February 2020
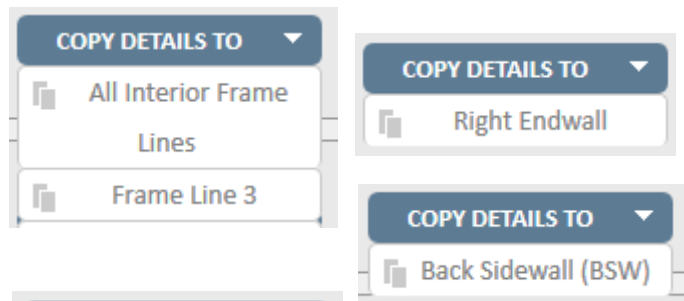
Tips from eQuote: Using the Copy Function for Efficiency

In this month's Knowledge Center we are bringing you information from eQuote, which can hopefully assist in making your process for estimating a building project more efficient. As you know, many details need to be entered into eQuote to adequately describe the building for quoting and order placement. This means a lot of data entry, which sounds like it would take a lot of time. However, we are constantly seeking to improve the user experience and have designed eQuote with user efficiency in mind. Following are some tips you may not be using yet. Take a look and see if we can get your speed of entry kicked up a notch!
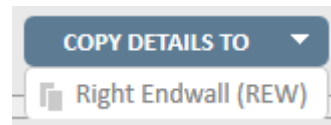
Copy Functions

Most of the building details that can have multiple entries have the ability to copy information quickly. It can be from one wall to another, or to simply make a copy of an entire entry. In this existing function, you can even copy a whole building at once.
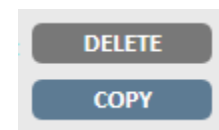
1. Frame Information allows you to copy details about the endwalls from one end to the other, and from one interior frame to any other interior frame or to all the interior frames at once.
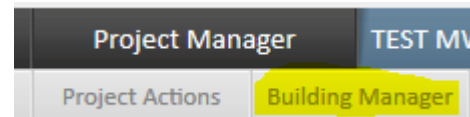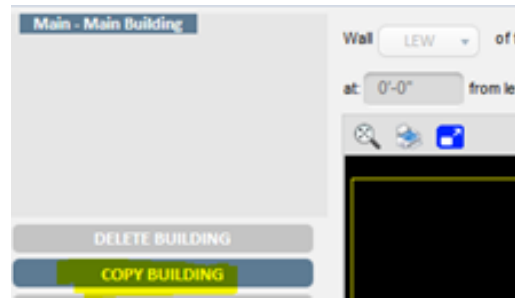
   COPY DETAILS TO ▼
   📋 All Interior Frame Lines
   📋 Frame Line 3

   COPY DETAILS TO ▼
   📋 Right Endwall

   COPY DETAILS TO ▼
   📋 Back Sidewall (BSW)

2. Roof Line Trim entry is assisted by the ability to copy to the corresponding wall.

   COPY DETAILS TO ▼
   📋 Right Endwall (REW)

3. For a large number of the input screens, like Wall Framed Opening, Wall Deletions, etc., you have the convenient option of simply copying the entire entry and then making any needed changes to the new entry. The screens place the new entry as the top one in the list, making it quick to modify and then hit the copy button again to do it all over! Some of the screens will re-order the selections for you when you leave and re-enter the screen, if they follow a pattern like distance from left steel line. The proposal will have the same order, as well.

   DELETE
   COPY

4. For mulitple building projects, it may make sense to copy the entire building at some point in the entry. After entering elements that will be common between the buildings, like full rake and eave extensions around the buildings, for example, but before entering too many details that would require more work to modify rather than on which to do initial entry, is likely the prime time to make a building copy. This takes place in the building manager (accessed by clicking the Building Manager button) and is as simple as selecting the building you wish to copy and clicking the "Copy Building" button.

Same, Matching, and Default

Several screens, like Girt Condition and Spacing and Colors give you the ability to set all walls the same and do the entry on all four walls at once. Other screens, where you enter bay spacing, soldier column spacing, girt spacing, etc., offer to use our defaults as a starting point or to match the opposing wall. For buildings other than the main building, you can choose to match the main building on a number of screens, like Roof Panel, Wall Panel, and Building Load Requirements.

For more information or questions, please reach out to your DSM.