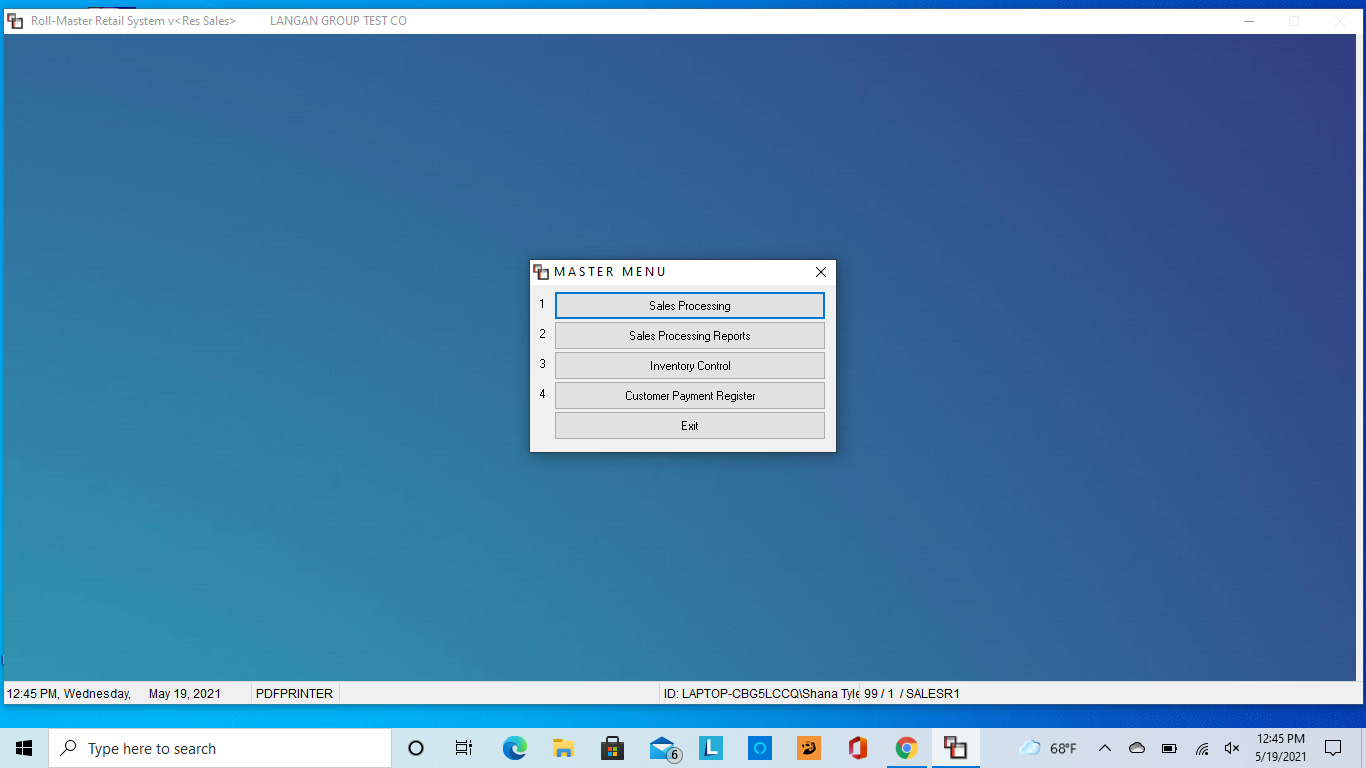
Open Rollmaster software, enter in login information

