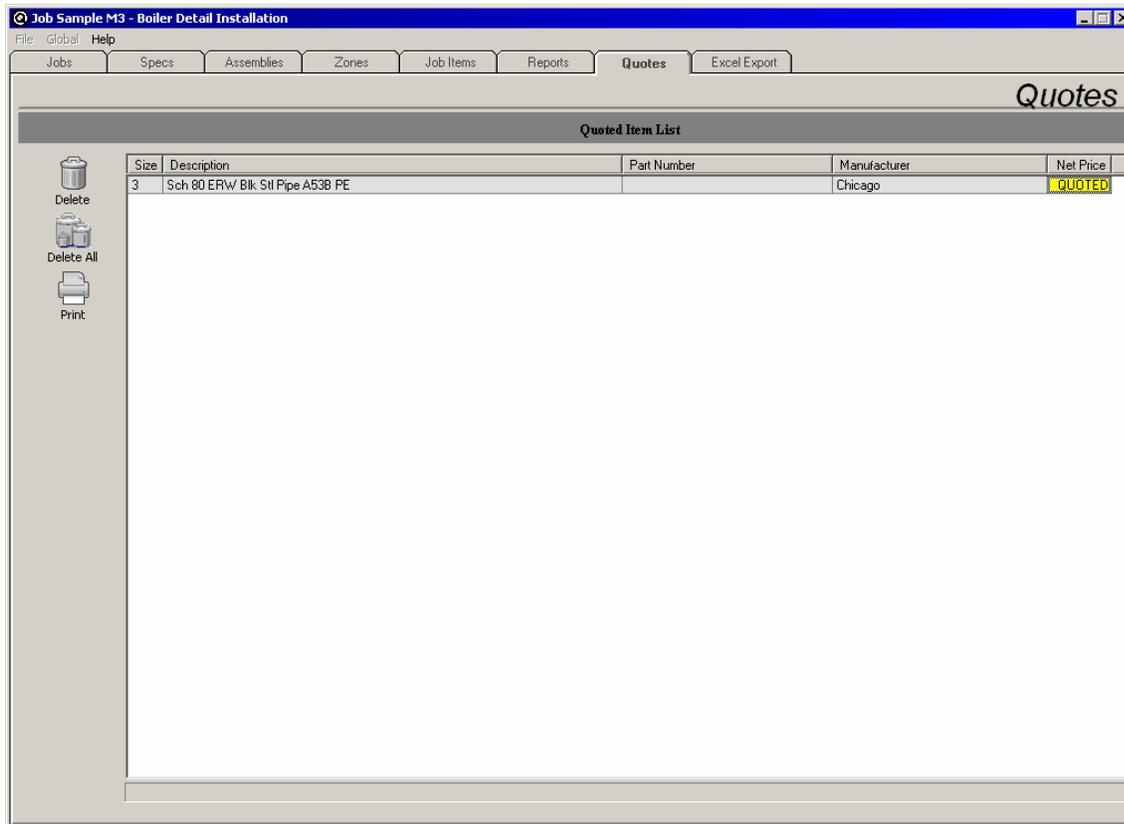
∇ Insulation spec required

A hanger definition required insulation thickness but no Spec definition was found.

Resolution: Add the definition for insulation thickness into the Zone Spec or select the Use Pipe Size option in the hanger definition.

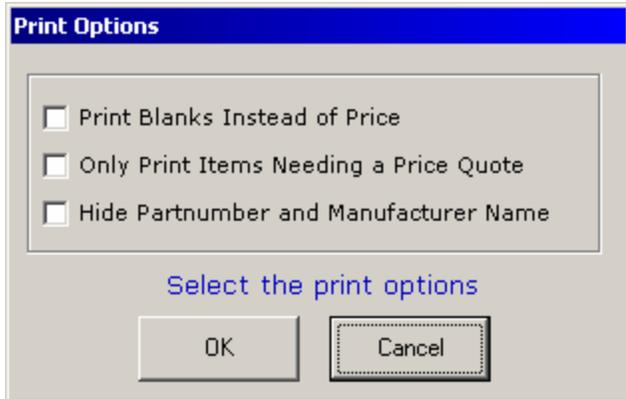
4.5. Quotes Tab

Occasionally you will request takeoff of items from the catalog that do not have a list price. During recalculation, these items will generate exceptions and will be forced into the Quoted Item list.



The Materials Price Quotes Sheet shows the Size, Description, and Part Number, and Manufacturer from the Catalog for each item. Enter prices for the appropriate items in the Net Price column of the Material Price Quotes window by keying in the price of the item where the box is highlighted. Move from item to item by clicking on the item or using the arrow keys on your keyboard. When Price Quotes are complete, click and confirm by clicking .

