ADTEK
SOFTWARE

Generator Consultant™

Version 2.0.0 (updated 8/1/11)

A Residential In-Home Presentation Program

for Generators

Inside This Manual

- How to set up databases
- How to use the Generator Consultant™ in the home
- Viewing & Printing Professional Proposals
- How to compare prices of several systems in minutes

Electronic Consultant™ Manual $19.95

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 silence all cell phones, beepers, or other disruptive devices.

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

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

System Requirements:
>Windows® 98 or higher, NT, or XP operating system. (ME not recommended)
>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

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Toluca, IL 61369
(815) 452-2345

Table of Contents

I. How to set up your system.
"Company Information"

Company Setup Tab
Complete the Company Information Form.

Company
Enter your general company information.

Contact
Is used for your company's internal use only.

Misc. Settings
Default Salesperson
The name of the Salesperson giving the presentation.

Default Proposal #
You can assign a starting proposal number (numeric only) and the E/C will automatically increase that number or the last proposal number used, by one digit, each time you start a new proposal.

Default Proposal Number Box
Check this box if you want the software to add the proposal number to the Customer Information form. If you leave it unchecked, you must add a proposal number each time you start a new proposal.

Hide Cost on "Summary Screen" Box
Check this box if you do not want the customer to see any cost on the preview screen.

Enable Quantities on "Proposal Screen" Box
Check this box if you want to be able to add quantities to items on the proposal.

Notes:

Company Setup Screen
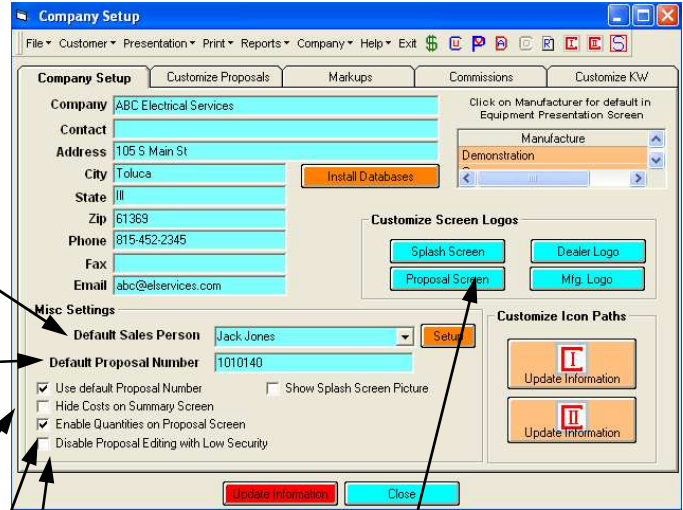
Customize Screen Logos
Splash Screen
The "Splash Screen" is the first screen you will see when you start the program. You may add a .jpg or .bmp of your choice. As an example, you may insert a picture of your company, the brand you sell or your employees.
1. Click the button labeled "Splash Screen"
2. The Look-in Dialog Box will pop-up.
3. Locate the desired file.
4. Click insert.
5. Follow the above instructions for the buttons listed below.

Proposal Screen
You may insert a logo to appear on the proposal.

Dealer Logo
You may insert your Company logo on the proposal.

Mfg. Logo
You may insert the Manufacturer's logo on the proposal.

I. How to set up your system.
"Company Information"

Company Information Tab (continued)

Customize Icon Path
Update Information C-I Button
This feature allows you to access another software program.

When you click on the C-1 button the "Set Program Path" Look-in Dialog Box will pop-up.

Locate the desired file and click insert.

You will be able to access that program by clicking on the C-I button located on the tool bar.

Update Information C-II Button
Same feature as above.

Hint:
After you have completed entering all the setup information and clicked the "Update Information" button, then exit the program and re-enter to view all the changes.

Class Exercise

1. Fill in your Company's general information

2. Type your name in the "Default Salesperson" box.

3. Determine if you are going to use the "Default Proposal Number". If so, add the starting number.

4. Click the update information button.

5. Insert a new picture into the "Splash Screen"

Company Setup Screen

Look-in Dialog Box (XP version)

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I. How to set up your system.
"Determining Your Markup"

Markups and Margins

Determine what gross margin of profit you want to have at the end of the year. You should monitor it regularly and adjust your gross margin as needed.

When you type in a gross margin, the multiplier will change automatically and visa-versa.

Material Markup

Enter the material markup or margin for each dollar level.

Warranty Markup

Enter the desired markup or margin for extended warranties.

Labor Markup

Enter the desired markup or margin. This will be applied globally.

You may enter up to three different labor rates to specific items.

Example:

Labor Unit 1 might be your top technician.
Labor Unit 2 might be an assistant or helper.
Labor Unit 3 might be a parts runner.

It is easy to update your labor margin because you only allocate labor units to specific equipment, so all you have to do is update the labor unit rate from this screen.

Hint:

This system will allow you to allocate overhead at a different rate for material and labor (*example; your accounting department may determine that labor is 80% of your overhead and material is 20%).*

Markup Setup Screen

Edit Discount Codes

To edit customized discounts click on the yellow Edit Discount Codes button and follow the instructions on the next page.

Material Sales Tax Rate

Enter the total sales tax rate for your area, if more than one, add them together. (*6 1/4% would be entered as .0625).*

Labor Sales Tax Rate

If labor is taxed in your area, then enter the rate here.

Determine if you want to calculate sales tax before or after markup. Be sure to Update Information.

Note:

The sales tax can be computed either before or after your markup is applied to equipment.

Class Exercise

1. Enter material markup for 0 to $25 @ 50% gross margin.

2. Enter material markup for $251 and up @ a 1.40 multiplier.

3. Enter labor markup @ 60% gross margin.

4. Click the update information button.

Customize Discounts

This screen allows you to setup special discounts that will not show on the proposal. The discount amount will be deducted from the total sale before tax and the tax, if any, will be calculated on the discounted amount.

1. Type in the Discount Code Name

2. Use the down arrows to determine the discount multiplier (for a 10% discount enter .90).

3. Click the Add/Update button

4. Enter a Label Name, this will appear on the Customer Information Screen.

5. Click the Set as Default button. The new label and any line that is highlighted will be the new default. You will be prompted to close and re-open the program for the changes to take effect.

Customized Discounts Setup Screen

Customizing KW

This screen allows you to customize and setup options of items that will makeup your KW Load.

Description
Includes the description of the item you are entering into the load.

Running/Starting Watts
Running Watts - Watts when item is running
Starting Watts - Watts when item starts up

To Insert an Item not already listed
Type your description into the box, along with a running and starting watts value, then click Insert line. You will now see an item inserted to your grid permanently so that you may use it in the future.

Delete Line
Select your item that you would like to delete from the grid, and choose delete line.

Note: Once you delete an item, you can no longer access that item in the future.

Customize KW Setup Screen

Hint:
You may organize or sort values by clicking the appropriate heading.

Remember:
After you have completed entering all the setup information and clicked the "Update Information" button, then exit the program and re-enter to view all the changes.

Finance Options
At this screen you should set the default settings for your area. When you start the program these settings will automatically come up, but may be changed at will.

Rate
Percent of interest currently being offered.

# of Payments
Number of payments for the duration of the loan.

Import System Costs
Check which system costs you would like to have imported into the amount field.

Terms

> Standard
> 90 days same as cash
> 180 days same as cash
> 360 days same as cash

If the amount is not paid within the selected terms, then interest will accrue from the first day of the note.

Down Payment
If the customer gives a down payment, you should enter it here. The down payment will show on the proposal.

Other options
Check the options you wish to use.
☐ Use percentage for monthly payment.
   If your finance company uses a percentage to determine the payment, enter the percentage here.

☐ Show monthly payments on proposal

Hint:
Use this screen to show different payment options to the customer.

Payment Calculator Screen

Notes:

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Class Exercise

1. Set the interest rate at 20%.

2. Set the number of payments at thirty-six.

3. Set the terms at 90 days same as cash.

4. Set the Amount to $5,000.

5. Set the Customer down payment to zero.

6. Click the "Calculate Payment" button.

7. Click the "Save as Default" button.

Purchase Orders

At this screen you should set the default settings for your distributor and your company. When you start the program these settings will automatically come up, but may be changed at will.

Buttons

Green "Set As Default": Click to set the information on the screen as default.

Brown "Preview": Click to preview how the information will look when printed.

Yellow "Print": Click to print.

Light Blue "Close": click to close this screen.

Using the Purchase Order

Select a System, Click the Refresh button, Highlight the labor and click Delete. This procedure will remove any unwanted items from the P.O.

Click the Add button and high-light the blank line that was added. Now you may add new items to the P.O.

The Preview/Print and Close buttons are the same as above.

Class Exercise

1. Select the Purchase Order Screen.

2. Select System I, II, or III.

3. Enter a Purchase Order Number.

4. Check the Include Material Cost box.

5. Click on the Refresh.

6. Add 20' of 2" PVC pipe; now select and delete a row

Shipping Information Screen

Purchase Order Screen

Notes:

I. How to set up your system.
"Importing Digital Pictures" and "Price Files"

Importing The Proposal Cover

The easiest way to personalize the homeowner's proposal is to take a picture of their home upon arrival. If you use a camera that accepts a 3 1/2" floppy disk the procedure is very efficient.

