

2023

eRep Order Processing

Online Order Processing Application



Work Instruction

Version 3.0

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eRep Order Processing

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1.0 VERSION HISTORY

Version	Revisions
1.0	Initial Issue
2.0	<ul style="list-style-type: none">• Changed access location (URL) of eRep Application.
3.0	<ul style="list-style-type: none">• Updated text to reflect current recommend workflow.

2.0 PURPOSE

Use this work instruction to create, select, price, and quote projects related to AboveAir Technologies Heating, Ventilating, and Air Conditioning (HVAC) systems and equipment. This work instruction describes all eRep Application activities from project initiation to quote submission. This work instruction will be revised at a later date to include additional eRep Application activities.

3.0 DEFINITIONS

- **eRep Application** – A web-based, mobile ready software platform designed specifically for made-to-order and engineer-to-order product manufacturers who sell through channels such as independent representatives, distributors, and inside sales. The eRep Application for AboveAir Technologies can be accessed at <http://solutionselect.aboveair.com/eRep/>.
- **Vertical Market** – A market in which vendors offer goods and services specific to an industry, trade, profession, or other group of customers with specialized needs. The eRep Application has options for Agricultural, Industrial, Institutional, Health Care, Educational, and Commercial markets.
- **Project Phase** – The representation or collection of the project activities aimed to prepare the product. Each phase is goal-oriented, contains a particular number of work steps, and ends in a milestone. The eRep Application has options for Design, Budget, Bidding, Award Pending, Contract Awarded, Hold, Closed (Won or Lost), and Dead.

4.0 PREREQUISITES

All individuals creating or making changes to a Project must be provided access to the eRep Application by a System Administrator.

5.0 ROLES AND RESPONSIBILITIES

- System Administrator
 - Ensures that the eRep Application is maintained.
 - Manages user access, profiles, and permissions in the Application.
 - Conducts selections and generates quotes for external sales representatives. These selections and quotes are performed by factory representatives only.

- Engineer – Responsible for ensuring that the correct unit configuration is being selected for the provided design inputs.
- Representative – Conducts selections and generates quotes for external engineers/contractors. These selections and quotes are performed by qualified AboveAir Technologies Sales Representatives only.

6.0 PROJECT CREATION/DELETION

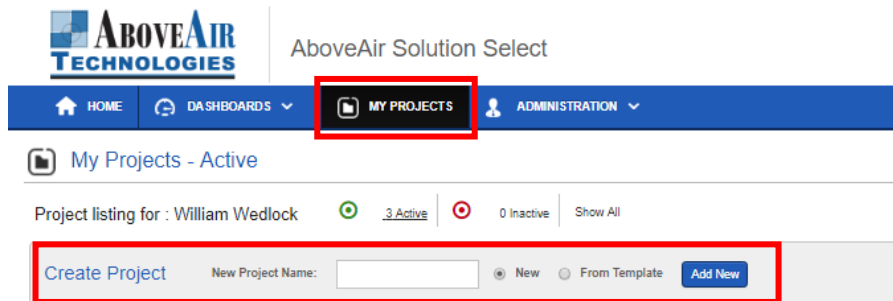
6.1 Creating a New Project



New projects should be created by System Administrators or Representatives only.

To create a new Project on the eRep Application, use the following path:

Go to → **MY PROJECTS** → **Create Project**



In “New Project Name” text box, type in appropriate project name, select “New”, and click [Add New](#)

The Project Information window, shown below, will then pop-up.

Project Information

General Project Information

Created On: 2/26/19
 Created By: William Wedlock
 Last Modified: 2/26/19
 Modified By: William Wedlock
 Project Name: TEMPLATE
 Description: INCLUDE LAST DESCRIPTION
 Display Units: Imperial
 Location:
 Representative: INCLUDE SALES OFFICE
 Sales Person: INCLUDE SALES REPRESENTATIVE
 Engineering Firm:
 Designer:
 Contractor:
 Other Contacts:
 Notes:

Project Status and Type

Status: Active Template: Yes

Vertical Market:
 Agricultural
 Industrial
 Institutional
 Health Care
 Educational
 Commercial

Project Phase:
 Design
 Budget
 Bidding
 Award Pending
 Contract Awarded
 Contract Awarded
 Hold
 Closed, Win
 Closed, Lost
 Dead

Admin Only

[Delete Project](#)

Project Users

Note: Allow others to help you such as your representative

Username	First Name	Last Name	Permission Level
wedlock	William	Wedlock	Non-Principal Administrator
bruce.giffis	Bruce	Giffis	Project administrator

[Add / Edit Users](#)

Note: Contact information on this screen will appear on the submittal cover page printout.