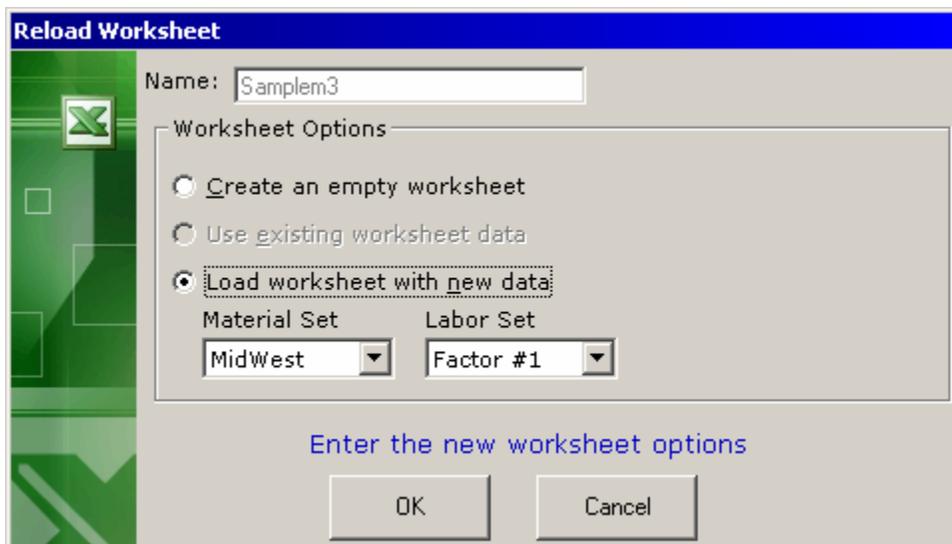
The Materials Price Quote screen has two Print Options. To view them, click .



The first option will print blanks instead of prices for all items in the list. This option could be used to send to suppliers for price quotes. The second option will only print those items where the Net Price is shown as QUOTED. (Any item can be changed to QUOTED by clicking on the price of that item and entering a **Q**.) The third option hides part number and manufacturer information (should this be preferred). The output from the print command is suitably designed for faxing to your supplier. Note that every time that changes are made to the Price Quote Sheet, the job will require Re-Calculation.

4.6. Worksheets Tab

QuoteExpress supports the downloading of job data to an Excel™ spreadsheet allowing further analysis and estimating. Once you have successfully configured the Excel™ program and suffix information in the configuration menu, you can load job specific information into your worksheet automatically from the **Job** screen (even for existing jobs). To create a new worksheet, first recalculate the job using **Reports⇒Re-Calculate**. Next, select the worksheets option **Reports⇒Worksheets...** and type the name of the worksheet to be created (for example, **base**) under the heading *Worksheet Name*.



You can also specify which labor and material set to use with the new data. After entering the new worksheet name, click on **Open**. QuoteExpress will then create a new worksheet named *BASE.XLS* in the current job directory and will automatically start Excel™. Since this was a new worksheet, the only Data Options value allowed was *Load new worksheet data*. Thus, the current job statistics (from the last recalculation) will be loaded into this worksheet. Subsequent attempts to load this worksheet will automatically set the Data Options value to *Use existing worksheet data* that will protect the original information from being changed. If (on subsequent opens) you select *Load new worksheet data*, QuoteExpress will reload the worksheet with the latest data from the last recalculation (allowing you to refresh the contents of a worksheet when you have made changes to a job).

After you select open, QuoteExpress starts Excel™ and the new data is loaded into the worksheet.

| BID RECAP SHEET | | | | | | |
|--------------------------|---------------------|--|---------------------|----------|------------|--|
| | | | | | 10/18/2004 | |
| Company: | | Quote Software | | | | |
| JobName: | | SAMPLE M3 [Boiler Detail Installation] | | | | |
| Bid: | | Base Bid | | | | |
| | | Labor | | | | |
| | Materials | Hours | Rate | Labor \$ | Total | |
| Piping Materials & Labor | \$3,660 | 143.8 | \$28.33 | \$4,075 | \$7,735 | |
| Equipment | \$0 | 0.0 | \$28.33 | \$0 | \$0 | |
| Fixtures | \$0 | 0.0 | \$28.33 | \$0 | \$0 | |
| Other Job Costs | \$0 | 0.0 | Varies | \$0 | \$0 | |
| Rental Equipment | \$0 | | | \$0 | \$0 | |
| Overtime Pay | | | | \$0 | \$0 | |
| Other | | | | \$0 | \$0 | |
| | Sub Total | | | \$4,075 | \$7,735 | |
| | Sales Tax | | | \$240 | \$456 | |
| | Sub Total | | | \$4,315 | \$8,192 | |
| | Subcontracts | | including Sales Tax | | \$0 | |
| | | | Sub Total | | \$8,192 | |

After you select open, QuoteExpress starts Excel™ and the new data is loaded into the worksheet. Note that there are numerous Excel™ sheets supplied with your system

- Recap** Provides a recap of all costs and estimates associated with a job including
- Piping Materials & Labor (from the **Summary** sheet)
 - Fixtures & Equipment (from the **Equip** and **Fixt** sheets)
 - Permits, Fees, and Miscellaneous (from the **Other** sheet)
 - Rental Equipment Charges (from the **Rental** sheet)
 - Overtime Pay, Overhead, Taxes, Etc. (from the **Subs**, **Labor**, and **Info** sheets)

These quantities are sub-totaled to produce the final estimate for bid.