The steps for importing files is similar throughout the software. From the *File* drop down menu, select *Import Cover File*.

Locate Picture

Click the yellow button **Locate Picture**. A box will pop-up and ask, *look in,* if you are using a 3 1/2" floppy disk, then look-in your (*a*) drive. Open the folders or files that contains your picture.

Go to page seven (7) if additional help is needed.

View Picture

The picture will be displayed, if correct, continue.

Re-name file

You may type in a new file name if you wish.

Save Picture

Click the green button **Save Picture**. When imported, a box will say imported successfully.

Importing Proposal Cover File Screen
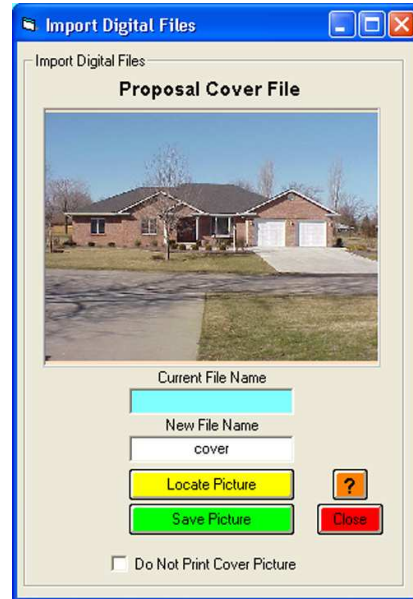
Printing Cover Picture

Un-check the **Do Not Print Cover Picture** box to Print a cover picture.

Close

Click the red button **Close** to exit this screen.

Importing Price Update File Screen
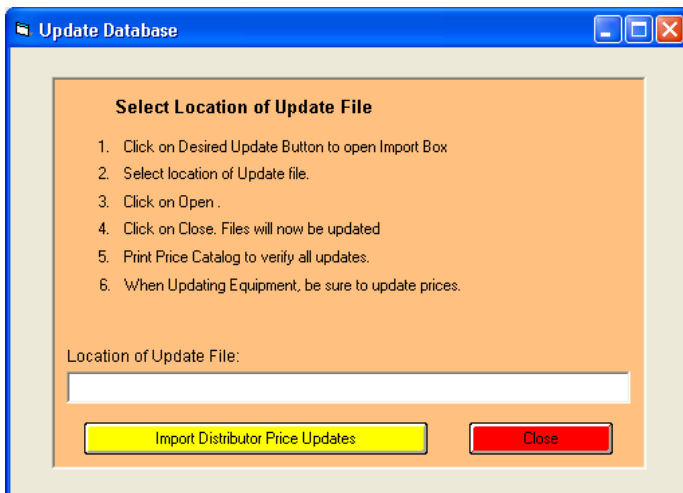
Updating Price Files

Your distributor may supply you with a 3 1/2" floppy disk containing your current cost on the items he sells.

Open Update Box

Click the yellow button **Import Distributor Price Updates**. A box will pop-up and ask, *look in,* go to the location of your update file *(usually A:\)*.

Open File

Highlight the Update1.mdb file and click the **open** button on the pop-up screen. When you open this file your prices will automatically be updated.

Close

Click the red button **Close** to exit this screen.

Verify

Print a catalog and verify the prices have been updated.

Updating Equipment

Be sure to update pricing when updating equipment.

I. How to set up your system.
"Setting Up Multiple Computers, Exporting, Backup"

Exporting Setup Files

If you decide to install the software on more than one computer, this step will save you time. Be sure the Electronic Consultant Software is installed and unlocked on all computers you wish to import to, before proceeding.

Setup your system completely on one computer; then send to a floppy disk. Usually your *(a:)* drive.

The procedure for exporting files is as follows:
Company Setup Files
Check the **Company Setup Files** box (*use one disk for each checked box).*

Send To
Click the down arrow and select the drive you wish to export to *(usually a:).*

Backup
Click the green button **Backup** to begin the backup process. When the process is finished a pop-up box will say Backup completed.

Close
Click the red button **Exit** to close this screen.

Hint:
Use this procedure to backup your files for storage. Regular backups are recommended.

Transferring Proposals
1. Click the yellow button to select proposals you wish to transfer. A pop-up screen will list all your proposal.

2. Highlight the proposals you wish to export.

3. Click the green **Export** button to copy.

4. When completed a "Proposal Transferred" box will popup.

Backup/Export Screen
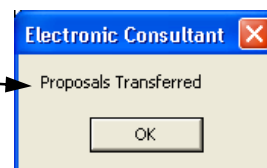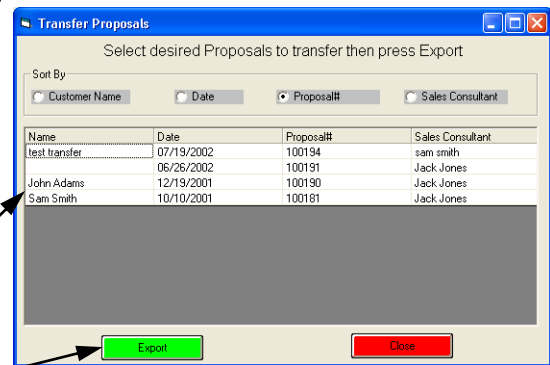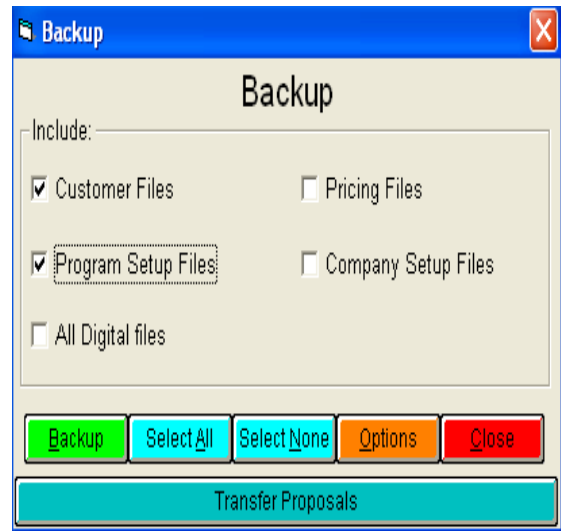
I. How to set up your system.
"Setting Up Multiple Computers, Importing"

Restoring Setup Files

Insert the floppy disk into your floppy drive.

The procedure for Restoring files is as follows.

Company Setup Files

Check the appropriate files box.

Import From

Click the down arrow and select the drive you wish to import from *(usually a:)*.

Restore

Click the green button **Restore** to begin the process. When the process is finished a pop-up box will say Restore completed.

Close

Click the red button **Exit** to close this screen.
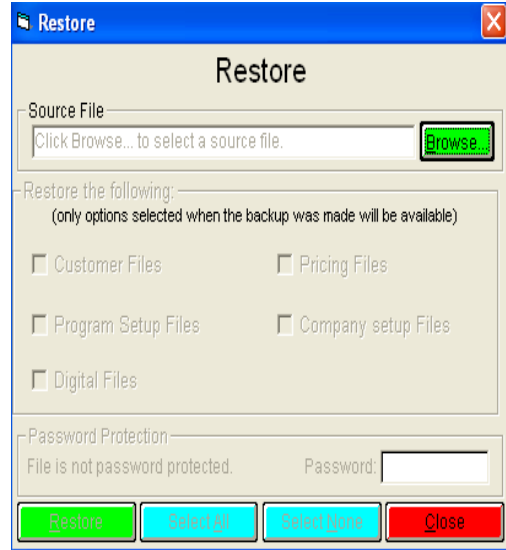
Importing Proposals from the Transfer File

1. Click on "File".

2. From the drop down menu select "Open Proposals".

3. Click on the "Import From Transfer File" button.

4. The Open Proposal Screen will popup

5. Highlight the proposals you wish to import.

6. Click the "Import button.

7.

Class Exercise

1. Click on Company Setup Files.

2. Locate your *(a:)* drive.

3. Click on backup.

4. Close.

5. Now Restore the file.

Import/Restore Screen

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II. How to set up your Databases.
"Adding Equipment To The Database"

Equipment Data

Data Entry is very similar throughout this software. When adding equipment, you will need to add some additional information.

Adding Equipment to the Database

Step 1: Select a database tag name.

Step 2: Enter the Type, Family, Description, & Model #.

Step 3: Enter a Distributor Part # and/or capacity if necessary.

Step 4: Click Add Record button.

Repeat this procedure for each part you enter.

Equipment Data Screen

Hint:
You may use this screen to add labor to a piece of equipment, change the multiplier/gross margin, and view the selling price. This will override the global settings.

Go to the next page to add specifications to the equipment.

Notes:

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Class Exercise

1. In the Optional Markup Screen change the multiplier to 2.

2. Click the View Selling Price button.

3. Note how the Gross Margin changed also.

4. Do not update the information.

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II. How to set up your Databases.
"Entering Equipment Specifications"

Equipment Specifications

From the Equipment Data Screen click the light blue button **Equipment Data** to bring up this screen.