[Save](#) [Cancel](#)

Project Information – General Project Information Region

1. In the **General Project Information** region, review or update the following fields, as needed.

Field	Description
Created On	Read-only system generated date (MM/DD/YYYY) when project is created; you cannot change the date.
Created By	Read-only system generated text (First Name Last Name) when project is created; name based on user's profile; you cannot change the name.
Last Modified	Read-only system generated date (MM/DD/YYYY) updated whenever project is updated; you cannot change the date.
Modified By	Read-only system generated text (First Name Last Name) when project is updated; name based on user's profile; you cannot change the name.
Project Name	Value has been copied from previous "New Project Name" textbox; this value can be changed. A Value is required.
Description	Enter a high-level description of the HVAC unit(s) to be provided, no maximum character length.
Display Units	Defaults to Imperial units; while this value can be changed to Metric, AboveAir Technologies defaults to Imperial units.
Location	Enter an approximate location or region where the physical project is taking place; no maximum character length. Field can be left blank.
Representative	Enter Sales Representatives Office; no maximum character length.
Sales Person	Enter Sales Representative(s) name(s); no maximum character length.
Engineering Firm	Enter Engineering Firm(s) name(s); no maximum character length. Field can be left blank.
Designer	Enter Designer(s) name(s); no maximum character length. Field can be left blank.
Other Contacts	Enter any other contacts with role(s), as applicable; no maximum character length. Field can be left blank.
Notes	Enter any miscellaneous notes, as applicable; no maximum character length.

Project Information – Project Status and Type Region

2. In the **Project Status and Type** region, review or update the following fields, as needed.

Field	Description
Status	Defaults to Active status; if box is unchecked, the new project will be created as an Inactive project.
Template	Defaults to No; Project templates should only be created by Project Administrators.
Vertical Market	Select appropriate Vertical Market from bulleted list. NOTE: Vertical Market must have a selection.
Project Phase	Select appropriate Project Phase from bulleted list. NOTE: Project Phase must have a selection.

Project Information – Project Users

3. In the **Project Users** region, review or update the following field, as needed.



A System Administrator should be included on all new projects.

If additional Project Users need to be added, click [Add / Edit Users](#) to bring up an additional window. Click [Add New User](#) to manually add project users via the search tool.

Once all information has been included and verified, click [Save](#)

6.2 Creating a New Project from Template



New projects should be created by System Administrators or Representatives only.

To create a new Project from a template on the eRep Application, use the following path:

Go to → **MY PROJECTS** → **Create Project**

AboveAir Solution Select

HOME DASHBOARDS **MY PROJECTS** ADMINISTRATION

My Projects - Active

Project listing for : William Wedlock 4 Active 0 Inactive Show All

Create Project New Project Name: New From Template [Add New](#)

In “New Project Name” text box, type in appropriate project name, select “From Template”, and click [Add New](#) . A second window will pop-up asking you which template to use. Please choose the applicable template.

Show Projects

Template Only

	Project Name	Engineer	Created By	Last Modified
Choose	TEMPLATE		William Wedlock	3/1/2018

1 - 1 of 1 items

Once you choose the template project, a similar process to Section 5.1 should be used. System Administrators should automatically be included as Project Users.

Once all information has been included and verified, click [Save](#)

6.3 Deleting a Project



Projects should be deleted by System Administrators only.



If any document from a project has been provided to any external customer, the project **SHOULD NEVER BE DELETED**. If the project has been put on hold or was not won by AboveAir Technologies, the project phase shall be changed accordingly.

7.0 ADDING AN HVAC UNIT TO A PROJECT

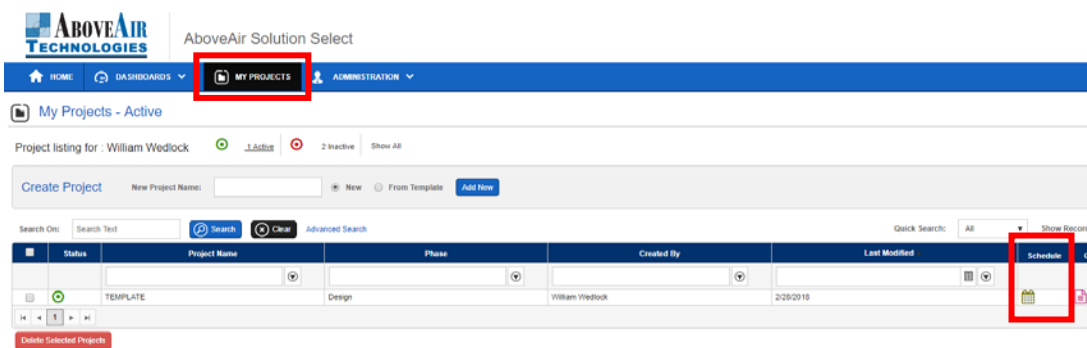
7.1 Adding an HVAC Unit to a Project




Units should be added by System Administrators or Representatives only.

