o://www.contractorshvacsupply	.com/	Soogle
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CONTRACTORS IN CONTRACTORS	Erreiter Lucreiter Taum las die Experit	Login   Apply
Welcome Home	Home	Type keywords Search Site
Welcome Home Downloads »	Home	Type keywords Search Site
Welcome Home Downloads » About Us »	Home Come join us at our <u>Open House</u> !	Type keywords Search Site
Welcome Home Downloads » About Us » Links	Home Come join us at our <u>Open House</u> ! May 12th 2009 - 11:00 am - 2:00 pm	Type keywords Search Site May 08, 2009

Start by going to your respective company's website. If you don't know the link to your website, go to http://www.mtncom.net/ and click on the "website" link for the company you belong to. If you belong to more than 1 company, you can log into either one, it does not matter. MAKE SURE YOU INCLUDE THE "www" PREFIX (eg http://www.contractorshvacsupply.com/)! It will NOT work, otherwise. The appearance may vary slightly by website, but the procedure is the same for all of them.

From there, click on "Login" in the upper right corner. This will take you to the login screen.

Login		Type keywords	Search Site
	Login (email):	Login	
	Forgot Password		

Enter your username (this will be your email address), and the password you were assigned. If you have not been setup, please contact dpeterso@mtncom.net with your name, email, company(s)/department and position. If you have been setup, already, but do not remember your password, click on "Forgot Password". From there, enter your email address, and it will send you an email with the steps to get your password reset. **Please do this, first, before automatically calling/emailing me to get your password reset.** I do not have time to do this for every person!

Welcome Home	Welcome	Type keywords Search :	Site
Downloads »			
Store		May 08	1, 2009
Events »			
Commercial Projects »	View Projects		
About Us »	Vi View Projects		
Directory »	Bid Report	Contraction of the local division of the loc	
Links		1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Administration »		versioner 1 - E	

To access the commercial projects section, hover your mouse over "Commercial Projects", on the left. This will drop down the next level. Click on "View Projects".

View Projects	Type keywords Search Site
Type keywords Find Bid Clear Search Search Tips	from: 05/01/2009 to: 05/31/2009 Find Range

It will begin by listing all projects that fall within the date range you have specified on the right. To search for a specific project within that name, start entering the name of the project, or Dodge # next to where it says "Find Bid". When you start tying, it will drop down a list of up to 10 matches, ordered by relevance to help in knowing what matches will be returned. There is also a "Search Tips" to the right of the search box that will help in narrowing the search.

Inigation	By: Bid Date	Ascending	✓ <mark>Go</mark>

Location:	UT [Salt Lake]
Action Stage:	Unknown
Project Type:	Unknown
Valuation:	\$ 500,000.00

The image on the left shows sort preferences. Most, if not all of you, will not have the option to list more than 1 department's projects. If you do, changing this to a different department will change the projects displayed to the corresponding department. From there, you have the option to sort by:

Bid Date, Project Name, Project Type, Action Stage, County, State, Location, Valuation and Status (this is OUR takeoff status, not the status of the physical project status). If you have entered the name of a project, you can also sort by relevance.

The image on the right shows a colored dot, that corresponds to the key listed at both the top and bottom of the page. This shows our current takeoff status. Next to that, there is a graphic that looks like a piece of paper with a pencil. That means you can edit this project. Next to that, there may or may not be an [Invitational] or [Not On Calendar] status. Projects with these flags WILL NOT be displayed to Contractors.

Information	Options	Notes	As Equal	Estimating	Tracking		
				Enoch Stak	e Building -	LDS Church	• HVAC
Main	Specifiers						Irrigation Dept     Plumbing Dept     Radiant Heating     Waterworks Dept
Dodge Number: 200900674837	v	ersion: 0					
Enoch Stake Build	ling - LDS Ch	urch					
Address:							
2200 E Heather H	ue Rd						
(Approx)							
Enoch UT, 84720 [ ]	ron]						
Enter zip code to fil	l in city / state	/ county inform	ation:				

Upon clicking on the edit graphic (the piece of paper/pencil), you will be brought to a screen that looks like this. Depending on how completely the project has been filled in, the tabs that appear may differ. Within the "Information" tab, this lists generic project information that applies to the project in general (name, address, specifiers, etc). Most of the time, this information will automatically be pulled in from Dodge, and will not require any extra effort. At times, a project may not be listed on Dodge, and this information will have to be filled out, manually. Fill this out as completely as possible, to help in most accurately tracking the project.

