

Number: 23

Objective: How to Use Quote Groups

Commands used: Quote Groups

Purpose: The Quote Groups command allows you to create a template with material items grouped together, with a different name from our standard category label, eg - Ridge may be referred to as Capping. All items in a Quote Group also have their individual costs aggregated into a single cost for that group, eg - Total Flashings: all ridge, hip, valley, downpipes etc.

To make use of the Quote Groups function we must first setup up a template with the appropriate Key Text Strings on it. Firstly save your existing work, if you have a job already open. To open up the template simply go to **Utilities | Edit-Templates** and select the template that you would like to put Quote Groups on.

When the template is open, go to **Utilities | Ins-Text**. Type in **###QGROUP1** and click **OK**. Crosshairs will appear and you will be asked to locate where you want to place the text. Place the text in the appropriate place by left clicking and then right click to cancel out of the command.

Now depending on how many Quote Groups you want to use will determine how many Quote Group Key Text Strings you insert on the template.

For Example if you have **###QGROUP1**
###QGROUP2

You will have the ability to setup 2 Quote Groups. The more Key Text Strings that you put in, the more Quote Groups you can use.

Once you have inserted the required number of Quote Group Key Text Strings, Save the template.

NOTE: For more information on Modifying templates, read the Setup Guide.

Now that our template is setup, we can configure how are Quote Groups are setup. Go to **Costing | Quote-Groups**, this will bring up the following dialog box.

Tips and Tricks

Items drawn from Applicad's Customer Service file

Setup quote groups (rec 1 of 2)

Group name

Key text string

Write the name on the report ?

Show the tax amount on the report ?

Will the displayed value include tax ?

Will the default value include the markup % ?

Straight	<input type="checkbox"/>	<input type="text"/>	Sarking	<input type="checkbox"/>	<input type="text"/>
Curved	<input type="checkbox"/>	<input type="text"/>	D Pipe	<input type="checkbox"/>	<input type="text"/>
Ridge	<input type="checkbox"/>	<input type="text"/>	Roof tiles	<input type="checkbox"/>	<input type="text"/>
Fascia	<input type="checkbox"/>	<input type="text"/>	Hip tiles	<input type="checkbox"/>	<input type="text"/>
Gutter	<input type="checkbox"/>	<input type="text"/>	Ridge tile	<input type="checkbox"/>	<input type="text"/>
Barge	<input type="checkbox"/>	<input type="text"/>	Valley tile	<input type="checkbox"/>	<input type="text"/>
Valley	<input type="checkbox"/>	<input type="text"/>	Eave tile	<input type="checkbox"/>	<input type="text"/>
Apron	<input type="checkbox"/>	<input type="text"/>	Roof Shingles	<input type="checkbox"/>	<input type="text"/>
Step	<input type="checkbox"/>	<input type="text"/>	Hip Shingles	<input type="checkbox"/>	<input type="text"/>
Box gutter	<input type="checkbox"/>	<input type="text"/>	Ridge Shingles	<input type="checkbox"/>	<input type="text"/>
Batten	<input type="checkbox"/>	<input type="text"/>	Roof Shakes	<input type="checkbox"/>	<input type="text"/>
Counter	<input type="checkbox"/>	<input type="text"/>	Hip Shakes	<input type="checkbox"/>	<input type="text"/>
Insulation	<input type="checkbox"/>	<input type="text"/>	Ridge Shakes	<input type="checkbox"/>	<input type="text"/>
			Membrane	<input type="checkbox"/>	<input type="text"/>

From here we can name the Group, e.g **Roof**. We can then proceed to select the appropriate components that we want to assign to the **ROOF** Group, by selecting the button next to the component. If required, we can then rename that component as described previously. This name will then appear on the quote. If you don't name the components a description won't be given, just a final cost. Following is an example.