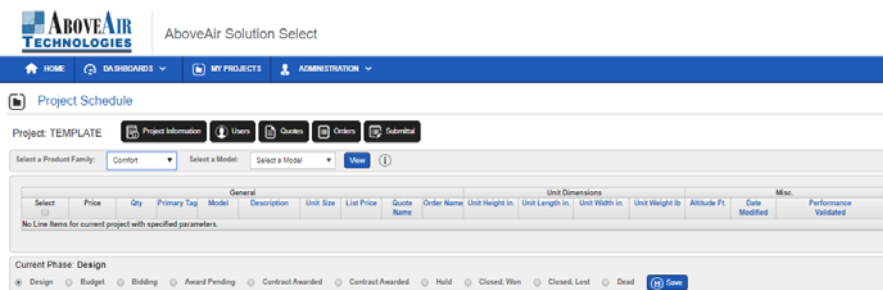
Once a new project has been created, unit(s) can be added. To create a new Unit in a Project on the eRep Application, use the following path:

Go to → MY PROJECTS → Project Name → Schedule

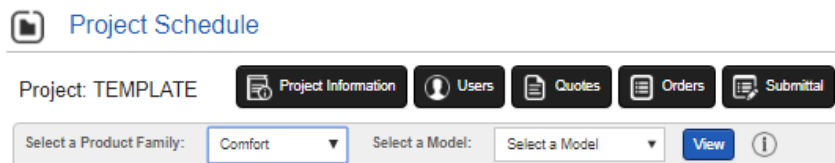



In the appropriate project row, move your cursor to the schedule column and click 

This brings up the Project Schedule Window, shown below. In this window, individual unit configurations can be added.



To add a new unit, move your cursor to the “Select a Product Family”





Once a Unit has been added to the project, the Product Family drop-down list also acts

	as a filter to the units displayed in the table.
--	--

Select a Product Family


1. In the **Select a Product Family** drop-down list, select the applicable family.

Field	Description
Comfort	Limited to AboveAir Technologies Comfort Air systems. This includes VK Vertical (Standard) units.
Outside Air	Limited to AboveAir Technologies Outside Air systems. This includes HK Horizontal (Outside Air) and VK Vertical (Outside Air) units.
Mission Critical	Limited to AboveAir Technologies Mission Critical systems. This includes MC2x2, MC1, & MC2 Precision Mission Critical units, HK Horizontal (Standard), FC Floor Console, SC Spot Cool, and WC Wall Cassette units.
Dry-Coolers	Limited to AboveAir Technologies FLUIDCOOL systems.
Pump Packages	Limited to AboveAir Technologies PUMPALL systems.

Select a Model

2. In the **Select a Model** drop-down list, select the applicable model.

Field	Description
VK™	VK Vertical (Standard). This will show up on the list only if Comfort was selected for Product Family.
HK-OA™	HK Horizontal Outside Air. This will show up on the list only if Outside Air was selected for Product Family.
VK-OA™	VK Vertical Outside Air. This will show up on the list only if Outside Air was selected for Product Family.
FC	Floor Consoles. This will show up on the list only if Mission Critical was selected for Product Family.
HK™	HK Horizontal (Standard). This will show up on the list only if Mission Critical was selected for Product Family.
MC	Mission Critical Vertical Floor Mounted A/C's. This includes the MC2x2 and MC1 cabinets. This will show up on the list only if Mission Critical was selected for Product Family.
SC™	Spot Cool 2x4 Packaged and Split Units. This will show up on the list only if Mission Critical was selected for Product Family.
WC	WC Wall Cassette. This will show up on the list only if Mission Critical was selected for Product Family.
FLUIDCOOL	FLUIDCOOL dry coolers. This will only show up on the list if Dry-Coolers was selected for Product Family.
PUMPALL	PUMPALL pump packages. This will only show up on the list if Pump Packages was selected for Product Family.

Once the appropriate unit has been selected, a third box will appear for the quantity of units to be added to the project. This value can be either manually entered or adjusted using the arrows within the text box. This quantity should reflect the number of *unique* configurations of that model there will be in a project. Once a quantity is determined, click 



If a project requires multiple units with the same configuration, the quantity should be kept at one at this step. There is a different method of adding multiple units with the same configuration.

8.0 CONFIGURING AND PRICING AN HVAC UNIT

8.1 Configuring and Pricing an HVAC Unit from Scratch



Unit Configurations and Pricing should be done by System Administrators or Representatives only.


Once a new project has been created and unit(s) have been added, unit(s) can be configured and priced. To configure and price a new Unit in a Project on the eRep Application, use the following path:

