



# Report Writer

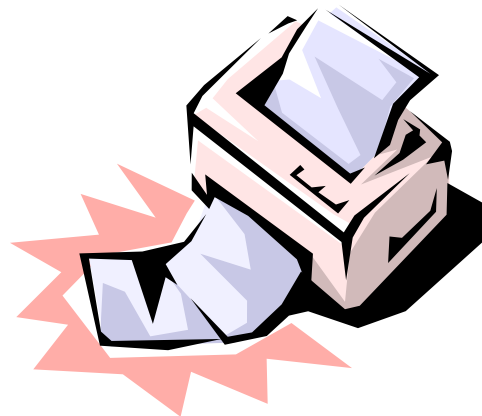
Version 5.0

## **Training Manual & Workbook**

**Learn how to design forms to be used with the Electronic Consultant and The Energy Analyzer.**

**Add pictures, logos, and charts to your reports.**

**Design Templates that may be used over and over again.**



**Custom design Proposals and Reports to enhance your Company's image.**

**1/2011**

## Important Information

**Please Note:** To maximize your training investment, the following guidelines are recommended.

All trainees are to have a computer. Be sure and bring your workbook, power supply and all external drives (CD-ROM & floppy drive).

All computers are to have the Electronic Consultant and the Energy Analyzer (optional) software installed and unlocked (validated) prior to starting time. Call Connie at (815) 452-2345 to validate.

Electronic Consultant CD-ROM should be in CD-ROM drive (*usually*; D:\, E:\, or F:\).

Please set all cell phones, beepers, or other disruptive devices to vibrate mode.

Please have computers plugged in and ready to begin at the pre-set starting time.

### **System Requirements:**

Windows® 95 or higher operating system.  
Pentium® 100 or higher processor.  
64 megabytes of RAM.  
CD-ROM or DVD drive.  
Sound card.  
High color monitor.  
30 MB hard drive space available.

### **Recommended hardware for best performance:**

Pentium® 300 or higher processor.  
128 megabytes of memory or more.  
1 GB or more of storage (hard drive).  
Digital camera.  
Portable printer.  
External mouse



## Manual Contents

This manual is setup in two sections. The first addresses each screen and their function.

- Dropdown Menus
- Popup Screens
- Steps to design different templates
- Adding Headers and Footers
- Adding color
- Embedding or linking pictures
- Inserting tables
- Page setup
- Printing

The second section is a practical exercise on how to set up custom proposals, surveys, and summary templates.

- Selecting paper size and setting margins
- Inserting tables
- Adding your Logo
- How to split cells
- Inserting data fields
- Inserting a Proposal table
- Adding an Options table

**The secret to navigating through this software is familiarization and then practice.**

*Look for Hints Throughout this workbook, you will find boxes like this with additional information or hints that are informative and helpful.*

### **Notice**

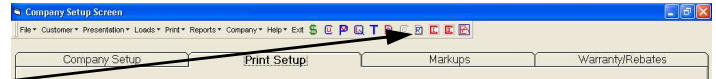
The information contained herein is **Confidential and Proprietary** and is for the sole use of the Adtek Software Company and its customers. Any other use is strictly forbidden without the written permission of the Adtek Software Company  
P.O. Box 114, Toluca Illinois 61369

## Section I. Learning the fundamentals



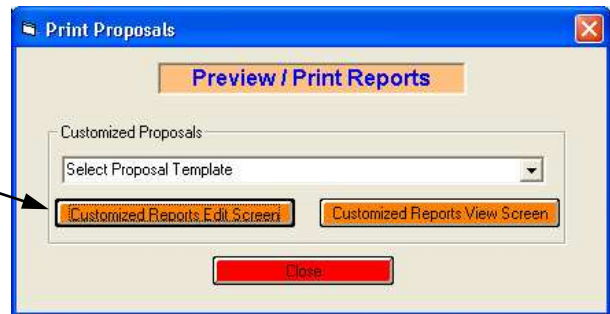
### To open the Report Writer

From the Electronic Consultant, then click on the “R” button located on the menu bar.



OR

From the Energy Analyzer, then click on the Preview Report button located on the Savings Calculator screen. The Preview/Print Reports Screen will popup. Select the “Customized Report Edit Screen” button.



### Report Generator Screen

“File” drop-down menu.

#### New

Use this selection to clear the current text from the screen. The User is prompted to save the modification if the current document has been modified.

#### Open

Use this selection to clear the current text from the screen and open a new document. The User is prompted to save the modification if the current document has been modified.

#### Save

Use this selection to save the text and format data to the current file name. If a file is not yet specified, the editor will prompt you for a file name.

#### Save As

This selection allows you to specify a new file name for saving the text.

#### Proposal Tab

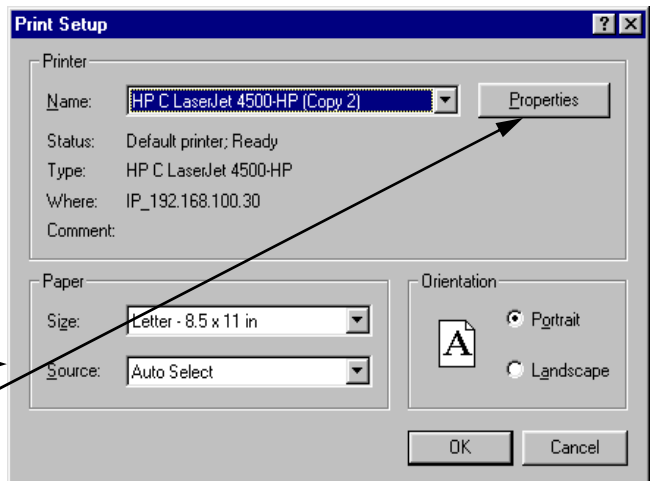
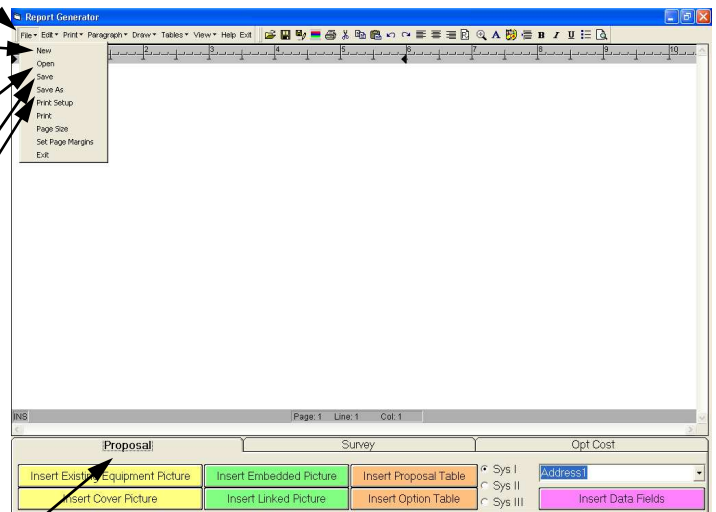
To design a custom proposal you must select the “Proposal” tab to begin.

#### Print Setup

This is a standard Print Setup dialog box. To set up print parameters, select print range, number of copies, collate if desired, and click OK.

Click on “Properties” to setup print parameters for your individual printer.

### Proposal Tab w/ “File” drop-down menu



# Section I. Learning the fundamentals

## Report Generator Screen (continued)

**“File”** drop-down menu.

### **Print**

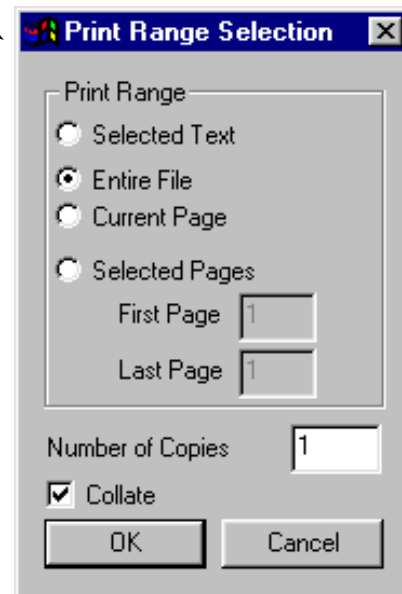
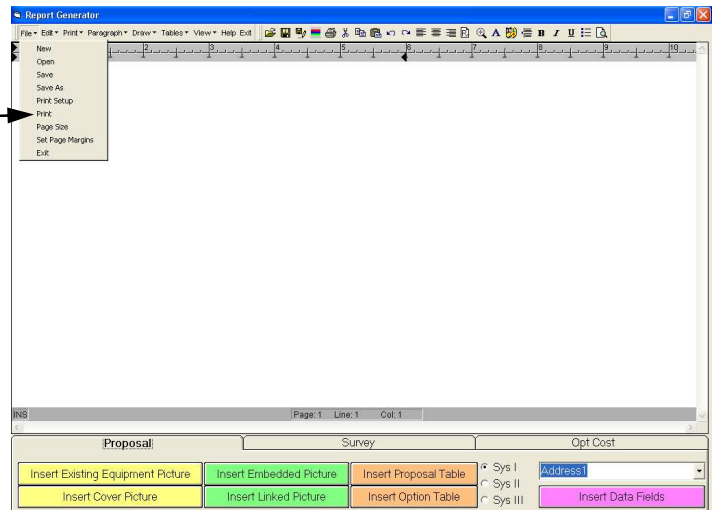
Use this option to print all or part of the current file. To print a block of text, the desired text must be highlighted before invoking the print function.

When you click on “Print” the “Print Range Selection” Box pops up.

### You may Print:

1. **Selected Text:**  
Click on the Selected Text check box. The desired text must be highlighted before invoking the print function.
2. **Entire File:**  
All pages in the file. Select this for a legal size proposal.
3. **Current Page:**  
Only the current page viewed on the screen.
4. **Selected Pages**
  - a. Insert starting page.
  - b. Insert ending page.
5. **Number of Pages:**  
Type in how many copies you would like.
6. **Collate:**  
To collate check the collate check box.
7. Click OK to print.

## Proposal Tab w/ “File” drop-down menu



### Notes:

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# Section I. Learning the fundamentals

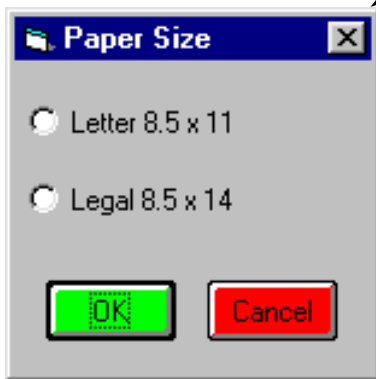
## Report Generator Screen (continued)

**“File”** drop-down menu.

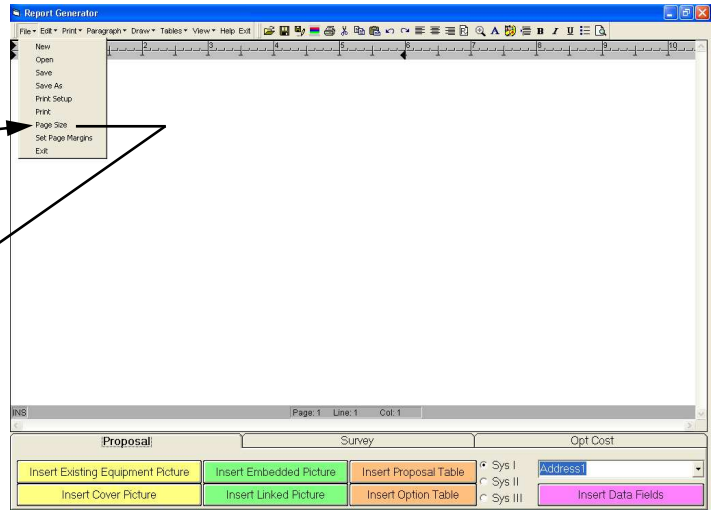
### **Page Size**

Click to choose paper size.

This option allows you to choose between letter size and legal size.