Equip Material and labor costs for job equipment.

| | |
|------------------|--|
| <i>Fixt</i> | Material and labor costs for job fixtures. |
| <i>Other</i> | Miscellaneous costs associated with the job including permits, water department, meter installation, sewer tap, and utility company fees. |
| <i>Rental</i> | Rental equipment list and associated costs. |
| <i>Subs</i> | Subcontractor charges. |
| <i>Labor</i> | Labor rates and crew sizes. |
| <i>Info</i> | Sales tax and bond information. |
| <i>Summary</i> | Summary data that can be sorted by Zone, spec, area or material group. The data on this sheet contains both price and labor summaries for the respective sort topic. The bottom line of this sheet also contains summations of all appropriate columns. |
| <i>Detail</i> | Detail data that can be sorted by Zone, spec, area or material group. The data on this sheet contains individual price and labor items for the respective sort topic. The bottom line of this sheet also contains summations of all appropriate columns. |
| <i>Exception</i> | A list of exceptions associated with this run. These exceptions indicate areas where the calculation could not be completed due to incorrect specifications or missing information. You must ALWAYS review this sheet to make certain your estimate is complete. |

The Excel™ spreadsheets have been optimized to allow easy entry of data into the worksheets with a minimal possibility of error. All sheets are configured in protected mode to prevent accidental removal or modification of formulas. Additionally, those fields (cells) that can be modified are colored light yellow to simplify navigation. Users wishing to modify the master copy can do this (at their own risk) by unprotecting the sheets, making the necessary changes, and re-installing protection (note that the protected sheets do NOT have a password). It is strongly recommended that you first make a backup copy of your current spreadsheet before you make any changes. Additionally, a copy of the original QuoteExpress spreadsheet is normally installed in *C:\QPIPE_GLOBAL\WRKPROTO.XLS* for safekeeping, should the original copy become corrupted.

Once you have opened a worksheet and Excel™ is active, you should always complete your work on the current worksheet and exit Excel™ *before* continuing work with QuoteExpress.

4.6.1. Worksheet Operational Design

Effective use of the Excel™ worksheets feature requires a detailed understanding of how worksheets are managed by the system. When you first install QuoteExpress, a global default worksheet template file is created and stored in the QuoteExpress global data directory (normally this is *C:\QPIPE_GLOBAL\WRKSHEET.XLS*). This worksheet initially contains sheets developed by Quote Software Inc., Inc. that can be custom-tailored to meet the needs of most mechanical contractors. Whenever you recalculate a job (or modify information using the *Labor Hours Sheet* or *Material Cost Sheet*), QuoteExpress generates a worksheet variable file within the job directory named *WRKSHEET.VAR*. If you request a new worksheet (or new data for an

existing worksheet), QuoteExpress copies the file *WRKSHEET.VAR* to the name of the new or existing worksheet replacing the suffix with *.VAR* (For example, if your new worksheet was named *BASE*, QuoteExpress copies *WRKSHEET.VAR* to *BASE.VAR*). Next, QuoteExpress copies the global worksheet file *C:\QPIPE_GLOBAL\WRKSHEET.XLS* to the job directory and renames it *BASE.XLS*. There are now two files named *BASE*, one with an *.XLS* suffix and the other with a *.VAR* suffix. At this point, QuoteExpress starts Excel™ on the sheet *BASE.XLS*, which contains internal macros that automatically detect *BASE.VAR* at startup. If this *BASE.VAR* is detected, the job data in that file is loaded into an Excel™ sheet named *FPData*, which is used to calculate the remaining sheets. Once successfully loaded, *BASE.VAR* is deleted and you now have a new Excel™ worksheet with the latest job information ready for your analysis.

A powerful feature of the Excel™ Electronic Spreadsheet Interface is the ability to move the worksheet file from one system to another (even if the receiving system doesn't have QuoteExpress installed). Once the new data has been loaded, the worksheet will have no further dependencies on Job data and can be copied to another system for subsequent analysis.

After you have experimented with the worksheet functions and are comfortable with their use, you can customize the global worksheet by running Excel™ and opening the global worksheet file named *C:\QPIPE_GLOBAL\WRKSHEET.XLS*. Take time to review the data carefully and (once you are comfortable), experiment with building a new worksheet by replacing the default Excel™ Worksheet provided by Quote Software Inc., Inc. If a serious problem occurs and you need to restore this file, a backup copy is in *C:\QPIPE_GLOBAL\WRKPROTO.XLS*.

NOTICE: There are two unseen (hidden) Excel™ sheets that must never be deleted from *WRKSHEET.XLS*. These sheets are provided by Quote Software Inc., Inc. and are required for proper functioning of the system. To avoid accidentally deleting these sheets, always copy worksheets or formulas into *WRKSHEET.XLS*, rather than trying to copy *WRKSHEET.XLS* out to a new worksheet file for editing.

4.6.2. Excel™ Version Considerations

The QuoteExpress spreadsheet is delivered in Excel™ 5 format (for compatibility across systems). Quote Software Inc., Inc. recommends that you convert this to the latest version of Excel™ prior to running any new calculations. To perform this conversion, simply open the global spreadsheet file in *C:\QPIPE_GLOBAL\WRKSHEET.XLS* and save it again (by clicking on **F**ile + **S**ave). Excel™ 97 will normally detect that the spreadsheet is stored in a prior-version format and ask you whether or not you would like to update to the new format. Answer **Y**es to convert to your current Excel™ format and then exit the program.

Finally, please note that newer versions of Excel™ have “virus-detection” features that will detect QuoteExpress’s hidden macros inside of the spreadsheet. You may be prompted to disable these macros whenever you open a QuoteExpress spreadsheet. These macros **MUST NOT** be disabled or the spreadsheet features will not function correctly. There are two options for handling this situation:

1. Always respond to the “virus-detection” prompt and **E**NABLE these macros on startup.
2. Disable the “virus-detection” prompt by clicking on the **T**ools + **O**ptions, and selecting the *General* tab. You will see the option listed on this form. If you disable “virus-detection”, the macros will operate transparently.