Go to → MY PROJECTS → Project Name → Schedule → Price

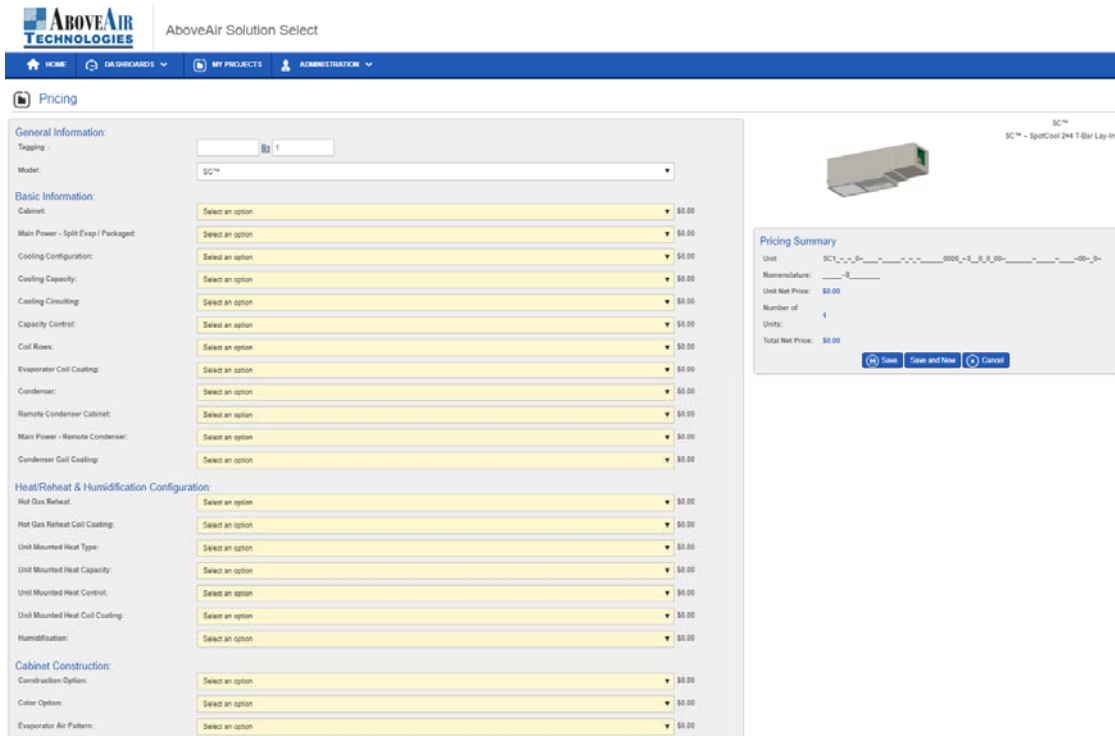
The screenshot shows the 'Project Schedule' page in the AboveAir Solution Select application. The page includes a navigation bar with 'HOME', 'DASHBOARD', 'MY PROJECTS', and 'ADMINISTRATION'. Below the navigation bar, there are tabs for 'Project Information', 'Units', 'Quotes', 'Orders', and 'Submits'. A table of units is displayed with columns for 'Select', 'Price', 'Qty', 'Primary tag', 'Model', 'Description', 'Unit Size', 'List Price', 'Quote Name', 'Order Name', 'Unit Height in.', 'Unit Length in.', 'Unit Width in.', 'Unit Weight lb.', 'Altitude Ft.', 'Date Modified', and 'Performance Verified'. A red box highlights the 'Price' column header, and a green box highlights the 'Summary View' dropdown menu in the top right corner of the table area.



The columns displayed may vary depending on the view selected. Pricing will always be available. Displayed columns can be changed by clicking on the drop-down menu along the top-right of the page. See green box shown above.

In the appropriate model row, move your cursor to the price column and click .

This will bring up the Pricing module, which will determine a price for the unit(s) based on the selections made. The process and selections are slightly different depending on the product being configured. The beginning of the pricing module is shown below.



General Information

1. In the **General Information** section, provide information on the tagging and quantity.

Field	Description
Tagging	This value should be set to the alphanumeric tag number given to the unit to be physically installed in the field. This value is typically assigned by the engineer and provided on project drawings. If no tag has been provided, a generic tag should be included.
Quantity	This value should be set to the number of units that will have the same configuration. If different configurations of the same model type are to be provided, these should be done under separate line items.

Basic Information

2. In the **Basic Information** section, provide selections from the various drop-down lists that will begin to configure the unit(s). These drop-down selections determine items such as cooling configuration, cooling capacity, packaged or split configuration, power input, along with a few others. Based on selections made throughout the process, options in later selections may become unavailable.

Heat/Reheat & Humidification Configuration

3. In the **Heat/Reheat & Humidification Configuration** section, provide selections from the various drop-down lists that will configure the heating, reheating, and/or humidification options to be provided in the unit(s). These drop-down selections determine items such as

hot gas reheat, unit or duct mounted heating, humidification, and heating coil coatings. Based on selections made throughout the process, options in later selections may become unavailable.

Cabinet Construction

4. In the **Cabinet Construction** section, provide selections from the various drop-down lists that will configure the different cabinet constructions and airflow patterns of the unit(s). These drop-down selections determine items such as installation options, color options, evaporator and condenser/condensing unit air patterns, and rigging options. Based on selections made throughout the process, options in later selections may become unavailable.

Control Options

5. In the **Control Options** section, provide selections from the various drop-down lists that will configure the controls and control accessories to be provided with the unit(s). These drop-down selections determine items such as control scheme, BMS communications card, thermostat, and control accessories. Based on selections made throughout the process, options in later selections may become unavailable.

Supply Fan Options

6. In the **Supply Fan Options** section, provide selections from the various drop-down lists that will configure the supply fan characteristics to be provided with the unit(s). These drop-down selections determine items such as supply fan type, fan horsepower, airflow control, and air quality options. Based on selections made throughout the process, options in later selections may become unavailable.

Condensing Options

7. In the **Condensing Options** section, provide selections from the various drop-down lists that will configure the condenser/condensing section characteristics to be provided with the unit(s). These drop-down selections determine items such as condenser blower type, motor horsepower, head pressure control, and accessory options. Based on selections made throughout the process, options in later selections may become unavailable.

Energy Conservation Options

8. In the **Energy Conservation** section, provide selections from the various drop-down lists that will configure economizer options to be provided with the unit(s). These drop-down selections determine items such as economizer type and economizer controls. Based on selections made throughout the process, options in later selections may become unavailable.