Whenever you add a new piece of equipment you will need to fill in this form for the data to be viewed from the Proposal Builder Screen.

Use the data from the Manufacturer's Specification sheets and fill in all applicable blank fields.

Be sure to click **Add Record.**

To add information that may be viewed when you click the **Features** button on the data screen, follow these steps:

Locate a file in the Bmp folder with an .rtf extension.

Path
My Computer
    C: drive
        Program Files Folder
          Adtek Folder
            Brand Folder
              Sales Folder
                Bmp Folder

Select a Word document with an .rtf extension (example; fur.rtf). Type over existing information and save under a new name. Be sure to leave the file extension (.rtf).

The new file name will need to be entered in the Feature File Name box.

Equipment Specifications Screen

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Class Exercise

1. Find an .rtf file using the above path.

II. How to set up your Databases.
"Building Kits"

Kit Builder

This feature allows you to group material and labor used on most jobs *(example: generator, transfer switch, etc.).* This will save time in the home when building the proposal.

Step 1: Click on **Clear Screen** *(optional).*

Step 2: Check the boxes that apply.
☐ *Include Manufacturer Name with equipment description*
☐ *Include Model # with equipment description*
☐ *Include Capacity and Efficiency with equipment description*
☐ *Show quantity on Description*
☐ *Itemize on Proposal*
  (If you do not itemize on the proposal, then the description line will be printed on the proposal).

Step 3: Check the Database box that applies.
☐ *Equipment Database*
☐ *Accessory Database*
☐ *Parts Database*
☐ *Warranties*

Step 4: Go to the Tag dialog box and click the down arrow. From the drop down menu select the database Tag; then the Family; then the item you wish to add to the kit; then add the quantity of that item; then click the green down arrow (+) to add. Click the red up (-) to remove an item.

Step 5: Repeat Step 4 for each item you wish to add.

Hint:
Be sure you have entered a part into your new kit before assigning a Kit Part # and Description.

Kit Builder Screen

Step 6: Go to Kit Database; Category. Type in a category *(example; Air Conditioner or Furnace);* then click the Kit Part # data entry box and type in a unique part number; then click the Description data entry box and type in the description that you want to show on the proposal.

Step 7: Click the green button **Add/Update Kit** to save.

(continued on next page)

Hint:
It will be easier to manage your Kit Database if you begin the kit part # with "AC" for air conditioners, "HP" for heat pumps, etc. Kit part #'s are alphabetized in the proposal screen

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Kit Builder (continued)

Other Buttons:
Add/Update Kit: To add or remove an item of an existing kit, select the Kit Part# that you want to edit and repeat step 4; then click the green **Add/Update Kit** button.

Update Prices: When new prices have been imported or you have manually changed prices in any of the databases, you must click the orange **Update Prices** button, if you want the new prices applied to your kits.

Copy: After you have built a kit you may select several line items and copy them to clipboard.

Paste: When building a new kit you may paste the items you saved in the clipboard.

Delete a Kit: To remove a kit from the Kit Database click the red **Delete Kit** button.

Close: To close the Kit Builder screen click the light blue **Close** button.

Note:
To change the order of any line item in the kit database, just drag the line with your mouse.

Kit Builder Screen

Enter quantity here

Notes:

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Class Exercise

1. Build a kit with an A/C, coil, lineset, pad, and labor.

2. Click "Include Manufacturer Name with description".

3. Click "Itemize on Proposal".

4. Add the kit to the Kit Database.

Hint:
If you want to include the manufacturer's name and a model # in the description, then be sure to check

☐ _Include Manufacturer Name with equipment description_
☐ _Include Model # with equipment description_
☐ _Include Capacity and Efficiency with equipment description_

before you add that item to your new kit.

To reverse an entry, delete the part and re-enter. Then Update Kit.

Manual Kit Builder

When you click the Add Manual button from the Kit Builder Screen, this screen pops up. This will allow you to enter parts that are not in the database. Be sure to add the material and the labor cost. This information will be used when analyzing your profits. You may establish the selling price for any part you add manually.

You may adjust a kit selling price by entering an amount into the Selling Price field.
Example: By adding (-100) in the selling price field and clicking the green down arrow, the amount in the Total Selling Price field will be decreased by $100. Click "Update Kit" to save.

To Add A Part Manually:

1. Enter a Part #

2. Enter the material and labor cost.

3. Enter the Description.

4. Click the "Calculate Selling Price from Mark-ups" button or enter the desired selling price into the Selling Price field.

5. Click the green down arrow (+) to add the part to the kit.

6. Repeat Steps 1 through 5 for each item you wish to add.

7. Click the green button **Add Kit** to save if your building a new kit and **Update Kit** if you are adding to an existing kit.

8. Click the light blue button in the upper screen to **Close** the Manual Kit Builder Screen.

Kit Building: Manual Screen

Note:
When you enter an item into the Manual Entry screen

And click on the green (+) down arrow

It will be entered into the kit database.
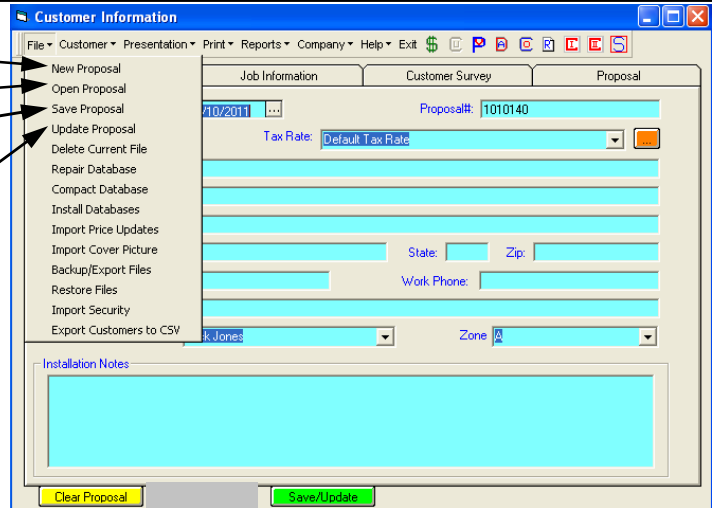
Notes:

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Class Exercise

1. Add a part manually.

2. Calculate the selling price.

3. Change the selling price to $100

4. Click on the green down arrow (+)

5. Return to the Kit Builder Screen.

III. Steps of the In-Home Presentation Process.
"Pre-Call Preparation"

To start a new proposal, click here.

To open an existing proposal, click here.

To save a new proposal, click here.

To save (update) an existing proposal, click here.

Opening An Existing Proposal
To open a proposal, first, Click "*File*" then; "*Open Proposal*" from the drop down list. Select the proposal you want to work with from the list shown. The Customer Information Screen, shown below, will appear.

Saving a Proposal
To save a new proposal, click "*Save Proposal*" from the drop down list. If you are working with an existing proposal, then click "*Update Proposal*".

Pre-call Preparation:
The first step in the selling process is to fill-in the Customer Information Form before you arrive at the prospect's home. This will save valuable selling time.

Date
The date will be entered by your computer.

Sales Tax
Choose your tax rate.

Proposal
You can assign a proposal number or the E/C will do it for you, automatically, increasing one digit each proposal. *(see Company Setup of this workbook, for details).*
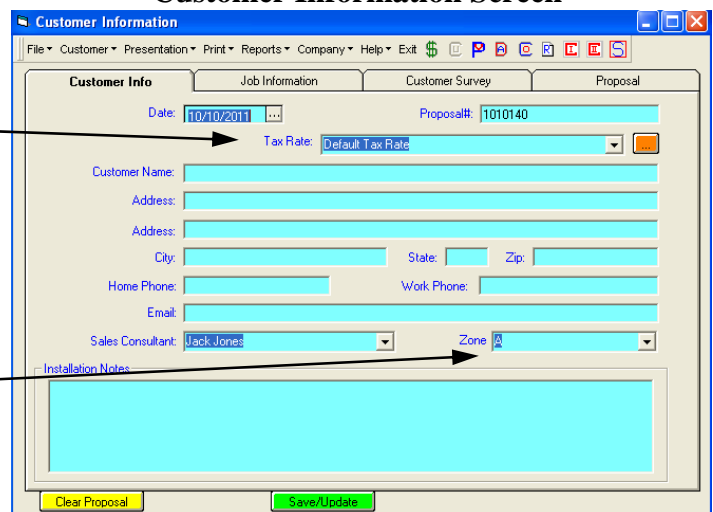
Price Code
Select the price code for this proposal
(see pages 14 & 15, on customized discounts).

Installation Notes
Type in information specifically intended for the use of the Consultant. *(example: Homeowner works nights, call only after 2 P.M.).*

JADTEK SOFTWARE

Notes:

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Customer Information Screen

Class Exercise

1. Fill in the Customer Information Screen.

2. In the Installation Notes box type in a statement that might be beneficial to a Consultant.

III. Steps of the In-Home Presentation Process.
"Importing The Proposal Cover"

On Arrival:
Using a digital camera, take a picture of the customer's home upon arrival *(a camera that uses a 3 1/2" floppy disk, is recommended)*. Insert the floppy into your *(a:)* drive.

If you need additional help with importing a picture, turn to page eighteen (18) of this manual.