5. Program Maintenance

Your QuoteExpress estimating system is designed to maximize your efficiency as a mechanical contract estimator. The following are guidelines and helpful hints to optimize your benefits from this system.

5.1. Backups

Computer technology has advanced significantly during the past 10 years, providing reliable high-speed systems than can sit on your desktop. Unfortunately, even with these advances, personal computers still can and do fail, and this can result in loss of critical data. Since you will spend much of your valuable time creating job takeoffs, we ***strongly recommend*** should protect yourself against loss of critical data by periodically backing up your system to floppy diskettes.

Recognizing the importance of backups, QuoteExpress was designed to simplify this process as much as possible. In general, there are two types of data that you should consider for backup: global data and job data.

Global data includes the Configuration, Master Catalog, Global Material/Labor Discounts, and Global Specs. All of these components are stores as files under a singled Windows directory named *C:\QPIPE_GLOBAL* and requires approximately 6.5MB of disk space (approximately 5 diskettes if no backup compression is used). This directory should be backed up after making significant changes to any of these data components. Typically, the longer you use the system, the less frequently you will change these data components and the less frequently you will have to perform this backup.

Job data includes all information that is specific to a job, including the takeoff, specs, and calculations. All of these components are stored as files under a single Windows directory named *C:\Qpipe\XXXXXXXX.JOB* where *XXXXXXXX* is the 8-letter name you assigned to the job. This directory is small (normally less than 1MB requiring just 1 diskette) and should be backed up frequently, especially while you are taking off a job. It should also be backed up once at the end of job takeoff and stored for future reference. Note that since the entire contents of this directory will normally fit on a single diskette, backup should require less than a minute.

There are many different methods for performing the backups described above. Unfortunately, these methods are often unique to each computer vendor and are not documented here. For complete details and instructions on backing up a Windows directory on your system, refer to the *Backup Zone* of your computer's documentation.

5.2. Display Resolution

QuoteExpress is best displayed by setting your computer's display resolution to either 800x600 (SVGA) or 1024x768 (XVGA). If you choose a lower resolution (e.g. 640x480 VGA), QuoteExpress will adjust the screens appropriately but will have less information available at your fingertips. If you choose a higher resolution than 1024x768 the graphics may appear grainy.

To adjust your display resolution, go to the Windows Control Panel and select Display. Choose the Settings tab (normally the right-most tab at the top) and you will see your current settings. Adjust this (using the slider bar) to achieve the best display results.

5.3. Performance

The speed of the QuoteExpress system is primarily determined by three components of your computer system: CPU Speed, Disk Speed, and RAM. When selecting a computer system, we strongly recommend you purchase a 66MHz (or faster) Intel or 486-based system with at least 8MB of RAM and 250MB of disk space. The cost of these systems continues to decrease and running slower equipment is generally not worth the savings.

If you have already purchased a system (or are using QuoteExpress on an existing system), the following items should be considered for obtaining optimum performance:

- RAM** You can purchase *RAM* upgrades for most systems for a few hundred dollars. If you have a 64MB system, consult your computer dealer about upgrading to 128MB.
- Free Disk Space** Hard disk drives become fragmented and will perform poorly as they become filled. You should always make certain you have at least 10% of your drives total capacity free, especially when installing QuoteExpress. Consider backing up and deleting old job directories if you are short on hard disk space.

Always consult your personal computer dealer and user's manual if you have any questions on these topics.

5.4. Tablet Maintenance

Digitizer tablets are high-precision instruments that should be treated with special care in the work place. Always avoid sudden impacts or constant vibration. In addition, care should be taken to keep the surface clean of dust and or other foreign matter (coffee, soda,...). Also, keep all cables secured and out of the way to avoid tripping or stepping on them.

Quote Software Inc., Inc. normally ships a 4 or 16-button cordless cursor (mouse) with each digitizer system. This mouse is made of hardened plastic, but is still vulnerable to drops, impacts, and liquids. When not in use, always store the cursor out of the way (ideally in its original shipping container) and away from coffee cups.

Glossary

- Master Catalog*** Collective database of descriptions, prices, and labor estimates for items used by estimating system. There are four distinct Windows® files that make up the master catalog and include *catitem.dat*, *catdesc.dat*, *labrdesc.dat*, and *matldisc.dat*.
- Cursor*** Pointing device for digitizing tablet (also referred to as a mouse).
- CPU*** Central Processing Unit. The CPU is a microchip at the heart of your personal computer system. It performs calculations, reads information from the disk drives, and display information on the screen. CPUs are normally classified by their manufacturer (such as Intel Corporation) and are designated by the codes *386*, *486*, *Pentium*, etc. The codes designate the internal capabilities of the CPU, with the *386* having lesser capabilities and the *Pentium* having greater capabilities. CPUs are further classified by speed using the mega-hertz (MHz) designation. A 25MHz CPU has an internal clock that ticks 25 million times/second. A CPU performs a fixed amount of work (such as an addition or subtraction) during a fixed number of clock ticks. Thus, a 66MHz *486* CPU can perform certain internal operations twice as fast as a 33MHz *486* CPU since there are twice as many clock ticks occurring each second.
- RAM*** Random Access Memory. High-speed memory that is used to store programs and data that are active. RAM is typically installed in 4MB increments with most computers having between 4 and 16MB total RAM available. For systems that run many large programs, increasing RAM size can provide a substantial boost in performance.
- Byte*** Unit of measure for memory. A byte is the amount of storage typically required to store a single letter (such as 'A', 'B',...).
- Megabyte (MB)*** Unit of measure for memory. A megabyte is 1024 x 1024 bytes (approximately 1 million).