Back							Update
Information	Options	Notes	As Equal	Estimating	Tracking		
		_		Enoch Stak	e Building -	LDS Church	O <u>HVAC</u>
Bid Info	Estimator	Takeoffs					<ul> <li>Irrigation Dept</li> <li>O <u>Plumbing Dept</u></li> </ul>
							O <u>Radiant Heating</u> O <u>Waterworks Dept</u>
Target Start:		Target Comp	oletion:				
(mm / dd / yyyy)		(mm / dd / yyy	0				
Bid Date:	_	Bid Time:					
(mm / dd / yyyy)		02 🗙 : 00	am 🚩				
Don't Display o	n Calendar						
Invitational / Pri	vate						

Clicking on the "Options" tab, will list project bid date information, as well as the takeoff status for EACH department. Changing this information (and any information in the remaining tabs) will affect your department, ONLY! This page is where you go to assign the takeoff status (the colored dot will change accordingly). You will also be assigning Invitational / Private flags on this page (the bottom 2 checkboxes). These checkboxes are both set to "checked" by default, to avoid accidentally publishing a project to contractors.



Clicking on the "Estimator" tab will display the project estimator for this department in this project. Below that, they will have the option to change the status to "Project Lead" (basically, means it has not been assigned an official status). "TBD" (meaning the status cannot be determined at this time), "In Progress" (meaning the takeoff has been started, but not completed), "Done" (the project has been completed). If you select this, an additional box "Completion Date" will become active for them to specify the date the takeoff was completed, "Did Not Bid" (this means there were portions of this project that your department COULD have completed, but either due to lack of time or interest, it was not completed. If this option is selected, an additional box will display that allows the user to state why the takeoff was not completed for this project, and finally "Not On Project" (this means there were no applicable portions to this department).

Clicking on the "Takeoffs" tab will display what types of takeoffs will be completed for this department on this project. The available options will likely vary from department to department. This will help to be able to more finely track which takeoffs were performed / sent for reporting later on. This information will display to the contractor, so they know which takeoffs are being performed. They will be required to specify which takeoff(s) they want a quote on.

Tracking

		Enoch	Stake Build	ing - LDS Chu
Subject	t Type		Cre	ated
🗹 <u>No pertinent specs or addenda.</u>	ProjectNote	Jeremy Stutz 04/21/2010		21/2010
		Add Note	Add Task	Add Phone Loo

Clicking on "Notes", it will display any notes related to this department on this project. There are 3 types of notes: Note, Task, and Phone Log. To view any note, simply click on the subject of the note. To edit it, click on the pencil/paper to the left of the note, and to delete it, click on the garbage can to the right. You must either have been granted access to do these last 2 things, or have been the creator of the note. Any employee of your department can VIEW notes created by you. It will list which type of note it is, who created it, and when it was created. To add a new note, click on the corresponding button below (eg "Add Note").

Subject:	
Comments:	
	~
	<u>~</u>
Make note visible to all co	ntractors/employees

Clicking on "Add Note" will display something similar to the screenshot, above. Simply type a subject and any comments (optional). If you want to make this note visible to contractors, click on "Make note visible to all contractors/ employees". If you check this, this note will then become public to ANYONE who has access to our project list! This includes contractors, so do not publish information intended for internal use, only.

Subject:
Due Date:
04/29/2010
Status: Not Started
Start Date:
04/29/2010
Priority: Low
% Complete:
Details:
B I U ARE ≣ ≣ ≣ Styles ▼ Format ▼ Font family ▼ Font size ▼
🔏 🛍 🛍   船 🅼   汪 汪   淳 淳 🥨   🤊 🕐   ∞ 🖉 🕹 💆 🝼   <u>A</u> + 👱 -
🗹   Ξ Ξ   4° ≒ ⇒   %, ,,? †   Ξ Ξ   − 2 🔙   ×, ×'   Ω 🚦 🖛   Μ Μ
过量 🖳 🖞   ### ### ### ### 🗛 🖀   ¶ 🖼 🖬 岩   🙂 💷 🗋 🗟

Clicking on "Add Task" will display a screenshot similar to the one, above. Simply enter a subject, a due date, the status of the task (this can be updated as you go along), when you started it, the priority of the task, and the percent complete. You can also enter any comments on this task (optional). You will be sent a reminder of this task after the due date, until the status is marked as "Completed"

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Subje	ect:					T
Durat	tion:					-
Calleo 04/29	d On: 9/2010		@ 05	: 00 🛩	am 👻	_
B X M		æ   ≣ ⊉ ∰    ∃*ª ∃ <sub>*</sub> 1   4:,	≝ ≡ ■ #4 \%   : . ∋+   ?m	Styles ∃ ]∃   ∰ m <sup>7</sup> 17   ] → ▲ 27	Format     ∰	▼ Font fo (*   ∞ ∞ 2 □   × → =   ② □ [

Clicking on "Phone Log" will display something similar to the screenshot to the left. Enter a subject, how long the call lasted, when you called, and at what time you called. You can enter any comments with regards to this call in the Comments section.