Importing the Proposal Cover
From the *File* drop down menu, select *Import Cover File/Dealer Logo*.

Locate Picture
Click the yellow button **Locate Picture**. A box will pop-up and ask, *look in,* select your *a:* drive, open the file that contains your picture.

View Picture
The picture will be displayed on the left side of the screen, if O.K., continue.

Save Picture
Click the green button **Save Picture**. Once the picture is imported, a box will say imported successfully.

Printing Cover Picture
Un-check the **Do Not Print Cover Picture** box to Print a cover picture.

Close
Click the red button **Close** to exit this screen.

Class Exercise

1. Locate *(file)* on your Adtek tutorial floppy *(see page 18 of this workbook for details).*

2. View and save picture.

Importing Digital Files Screen

Hint:

For Help press F1 or click the "?" Button.

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III. Steps of the In-Home Presentation Process.
"Entering Job Information"

Appraise the Existing Conditions:
Establish a comfortable procedure when arriving at the prospect location. Look at the existing equipment, take measurements and pictures. Collect the information needed for the loads program. *(Use the input form that you printed prior to arrival).*

Set-up your printer and your computer. Start printing the cover page. While the cover page is printing, do your loads calculation.

Next, complete the Job Information form.
1. Click on the type of Exterior the building has.

2. Click on the Indoor Unit Location.

3. Type in the Outdoor Unit Location.

4. Type in the dimensions of the;

> Existing Indoor Unit.

> Supply Air Plenum.

> Return Air Plenum.

5. Type in Special Instructions for the installers *(example; Locate condensate drain near water heater.).*

The above information will print out on the Installers Guide.

Post Sale Information, Enter:
> Which system that was sold
> Call Back Date and any Comments
> Closing Date and any Comments

Job Information Screen
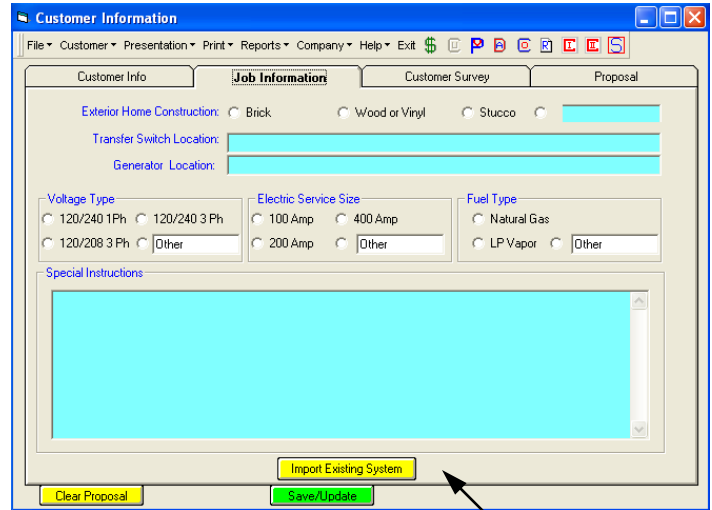
Import Picture of Existing System:
Click the yellow button and follow the instructions on the following page.

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Class Exercise

1. Fill in the Job Information.

2. Click on the "Import Existing System".

(continue on next page to finish this exercise.)

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Taking the Customer Survey.
This creates interaction with the customer.

When the home owner answers positively to a survey question, the answer will result in a recommendation for the necessary equipment to fulfill the need.

Example: Does anyone suffer from hay fever or allergies? The recommendation will be an Electronic Air Cleaner.

Thus, the customer is helping to select high efficiency equipment or accessories.

Let the customer click on the screen, get them involved. People support what they create.
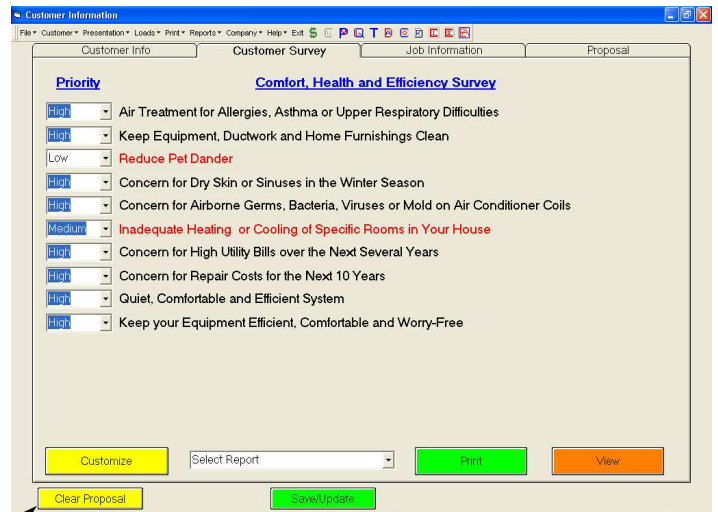
Customizing the Customer Survey
Click on the "Customize" button
to customize a survey.

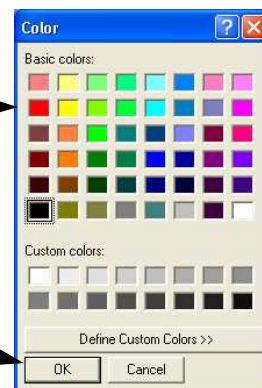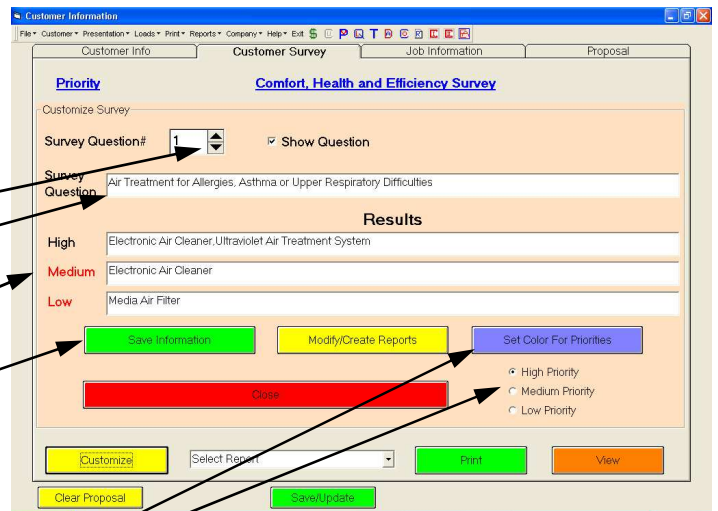Select the Survey Question Number.

Type in the Survey Question.

Then the Results for High,
Medium, and Low priority.

Save your information.

To set a color for each priority check which priority and click on the "Set Color For Priority" button.
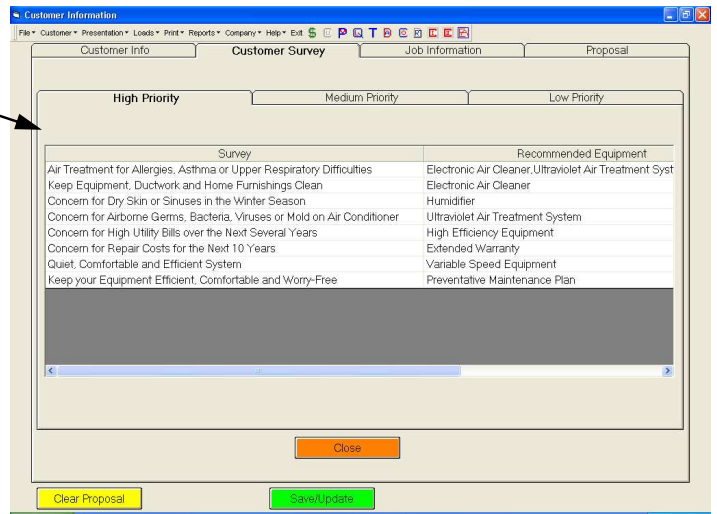
Select the color of your choice

Click OK

Customer Survey Screen

III. Steps of the In-Home Presentation Process.
"Customer Involvement"

Viewing the survey questions and the results.
When you click on the "View" button on the previous screen, this screen will popup.