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Quote Express Mechanical Estimating

Pricing Service

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Companies, names, and data used in examples herein are fictitious unless otherwise noted.

Using a Pricing Service

Having correct pricing information is key to delivering a winning bid. Quote Software's integration with Harrison's E-Office gives you the ability to have material pricing updated in just few minutes.

Congratulations, you've just made your installation of Express Piping even easier.

When you use a pricing service, the amount of time it takes to enter pricing is dramatically reduced.

With every purchase of Quote Software you will receive 2 months of free subscription. After that period, Harrison will send you an invoice to continue with the service. If you decide not to continue with their service, your access will be turned off.

Harrison's contact information:

Harrison Publishing House
P. O. Box 320
995 Industrial Park Rd.
Littleton, NH 03561-0320
www.hph.com
Main Phone: (800) 890-0820
FAX: (603)444-0826

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6. I. Downloading the Pricing Program

When you are ready to start using Harrison Pricing Service, the first thing you do is call Harrison Publishing House to set up a new account with them.

1. Contact Dave McFall at Harrison Publishing House:

Main Phone: (800) 890-0820

2. They will ask for your e-mail address so they can send you a password and a log in name.

IMPORTANT: Keep in mind that the e-mail address you give Harrison is the address where all future e-mails from Harrison – including future update notifications – will go. Be sure to give them the e-mail address of the person who would like to receive update e-mails.

3. While you have Harrison on the phone, they will ask you to go to your internet page and type in the following link:

www.hph-e-office.com/download/eofficesetup.exe

4. The following screen appears.



5. You will be asked to save or run the program. Click Save. A screen appears asking you where you would like to save this file. We recommend you save it to your

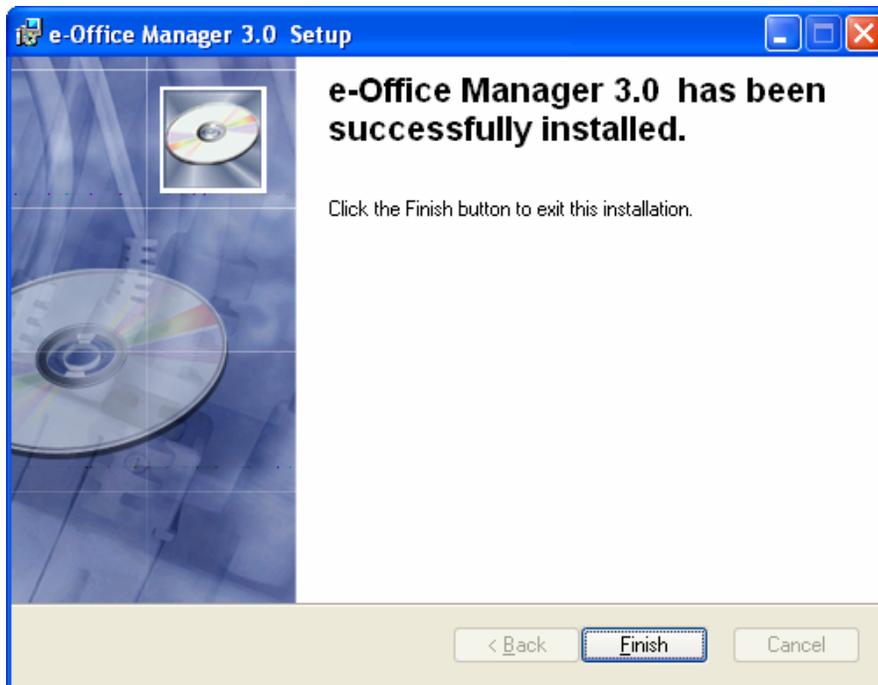
desktop so navigate to your desktop and click **Save**. This may take a few minutes depending on your internet connection speed.

Continue to the next step to run the “exe” file that was downloaded to your desktop.

1. On your desktop, double click **eofficesetup.exe**. The following screen appears.



2. Click **Next**. A License Agreement screen appears. You must agree to the license agreement to proceed.
3. Select **I accept the license agreement** and click **Next**. The User Information screen appears.
4. Type in your name and organization, and click **Next**.
5. Check to make sure the Destination Folder is accurate.
6. Click **Next**. A Ready To Install window appears. Click **Next**. The program is installed onto your computer. When the installation is complete, the following screen appears.



7. Click **Finish**.
8. On your desktop, the following icon appears.



The E-Office Manager has many uses. You may want to schedule a training session with Wendy Adams from Harrison to learn about the details. She can be reached at (303) 738-0614.

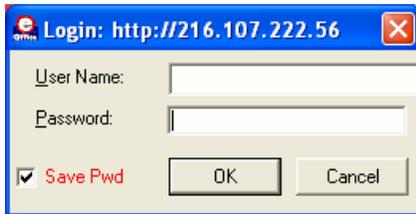
7. II. Downloading Initial Pricing Data

Now that you have the pricing service program on your desktop, you are ready to start the loading process into the Piping Program. The first step happens in e-Office Manager. This step happens only once since this is the initial load. After this, you will do updates only. See the appropriate section in this handout for information on how to do updates.