Company		Ne	Nam	e	Takeoffs		
Requested B	v:						
			Se	elect Contacts	Send Selecte	d Quotes	Add Quote
2 <u>124697</u>	\$ 233	354.35	Christie Hume	IRRIGATI	ON MTO		🖬 🗌 Select
Number	Ато	unt	Created By	Commen	ts		
(	Quotes	File	s				
					Enoch Stak	e Building -	LDS Church
Infor	mation	Option	s Notes	As Equal	Estimating	Tracking	

We'll skip the "As Equal" tab, until it gets the rest of the way working, and move to the "Estimating" tab. This is where project information is listed for each department. "Quotes" is a list of quotes, tied directly to AccuTerm, and is where you will go to send a quote to a customer. We will find out how to send quotes in the last section of the tutorial. "Requested By", is where it will list any contractors that have requested a quote for this project from the respective department. It will also list any contacts you have selected to send quotes to. "Files" lists any plans pulled from Dodge, or anything directly related to this project and this department.

Q	uotes Fil	es		- M
Number	Amount	Created By	Comments	
🗹 <u>124697</u>	\$ 23354.35	Christie Hume	IRRIGATION MTO	🗂 🗌 Select
			Select Contacts Send Selected Q	uotes Add Quote

To add link a quote to this project, click on "Add Quote", below the "Quote" section. To edit an existing quote, click on the pencil/ paper icon to the left of the quote number. To view the quote itself, click on the bid number. If tied to AccuTerm, it will pull it DI-RECTLY from AccuTerm. You cannot edit the quote from the web, but it will display word for word, exactly how it appears in AccuTerm. If it is a file, it will give you a prompt box to download the file.

Company:	
N/A - Uploading local file 💌	
Bid Number:	
Dollar Amount:	
S	
(Not neccesaray if entering a bid tied to AccuTerm)	
Upload File:	
Browse	
(pdf, dwg, dxf, dcd, bmp, tif, tiff, doc, wpd, pln)	
Comments:	
	~
	-
	1.00

After clicking on "Add Quote", you will be brought to a screen that looks like the picture, above. Company specifies which company's database you are going to access. This is only necessary if you are linking to AccuTerm, rather than just uploading a file. Most will only have access to 1 or 2. Bid Number, is the AccuTerm number, minus ANY letters (for example, 92842, rather than BA92842). Dollar Amount is the total dollar amount for the quote (leave blank if linking to AccuTerm). Upload File is for uploading a file for the quote, rather than AccuTerm providing the information. Comments is helpful for making notes about addendums, etc. Click on "Submit" to save this information. After finishing, go ahead and click on "Back" to get back to the general "Estimating" tab.

2019년 1월 201	
No information to display!	

To add a file, click on "Add File", below the "Files" section of the Estimating tab. The information for the file should be apparent. Pay attention to the list of valid formats for upload (pictured below), as it will reject all others. If you NEED a different file format listed, let me know, and I will see about getting it approved. Editing / viewing a file is the same as editing / viewing a quote.

Name:		
Comments:		
	0	
File:	Browse	(pdf, dwg, dxf, dcd, bmp, tif, tiff, doc, wpd, pln)

Sent To	Awarded	Tickets	Submittals			
Quote #: 124697						
Account Name		Contact	Da	ate Sent	Salesmai	n Sent
WESTERN MEADOW		Kyle Nebeker	04	/29/2010		Yes

Clicking on "Tracking", will show tracking information. "Sent To" lists anyone we have sent a quote to, from the website (company name, contact name, date it was sent, and the salesman of that account).

Sen	t To	Awarded	Tickets	Submittals		
						Add Sold By Company
Awarded to: Sold By:				Browse	e Clear e Delete	
	Hown	much was sol 0	d by this com	pany?		
	Portio	ins sold:				
					2	

Clicking on the "Awarded" tab will allow you view and enter who was awarded this project, which company sold it (one of our companies, or a competitor), how much it sold for, and which portions were sold to this company. If parts were sold to multiple companies, you can click on "Add Sold By Company", and it will allow you to specify the information for that portion.

	Sent To	Awarded	Tickets	Submittals		
Order	Com	ments			Date	
			No tickets	for this project!		
						Add Ticket

Clicking on "Tickets" will allow you to enter any tickets tied to this project, provided we sold it. To add a ticket, click on "Add Ticket". The button will not become active until the "Awarded" section is filled out.