Filter & Damper Options


9. In the **Filter & Damper Options** section, provide selections from the various drop-down lists that will configure filter(s) to be provided with the unit(s). Based on selections made throughout the process, options in later selections may become unavailable.

Power Options

10. In the **Power Options** section, provide selections from the various drop-down lists that will configure power disconnect(s) and voltage/phase monitor(s) to be provided with the unit(s). Based on selections made throughout the process, options in later selections may become unavailable.

Accessories

11. In the **Accessories** section, provide selections from the various drop-down lists that will configure accessories to be provided with the unit(s). These drop-down selections determine items such as life safety options, water/glycol-cooled accessories, condensate pumps, as well as a few others.

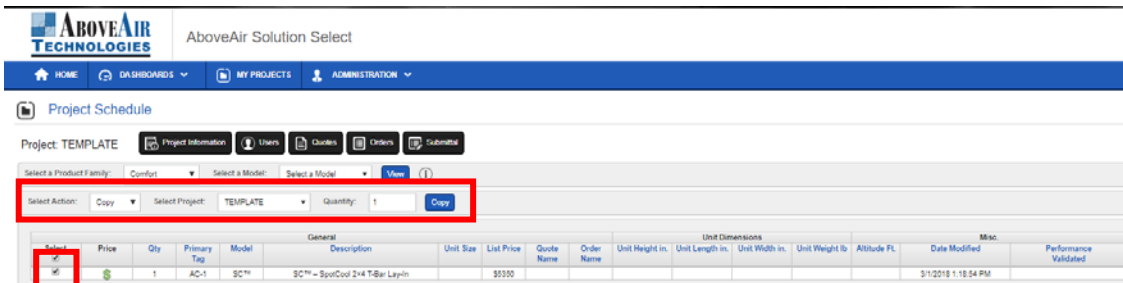
Once a selection has been made for every drop-down menu, verify that the configured unit is correct and click  in the Pricing Summary window.



If a selection has not been made in one or more drop-down lists, the Application will not let you add the configured unit to the project.

8.2 Copying a Configured HVAC Unit from a Different Project

It is possible to copy a previously configured unit from one project to another. Within the project schedule where the desired unit has been configured, select the unit from the table and move your cursor to the “Select Action” drop-down list. From this drop-down list, select “Copy”. Then, in the “Select Project” drop-down list, select the project to put a copy of the unit. Additionally, multiple copies can be put into the desired project.



The screenshot shows the 'AboveAir Solution Select' application interface. The 'Project Schedule' section is active, displaying a table of units. A red box highlights the 'Select Action' dropdown menu, which is set to 'Copy'. Another red box highlights the 'Select Project' dropdown menu, which is set to 'TEMPLATE'. The table below shows a unit with the following details:

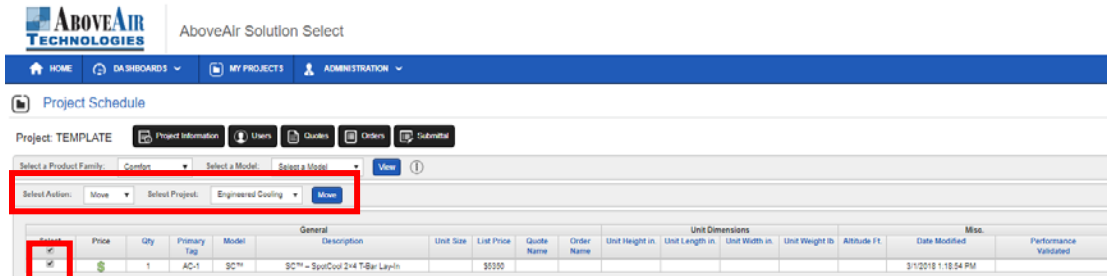
Unit ID	Price	Qty	Primary Tag	Model	Description	Unit Size	List Price	Quote Name	Order Name	Unit Height in.	Unit Length in.	Unit Width in.	Unit Weight lb.	Altitude Ft.	Date Modified	Misc.	Performance Validated
1		1	AC-1	SC™	SC™ - SpotCool 244 T-Bar Layin		\$9350								5/1/2018 1:18:54 PM		



This copied unit will have the same configuration as the original, including tag number. The tag number of the copied unit should be revised to reflect the applicable project. The configuration of the copied unit should also be verified.

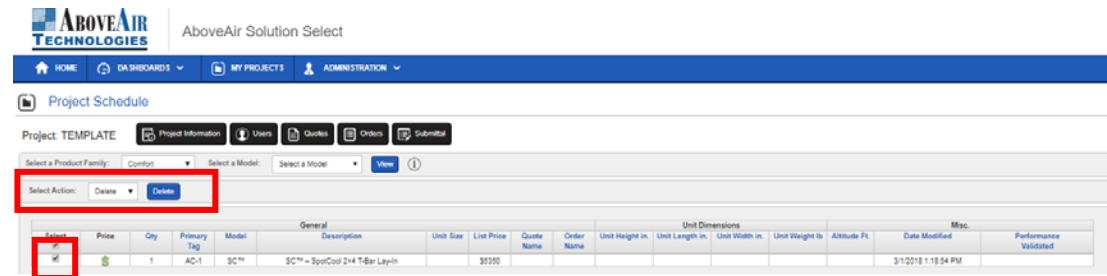
8.3 Moving a Configured HVAC Unit to a Different Project

It is possible to move a configured unit from one project to another. Within the project schedule where the desired unit has been configured, select the unit from the table and move your cursor to the “Select Action” drop-down list. From this drop-down list, select “Move”. Then, in the “Select Project” drop-down list, select the project to move the unit.