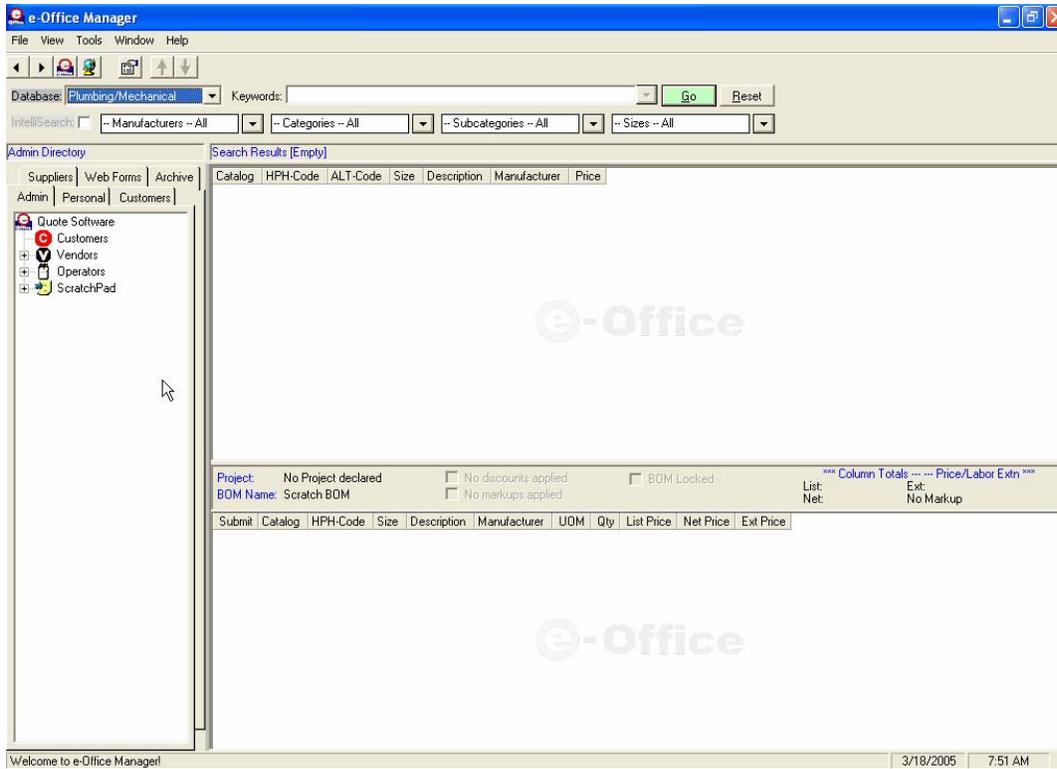
1. To begin, double click on the e-Office Manager icon on the desktop.



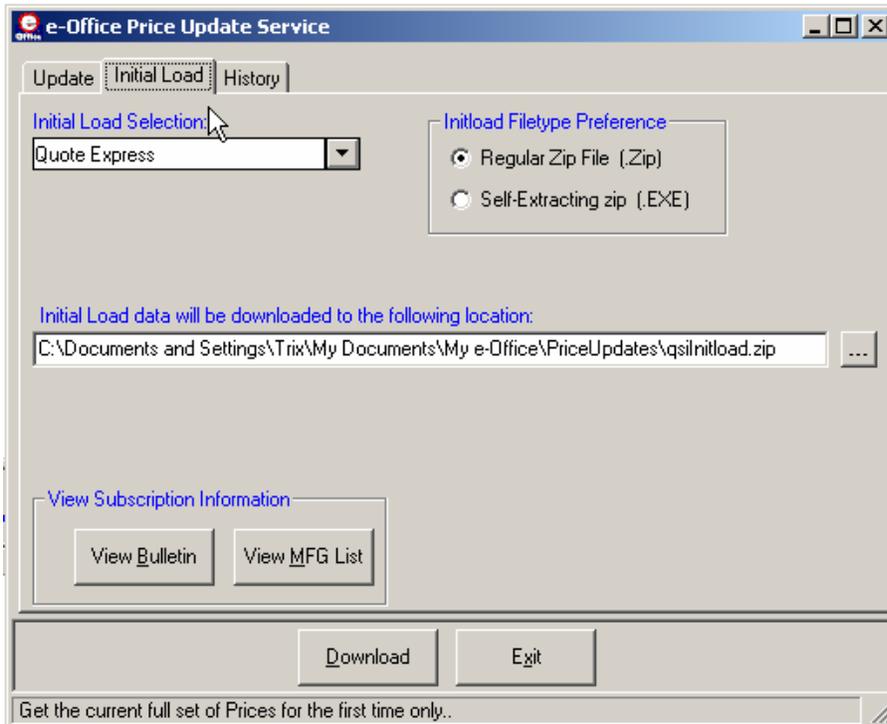
2. The password screen appears.