	Sent To	Awarded	Tickets	Submittals	
Name			D	ate Created	Size
Ĵ.			No submitta	als for this project!	
					New Submittal

Clicking on submittals will allow you to view any created submittals for this project. To create a new submittal, click on "New Submittal". Like Tickets, the "Awarded" tab must be filled in before this button will become active.

				Enoch Stake E
Q	uotes Fil	es		
Number	Amount	Created By	Comments	
1 <u>124697</u>	\$ 23354.35	Christie Hume	IRRIGATION	и МТО
		Sele	ct Contacts	Send Selected Q
quested By				<b>T</b> -1
.ompany	No	companies have req	uested quotes t	Takeons for this project!
	140	companies nate req		
be keywords	Search Clear Search			
e: 1				ltems: 1 - 1 of 1
me a <b>me</b>		City	State	Zip Pho
All Companies	5			

If a contractor has requested a quote, their information will appear in the "Requested By" section of the Estimating tab. If you know a contractor needs a quote, but they have not requested it, you can manually add them by clicking on "Select Contacts" below the "Quotes" section of the Estimating tab.

Per Page

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Where it says "Type keywords", enter the name of the company, and click on "Find Account". When the results are returned, pay special attention to the header above the list of companies. This will help in determining which company you are selecting. Most of the time, when sending quotes, you will want to make sure it is an "Account Company". An example of this would be "Home > All Companies > All Account Companies > Contractors HVAC Supply Accounts". A company may appear under multiple places (like under "Specifier Companies", etc. Make sure you select the correct one. Click on the binocular icon to view the list of contacts for this company.

DOUG PETERSO	N	ACCOUNT # 2488
2488 in: Co	ntractors HVAC Supply V Find Account	
Billing Address: 4412 DRAPER STREET KEARNS, UTAH 84118 Phone: 801-674-5379		
Last Sale: 04-24-2009	Total Balance: \$ 0.00	Order Balance: \$ 0.00
MTD Sales: \$ 1.86	YTD Sales: \$ 15.95	MTD Last Year: \$ 0.00
YTD Last Year: \$ 0.00	Future: \$ 0.00	Current: \$ 0.00
30-60: \$ 0.00	60-90: \$ 0.00	90-120: \$ 0.00
120+: \$ 0.00	Start Date: 11-04-2008	
Type keywords Find Select Contacts Doug Peterson Position: Demo User Email: <u>cgremakes@gmail.co</u>	User Clear Search Search Tips	All Groups V By: First Name V Go ALL 123 A B C D E F G H

When an account is brought up, it will list all the contacts for that company. There should be a checkbox in the upper-right corner of their respective card. Click on that for all customers you wish to send a quote to for this company, and click on "Select Contacts". If you have other companies to send a quote for this project to, enter their account # or name in the box below their account name. Repeat the process until all are selected, then click "Back" to get back to the project screen.

☑ <u>97224</u> \$ 21668.73 IRRIGATION BID	Number	Amount	Comments	
	<mark>∕2</mark> <u>97224</u>	\$ 21668.73	IRRIGATION BID	tarian terretaria ter

From there, you can click on the bid number(s) you wish to send to these selected contacts. You should see the contacts you have selected in the "Bid Requested By" section. Once you have selected the bids you wish to send, click on "Send Selected Bids"

Back			Send Bids	
DOUG PETERSON			Personalize Bid	
Contact	Method		Bid Numbers	
Doug Peterson	🗹 Email:	cgremakes@gmail.com 👻	97224	
Comment:				
Comment:				
< Back			Send Bids	

All customers you have selected will be listed here, with the option to email and/or fax them the quote (depending on their preferences). If you wish to only email, uncheck fax, or if you wish to only fax, uncheck email. There will be dropdown menu you can click on to list all emails/faxes associated with this user. Select the appropriate information. If a customer has requested a quote, but you do not wish them to have it (they don't pay their bills, just use our quotes to shop competitors, etc), uncheck BOTH email and fax (if applicable), as well as ALL bid numbers for the respective contact. It will still log that they requested it, but will mark it as "not sent". If you sent a quote from AccuTerm, and want to just log that you sent it, but not physically resend it, uncheck BOTH email and fax, but leave the bid numbers checked you wish to log as having been sent. You are free to enter 2 lines of comments, just as you can in AccuTerm. Currently, "Personalize Bid" does nothing, so ignore that for now.

This concludes the tutorial for the commercial projects section of the website. Please try following this guide, and asking fellow employees that are currently using the system before contacting me. My load is heavy right now, so not having to answer questions that can be answered by those within your own building will help greatly. Any feature requests will need to be made by email, and will be approved / prioritized by management. Let me know any bugs you encounter (I know there are some, and I do my best to fix them as quickly as possible). There will be more in the future, but this should at least help in getting started.