Previewing and Printing a report.
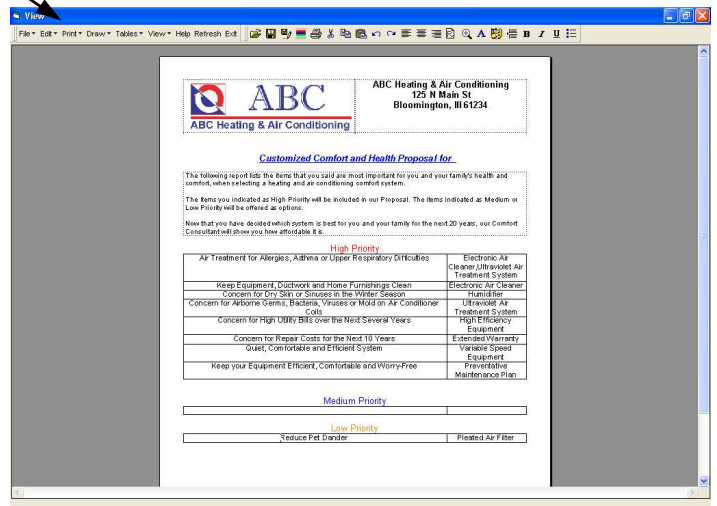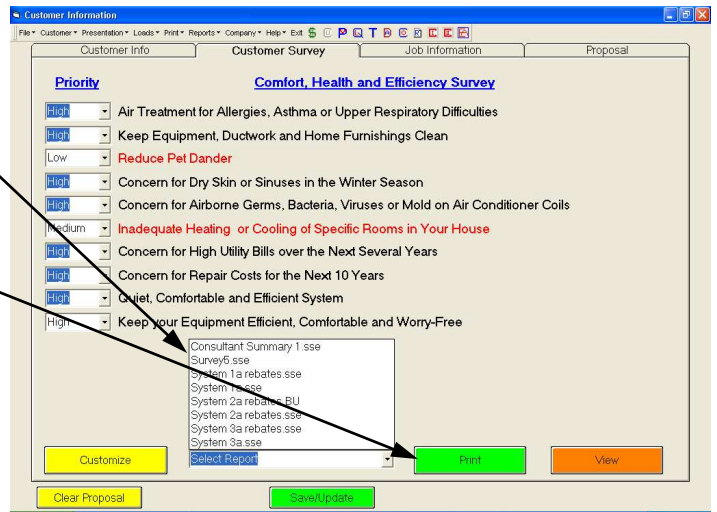Select the Survey Template from the menu by clicking on the down arrow and highlighting the Survey Template.

Click on the "Print" button and you will be able to Preview the "Survey Results" form.

To print the Survey,
Click on Print from the Menu Bar

Select Entire File.

Click OK.

Be sure you have selected a printer and setup the printer properties for that printer.

Note:
You may customize the survey form. See the Report Writer Manual for additional details.

Customer Survey View Screen

III. Steps of the In-Home Presentation Process.
"Developing a Professional Image"

Selling Yourself and Selling Your Company.
This may be the most important part of your presentation and when linked with the other image building tools in the software, you will have added value to the sale.

When you create a professional image there is a perceived value related to you, your company, and the product.

The Electronic Consultant Software allows the dealer to present a professional presentation every time. Just point and click. By using the fifteen buttons at the right, the dealer can organize his presentation and not worry about missing any key points.

Examples:
Show pictures of key employees *(smiling)*.
Technicians neatly dressed.
Talk about your policies and guarantees.
Testimonials of satisfied customers.
Ongoing education.
Licenses, permits, and liability insurance.
Other services.
Etc.

When the dealer sets up the presentation and exports it to all his salespeople, the company story will be reinforced in the market place.

This is also a good tool for new inexperienced salespeople.

Click the **Customize** button and then go to the next page to learn how to setup your presentation.

Hint:
Remember, Homeowners may say they are looking for the best price, but they are looking for the best value.

Company Presentation Screen

Notes:

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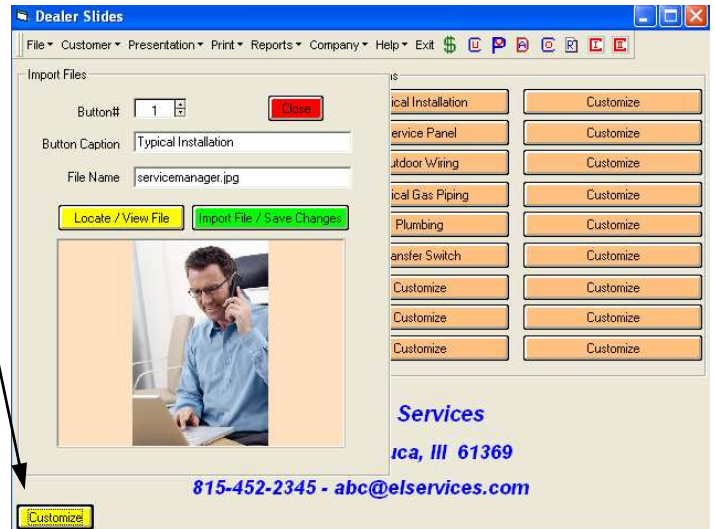
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ADTEK
SOFTWARE

III. Steps of the In-Home Presentation Process.
"Personalizing Your Presentation"

How to customize the presentation buttons.

1. Click the yellow **Customize** button.
2. This will bring up the Import Digital Files screen.
3. Select the button # you wish to setup.
4. Type a description in the "Button Caption" field.
5. Click the yellow **Locate/View File** button.
6. Select the file you wish to import (.bmp or .jpg file extension).
7. If this is the picture you want to import, then Click the **Import/Save Changes** button.
8. Repeat this process for each button.

Company Presentation Setup Screen

Hint:
Digital Files can be located on the Electronic Consultant CD-ROM in the Bmp directory.

Class Exercise

1. Import a new picture for button #3 from the Adtek floppy disk.

2. Label it "Classroom Test".

3. Save it.

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ADTEK SOFTWARE

III. Steps of the In-Home Presentation Process.
"Presenting Your Products"

The Product Presentation.

You want the fifteen buttons to list the equipment you want to sell, the accessories you offer, and the type of installations you do.

Example:

1. Series A Generator
2. Series B Generator
3. Series C Generator
4. Portable A Generator
5. Portable B Generator
6. Portable C Generator
7. Transfer Switch
8. Accessory Item #1
9. Accessory Item #2
10. Custom
11. Custom
12. Custom
13. Custom
14. Custom
15. Custom

Equipment Presentation Screen

Notes:

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Hint:
Remember, The Homeowner helped pick out the products they desire with the customer survey.

Show your quality installations, it will add value to your presentation

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To set up your Equipment show, Click the **Customize** button and follow the steps listed on page 38 of this manual.

Hint:
Equipment digital files can be located on the Electronic Consultant CD-ROM in the Bmp directory.
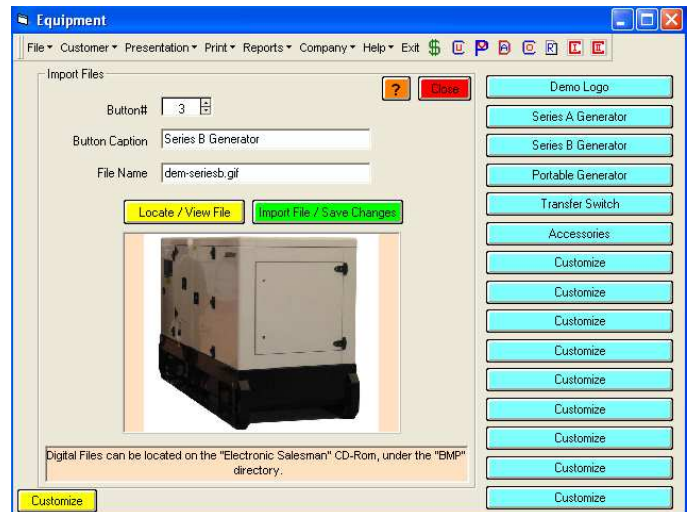

Equipment Presentation Setup Screen

ADTEK SOFTWARE

III. Steps of the In-Home Presentation Process.
"Power Point Presentations"

Using the Powerpoint Screen.

This features allows you to add up to twenty-one powerpoint presentations. After you have developed a powerpoint presentation (.ppt), you will need to "Save As" a powerpoint show (.pps).

Some powerpoint presentations may be available from your equipment manufacturer or distributor.

This tool is only limited by your imagination.

Examples of powerpoint topics:

1. Your Company History or Company Story.
2. How different types of equipment operates.
3. Maintenance agreements or Pre-season checks.
4. Warranty details and procedures.
5. Packages:
   - Clean-air Package
   - Landscape Package
   - Comfort Package
6. Unique or specialty installations.
7. Other services you offer.