Company ID: 99

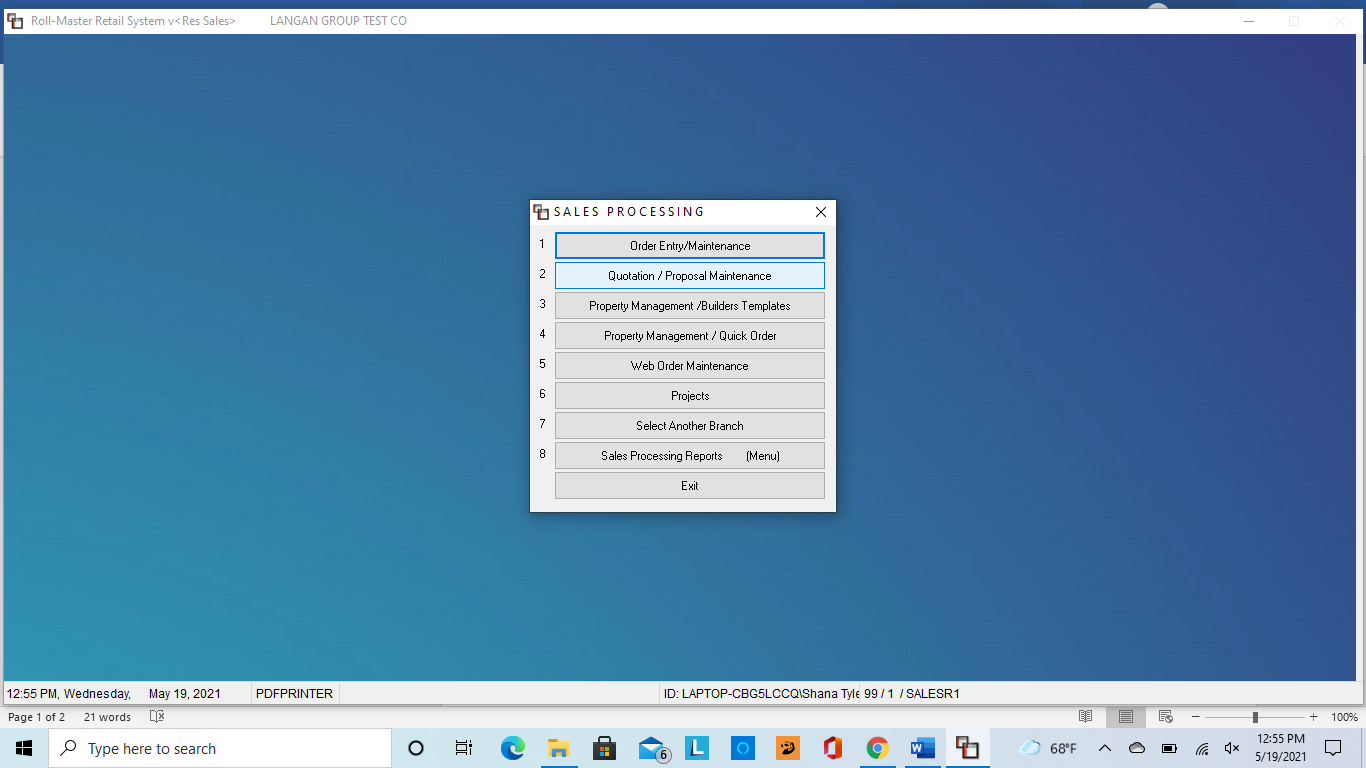
Password: TEST

Branch ID: 1

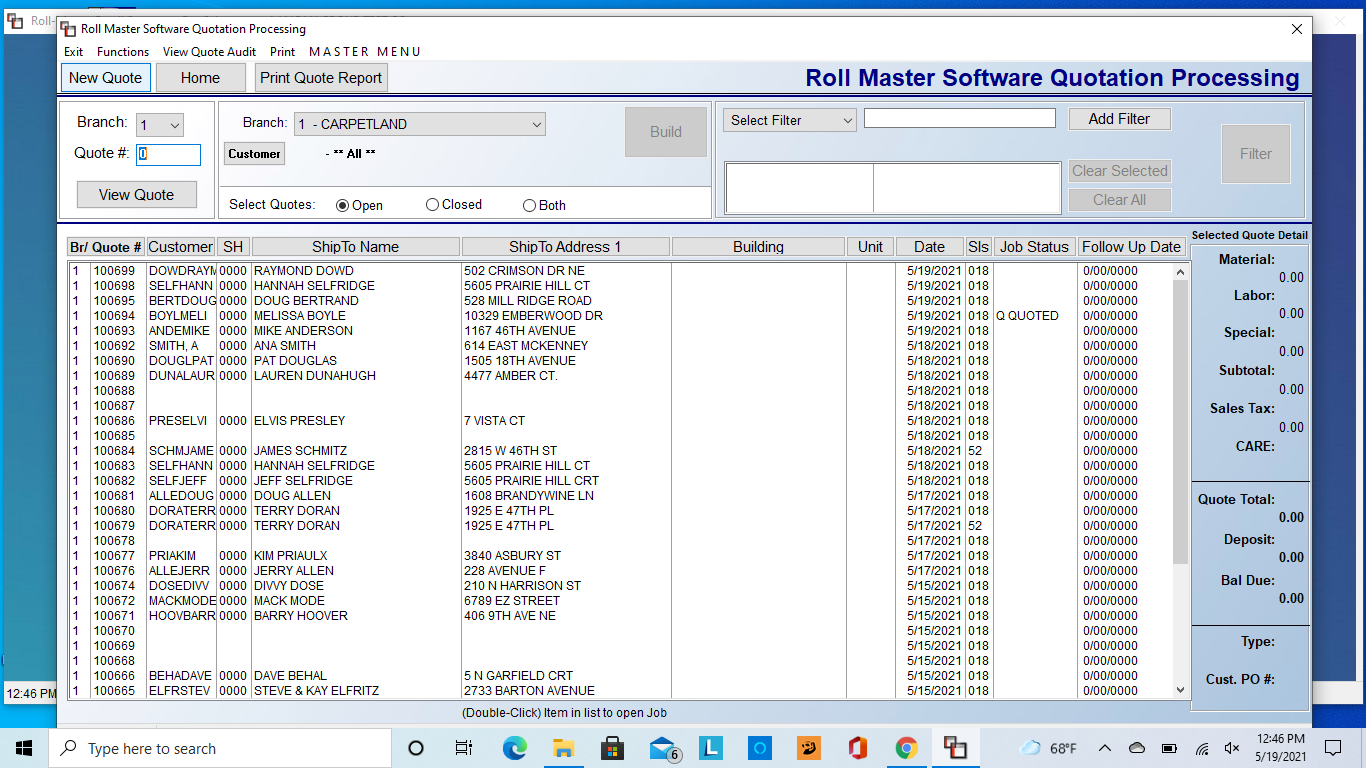
User ID: SALESR1



Click sales processing



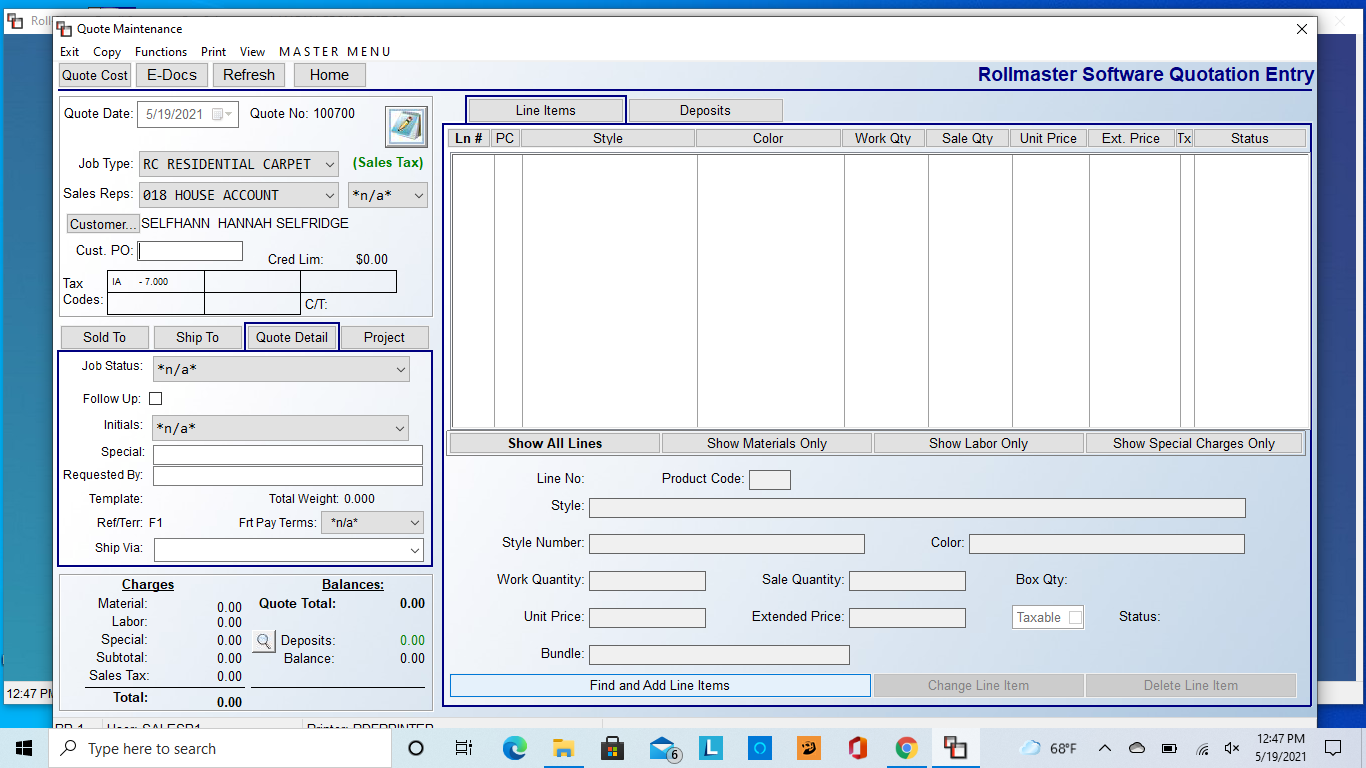
Then Quotation/Proposal Maintenance