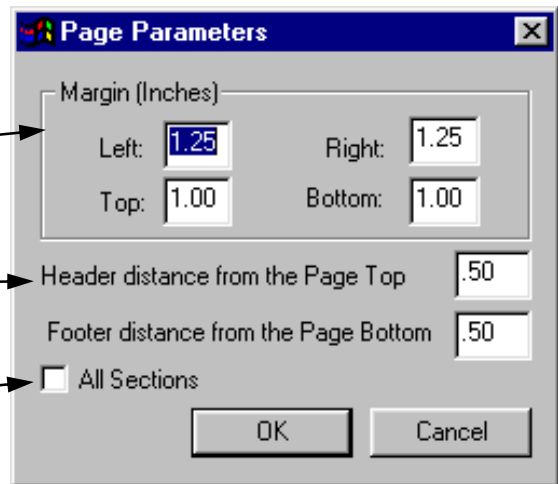
## Proposal Tab w/ “File” drop-down menu



### **Set Page Margins**

Use this option to set all margins

1. Set Left, Right, Top, and Bottom margins.
2. Set Header and Footer distance from the top and bottom edge.
3. If you want these settings to apply globally to all pages and sections click “All Sections”



### **Notes:**

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### **Exit**

Click “Exit” to close the file.



# Section I. Learning the fundamentals

## Report Generator Screen “Edit” drop-down menu.

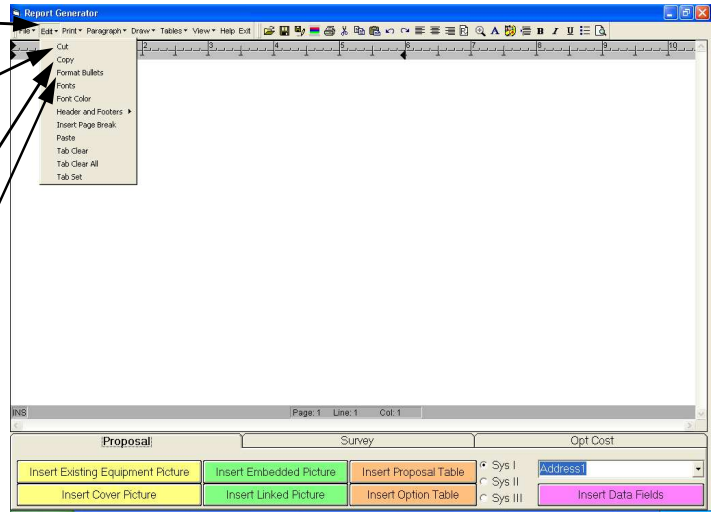
## Proposal Tab w/ “Edit” drop-down menu

### **Cut**

Use this command to cut a highlighted block of text to the clipboard. The formatting information is also copied to the clipboard using a special clipboard format.

### **Copy**

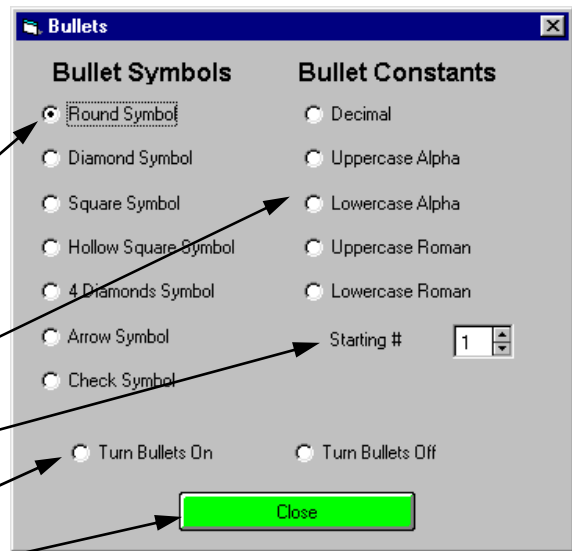
Use this command to copy a highlighted block of text to the clipboard. The formatting information is also copied to the clipboard using a special clipboard format.



### **Format Bullets**

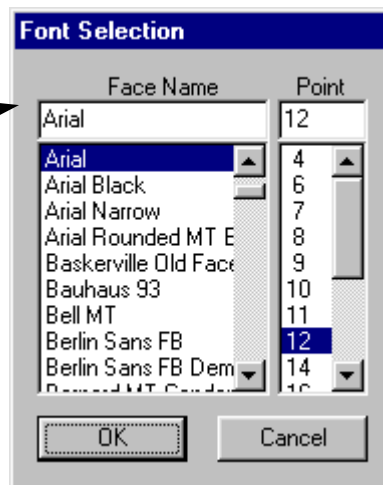
Click on the Format Bullets on the menu bar. This option allows you to specify the bullet property for a paragraph. The paragraph with the bullet property is displayed with a bullet on the left margin. The paragraph text is indented toward the right.

1. Select the desired Bullet symbol.
2. Select the desired Bullet constant.
3. Select the starting number.
4. Click Turn Bullet On or Turn Bullet Off.
5. Click “Close” when done.



### **Fonts**

Select the type face and point size from the Font selection menu.



# Section I. Learning the fundamentals

## Report Generator Screen (continued)

**“Edit”** drop-down menu.

### Header and Footer

1. **Creating a first page footer:**

Use this option to create the first page footer. The first page footer displays only on the first page of the selection. The remaining pages display the regular footer. This option is available only in the page modes.

2. **Creating a first page header:**

Use this option to create the first page header. The first page header displays only on the first page of the selection. The remaining pages display the regular header. This option is available only in the page modes.

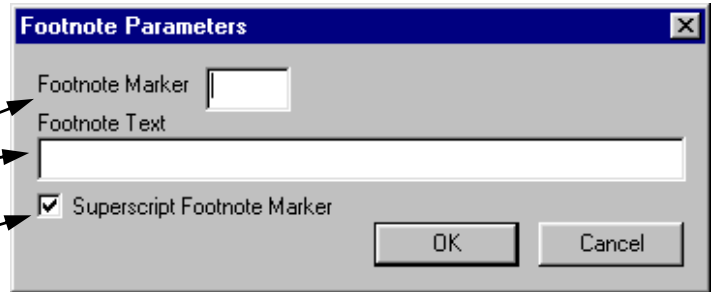
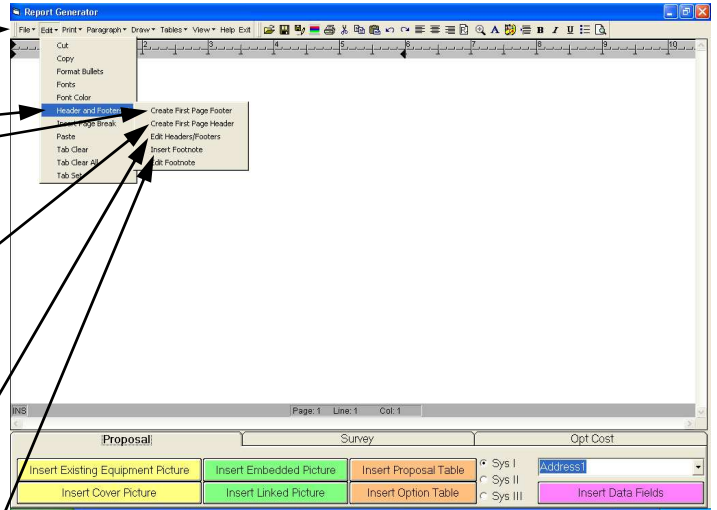
3. **Edit header and footer:**

Use this option to enable or disable the editing of page headers and footers.

4. **Insert footnote:**

This function displays a dialog box for the user to enter the footnote parameters. The user can enter the footnote marker (reference) and the footnote text.

The user can also select “superscript” style for the footnote marker.



**Notes:**

(continued on next page)

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# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Edit” drop-down menu.

### **Header and Footer** (continued)

5. **Edit foot note:**  
This option displays the in-line footnote text alongside the footnote marker to allow you to edit the footnote text.

### **Insert Page Break**

Use this function to create a hard page break before the current line. A hard page is indicated by a solid horizontal line. To delete a hard page break, position the cursor on the page break line, and hit the delete key.

### **Paste**

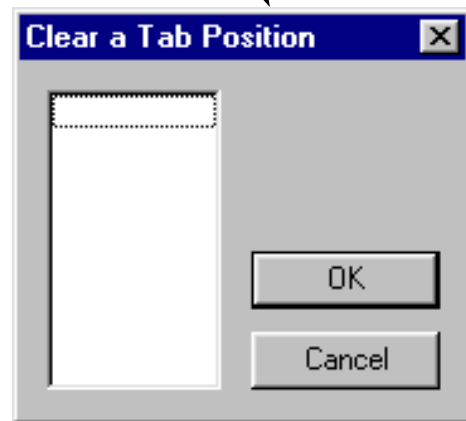
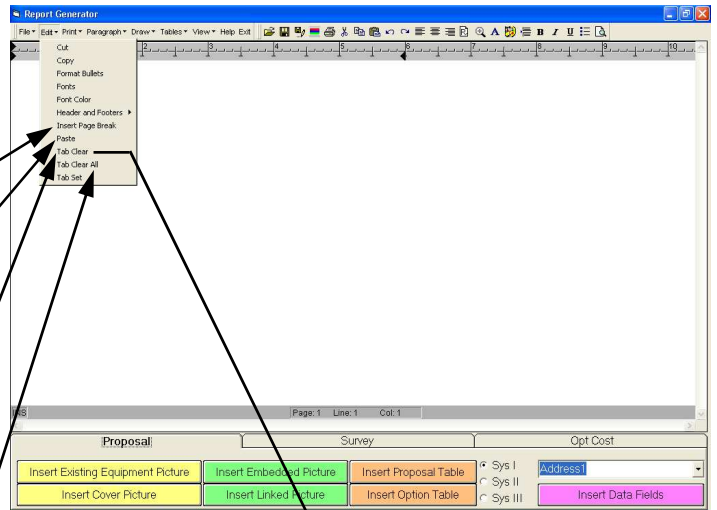
Use this command to paste the text from the clipboard at the current caret location. If the formatting information is available, this command restores the formatting information properly.

### **Tab Clear**

When you set a tab it will be listed in the Clear a Tab Position box. Highlight the number and click OK.

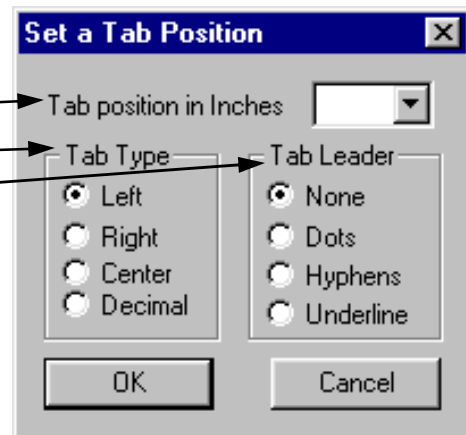
### **Tab Clear All**

Click here to remove all tabs.



### **Tab Set**

1. Select the tab position in inches.
2. Check the tab type.
3. Select the tab leader.
4. Click OK





# Section I. Learning the fundamentals

## Report Generator Screen (continued)

“**Print**” drop-down menu.

### **Print**

To print, select print range, number of copies, collate if desired, and click on OK when ready to print.