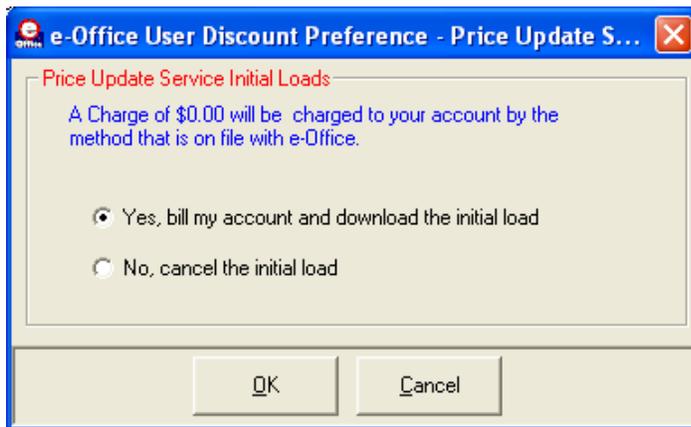
3. The User Name field is the e-mail address. Type in the password that Dave gave you. For future convenience, select the box for the system to save your password. You won't have to retype it every time you come to this screen. Click **OK**. The Office Manager main screen appears.



4. On the top of the screen, click **Tools**. A pull down menu appears.
5. Click **Price Update Service**.
6. An update service screen appears. Select the tab called **Initial Load**.



7. This is where you extract a file named **qsInitload.zip**. Double check that **Quote Express** is selected in the **Initial Load Selection** at the top left side of the screen.
8. Select the button next to **Self-Extracting zip (.EXE)** in the **Initload Filetype Preference** section.
9. In the field below **Initial Load date will be downloaded to the following location:** select the path where you would like the file stored (preferably in Document and Settings). We highly recommend you write down this path name because you will have to locate this file again in a few minutes. If you have the path name, you will be able to quickly find the file. If you choose not to change the path, you can reference the above path in the previous screen capture. You will see your name in the path name.
10. Click **Download**. The following screen appears.



11. Click **OK**.

You will see a Process Bar across the bottom of the screen. The speed of the extraction will depend on your internet connection speed.

12. When done, click **Exit**. The main screen reappears.

13. Under the **File** menu, select **Close**. E-Office Manager closes.

Before going into Express Piping to download the file, first you must run the self-extracting file.

14. Using your File Manager, navigate to and locate the file you downloaded **qsilnitload.exe**.

15. Double click on **qsilnitload.exe**. The file will be unzipped to C:\hph. Now you are ready to run the Express Piping program.

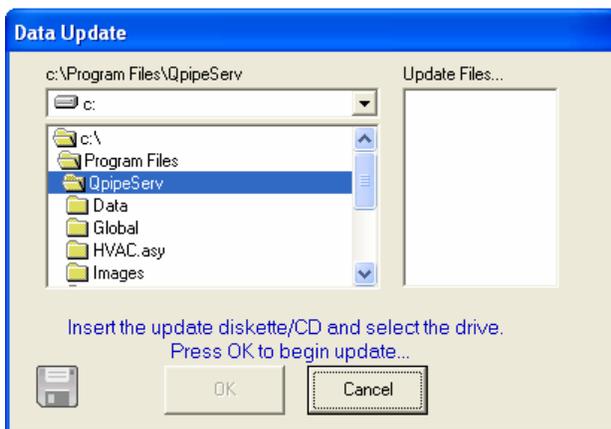
16. Double click the Express Piping icon to open.



17. The Express Piping welcome screen appears. Click **Continue**.

18. Select **File** from the top of the screen. A pull down menu appears.

19. Toward the bottom of the list, select **Data Update**.



20. Navigate and locate the file you extracted: **c:\hph\harrison.upd**

21. Click **OK**.

22. A screen appears giving you an Update Summary which shows you the active prices, quoted prices, and discounted prices.

23. The system tells you when the load is done.

Your system is now loaded with the most recent pricing. When updates are available, Harrison Publishing will e-mail you a notification of price changes. See the next section on how to do a price update.

8. III. Downloading a Pricing Update

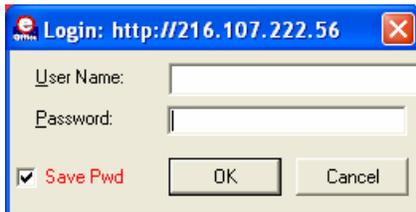
When there is a price change, you will receive an e-mail from Harrison.

It will contain any upcoming price changes or it will notify you of any significant manufacturer price changes where your current multiplier may need to be changed. Contact your supplier.