Click New Quote

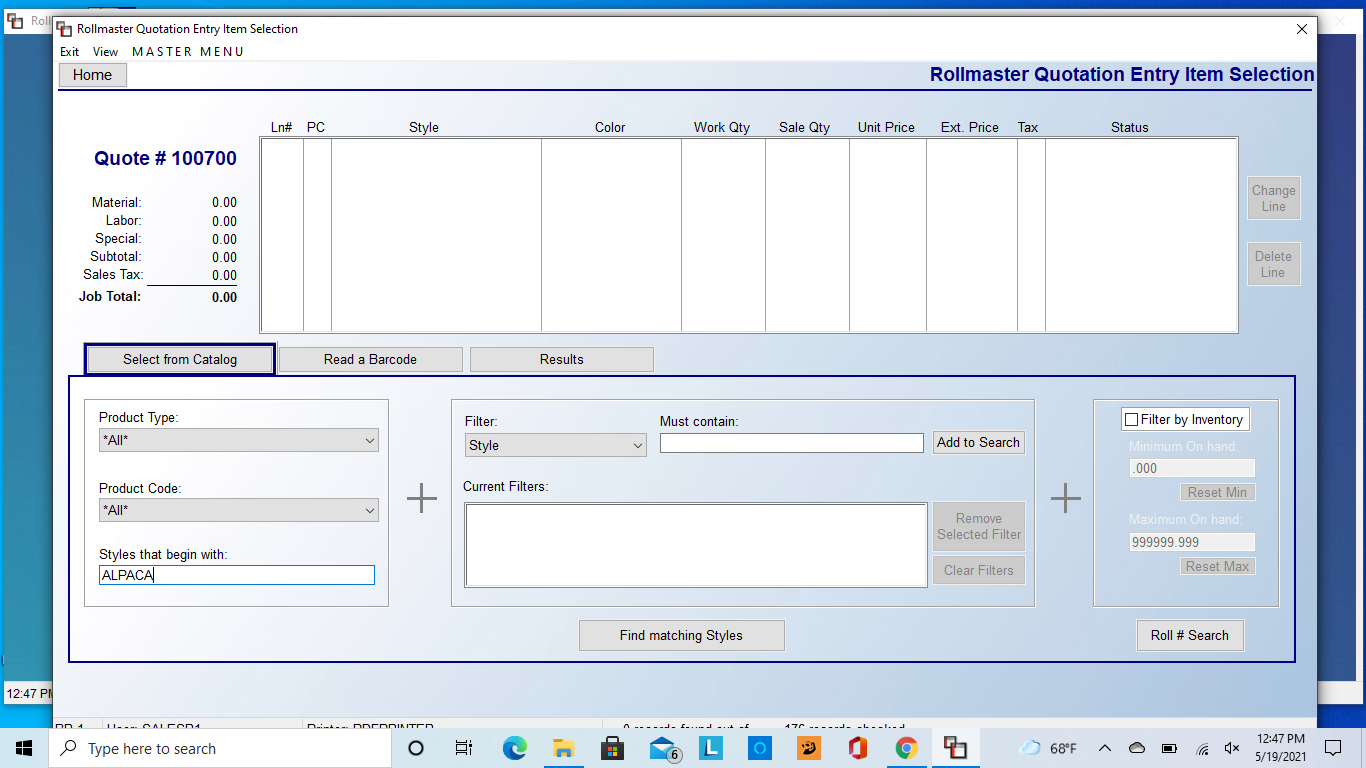


Type in customer ID, consisting of first 4 of the last name and first 4 of the first name of the customer. If the customer is not in the database yet, click add. If they are, select their name