### **Print Setup**

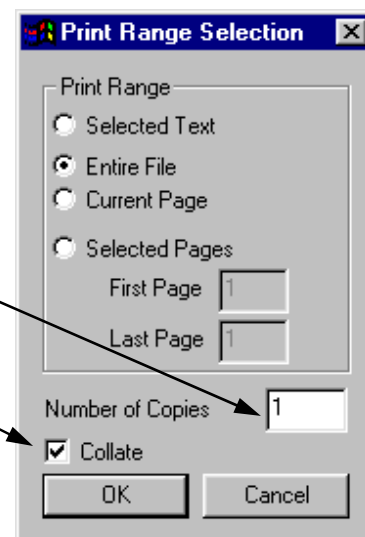
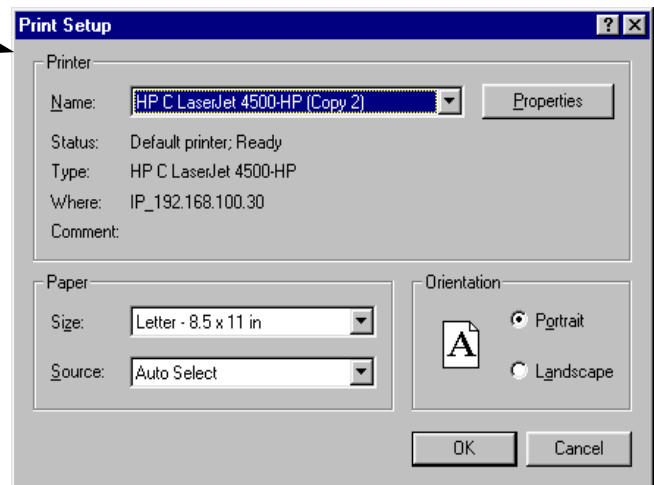
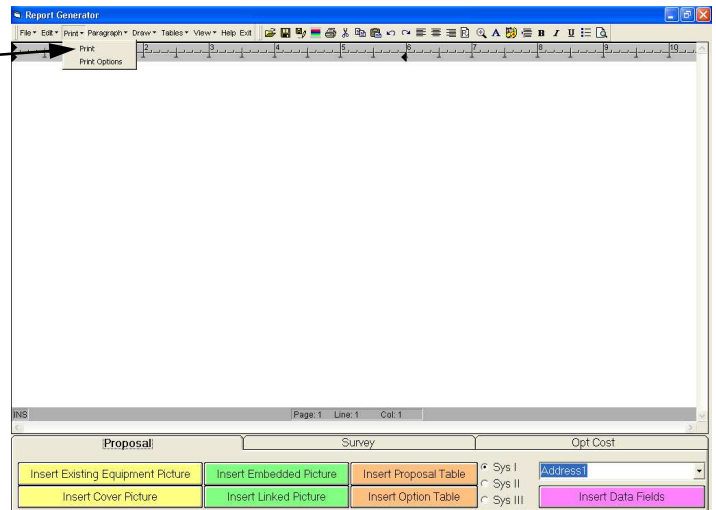
This is a standard Print Setup dialog box. To set up print parameters, select print range, number of copies, collate if desired, and click OK. Click on Properties to setup print parameters for your individual printer.

### **Print Options**

You may Print:

- **Selected Text:**  
Click on the Selected Text check box. The desired text must be highlighted before invoking the print function.
- **Entire File:**  
All pages in the file.
- **Current Page:**  
Only the current page viewed on the screen.
- **Selected Pages**
  - Insert starting page.
  - Insert ending page.
- **Number of Pages:**  
Type in how many copies you would like.
- **Collate:**  
To collate check the collate check box.
- Click OK to print.

## Proposal Tab w/ “Print” drop-down menu



# Section I. Learning the fundamentals

**Report Generator Screen (continued)**  
**“Paragraph” drop-down menu.**

**Proposal Tab w/ “Paragraph” drop-down menu**

**Insert Paragraph Frame**

This option allows you to insert a text box.

**Edit Paragraph Frame**

This option allows you to create the borders around the paragraph. You can draw all four sides of the border, or you can draw only the selected sides.

Additional two options allow you to select thick and double lined borders.

Shading back color is specified as a percentage value.

Click OK to accept settings.

**Paragraph Backcolor**

This option allows you to specify shading background color for selected paragraph.

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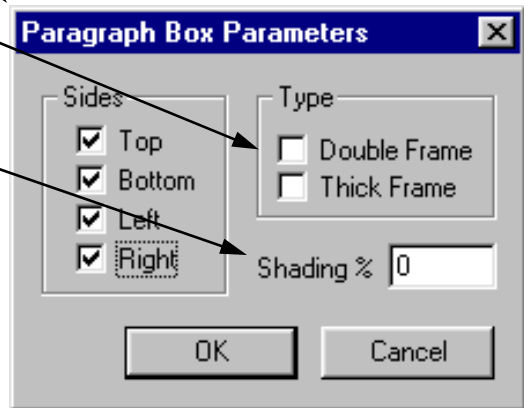
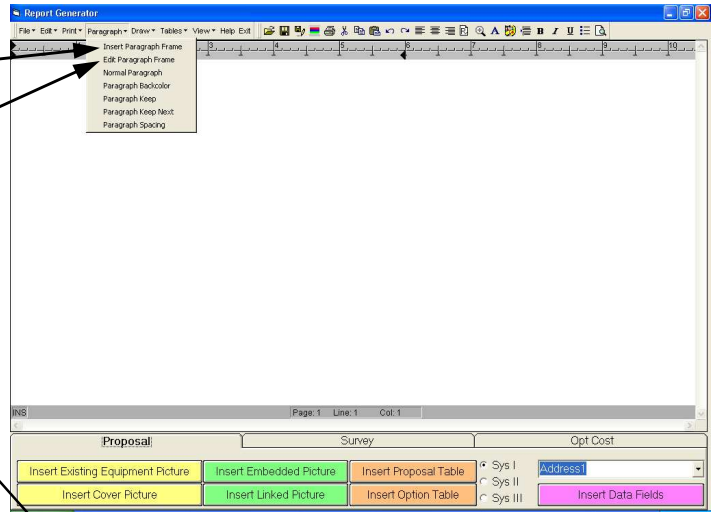
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# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Paragraph” drop-down menu.

### **Paragraph Keep**

When this attribute is turned on for a paragraph, the editor attempts to keep all lines in the paragraph on the same page.

### **Paragraph Keep Next**

When this attribute is turned on for a paragraph, the editor attempts to keep the last line of the current paragraph on the same page.

### **Paragraph Spacing**

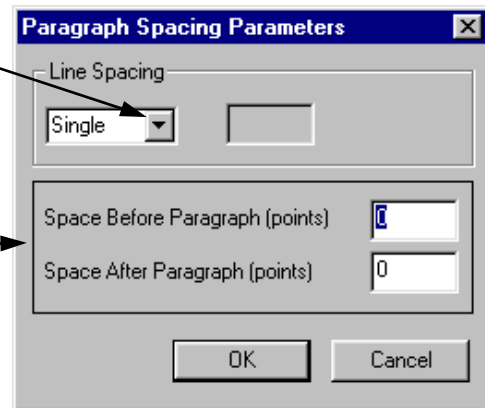
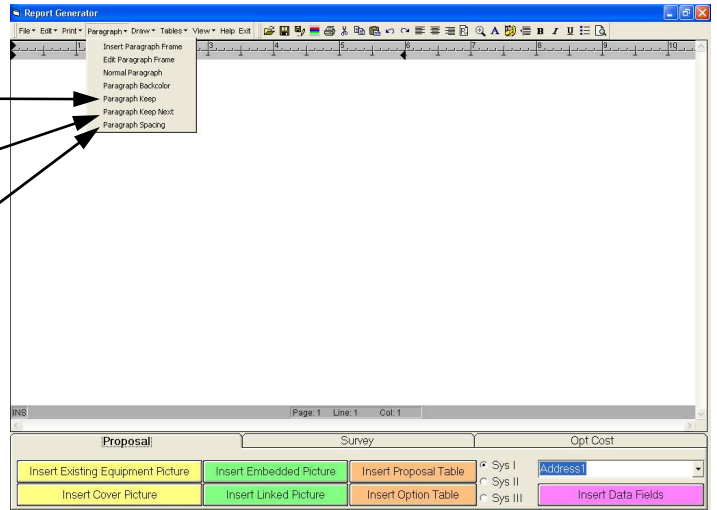
1. Click the down arrow and select:

- Single
- 1.5 Line
- Double Line
- At Least \_\_\_\_\_ points
- Exactly \_\_\_\_\_ points
- Multiple \_\_\_\_\_ Lines

2. If you wish to have a space before or after the paragraph type in the amount.

3. Click “OK” when finished.

## Proposal Tab w/ “Paragraph” drop-down menu



### **Notes:**

# Section I. Learning the fundamentals

## Report Generator Screen (continued)

**“Draw”** drop-down menu.

### **Insert Draw Object**

This function is used to embed a drawing object into text.

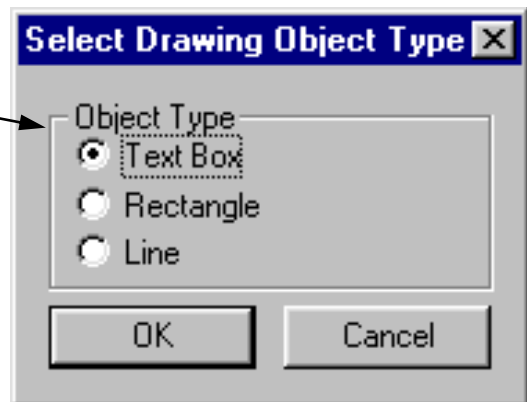
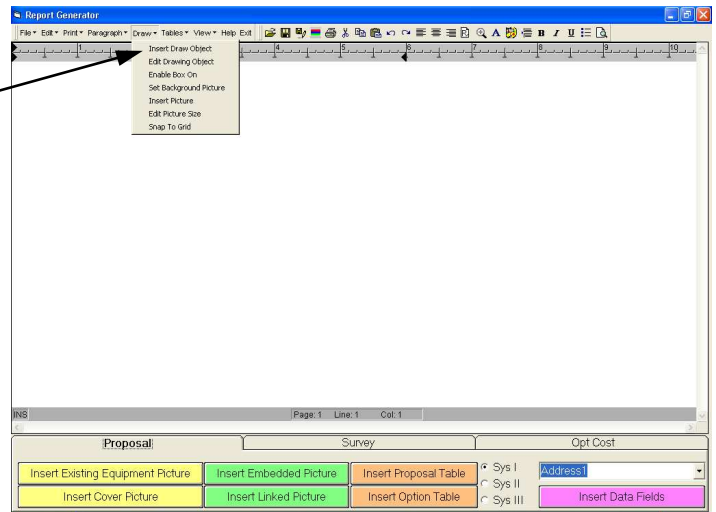
The new object is inserted at the current text position and overlays on top of the text.

The object can be moved or sized using the mouse.

This option is available in the **Page Mode** only.

1. Select the Object Type you wish to embed.
2. Click OK.

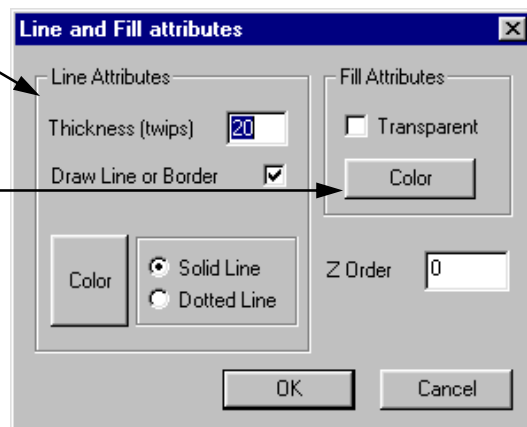
## Proposal Tab w/ “Draw” drop-down menu



### **Edit Drawing Object**

1. Determine Line Attributes  
You may add a border, determine line weight, line color, and if the line is solid or dotted.

2. Determine Fill Attributes  
You may leave the background transparent or select a color.



# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Draw” drop-down menu.

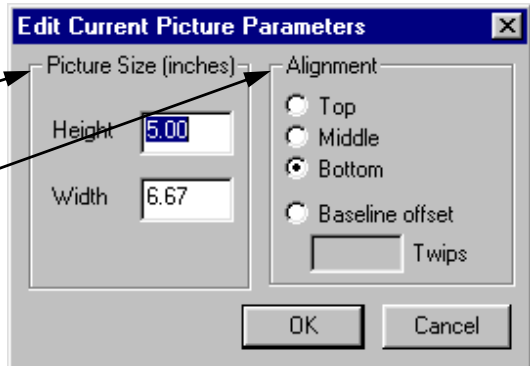
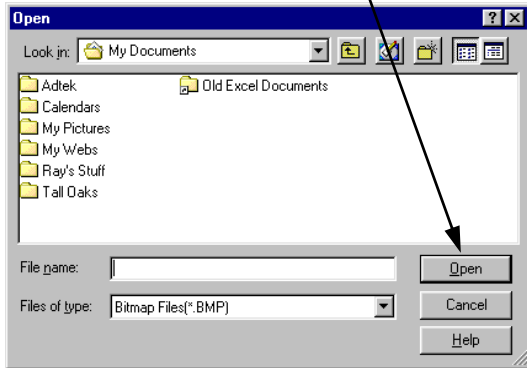
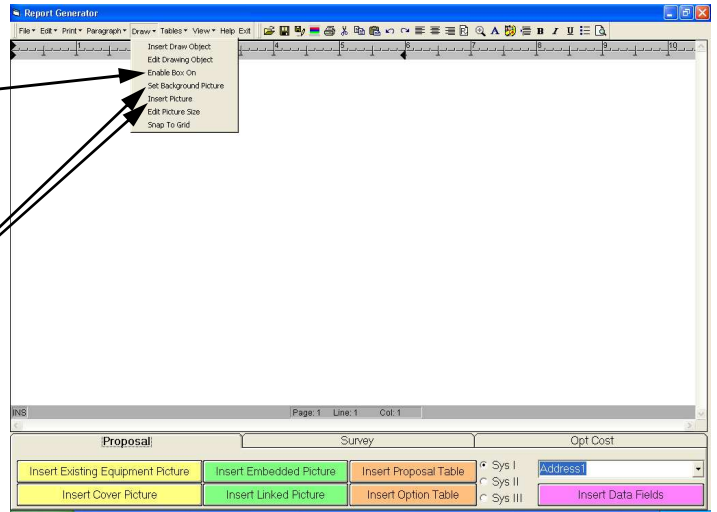
## Proposal Tab w/ “Draw” drop-down menu

### **Enable Box On**

This function is used to place a box around text.