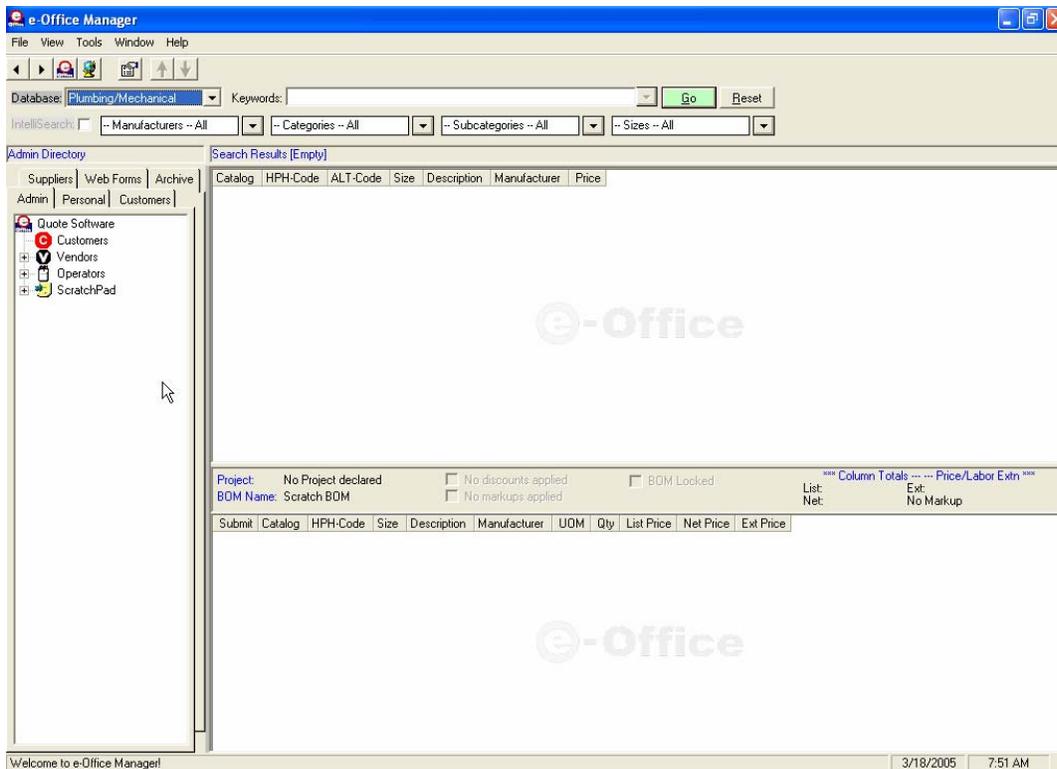
1. To begin, double click on the e-Office Manager icon on the desktop.



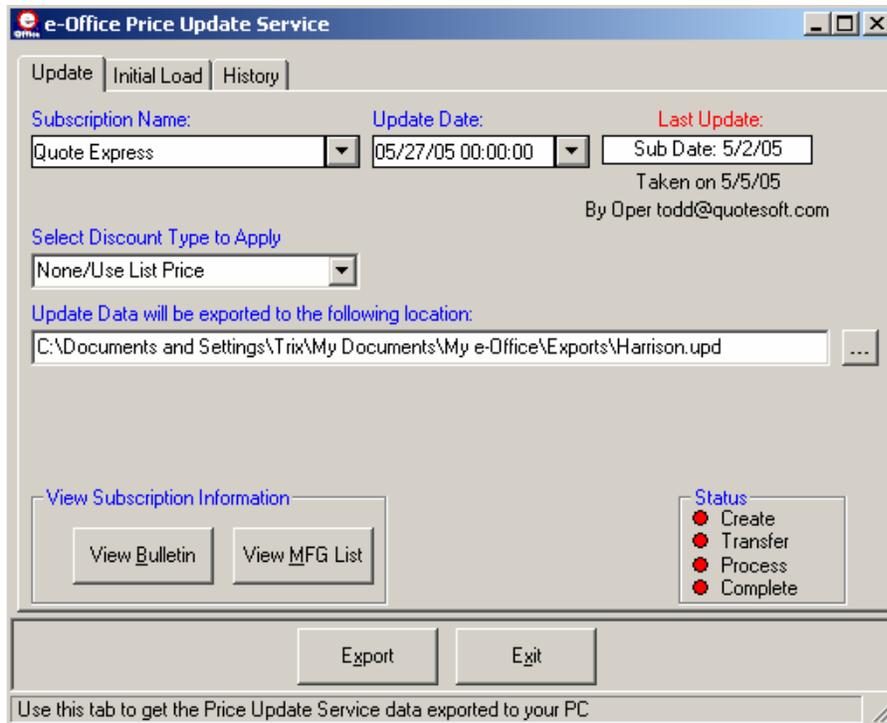
2. The password screen appears.



3. Since you selected **Save Pwd**, the required information on the screen should be filled in. Click **OK**. The e-Office Manager main screen appears.



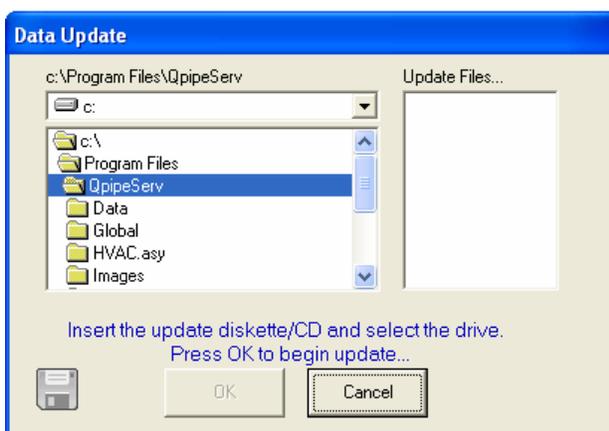
4. On the top of the screen, click **Tools**. A pull down menu appears.
5. Click **Price Update Service**.
6. An update service screen appears. You will be downloading a file called **Harrison.upd**. Check to make sure Quote Express is in the **Subscription Name** box. Click **Export**.



- When the download is done, click **Exit**. The main screen reappears. Under the **File** menu, select **Close**. E-Office Manager closes.

Now you are ready to run the Express Piping program to load the updates.

- Double click the Express Piping icon. The welcome screen appears. Click **Continue**.
- Select **File** from the top of the screen. Select **Data Update**.



- Navigate and locate the file you extracted: **c:\hph\harrison.upd**

- Click **OK**.

12. A screen appears giving you an Update Summary which shows you the active prices, quoted prices, and discounted prices.

13. The system tells you when the load is done.

Your system is now loaded with the most recent pricing.