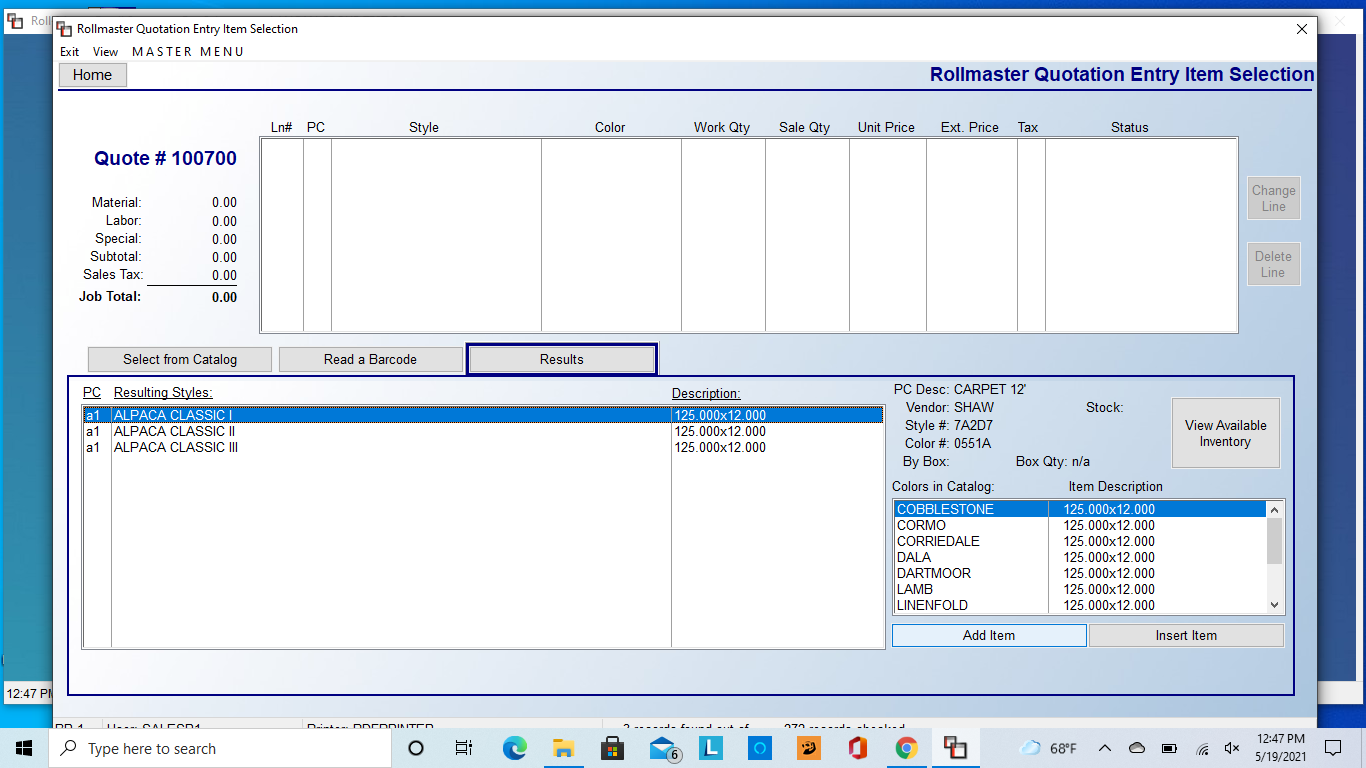


Select job type and salesman (in test mode, you don’t necessarily need to do this)

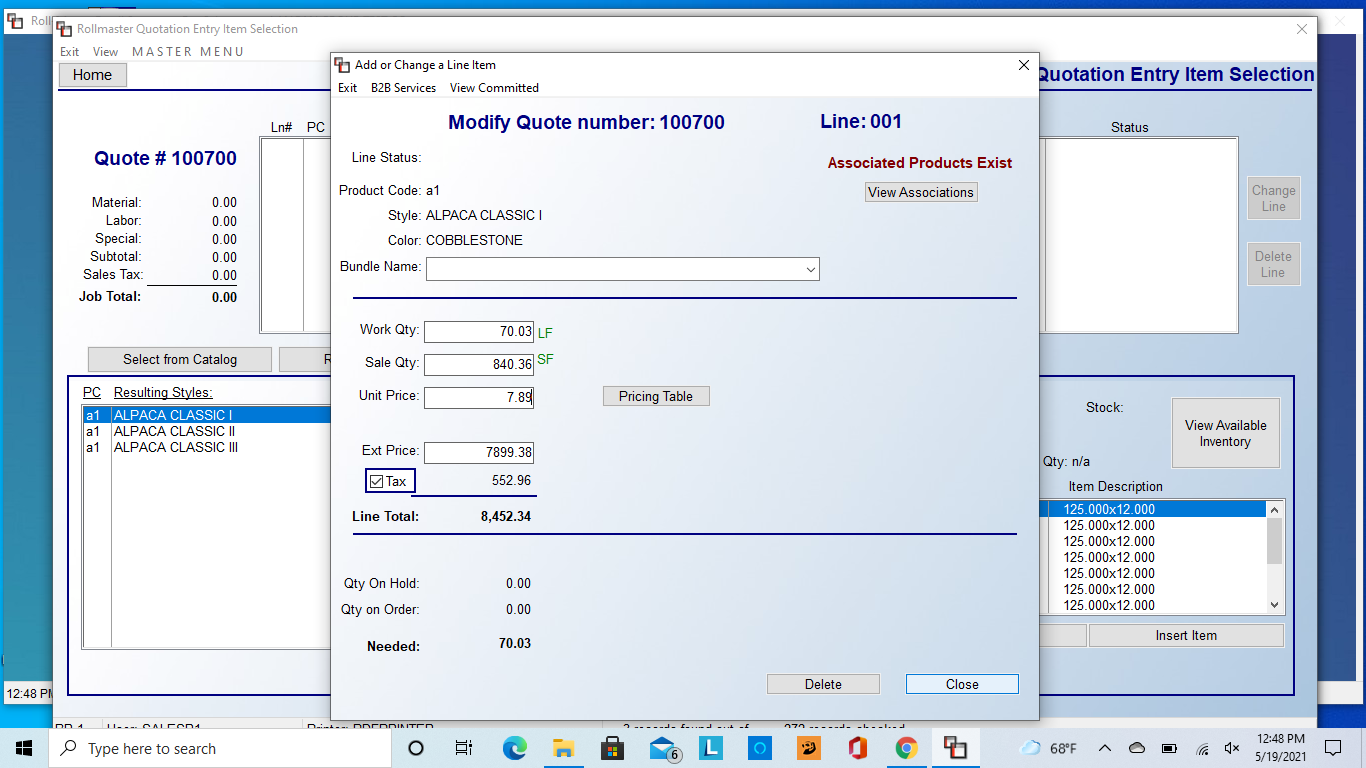
Click on Find and Add Line Items



Type in the style name of the product. There are other ways to narrow it down if this brings up too many options



Select the product that you are looking for on the left side, and then the color on the right side. Hit add item once both are selected