8.4 Deleting an HVAC Unit from a Project

If a unit is no longer required in a project, they may be deleted from the Application. Within the project schedule where the desired unit is listed, select the unit from the table and move your cursor to the “Select Action” drop-down list. From this drop-down list, select “Delete”. Click [Delete](#)



9.0 Quoting a Project

9.1 Generating an Initial Quote for a Project with One Product Family



Quoting should be done by System Administrators or Representatives only.

Once the unit(s) has/have been added, configured, and priced in the project, the project can be quoted. To generate a quote for a project on the eRep Application, use the following path:

Go to → MY PROJECTS → Project Name → Schedule

Within the project schedule where the desired unit(s) has/have been configured, select all units of the **same product family** in the project from the table and move your cursor to the “Select Action” drop-down list. From this drop-down list, select “Quote”. Then, in the “Select Action” drop-down list, select “New” and click [Create Quote](#)

The screenshot displays the 'Project Schedule' page in the 'AboveAir Solution Select' application. At the top, there is a navigation bar with 'HOME', 'DASHBOARDS', 'MY PROJECTS', and 'ADMINISTRATION'. Below this, the page title is 'Project Schedule'. The main content area shows a table of units with columns for Price, Qty, Primary Tag, Model, Description, Unit Size, List Price, Quote Name, Order Name, Unit Height, Unit Length, Unit Width, Unit Weight, Altitude, Date Modified, and Performance. A red box highlights the 'Select Action' dropdown menu, which is set to 'Quote'. Another red box highlights the 'Create Quote' button. A green box highlights the 'Select a Product Family' dropdown menu, which is set to 'Comfort'.



Once a Unit has been added to the project, the “Select a Product Family” drop-down list also acts as a filter to the units displayed in the table.



If multiple product families are included in a project, they can be generated under one quote. See Section 8.2 below.

After clicking to create a quote, a pop-up window will appear asking for the appropriate Customer or Customer Contact. Navigate or search for the appropriate contact and click [Choose](#)


Search & Select Customer or Customer Contact


Search On:

Advanced Search

	Company Name	Contact Name	Type
<input type="button" value="Choose"/>	AboveAir		Customer
<input type="button" value="Choose"/>	ADE, NY		Customer
<input type="button" value="Choose"/>	Airetech Corporation		Customer
<input type="button" value="Choose"/>	Applied Air Solutions	Mike Beall	Customer Contact
<input type="button" value="Choose"/>	Applied Air Solutions	David Retherford	Customer Contact
<input type="button" value="Choose"/>	Applied Cooling		Customer
<input type="button" value="Choose"/>	Brooks Building Solutions	Edgardo Diaz	Customer Contact
<input type="button" value="Choose"/>	Brooks Building Solutions	Chris Jackson	Customer Contact
<input type="button" value="Choose"/>	Brooks Building Solutions	Peter House	Customer Contact
<input type="button" value="Choose"/>	Climate Control Systems, Inc.	Jason Burt	Customer Contact

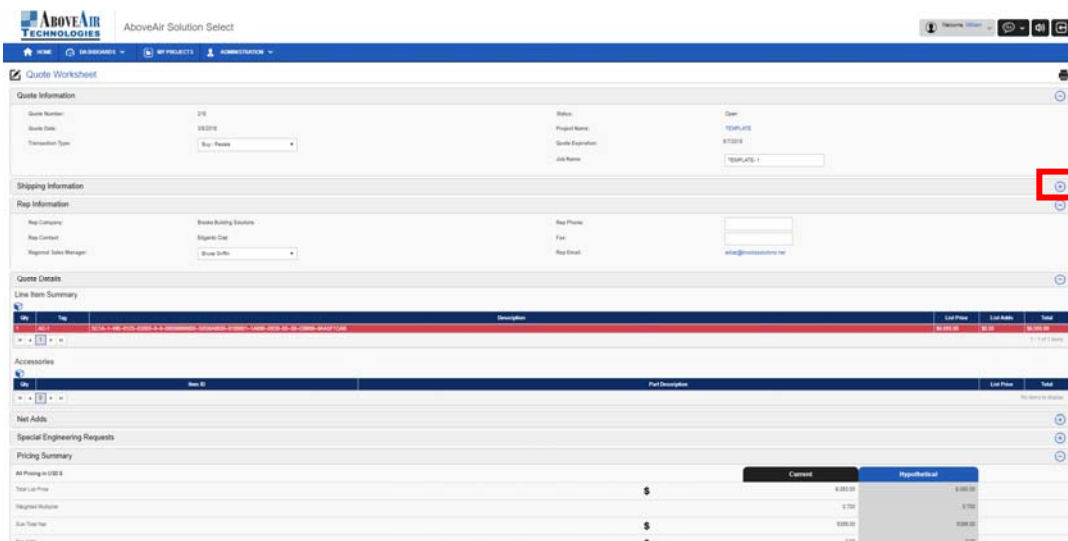
1 - 10 of 29 items



 If quote is being generated directly from factory, the Sales Representative that the quote is being generated for should be chosen. If quote is being generated by a Sales Representative, their name should be chosen.