### How to customize the power point presentation buttons.

1. Click the yellow **Customize** button.
2. This will bring up the Import Powerpoint Files screen.
3. Select the button # you wish to setup.
4. Type a description in the "Button Caption" field.
5. Click the yellow **Locate/View File** button.
6. Select the file you wish to import (.pps file extension).
7. Click the "open" button.
8. A box will pop-up and tell you the file was imported.
9. Repeat this process for each button.
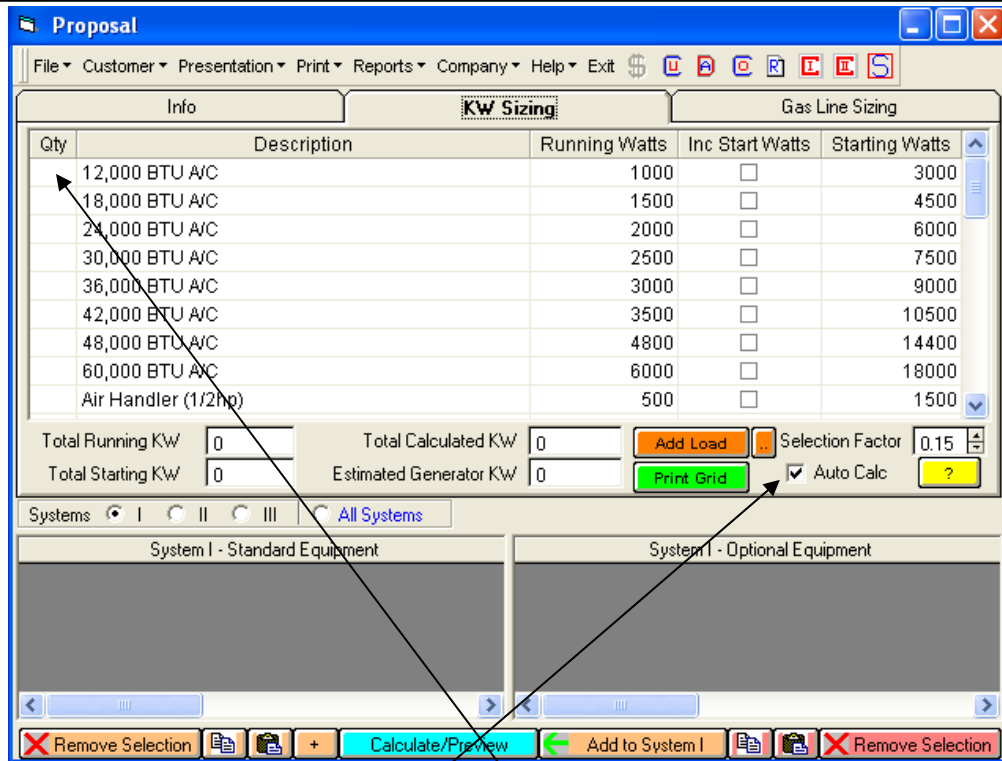10. Click "Close" when finished.

Powerpoint Screen
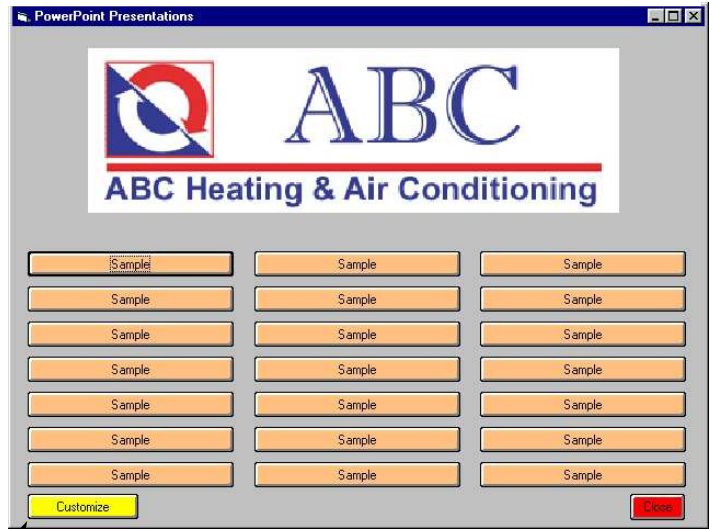
Note:
You will need Microsoft Power Point installed on your computer to use this feature.

Equipment Presentation Setup Screen
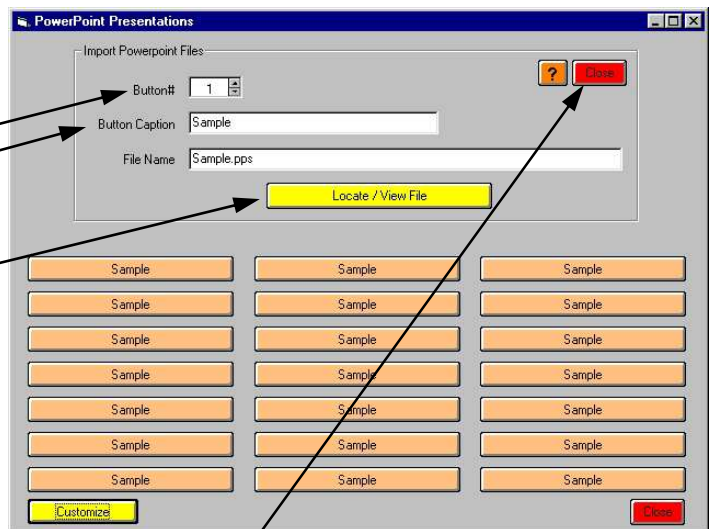
III. Steps of the In-Home Presentation Process.
"Sizing the Generator"

Using the Sizing Screen.

This features allows you to size the generator based on the anticipated connected load. Scroll through the items in the grid, the click on the field blow the heading "Qty" to enter the quantity.

We have include and "Auto-Calc" feature for your convenience. When this box is checked, the calculator will determine the size of generator based on a combination of methods. **This should size the generator appropriately when used with good judgment.** Please click on the yellow information button for further information on the Auto-Calc feature. You may also print the grid by clicking on the "Print Grid" button. This report can also be included on your proposal by using the report generator. You can add a customized load that may not be in the grid by clicking on the "Add Load" button. If this is a load that you would like to add to the database, click on the orange button "…" to add it to the database for future use. You may also delete or change the existing database with this function. *Please note that this is estimated sizing and good judgment must be used along with this sizing method.*
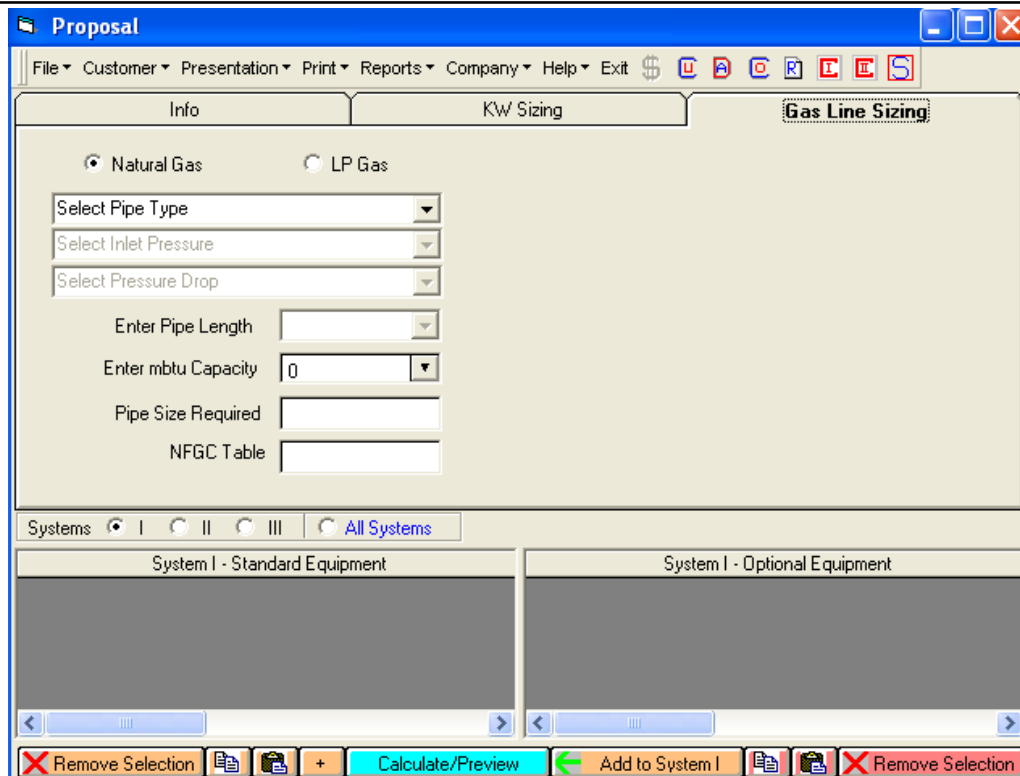
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III. Steps of the In-Home Presentation Process.
"Sizing the Gas Line"

Using the Gas Line Sizing Screen.

This features allows you to size the gas line based on type, length, etc. The calculator utilizes the NFGC tables. Simply follow these steps:

1. Select the gas type, Natural or Liquid Petroleum (LP).
2. Select the pipe type.
3. Select the inlet gas pressure
4. Select the pressure drop
5. Enter the pipe length from the drop down list
6. Enter the capacity in mbtuh. (100 cu ft = 100 mbtu = 100,000 btu)
7. Read the pipe size in inches in the next field.
8. The NFGC table used will be listed next.

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III. Steps of the In-Home Presentation Process.
"Building the Proposal"

Building a Proposal.

The graphical pictures at the right are linked to a database.

When you click on the brand of equipment, it will then ask you what type of equipment you would like to choose. Then it will ask you for your family of choice. This process will look at the database and limit your choices to only the models that will meet that criteria.