### **Set Background Picture or Insert Picture**

Locate Picture and click open.



### **Edit Picture**

1. Determine Picture Size
2. Determine Picture Alignment

### **Notes:**

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### **Snap To Grid**

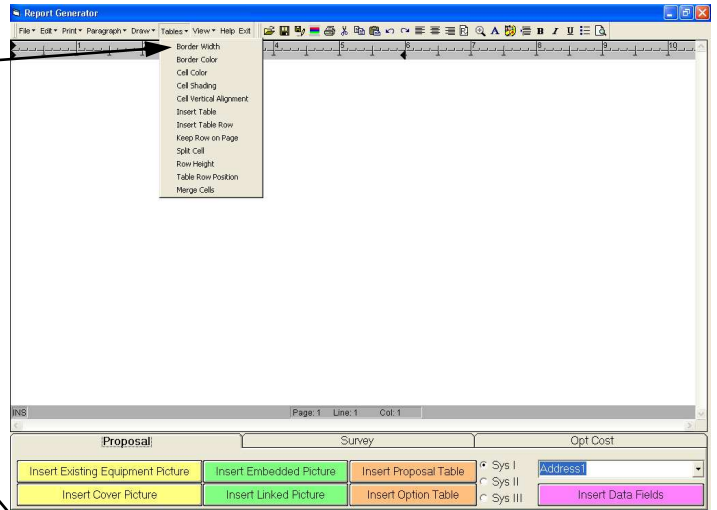
This option is used to toggle the “Snap To Grid” attribute. When the “Snap To Grid” selection is checked, the movement of the tabs and indentation markers on the ruler are locked on to an invisible grid at 1/16” interval.



# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Tables” drop-down menu.

### Proposal Tab w/ “Tables” drop-down menu



### **Border Width**

Use this option to create the borders around the selected cells in the table.

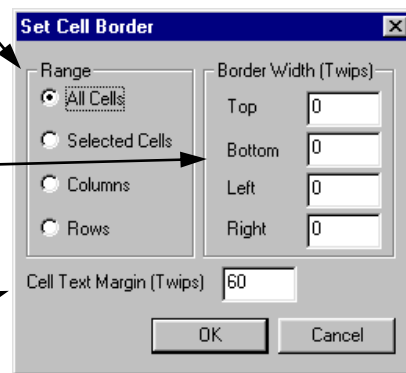
The “Range” checkbox has four options

- **All Cells:**  
This option will put a border around all cells in the table
- **Selected Cells:**  
This option selects the current cell and all highlighted cells.
- **Columns:**  
This option will put a border around all cells in the current column or highlighted column.
- **Rows:**  
This option will put a border around all cells in the current row or highlighted row.

The “Border Width” checkbox has four options

- Top
- Bottom
- Left
- Right

The “Cell Text Margin” may be set here.

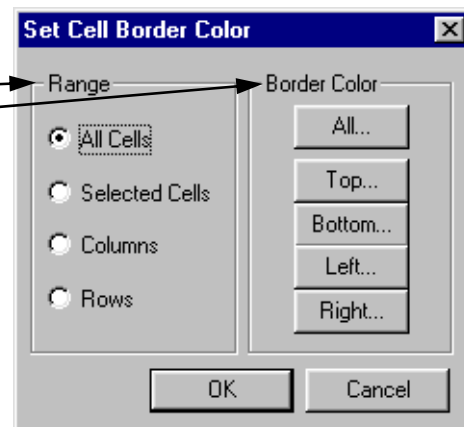


### **Border Color**

Set the Cell Border Color parameters.

1. Set the Range.
2. Set the Border Color.  
(when you click on a border color button, the color screen will pop up)

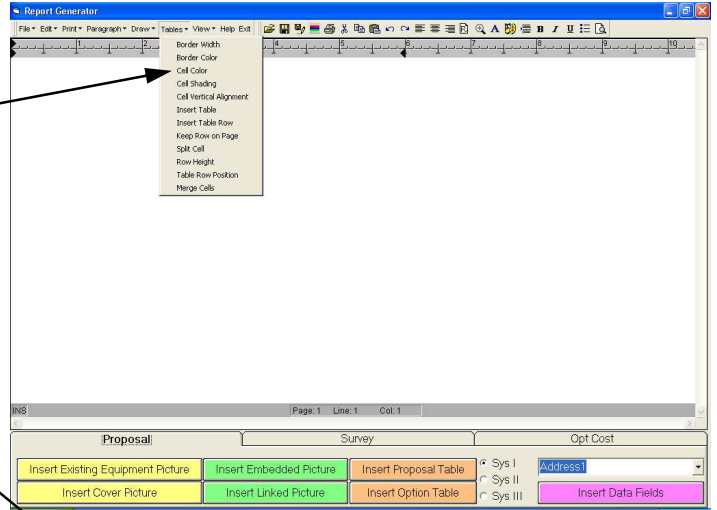
(continued on next page)



# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Tables” drop-down menu.

## Proposal Tab w/ “Tables” drop-down menu



### **Cell Color**

When you click on the “Cell Color” button, the Cell Color Parameters box will pop up.

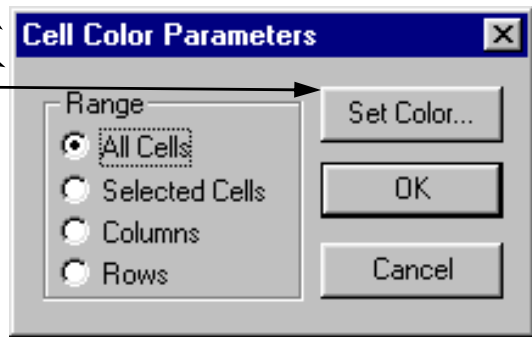
Select the range.

Click on the “Set Color” button

The Color Screen will pop up

Select the Color

Click “OK”

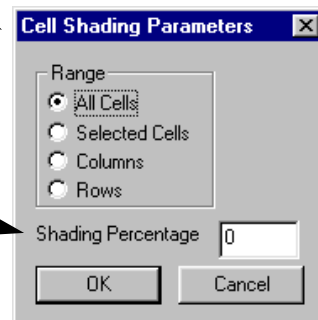
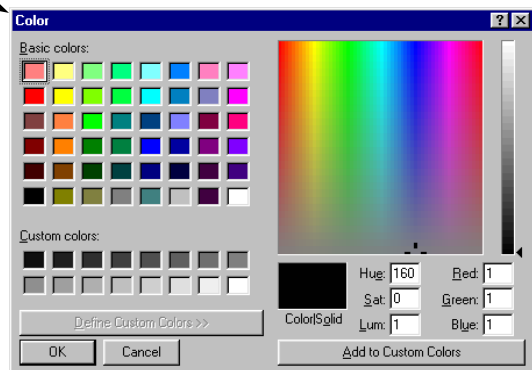


### **Cell Shading**

When you click on “Cell Shading” in the dropdown menu the Cell Shading Parameters screen will pop up.

Use this option to shade the selected cells.

The shading is specified in terms of the shading percentage. A value of 0 indicates a white background whereas, the value of 100 indicates a black background.





# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Tables” drop-down menu.

## Proposal Tab w/ “Tables” drop-down menu

### **Cell Vertical Alignment**

Use this option to align the text within the cells.  
See Cell Vertical Alignment options below.

### **Insert Table**

*Note: This may be one of the most used functions when building a template.*

Use this options to insert a new table in the document. The New Table Parameters Screen will pop up. You will be prompted for the initial number of rows and columns in the table.

You may insert logos or .bmp into the table.

### **Insert Table Row**

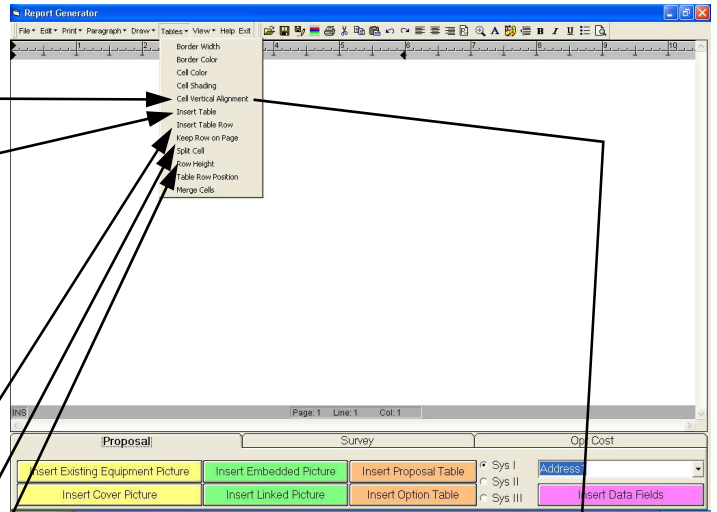
Use this option to insert a new row before the current table row. The new table row has the same number of columns as the current table row.

### **Keep Row on Page**

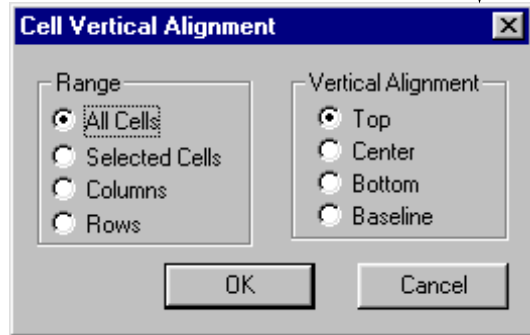
### **Split Cell**

Use this option to split the current table cell into two cells of equal width. The entire text of the original cell is assigned to the first cell. The second cell is created empty.

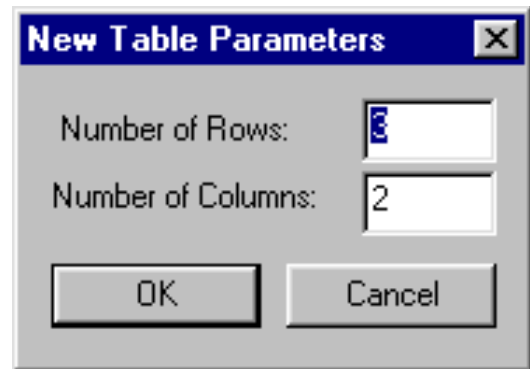
The above options are available only in the Page or Print View modes.



## Cell Vertical Alignment Screen



## New Table Parameters Screen



### **Note:**

The preferred method for inserting your logo or a bitmap into a customized proposal or form is to insert them into a table.



# Section I. Learning the fundamentals

## Report Generator Screen (continued) “Tables” drop-down menu.

## Proposal Tab w/ “Tables” drop-down menu

### **Row Height**

Use this option to adjust the row height. You may choose from Auto, Minimum, or you may select an exact size. Check the “Apply to all rows in the current table” box if applicable.