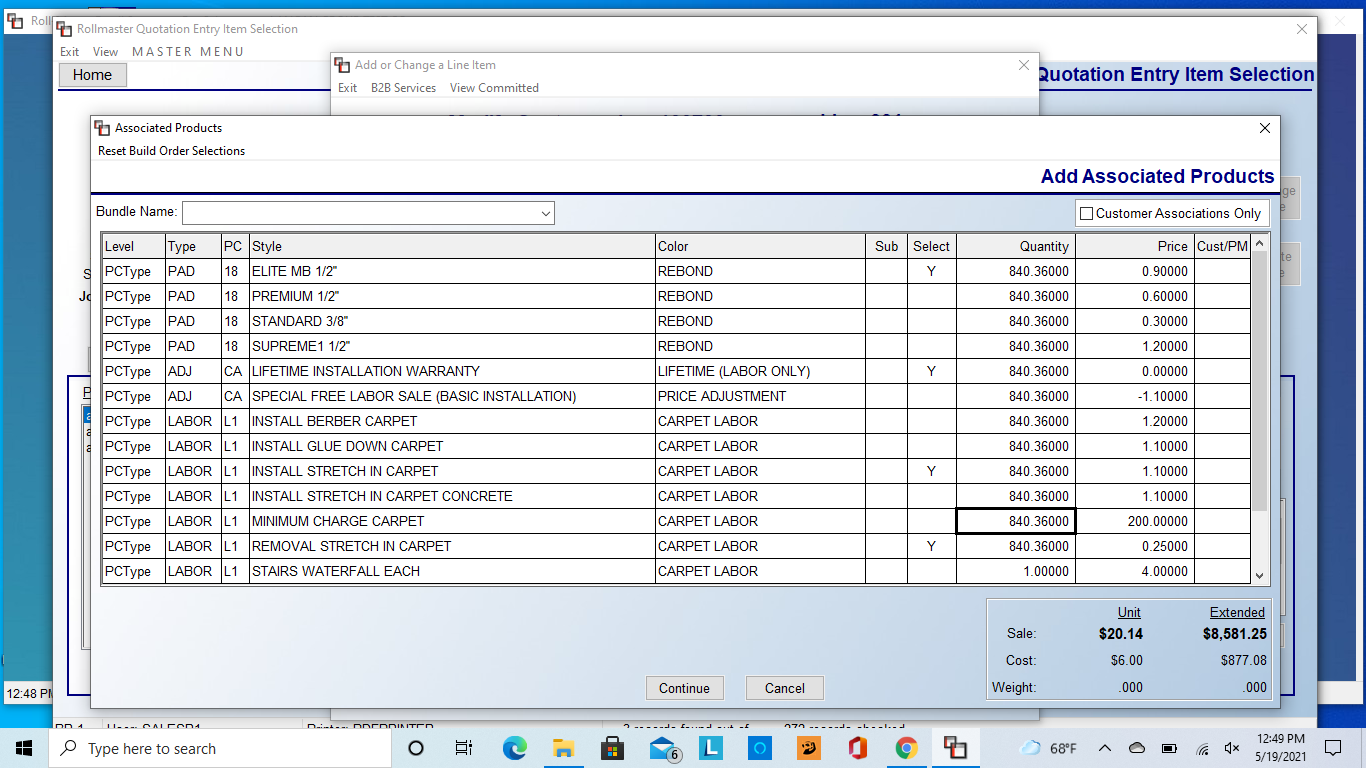


Enter in the work quantity (in linear feet, i.e. 12 x 70.03 lf)

Hit tab, and the software will figure and enter in the square footage for you

In unit price, enter in the correct price per square foot if it is not listed correctly.

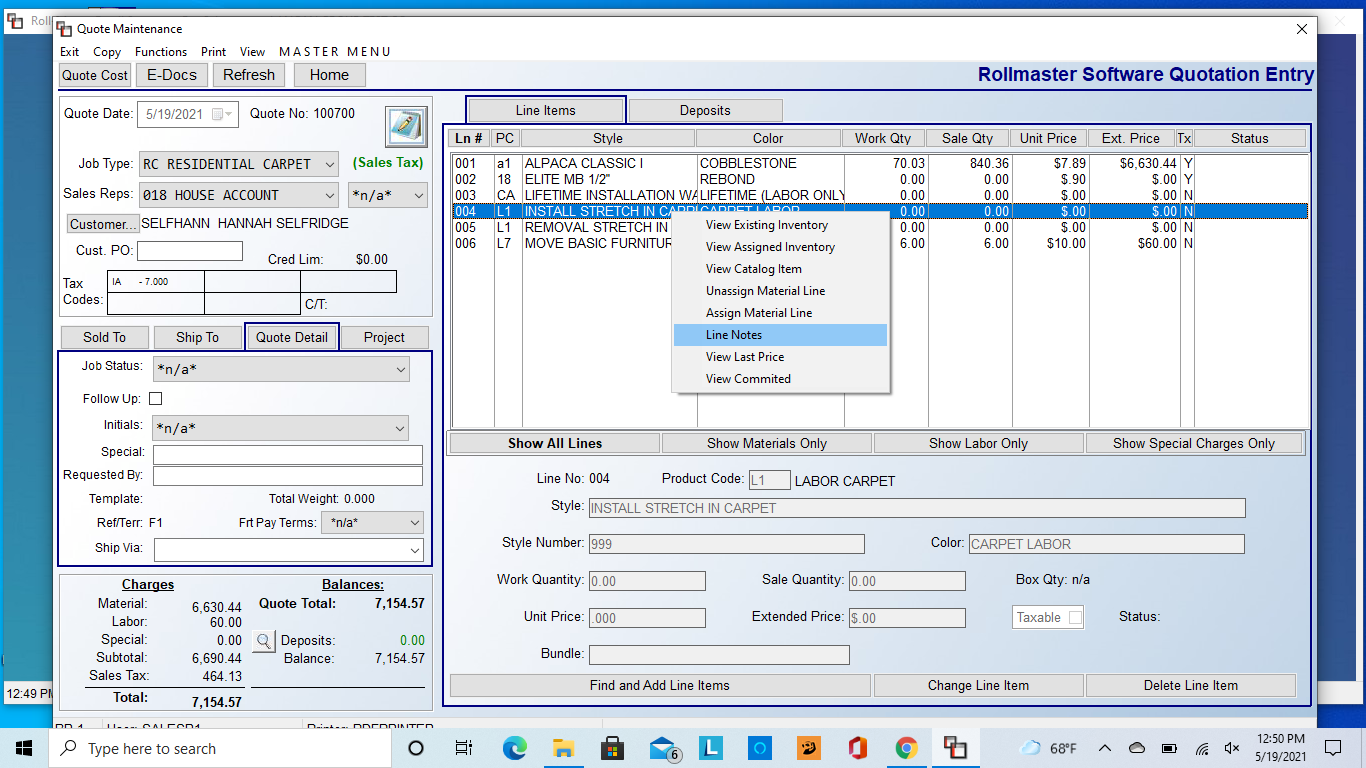
Once you have done all those steps, hit the Close button