When you click on all other items on the drop down screens, a list of the items in that database will pop-up in the upper left hand corner of the screen.
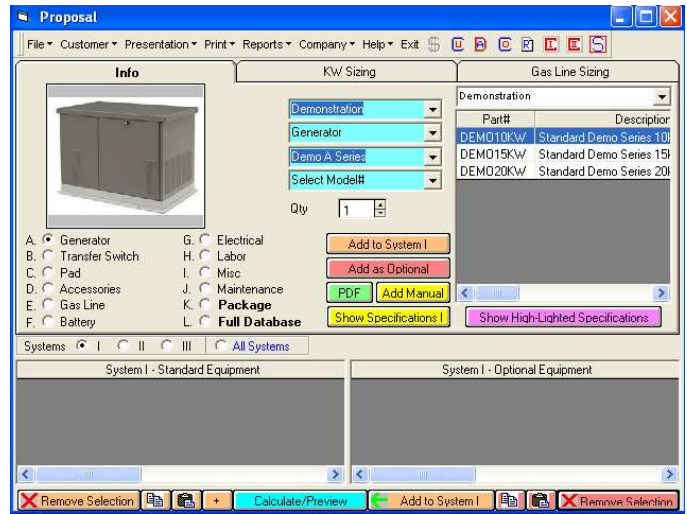
Example:

1. Click on the Brand.
2. Select the Generator.
3. Select a Family.
4. Choose a 10kW Option.
5. Click Add to System 1.
6. Select the Brand again.
7. Select the transfer switch.
8. Find a model #.
9. Click Add to System 1.

Repeat steps 6-9, and add the rest of your accessory items, including labor.

Options may be added by clicking the "**Opt**" button.

Proposal Builder Screen

Hint:
When building a proposal, start with the major pieces equipment first for each system you wish to quote. Check the "All Systems" box to add items that are common to all systems.
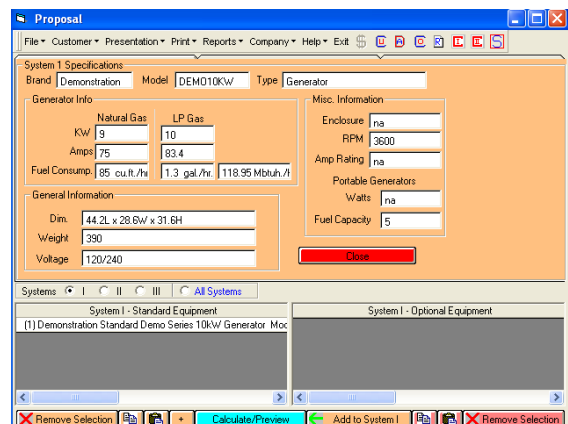

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Building a Proposal.

Using the Customized Kit feature is a quick and easy way to build a proposal. It is recommended to start with Kits containing High-efficiency equipment .

To add a Kit to the Proposal:
Click on "Customized Kits"

Your kits are stored by category. First select the category type.

A list of available kits will be listed in the upper left hand corner of the screen.

Highlight the kit you want to add to the proposal and click on the "Add to System" button.

The Kit will be listed in the Standard Equipment dialog box. When the Kit was built, if you checked the 'Itemized on Proposal' box, then all items in that kit will be listed. Otherwise, just the kit description will be listed.

Note: You may add/delete from the Standard Equipment list by highlighting the item and clicking Remove Selection; then re-enter the new item.

Example:
1. Click on Customized Kits.
2. Select a Kit containing 10 kW Generator
3. Click Add to System.
4. The Kit will be listed.
5. Compare a similar generator as possible.
6. See next page for instructions.

Proposal Builder Screen
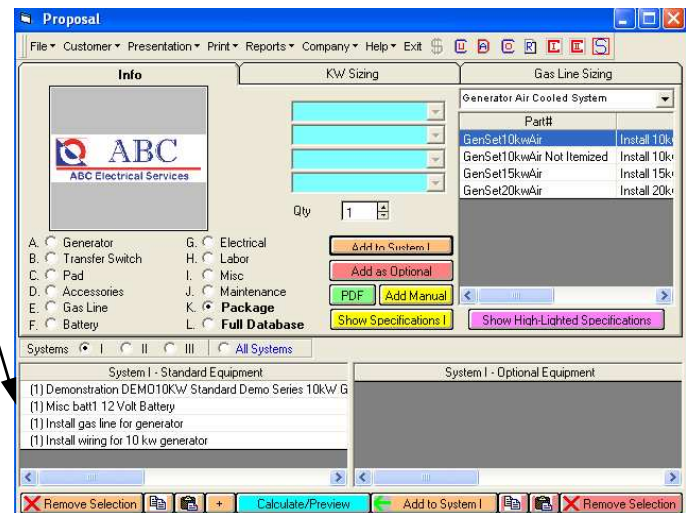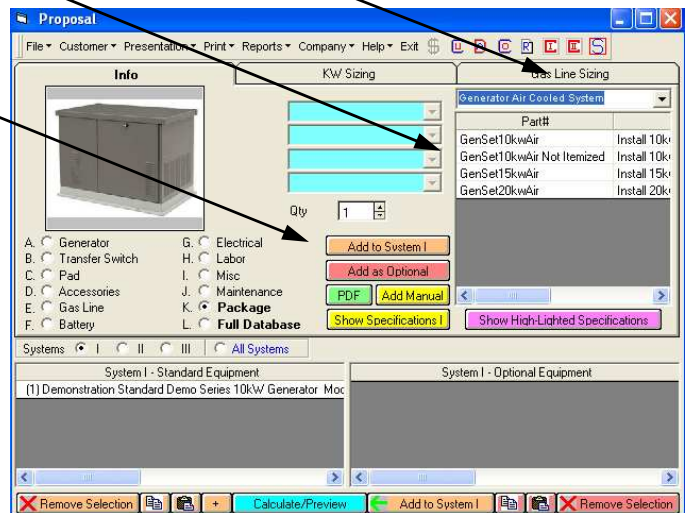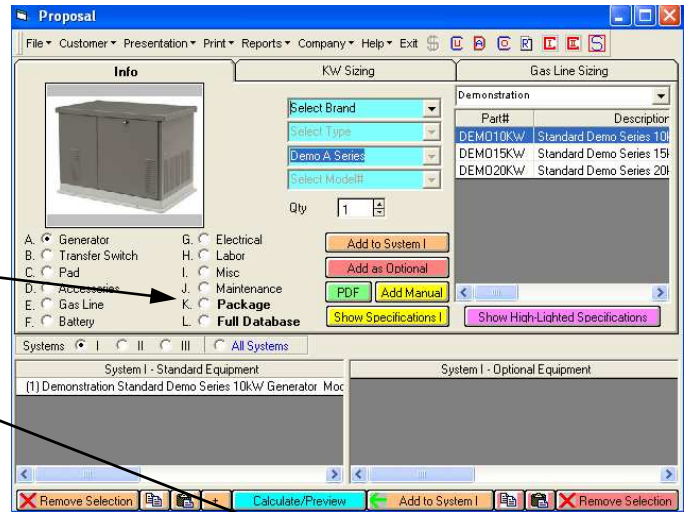
a

III. Steps of the In-Home Presentation Process.
"Comparing Equipment Prices"

Equipment Comparison Screen.
To compare the price of one piece of equipment to another, you will want your kit itemized. Follow the steps listed below.

Procedure for comparing equipment prices:
1. Select the Standard piece of equipment (follow steps listed on the previous page).

2. Click on the piece of equipment you want to compare as optional. Select the tonnage or capacity; then the Family/SEER; then the Model #.

3. Click the "**Opt**" button to add to the proposal. A box will pop-up asking if you want the price difference (click Yes) or show the full price of the optional equipment (click No).

4. Then a box will pop-up asking you to click on the equipment to compare too. **Be sure to highlight the item you want to compare.** Click "O.K." or "Cancel".

5. A box will pop-up verifying your selection, "Yes" or "No".

Your selection will be listed in the "Optional Equipment" box on the Proposal Builder screen and on the Proposal.

Optional Price Screen

Select Equipment Screen
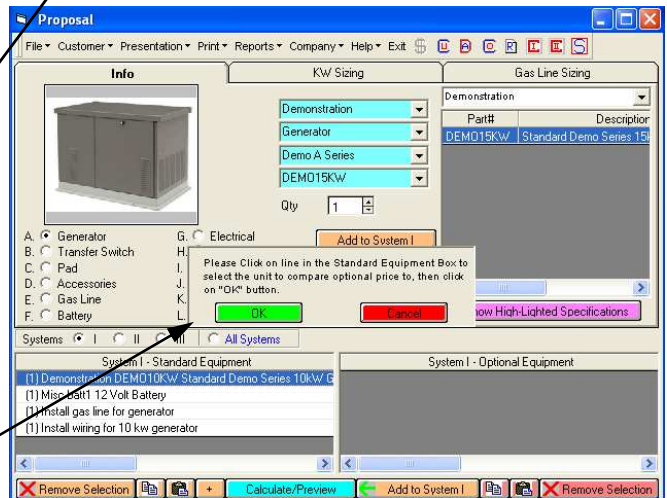
Compare Equipment Screen

Class Exercise
1. Compare a 10kW to a 15kW.