### **Table Row Position**

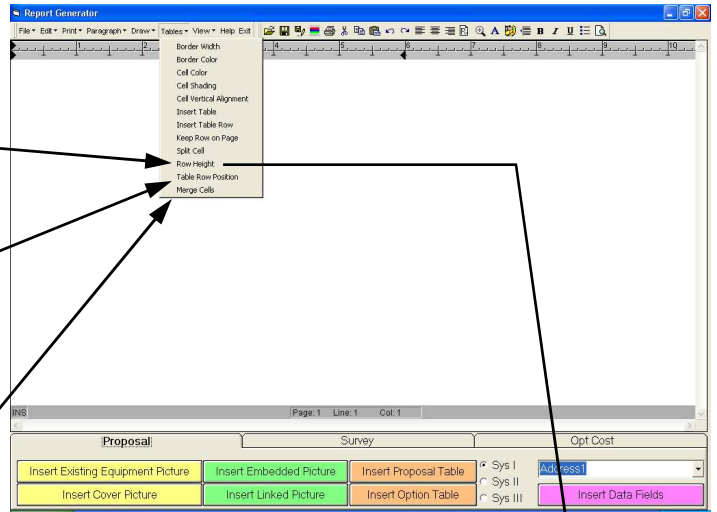
Use this options to determine if Left, Center, or Right Justified.

Check the “All rows in the table” box if applicable.

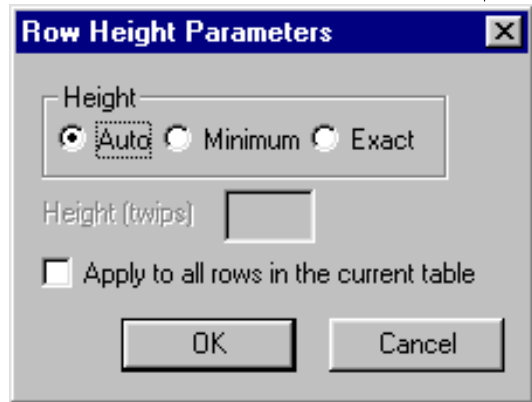
### **Merge Cells**

Use this option to merge together the highlighted cells. The width of the resulting cells is equal to the sum of all merged cells. If the highlighted cells span more than one table row, this operation creates multiple merged cells each within its row.

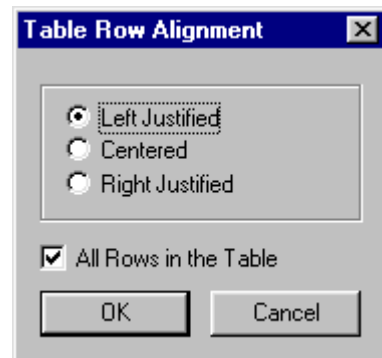
This option is available only in the Page or Print View modes.



## Row Height Parameters Screen



## Table Row Alignment Screen



### Notes:

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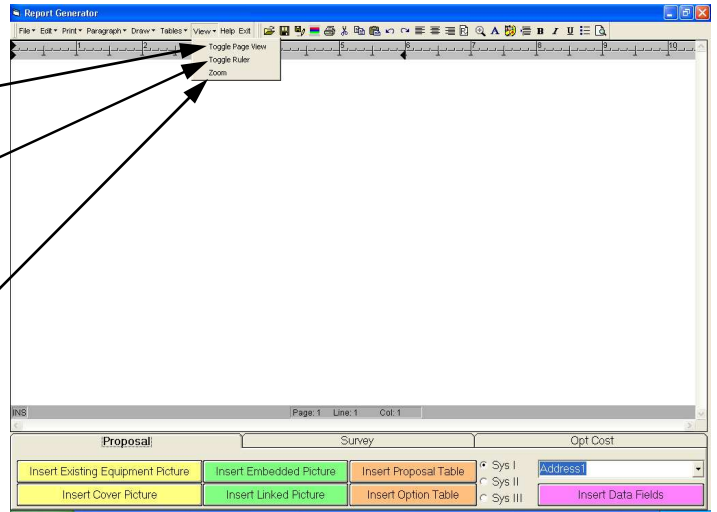
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# Section I. Learning the fundamentals

**Report Generator Screen (continued)**  
“**View**” drop-down menu.

**Proposal Tab w/ “View” drop-down menu**

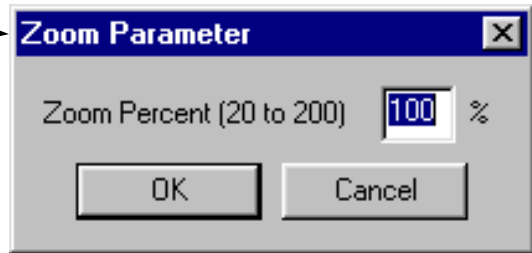


**Toggle Page View**  
Use this option to view full page.

**Toggle Ruler**  
This option is used to show or hide the ruler

**Zoom**  
Use this function to scale the text to a desired size. You may reduce to as small as 20% or enlarge as much as 200%.

**Zoom Parameters Screen**



**Notes:**

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# Section I. Learning the fundamentals

## Report Generator Screen (continued)

### Designing a Template

When designing a Template, it is best to gather the information you want on your report. Next, it is very helpful to have a sample or do a rough sketch of how you want the report to look.

The simplest way to lay out your report is to insert tables using the Insert Table function.

1. Put your cursor where you want your table to start.
2. Click Insert Table.
3. Determine how many rows and columns you want.
4. Click OK

### Insert Existing Equipment Picture

When you click the “Insert Existing Equipment Picture” button, the upper left hand corner of the picture will be inserted at the location of the cursor. Re-size the picture if needed.

### Insert Cover Picture

When you click the “Insert Cover Picture” button, the upper left hand corner of the picture will be inserted at the location of the cursor. Re-size the picture if needed. It is recommended that you create a table and insert the picture into it.

### Insert Embedded Picture

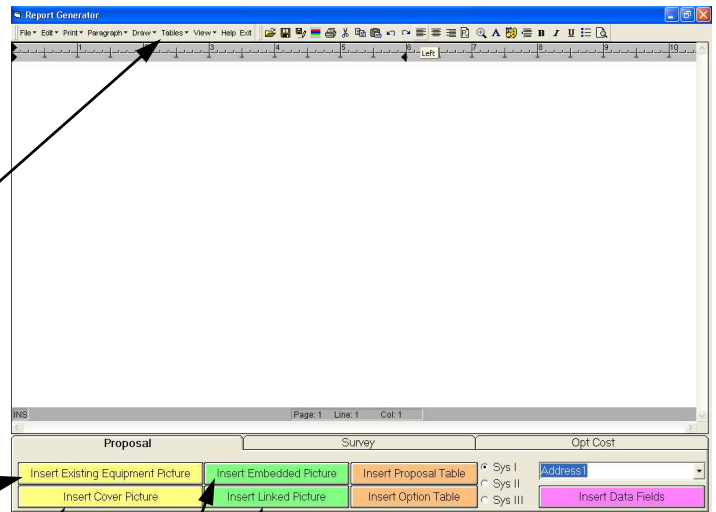
Use this command to embed a bitmap from a disk file at the current caret location.

### Insert Linked Picture

Use this command to link a bitmap to the document. A linked picture appears at the current caret location. A linked picture is not saved with the document; only it's name is stored with the document.

The simplest way to add a picture is to insert it into a table. Be sure and select a picture with a (.bmp or .jpg) file extension.

## Proposal Tab Screen



### **Example:**

1. Create a Table
2. Put your cursor in the table cell where you want your picture located.
3. Click on Insert Linked Picture
4. Locate the picture
5. Click Open
6. Re-size the picture if needed.
7. Then save it.

# Section I. Learning the fundamentals

## Report Generator Screen (continued)

### Designing a Template (continued)

#### **System Proposed**

Select system I, II, or III

#### **Insert Proposal Table**

Click on "Insert Proposal Table" to insert a Proposal Table in the document. Place the cursor where you want the table to go. The items listed as Standard on the proposal will be listed here. This box will automatically grow to fit the number of items on the proposal.

#### **Insert Option Table**

Click on "Insert Option Table" to insert a Option Table in the document. Place the cursor where you want the table to go. The items listed as Optional on the proposal will be listed here. This box will automatically grow to fit the number of items on the proposal

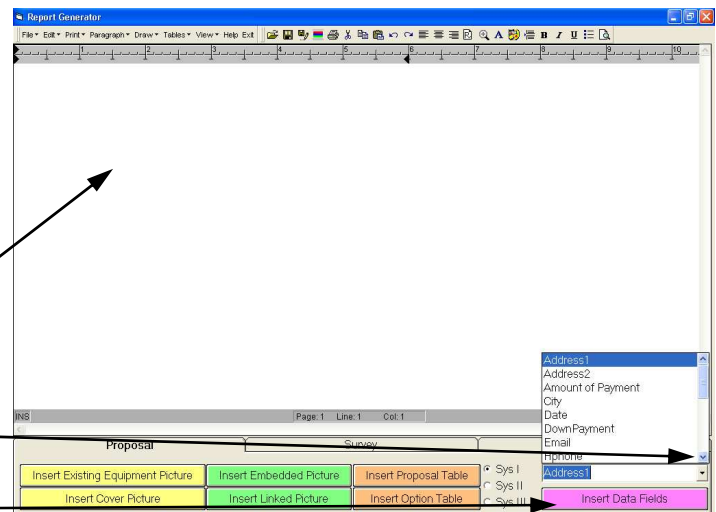
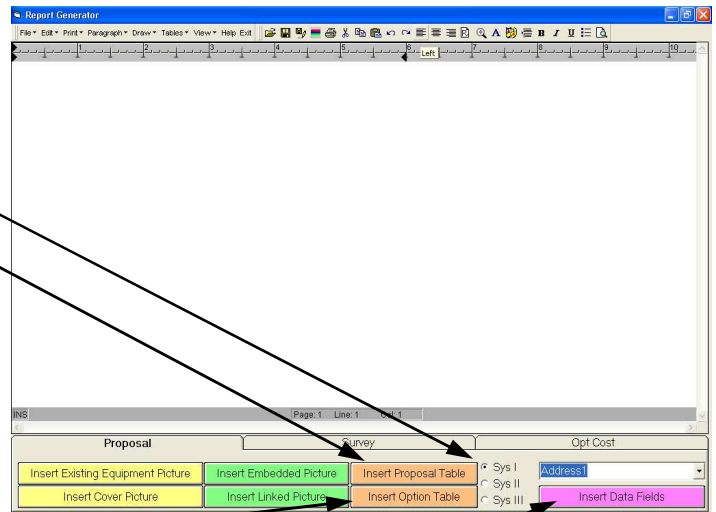
#### **Insert Data Fields**

When you insert a data field, the system will look-up that information and place it at the cursor location. You may type in a description before or after the insert location.

#### **Steps to insert a Data Field**

1. Determine the insert location in the table.
2. Click the down arrow above the "Insert Data Fields" button.
3. Highlight the data description you want to insert.
4. Click the "Insert Data Fields" button.

## Proposal Tab Screen



#### **Note:**

When you insert a proposal table or an option table you will need to leave space for the tables to grow as you add items to the proposal.



## Section II. How to Design a Template



### Designing a Proposal Template

To begin, start by gathering the information you want on your proposal. It is very helpful to have a sample or do a rough sketch of how you want the report to look. Graph paper might be helpful.