 If a Sales Representative's name and/or Company does not appear on this list, please contact a System Administrator or Regional Sales Manager.

TEMPORARY PROCESS: A second window will pop-up notifying you that the selected line items are not verified. This is temporary and will be fixed when the Application is 100% complete. Click yes to continue.

This will bring up the Quote Worksheet module, which compiles all of the data to generate a project quote. The beginning of a sample Quote Worksheet is shown below.



 Some sections of the quote worksheet default to a compact view. To expand these windows, click  to expand the section.

Quote Information

1. In the **Quote Information** region, review or update the following fields, as needed.

Field	Description
Quote Number	Read-only system generated number when project quote is created; you cannot change the number.
Quote Date	Read-only system generated date (MM/DD/YYYY) when project quote is created; you cannot change the date. This date will automatically update anytime the quote is modified.
Transaction Type	For all quotes, "Buy/Resale" should be selected. There are currently no other types of transactions, so this is the default.
Status	Read-only system generated text that reflects the status of the project; you cannot change the value.
Project Name	Read-only system generated text that reflects the name of the project; you cannot change the value. This text is a hyperlink that will take you back to the Project Schedule.
Quote Expiration	Read-only system generated date (MM/DD/YYYY) when project quote is set to expire; you cannot change the date. This date is set at 60 days after quote is generated and will automatically update anytime quote is modified.
Job Name	Value has been automatically generated by the system; while this value can be changed, it should be maintained. A Value is required.

Shipping Information

2. In the **Shipping Information** region, review or update the following fields, as needed.

Field	Description
Requested Ship Date	If the customer has provided a date to have unit(s) at the field, the date should be provided. A date is not required in this field.
Lead Time	Using the drop-down list, an appropriate Lead Time should be selected. Contact a factory Sales Representative for appropriate Lead Time.
Ship Via	While there are multiple options provided in this drop-down list, "Best Way" should be selected.

Rep Information

3. In the **Rep Information** region, review or update the following fields, as needed.


Field	Description
Rep Company	Read-only system generated text that reflects the Rep Company selected when quote was created; you cannot change the value.
Rep Contact	Read-only system generated text that reflects the Rep Contact selected when quote was created; you cannot change the value.

Field	Description
Regional Sales Manager	For all quotes, "Bruce Griffin" should be selected.
Rep Phone	If the Rep's phone number has been included in the system, this value will be automatically generated. If the number has not been included, the Rep's phone number can be manually added in this box.
Fax	If the Rep's fax number has been included in the system, this value will be automatically generated. If the number has not been included, the Rep's fax number can be manually added in this box.
Rep Email	Read-only system generated text that reflects the Rep's email; you cannot change the value. This text is a hyperlink that will take you to your default email provider.

Quote Details


- In the **Quote Details** region, a line item summary for each of the configured units is provided. This summary includes the quantity of each configured unit, the unit(s) tag number(s), the entire nomenclature string for the unit(s), and prices for each unit. This summary is generated from the project schedule and cannot be changed in the quote worksheet.


Net Adds

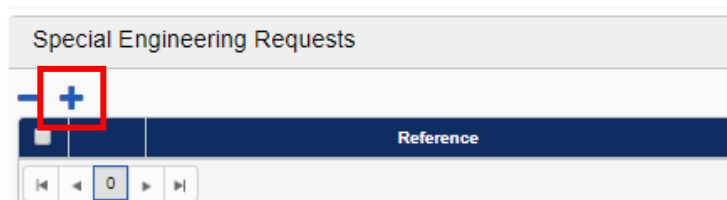
	Net Adds should only be performed by Factory Sales Representatives. If external Sales Representatives need to include specially designed configurations or parts, these should be done in the "Special Engineering Requests" section of the Quote Worksheet.
---	--


- In the **Net Adds** region, Factory Sales Representatives can manually add unit components or configurations not contained in the Configuration/Pricing module.

Special Engineering Requests

	Special Engineering Requests should only be performed by external Sales Representatives. If Factory Sales Representatives need to include specially designed configurations or parts, these should be done in the "Net Adds" section of the Quote Worksheet.
---	--

- In the **Special Engineering Requests** region, external Sales Representatives can manually add unit components or configurations not contained in the Configuration/Pricing module. To add these custom parts or configurations, click .



This will bring up a second window requiring a Reference, Description, and Quantity of the custom designed item being requested. Once information has been provided, click .

Special Engineering Request
✕

Reference

Description *

Qty *

Once this request is submitted, the system will notify a Factory Sales Representative to approve the request and assign a price.

Pricing Summary

- In the **Pricing Summary** region, a live break-down of all pricing is provided. Pricing will automatically change as the previous quote worksheet sections or project schedule are revised. If Freight is to be included in the quote, click the “Freight Quoted – Quote Number” box.