2. Show as price difference.

3. Preview on the Proposal.
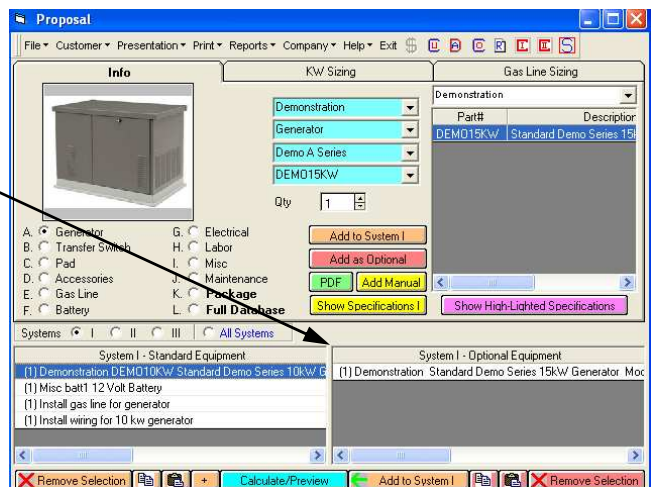
III. Steps of the In-Home Presentation Process.
"Equipment Specifications and Features"

Viewing the Product Specification.

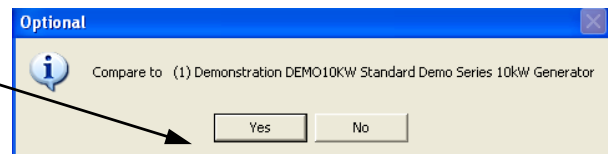After you have selected a piece of equipment, you may click the "Data" button.

The screen to the right will pop-up illustrating that model's nomenclature.

This information comes from the "Equipment Data" tab *(see page 23 in Section III "How to set up your Databases").*

From this screen you can click the "Features" button and the Features Screen will pop-up *(see below).*

Hint:

You may wish to check the unit dimension before adding size dependent equipment or accessories.

The Features screen serves as a reminder of the features and benefits of the product you are explaining to the homeowner.

You may edit this file *(see page 24 in Section III "How to set up your Databases").*

Class Exercise

1. Select a piece of equipment.

2. Click on the Data button.

3. Click on the Features button.

4. Click anywhere on the Features screen to close.

Data Screen
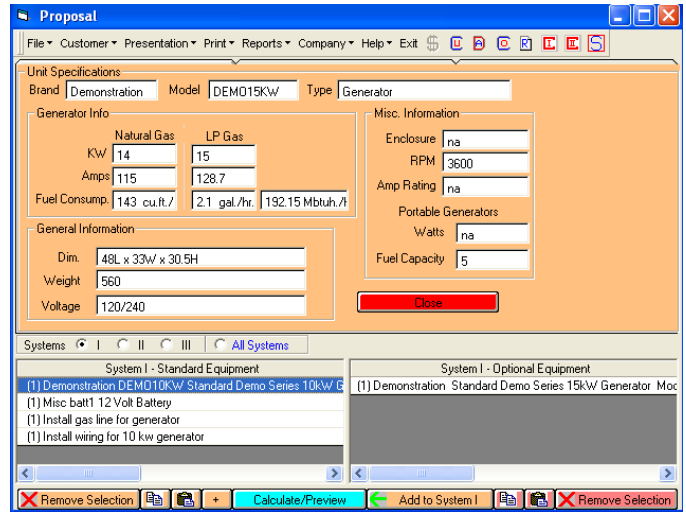
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Features Screen
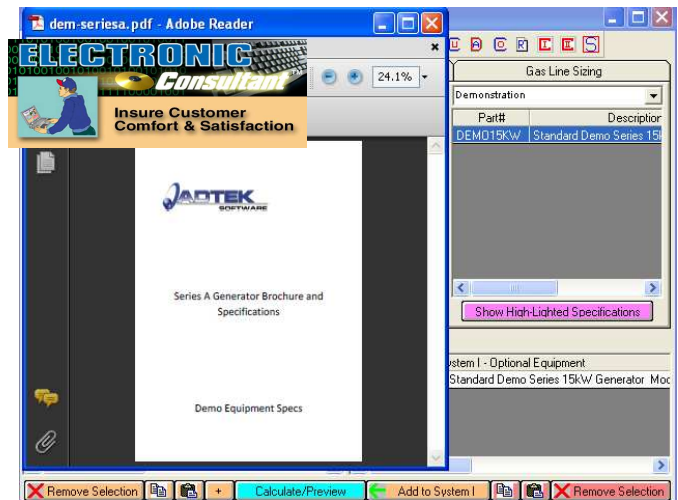
V. Printing Your Documents.
"Previewing and Printing the Proposal"

Preview.
When you click "Calculate" on the Proposal Builder screen, the Preview screen will appear.

You can preview each system. Just click the appropriate tab, I, II, or III.

The selling price will appear as the system investment, plus the price for the options offered. Also, any "Rebates" that might be offered.

> *Hint:*
> **You can click on the Standard box and type in additional information or change the description.**

Print.
When you click the "Print Proposal" button. the "Preview/Print Proposal" screen will pop-up, allowing you to either preview or print each system.

Click on the System you want to Preview or Print.

Click Include Cover Sheet if desired.

You can either print or preview from this screen.

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

1. Click on the down arrow to view the Proposal Templates.

2. Select the desired proposal.

3. Click "Customized Reports Edit Screen" or "Customized Reports View Screen".

4. You will be able to print from the view screen.

Preview Screen
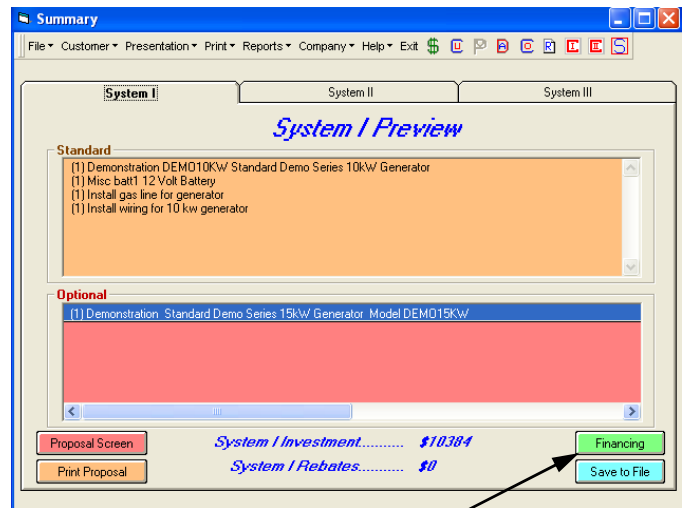
Payment Calculator.
New short cut key to the Payment Calculator. Click the "Financing" button and the Payment Calculator will popup.

Print Proposal Popup Screen
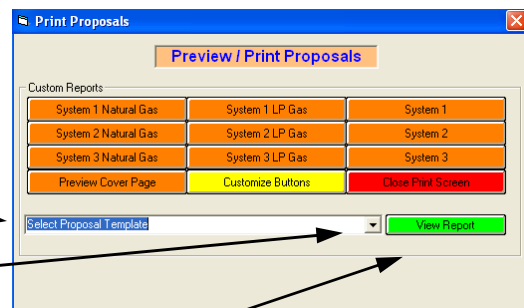
Class Exercise

1. Check the Include Cover Sheet box.

2. Check System I under Preview.

3. Click the "Preview" button.

V. Printing Your Documents.
"Previewing and Printing the Proposal (continued)"

Preview.

After you have completed the steps on page 51, then you may review the proposal.

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.

Preview Proposal Screen

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.

Notes:

Class Exercise

1. Close each screen after viewing.

V. Printing Your Documents.

You may print many additional items by selecting the "PRINT" dropdown menu. Items such as:

1. Proposals:

2. Installers Guide:

3. Customer Form:
  Prints a blank form for collecting job information.

4. Job Cost:

5. Net Price Lists:
  a. **Equipment**

  b. **Installation Items**

  c. **Accessory Items**

6. Retail Price Lists:
  a. **Accessory Items**

  b. **Equipment**

  c. **Installation Items**

  d. **Kit—Itemized**
  Prints the retail selling price for each line item included in the kit.

  e. **Kit—Total**
  Prints total retail selling price for the complete kit.

Class Exercise

1. Select "Print" from the Menu bar.

2. Select "Price List".

3. Then "Equipment"

4. Preview your equipment cost.

V. Printing Post Sale Information.

Job Costing Informational Sheet

Name: Mr. & Mrs. Anderson	**Sales Consultant:** Jack Smith
Address: 123 N. Main St.	**Proposal #:** 100100
City, State, Zip: Chicago, IL 61333	**Date:** 10/1/2000
Phone: 312 - 123-4567	

System I

Total Selling Price	$8,958.00	Selling Price before Rebate	$
Net Parts	$4,679.53		
Net Labor	$1,000.00		
Rebate Cost	$		
Net Tax	$438.71		
Total Cost	$6118.24		
Gross Profit	$2,839.77		
Gross Margin	31.7%		

System II

Total Selling Price		Selling Price before Rebate	$
Net Parts			
Net Labor			
Rebate Cost			
Net Tax			
Total Cost			
Gross Profit			
Gross Margin			

> **_Hint:_**
> **When the job is completed, Compare the Job Costing Informational Sheet with the actual job cost. Then adjust your gross margin to the desired percentage.**

System III

Total Selling Price		Selling Price before Rebate	$
Net Parts			
Net Labor			
Rebate Cost			
Net Tax			
Total Cost			
Gross Profit			
Gross Margin			

Notes:

Size the Generator

Size the Gas Line

Sell the Generator

Adtek Software Co.

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