*Information in this note is applicable to Applicad's Steep Roof Products:
Sorcerer, Roof Magician and Roof Wizard.*

Tips and Tricks

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Items drawn from Applicad's Customer Service file

Setup quote groups [rec 3 of 3]

Group name: Write the name on the report ?

Key text string: Show the tax amount on the report ?

Will the displayed value include tax ?

Will the default value include the markup % ?

Straight	<input type="checkbox"/>	<input type="text"/>	Sarking	<input type="checkbox"/>	<input type="text"/>
Curved	<input type="checkbox"/>	<input type="text"/>	D Pipe	<input type="checkbox"/>	<input type="text"/>
Ridge	<input type="checkbox"/>	<input type="text"/>	Roof tiles	<input type="checkbox"/>	<input type="text"/>
* Fascia	<input checked="" type="checkbox"/>	<input type="text" value="Fascia"/>	Hip tiles	<input type="checkbox"/>	<input type="text"/>
* Gutter	<input checked="" type="checkbox"/>	<input type="text" value="Gutter"/>	Ridge tile	<input type="checkbox"/>	<input type="text"/>
* Barge	<input checked="" type="checkbox"/>	<input type="text" value="Barge Capping"/>	Valley tile	<input type="checkbox"/>	<input type="text"/>
* Valley	<input checked="" type="checkbox"/>	<input type="text" value="Valley Irons"/>	Eave tile	<input type="checkbox"/>	<input type="text"/>
Apron	<input type="checkbox"/>	<input type="text"/>	Roof Shingles	<input type="checkbox"/>	<input type="text"/>
Step	<input type="checkbox"/>	<input type="text"/>	Hip Shingles	<input type="checkbox"/>	<input type="text"/>
Box gutter	<input type="checkbox"/>	<input type="text"/>	Ridge Shingles	<input type="checkbox"/>	<input type="text"/>
Batten	<input type="checkbox"/>	<input type="text"/>	Roof Shakes	<input type="checkbox"/>	<input type="text"/>
Counter	<input type="checkbox"/>	<input type="text"/>	Hip Shakes	<input type="checkbox"/>	<input type="text"/>
Insulation	<input type="checkbox"/>	<input type="text"/>	Ridge Shakes	<input type="checkbox"/>	<input type="text"/>
			Membrane	<input type="checkbox"/>	<input type="text"/>

Select Delete Add

Cancel Update Ok

When you are happy with the configuration simply click **Add** to add the Group. When all groups are defined simply click **OK**. With this done, we can now go to **Costing | Supply & Install**.

NOTE: Make sure that you have a job on your screen for this next part to work correctly.

From the Supply & Install dialog you will notice a button in the bottom left of the dialog called **Quote Groups**. Clicking on this button will then bring up your quote groups and prices. Following is an example.

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Tips and Tricks

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Items drawn from Applicad's Customer Service file

Quote group number 3 of 3

The name of this group is : Plumbing

Line item 1 : Fascia

Line item 2 : Gutter

Line item 3 : Barge Capping

Line item 4 : Valley Irons

The calculated total for this group is \$1284.37

The material component is \$1157.54

The labour component is \$126.84

What is the amount you want to write on the quote ?

By selecting the arrows in the top right of the dialog you can scroll through the different groups. Click **Continue** to return to the Supply & Install screen. Select **Print** and then select the template that you modified with the Quote Group Key Text Strings, and you are done. Following is a brief example of what your printout may look like.

*Information in this note is applicable to Applicad's Steep Roof Products:
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Tips and Tricks

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Items drawn from Applicad's Customer Service file

Roof		
• Roof		
• Ridge		
• Batten		
	Total	\$1673.27
Plumbing		
• Fascia		
• Gutter		
• Barge Capping		
• Valley Irons		
		1398.22
	GST (10.0%)	139.82
	Total	\$1538.05
Insulation		
		233.00
	GST (10.0%)	23.30
	Total	\$256.30

Example of the new Quote Form after Quote Groups has been applied.

End

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Sorcerer, Roof Magician and Roof Wizard.*