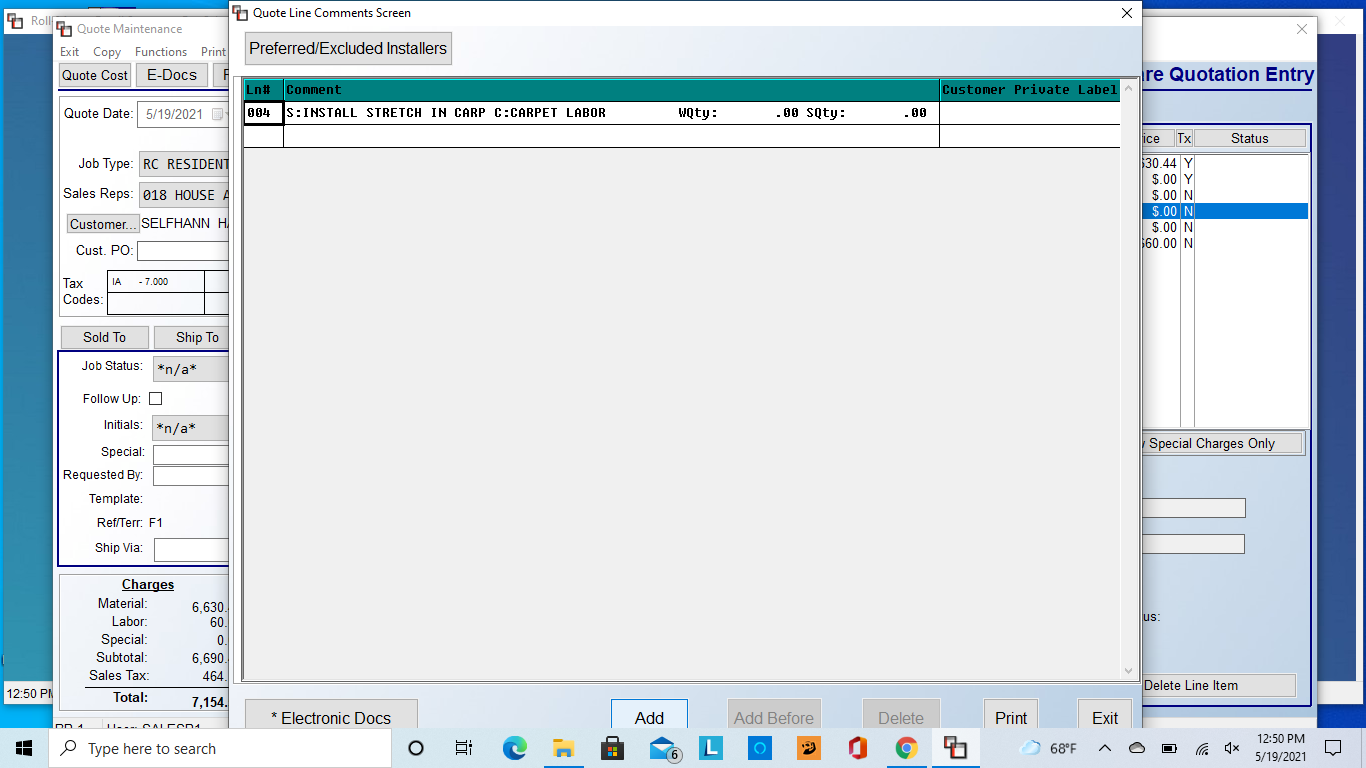
Associated products will automatically pop up.

In this screen, you will select pad, removal of old and installation of new product, as well as furniture moving. You can change quantities as need in the Quantity column.

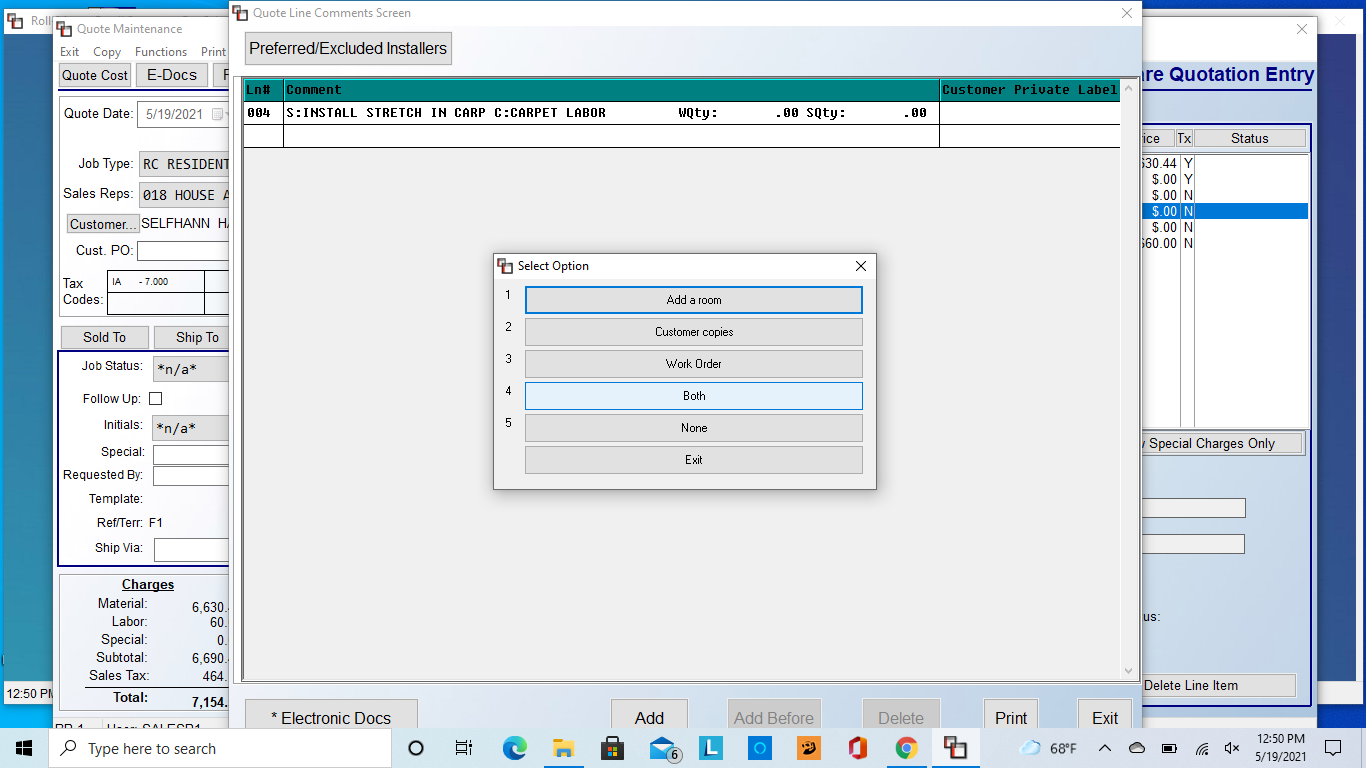
Once you have selected everything you need, hit the Continue button.