1. Click on "Customize Reports".
  2. Click on "file"
  3. Set page size (letter or legal).
  4. Set page margins.
- Set Left, Right, Top, and Bottom margins at .50.
  - Set Header and Footer distance from the top and bottom edge at .50.
  - If you want these settings to apply globally to all pages and sections click "All Sections"

### Notes:

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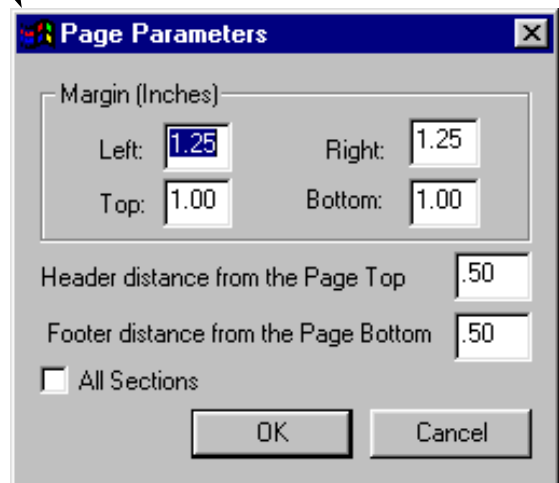
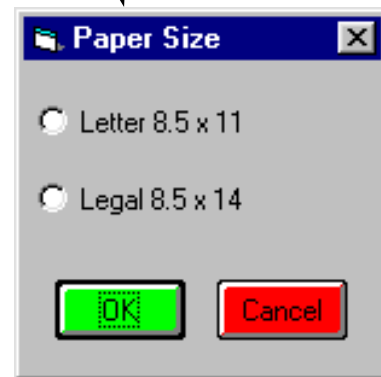
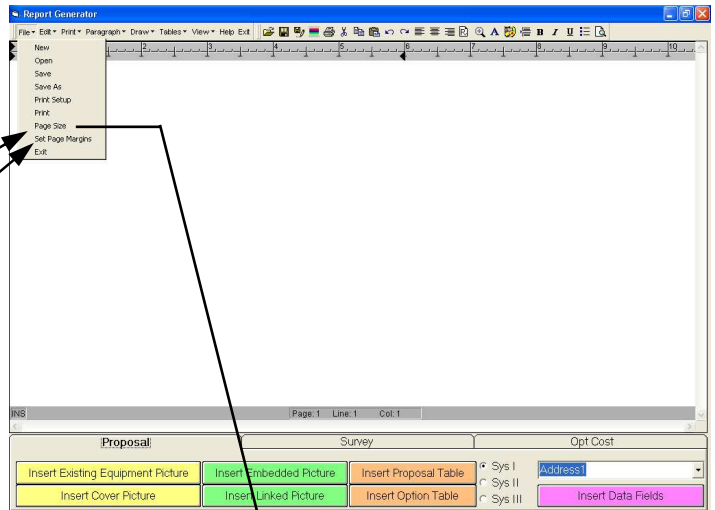
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### Customize Reports Menu Screen



## Section II. How to Design a Template

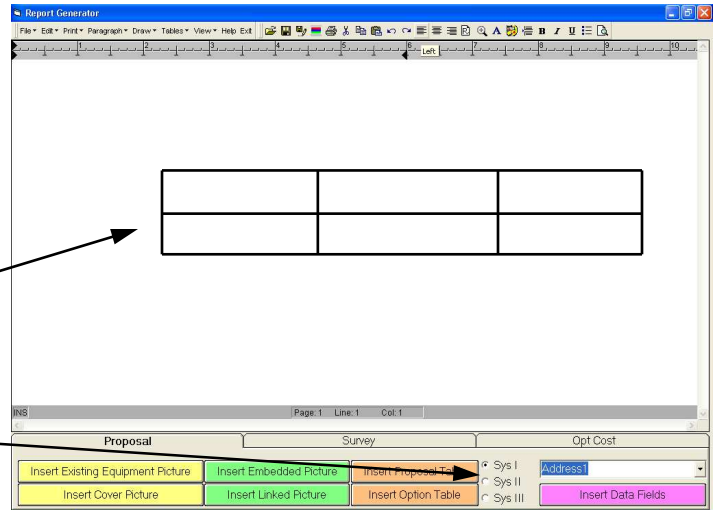
### Designing a Proposal Template

The simplest way to lay out your report is to insert tables using the Insert Table function.

To insert a table:

1. Put your cursor where you want your table to start.
2. Click Insert Table.
3. Type in (2) rows and (3) columns.
4. Click OK. Your new table will be inserted.

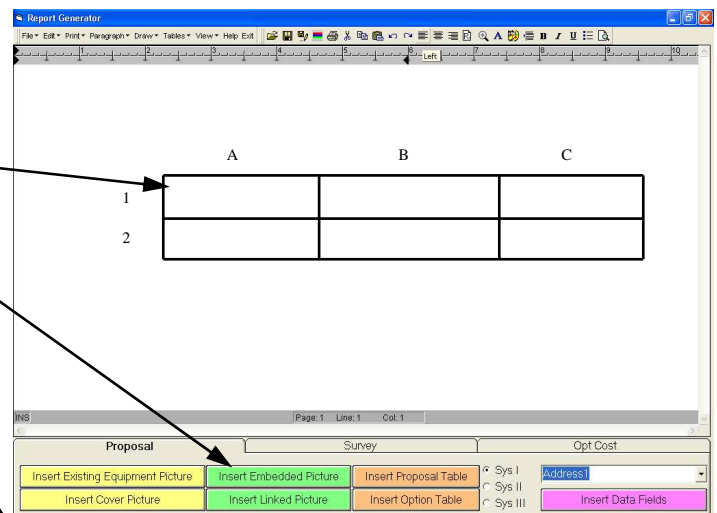
### Customize Reports Menu Screen



Select System I, II, or III

Add a Logo to the top of your proposal.

1. Put the cursor in the upper left hand cell of your new table (A1).
2. Click Insert Embedded Picture.
3. Locate the file that contains your Logo.
4. Click Open.
5. Re-size your Logo as needed.



### Notes:

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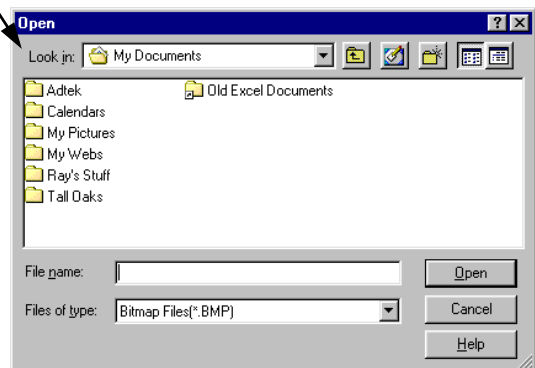
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## Section II. How to Design a Template

### Designing a Proposal Template

Next, type in general company information in the upper right hand cell (C1).

Select the type face and point size from the Font Selection menu. Then type in your Company name, address, and telephone number.

### Split Cells

Split Cells A2, B2, and C2

- Put the cursor in the cell you want to split
- Click on Table from the menu bar
- Click Split Cells.
- Repeat for each cell.

In cell A2 left side type "Consultant"

In cell B2 left side type "Proposal #"

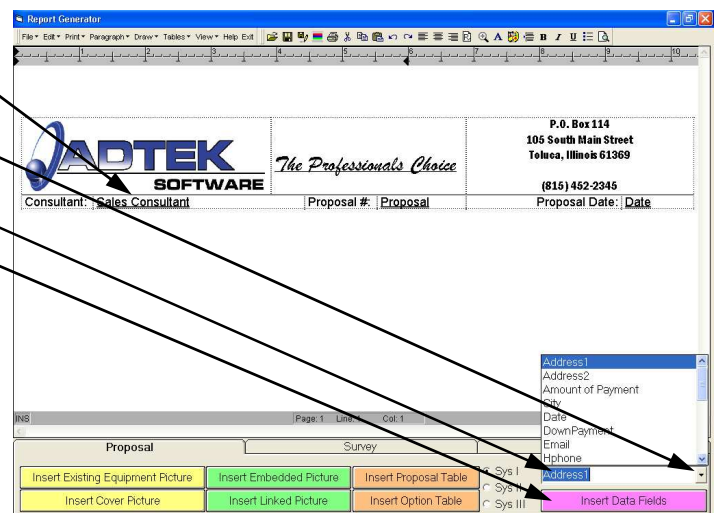
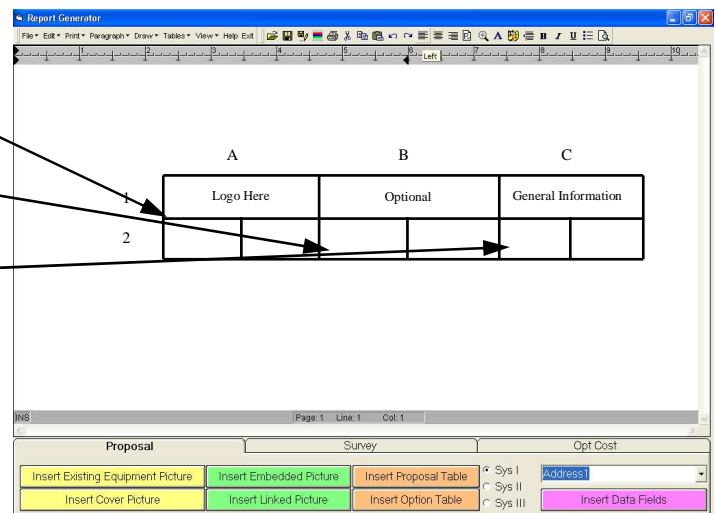
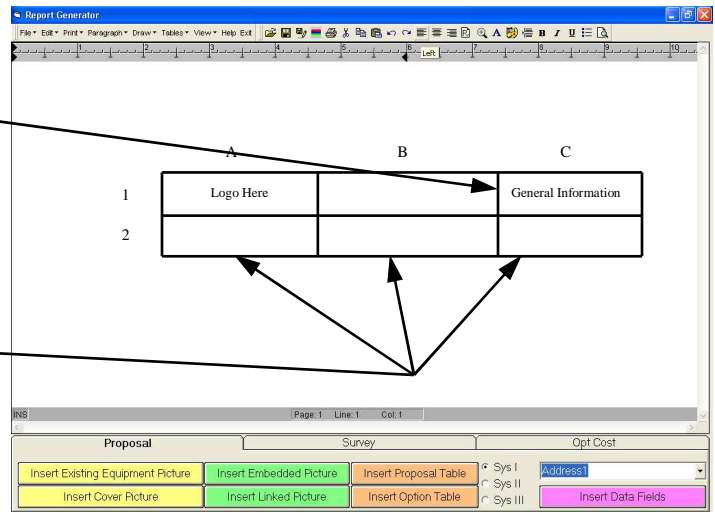
In cell C2 left side type "Proposal Date"

### Insert Data Fields

1. Determine the insert location.
2. Click the down arrow above the "Insert Data Fields" button.
3. Highlight "Sales Consultant".
4. Click the "Insert Data Fields" button.

When you print a proposal, the Sales Consultant's name will appear here.

### Customize Reports Menu Screen



## Section II. How to Design a Template

### Designing a Proposal Template

Your proposal should start taking shape. See example.

Next, we will insert a Proposal Table. You will want to title this table.

### Insert Proposal Table

Place the cursor where you want the table to begin. Click on "Insert Proposal Table" to insert a Proposal Table in the document. The items listed as Standard on the proposal will be listed here. This box will automatically grow to fit the number of items on the proposal.

Now that you have listed the standard specifications of your proposal, you will want to insert a table to list the price and financing option.

To insert a table:

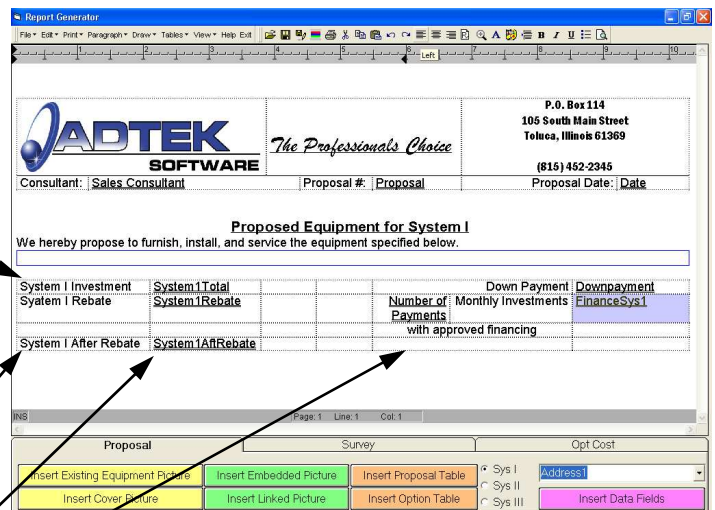
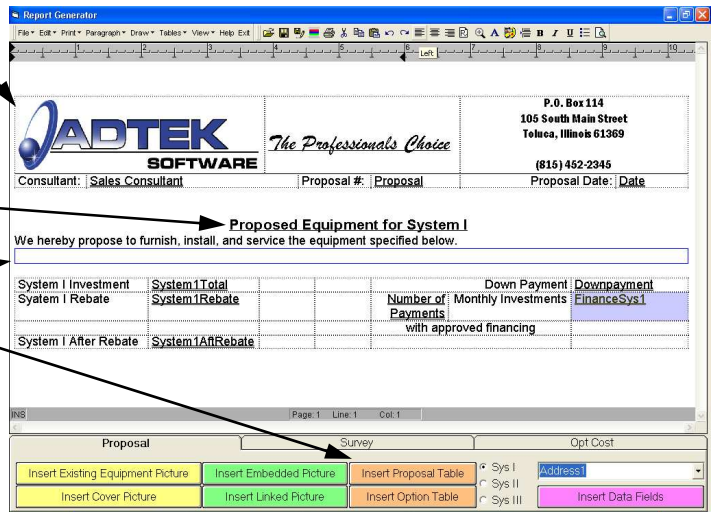
1. Put your cursor where you want your table to start.
  2. Click Insert Table.
  3. Type in (4) rows and (6) columns.
- Click OK. Your new table will be inserted

Type in System I Investment, System I Rebate, and System I After Rebate in the appropriate location.