Estimated Freight

Freight Quoted - Quote Number

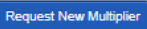
\$

For Quote Number, the responsible Sales Representatives initials should be provided. A value is required to be entered into this box. For freight cost, a third-party freight estimating tool should be used to determine appropriate price.




The Weighted Multiplier is an automatically generated value from the Representative’s company contract. If an incorrect value is being displayed, please contact a System Administrator or your Regional Sales Manager.

Multiplier and Commissions

- In the **Multiplier and Commissions** region, published, requested, and approved multipliers and commissions are displayed. If a special multiplier is being requested, the Sales Representative should type in requested Multiplier and click . The system will notify a factory Sales Representative to approve the adjusted multiplier.




Commissions should always be 0%. AboveAir Technologies does not include Commissions in quotes.

Once all information has been included and verified, a copy of the quote can be exported from the Application. In the top-left corner of the Quote Worksheet window, click . This will open a new window in the internet browser containing the quote report.



Ensure that pop-up windows are not blocked for this website in your internet browser.

In this window, the quote can be exported from the Application into a Word, Excel, or Adobe file by clicking  and selecting the desired file type. A sample quote report is shown below.

Report

1 of 3 Find | Next

AboveAir TECHNOLOGIES **Sales Quote**

Prepared for:
Edgardo Diaz
 Brooks Building Solutions
 Phone:
 Fax:
ediaz@brookssolutions.net

Quote Information

Quote Number:	218	Status	Open
Quote Date:	3/8/2018	Project Name:	TEMPLATE
Quote Expiration:	5/7/2018		

Shipping Information

Lead Time: 5-7 Working Days
 Shipping Via: Best Way

Equipment Summary

Qty	Tag	Model	List Price	List Adds	Total
1	AC-1	SC1A-1-W0-012S-03000-0-0-00000000000-S0G0A0000-0100001-1A000-00D0-00-S0-DB000-0AASF1CAB	\$9,080.00	\$0.00	\$9,080.00

Pricing Summary

All Pricing in USD \$

Equipment Net Price	\$6,356.00
Net Adds	\$0.00
Special Engineering Requests	\$0.00
Total Freight	\$0.00
Total Net Price	\$6,356.00

It is the responsibility of the AboveAir Representative to review quote for accuracy and confirm all Options are included per specifications and Schedule prior to bidding projects. If the Specification or Schedule change, the quote will need to be updated.

AboveAir does not provide Start Up Labor and Start up is NOT INCLUDED in this quote. Start Up is the responsibility of the selling or territory rep firm. AboveAir does offer Start Up Assistance via telephone at additional charge. Please contact the factory for a cost of this option.

Current Lead Times are estimated and subject to change based on Factory Loading, availability of Raw Materials and other Vendor parts required to manufacture the unit(s).

Quick Ship Options are provided based on the availability of Raw Materials and other Vendor parts required to manufacture the unit(s). Acts of God, which are outside of our control and revisions/delays by the Rep and/or Purchaser could delay shipment.

Quick Ship Options require Factory Confirmation and must be RFI FASFD to

In the Quote Worksheet window, once all information has been included and verified, click



9.2 Generating an Initial Quote for a Project with Multiple Product Families

Using the same process as Section 8.1 above, begin by generating a quote for the unit(s) in any single product family (Comfort, Outside Air, or Mission Critical). Once the Quote Worksheet window comes into view, click the project name hyperlink to go back to the Project Schedule. The quote will be saved in draft form.

Quote Information

Quote Number: 218 Status: Open

Quote Date: 3/8/2018 Project Name: **TEMPLATE**

Transaction Type: Buy / Resale Quote Expiration: 5/7/2018

Job Name: TEMPLATE-1

Once back in the Project Schedule, use “Select a Product Family” to filter the appropriate product family, select the applicable unit(s) to be added to the quote, and “Select Action” to Quote. In the “Select Action” box that appears, choose “Existing”. Then, in the “Select Quote” box that appears, select the applicable quote. Click [Add](#)

Project: TEMPLATE

Select a Product Family: Outside Air Select a Model: Select a Model View

Select Action: Quote Select Action: Existing Select Quote: TEMPLATE-1 Add

Select	Price	Qty	Primary Tag	Model	Description	Unit Size	List Price
<input checked="" type="checkbox"/>	\$	1		HK-OA™	HK-OA™ – High Percentage Outdoor Air – Horizontal		\$21050

The Quote Worksheet will be revised accordingly. Using the same process from Section 8.1, the quote with multiple product families can be completed.

9.3 Generating a Quote Revision for a Project



The Application DOES NOT maintain a historical catalog of quote revisions in its database. All quotes should be exported out of the Application and stored externally to maintain a project’s historical records.

When a quote is created, it is a static object and remains unchanged. In order to requote a line from the schedule after you have made change, the quote must be deleted. When revising a quote for a project, the following procedure should be followed:

1. Select the “Quotes” button.
2. Save a copy of the existing quote for your records, if desired.
3. Delete the current quote.
4. Make any required changes to your product selection and requote the item per the procedures detailed previously.