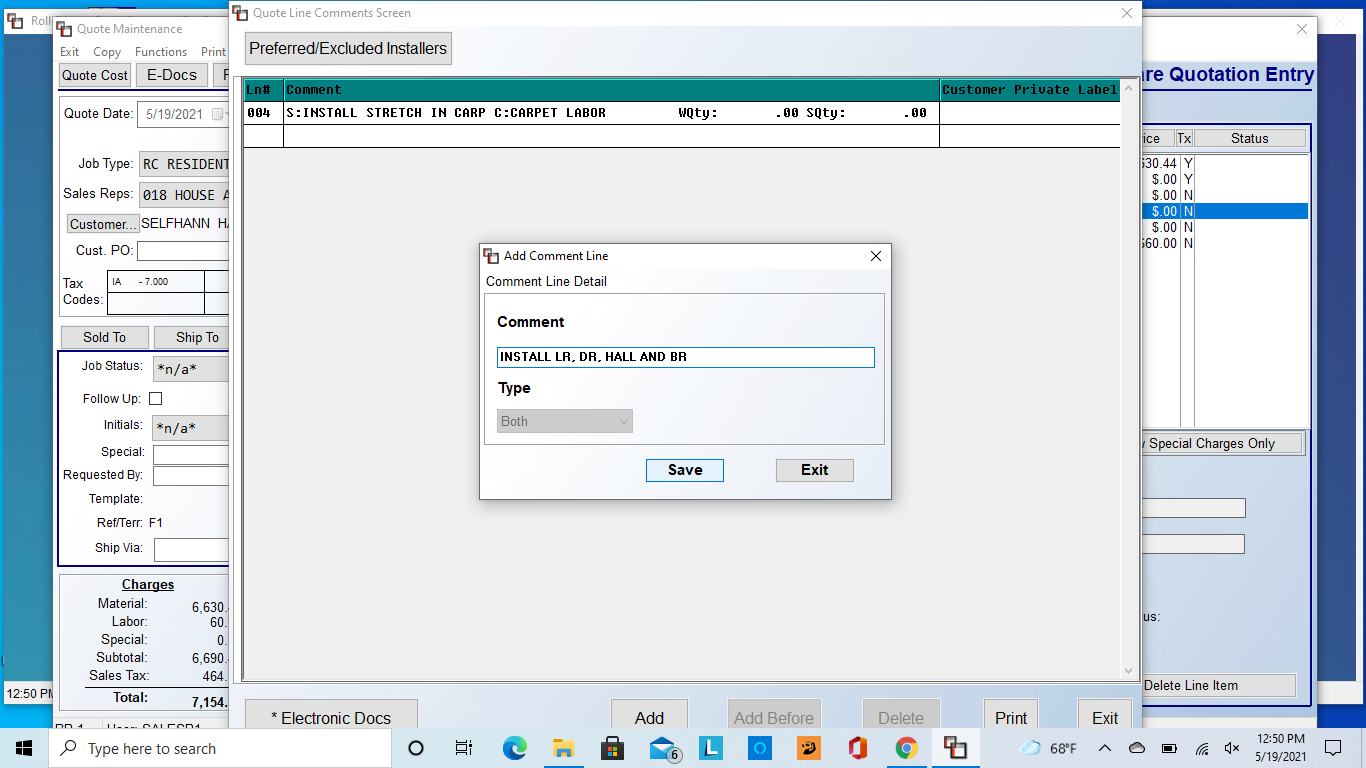
To add installation notes, select the installation line and right click on it. Select Line Notes



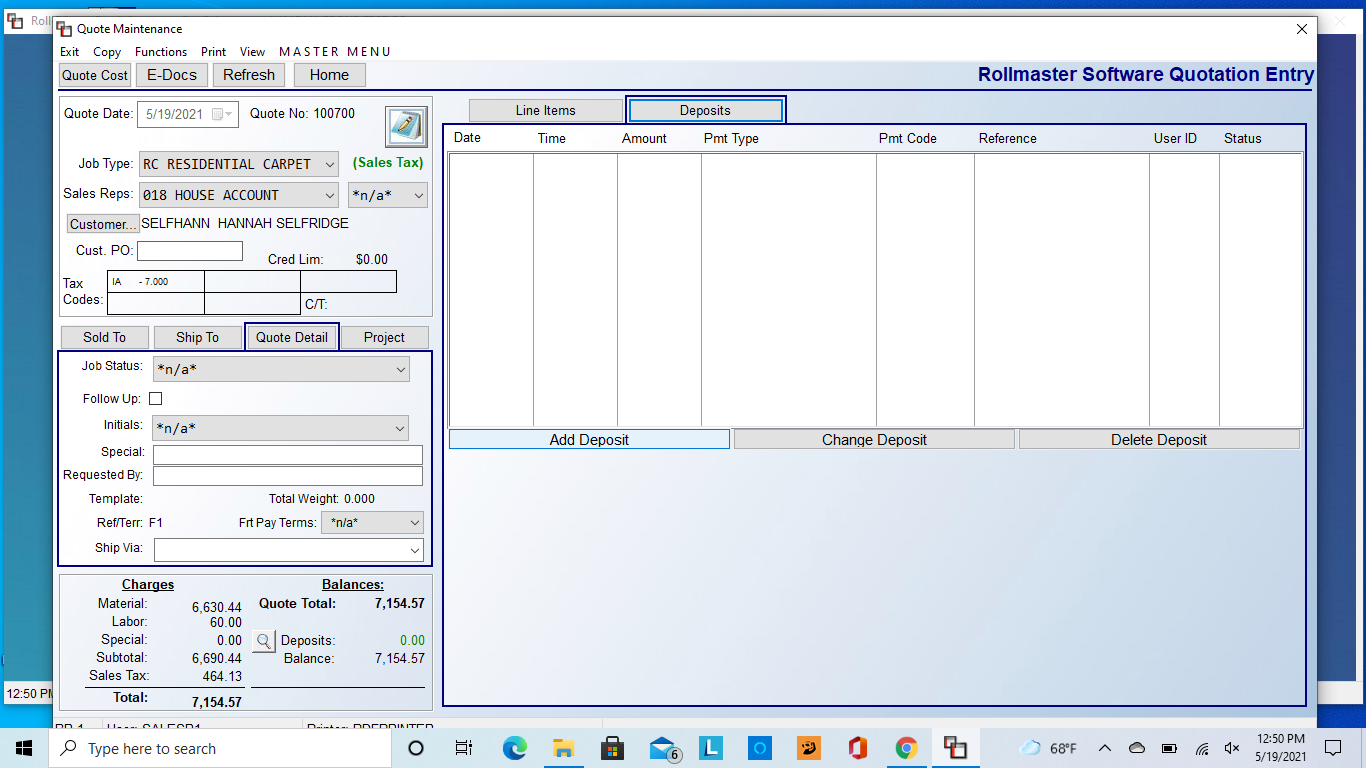
This screen will pop up, hit Add at the bottom of the screen