Using the Insert Data Fields function, insert System I Total, System I Rebate, and System I After Rebate.

Repeat for Financing Option.

### Customize Reports Menu Screen



#### **Note:**

If you are starting from scratch, it is advisable to save your work as you develop your proposal.

If you are re-designing a template, save under a new name, otherwise you will over-write your existing template.

Your file will be saved as a ".sse" file extension and a backup of your original file will be made with a file extension of ".bu".



## Section II. How to Design a Template

### Designing a Proposal Template

Next, we will insert an Option Table.

You will want to title this table.

### **Insert Option Table**

Click on "Insert Option Table" to insert an Option Table in the document. Place the cursor where you want the table to start. The items listed as Optional on the proposal will be listed here. This box will automatically grow to fit the number of items on the proposal.

Now that you have listed the standard and optional specifications, you will want to insert a table to list what is included with every installation.

1. Put your cursor where you want your table to start.
  2. Click Insert Table.
  3. Type in (4) rows and (2) columns.
- Click OK. Your new table will be inserted.

Type in what is included with every installation.

Insert a table with 1 row and 1 column. Type in your terms and conditions.

### **Put a border around your tables.**

Select the proposal table.

Click on Table in the Menu Bar.

Click on Border Width.

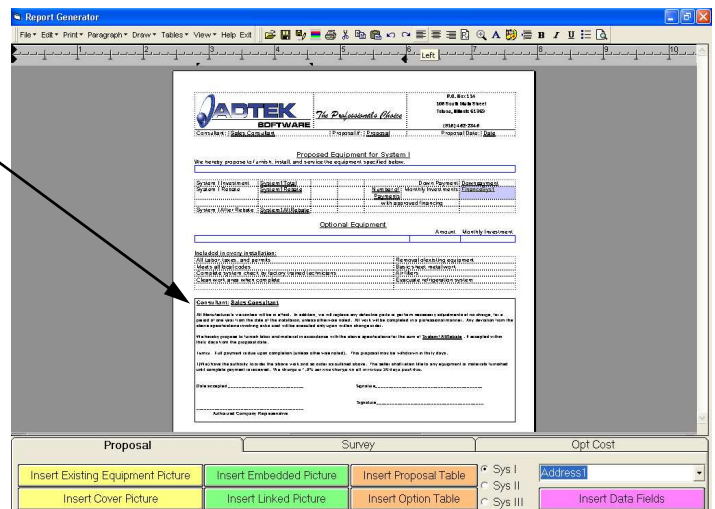
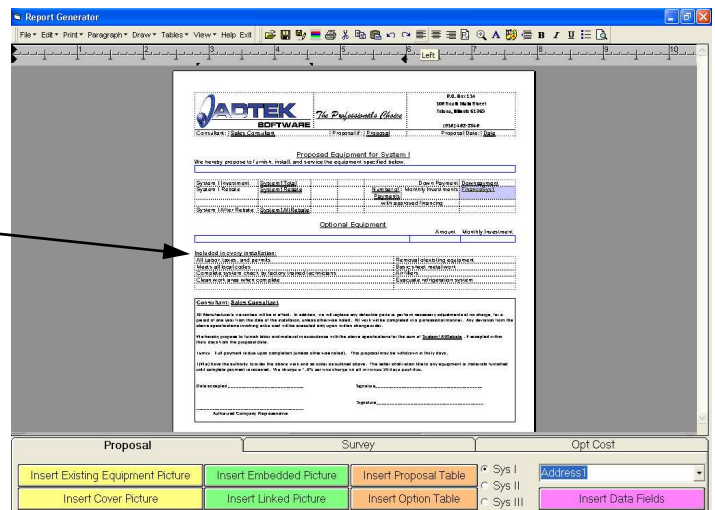
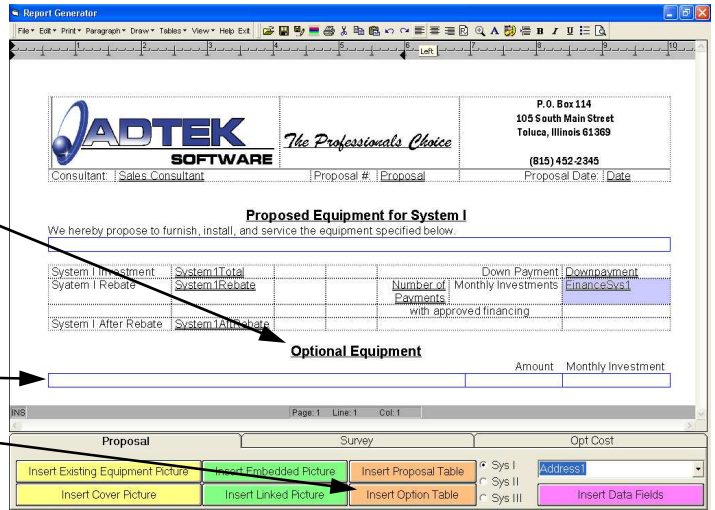
Check "Selected Cells".

Type in 12 for Top, Bottom, Left, and Right.

Click OK.

Repeat for the Option Table and the Terms and Conditions Table.

### Customize Reports Menu Screen

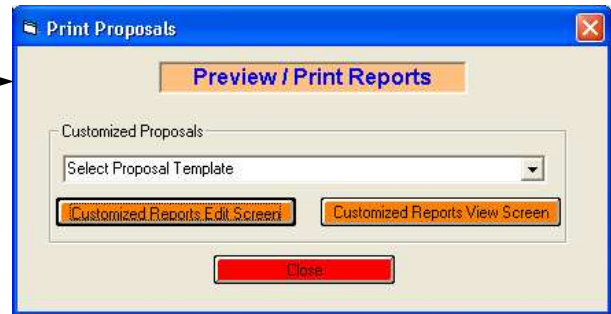


## Section II. How to Design a Template

### Print.

When you click the Preview Report button from the Energy Analyzer, this Preview/Print Proposal screen will pop-up

### Preview Report Screen

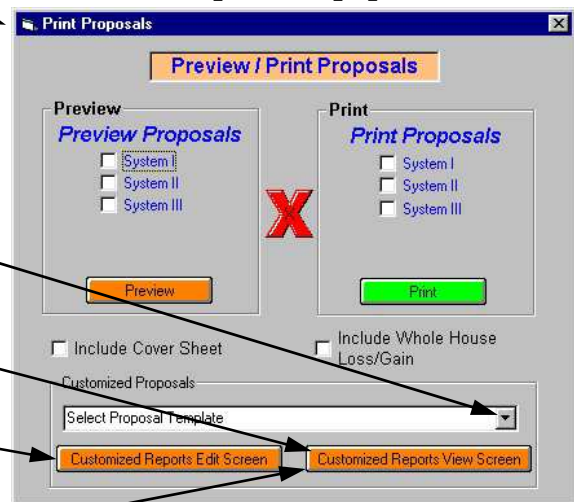


When you click the Print Proposal button from the Electronic Consultant, this "Preview/Print Proposal" screen will pop-up.

### Customized Reports.

From this screen you may edit, view, or print a Custom Proposal.

### Print Proposal Popup Screen



1. Click on the down arrow to view the Proposal Templates
2. Select the desired proposal.
3. Click Customized Reports View Screen to view how the report will print.
4. Click Customized Reports Edit Screen to design or edit a report.

### Preview.

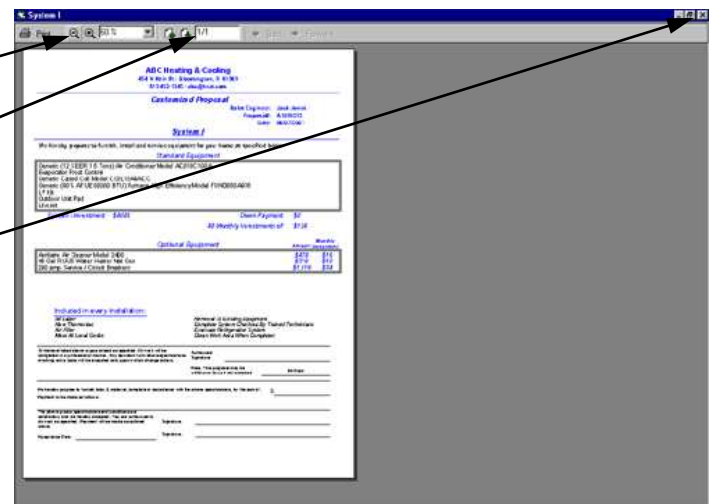
When you click the Customized Reports View button, you may review your report.

Click on the percentage to increase or decrease the viewing size (zoom).

The number of pages will be listed here.

To close this screen, click the "X" in the corner.

If you are viewing multiple screens (*Example: Proposal Cover, Loads Summary, and Proposal*) then by clicking on the "X" you only close one screen at a time.



**Hint:** When you click on the "X" in the upper right hand corner, the preview screen will close.

**Caution:** By clicking on the "X" from any Base screen in this software, you will be asked if you want to exit. Be sure to save your proposal before exiting.



## Section II. How to Design a Template

### Designing a Template for a Survey

#### **Survey Tab**

Click on the survey tab to access the survey buttons.

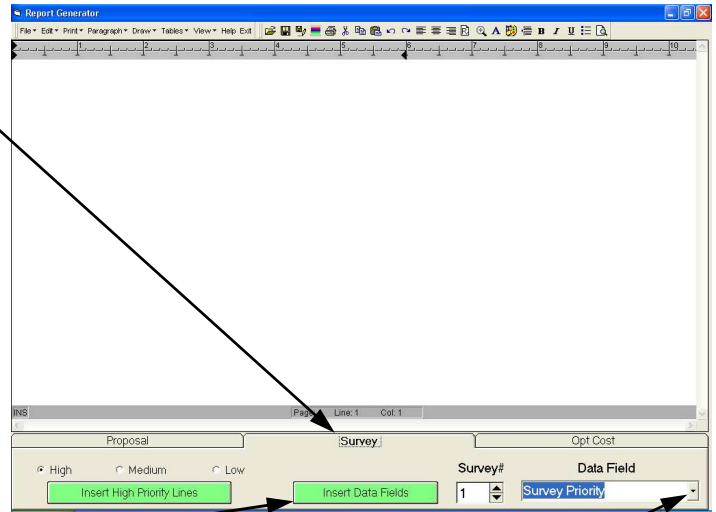
#### **Designing The Survey**

To design a survey template follow the steps outlined on pages 21 through page 25. The information and buttons may vary slightly, but the procedure is the same.

#### **Insert Data Fields**

When you insert a data field, the system will look-up that information and place it at the cursor location. You may type in a description before or after the insert location.

### Survey Tab Screen

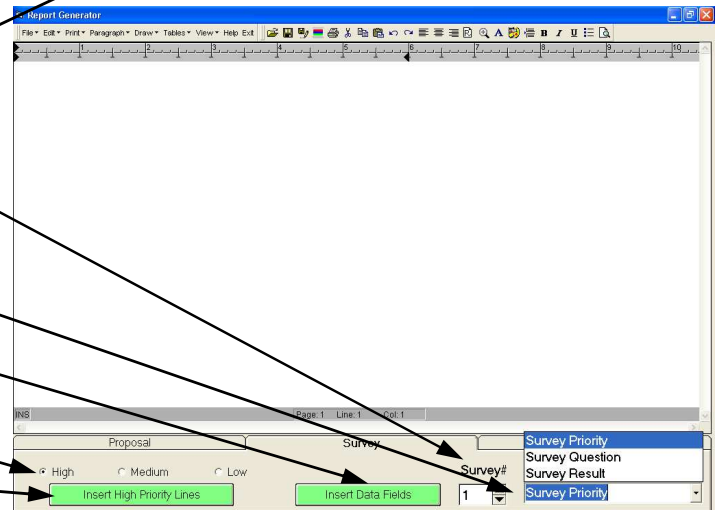


### Steps to insert a Data Field

1. Start by inserting a table (page 22).
2. Determine the insert location in the table.
3. Click the down arrow right of the “Data Fields” view box.
4. Select the Survey line number.
5. Highlight the data description you want to insert.
6. Click the “Insert Data Fields” button.

To insert all the lines for high, medium, or low priorities, check the high, medium, or low box.

Then click the “Insert Priority Lines” button.



## Section II. How to Design a Template

### Designing a Template for the Energy Analyzer

#### ***Opening the Customized Reports Screen***

Click on the Preview Report button.

The Preview/Print Report screen will popup.

Click on the “Customized Report Edit Screen” button.

The “Report Generator Screen” will popup.

#### ***Designing an energy cost summary***

To design this summary template follow the steps outlined on pages 21 through page 25. The information and buttons may vary slightly, but the procedure is the same.

#### ***Customer Information Tab***

You will be able to insert pictures and/or general customer information from this screen. Click the Customer Information Tab.

See page 30 for a complete sample template in Edit Mode.

#### **Notes:**

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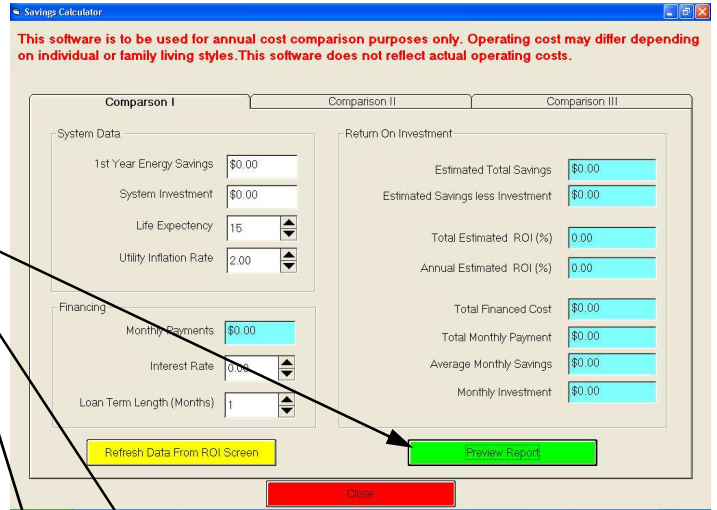
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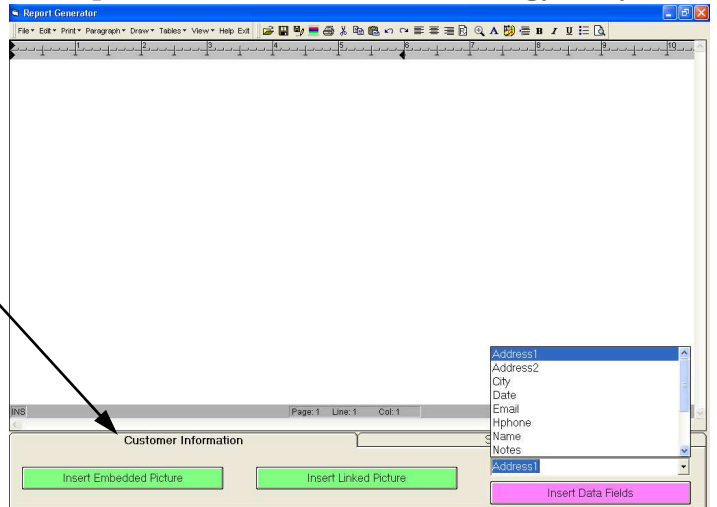
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#### **Report Generator Screen in the Energy Analyzer.**



#### ***Note:***

**Use your imagination to develop a summary that fits your presentation style.**  
**Include information that is important to your customer and will help you close the sale.**

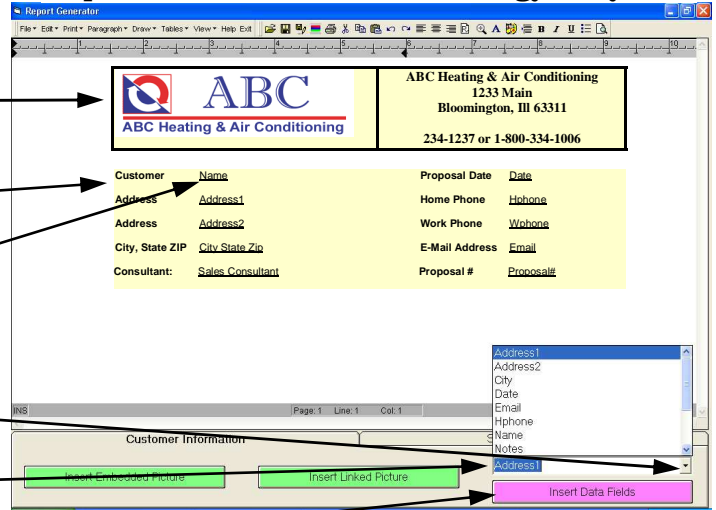
## Section II. How to Design a Template

### Steps to build an Energy Cost Summary Template

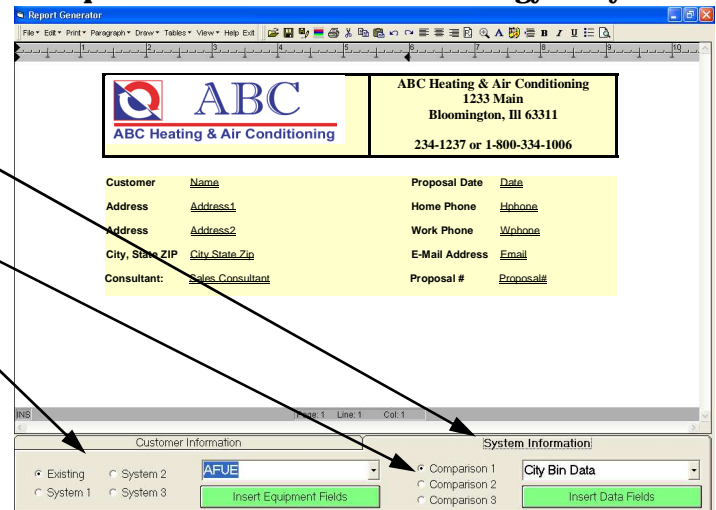
1. Start by inserting a table (page 22) for your company information and logo.
2. Insert a table for your Customer information (4 columns and 5 rows displayed).
3. Determine the insert location in the table.
4. Click the down arrow right of the "Data Fields" view box.
5. Highlight the data description you want to insert.
6. Click the "Insert Data Fields" button.
7. Click on the System Information tab to access the System Information screen.
8. You may want to build a template for all three comparisons.
9. Check which system you want to work with.
10. Insert an additional table (page 22) for equipment specifications.
11. Determine the insert location in the table.
12. Insert the desired equipment and type in all necessary descriptions
13. Continue this process as explained on pages 21 through 25.

**See page 30 for a detailed template in design (edit) mode.**

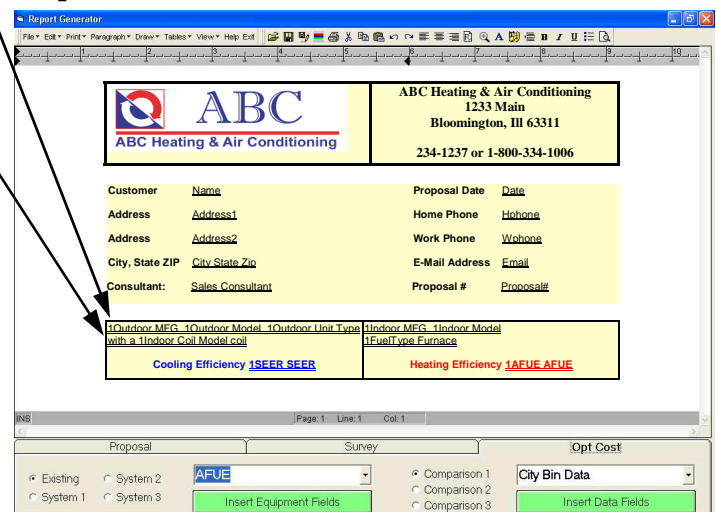
### Report Generator Screen in the Energy Analyzer.



### Report Generator Screen in the Energy Analyzer.



### Report Generator Screen in the Electronic Consultant.





## Sample Template in Edit Mode



# ABC

**ABC Heating & Air Conditioning**

**ABC Heating & Air Conditioning**  
**1233 Main**  
**Bloomington, Ill 63311**

**234-1237 or 1-800-334-1006**

### Energy Cost Summary for Comparison I

<b>Customer</b>	<u>Name</u>	<b>Proposal Date</b>	<u>Date</u>
<b>Address</b>	<u>Address1</u>	<b>Home Phone</b>	<u>Hphone</u>
<b>Address</b>	<u>Address2</u>	<b>Work Phone</b>	<u>Wphone</u>
<b>City, State ZIP</b>	<u>City_State_Zip</u>	<b>E-Mail Address</b>	<u>Email</u>
<b>Consultant:</b>	<u>Sales_Consultant</u>	<b>Proposal #</b>	<u>Proposal#</u>

The following is additional information to help you select the system that meets your family's personal comfort and economic needs.

### System I Equipment Specifications

<u>1Outdoor MFG</u> <u>1Outdoor Model</u> <u>1Outdoor Unit Type</u> <u>with a 1Indoor Coil Model coil</u>	<u>1Indoor MFG</u> <u>1Indoor Model</u> <u>1FuelType Furnace</u>
<b>Cooling Efficiency</b> <u>1SEER_SEER</u>	<b>Heating Efficiency</b> <u>1AFUE_AFUE</u>

### Fuel Cost Information

Electric Rate for summer	<u>ElectS</u>	LP Rate	<u>LP</u>
Electric Rate for winter	<u>ElectW</u>	Fuel Oil Rate	<u>Fuel</u>
Natural Gas Rate	<u>Nat</u>	Estimated Fuel Inflation Rate	<u>inf1 %</u>

### Weather Data & Design Conditions

Outdoor Design Temperature (cooling)	<u>Clg</u>	Building Heat Gain	<u>HeatLoss BTU's</u>
Outdoor Design Temperature (heating)	<u>Htg</u>	Building Heat Loss	<u>HeatGain BTU's</u>

### Economic Considerations for Comparison I

System Investment	\$ <u>sysinv1</u>	Estimated savings over the life of the equipment	\$ <u>tsav1</u>
System Investment + Financing Cost	\$ <u>tfcost1</u>	Estimated savings less your investment	\$ <u>tsav1</u>
Financing Rate	<u>intr1 %</u>	Estimated Life of the System	<u>life1 Years</u>
Monthly Payment	\$ <u>mpay1</u>	Payback in years	<u>P1ROI Years</u>
Term of the Loan	<u>trm1 Months</u>	Estimated Monthly Savings	\$ <u>amsav1</u>
Total Estimated Rate of Return on Investment ( <u>life1 Years</u> )	<u>troi1 %</u>	Annual Estimated Rate of Return on Investment	<u>aroi1 %</u>

## **Products For The HVAC Industry**

*Helping you close more high-efficiency sales*

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The ultimate in-home presentation software.

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Whole house loads for the residential replacement contractor.

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Gather general information, quick customer survey, and set the appointment for the consultant.

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Three levels of security for the Electronic Consultant.

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*Professional Packages available for as low as \$179.95 a month for 36 months.*

- Laptop Computer
  - Pentium 4 or better when available
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- HP Mobil Color Printer
- Mobil Office Presentation Case
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And all of the Software listed above is Pre-loaded and tested.

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*From Basic to Advanced*

Adtek Software offers an array of training and startup services.

Custom Setup and Training at your location.

Training at the Distributor's location.

Semi-annual training at Adtek's Office.

#### **Training Sessions Offered**

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P.O. Box 114  
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*“Professionalism is knowing how to do  
it, when to do it, and doing it.”*