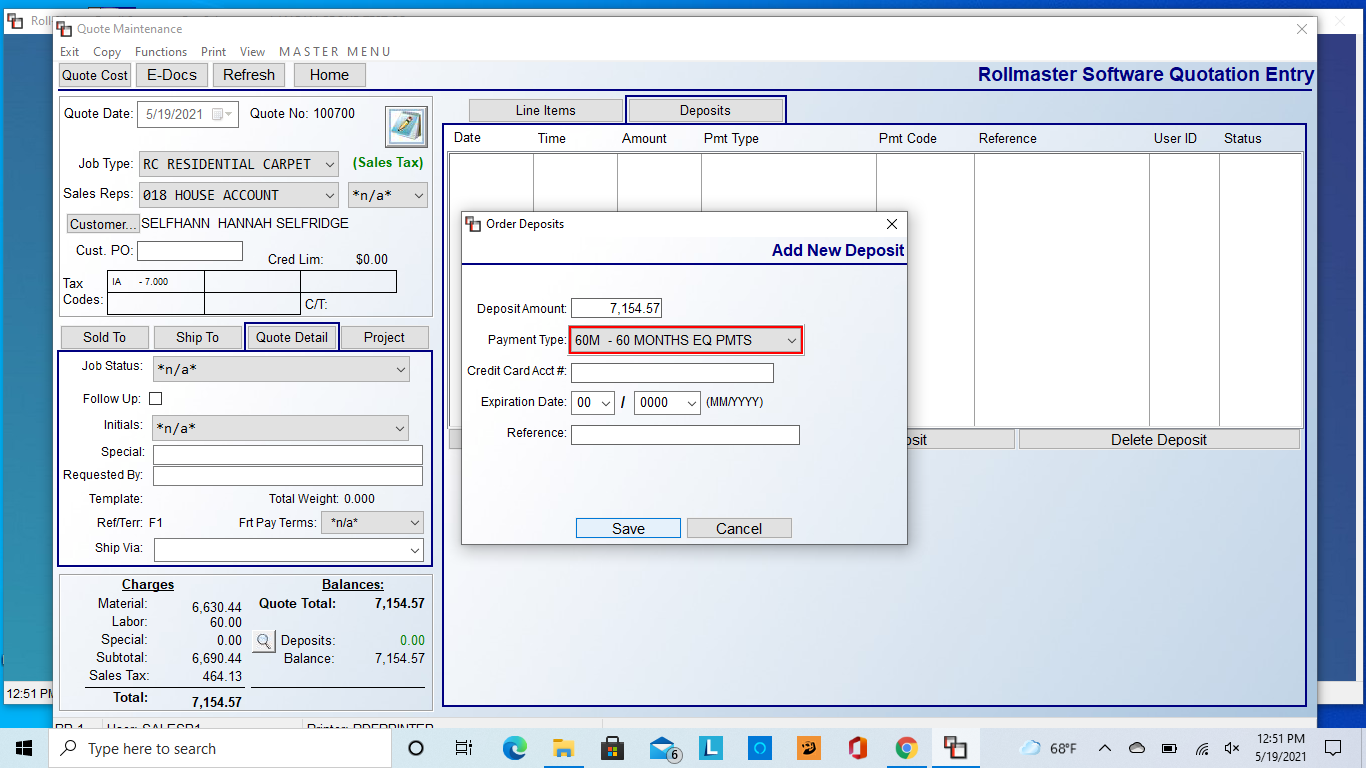
Select Both, as this will put the note on the contract and on the work ticket



Type in any installation notes and then select Save. If you need to add another note, a comment box will automatically pop up. Once you are completely done adding notes, hit Exit on both the small comment box and the larger Quote Line Comments Screen

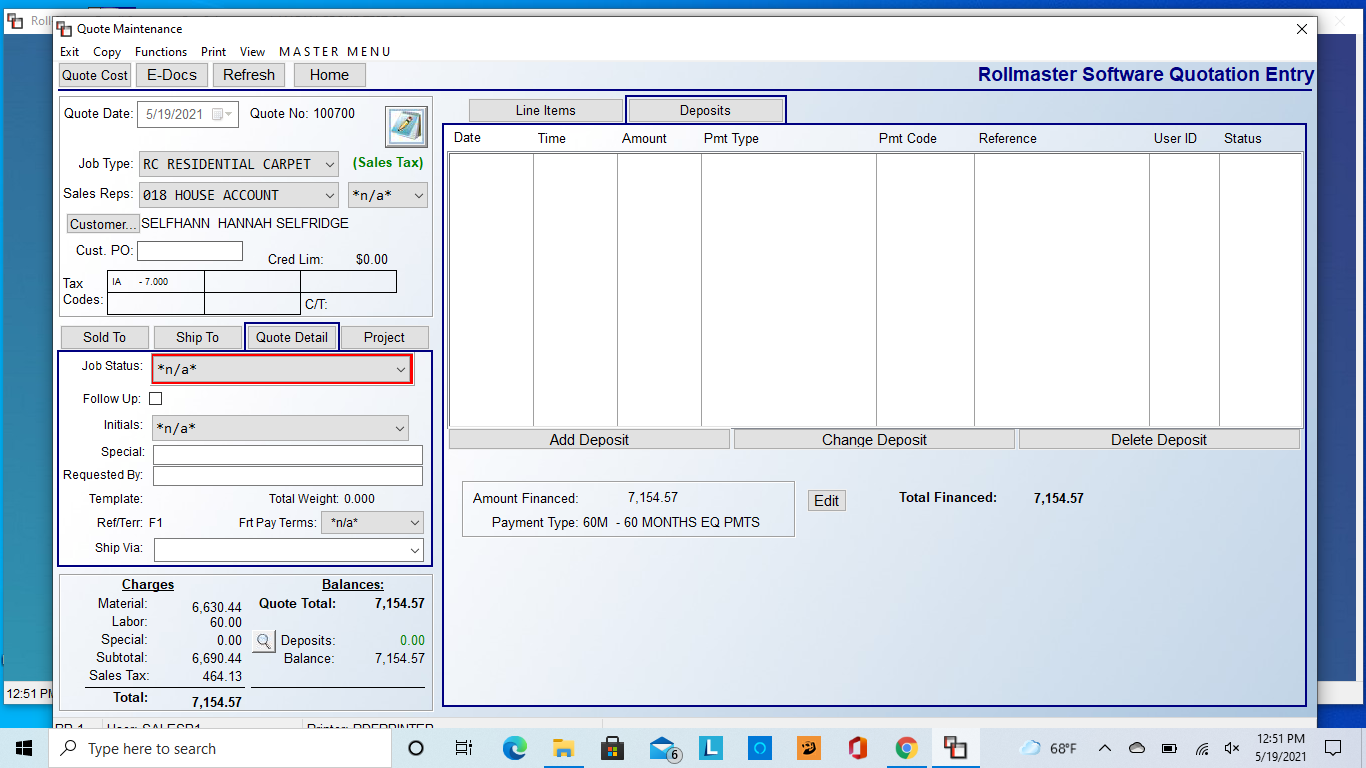


Once you are back to this screen, select Deposits to add down payments, financing, etc. Click Add Deposit



Type in the deposit amount, for financing, enter in the total order amount.

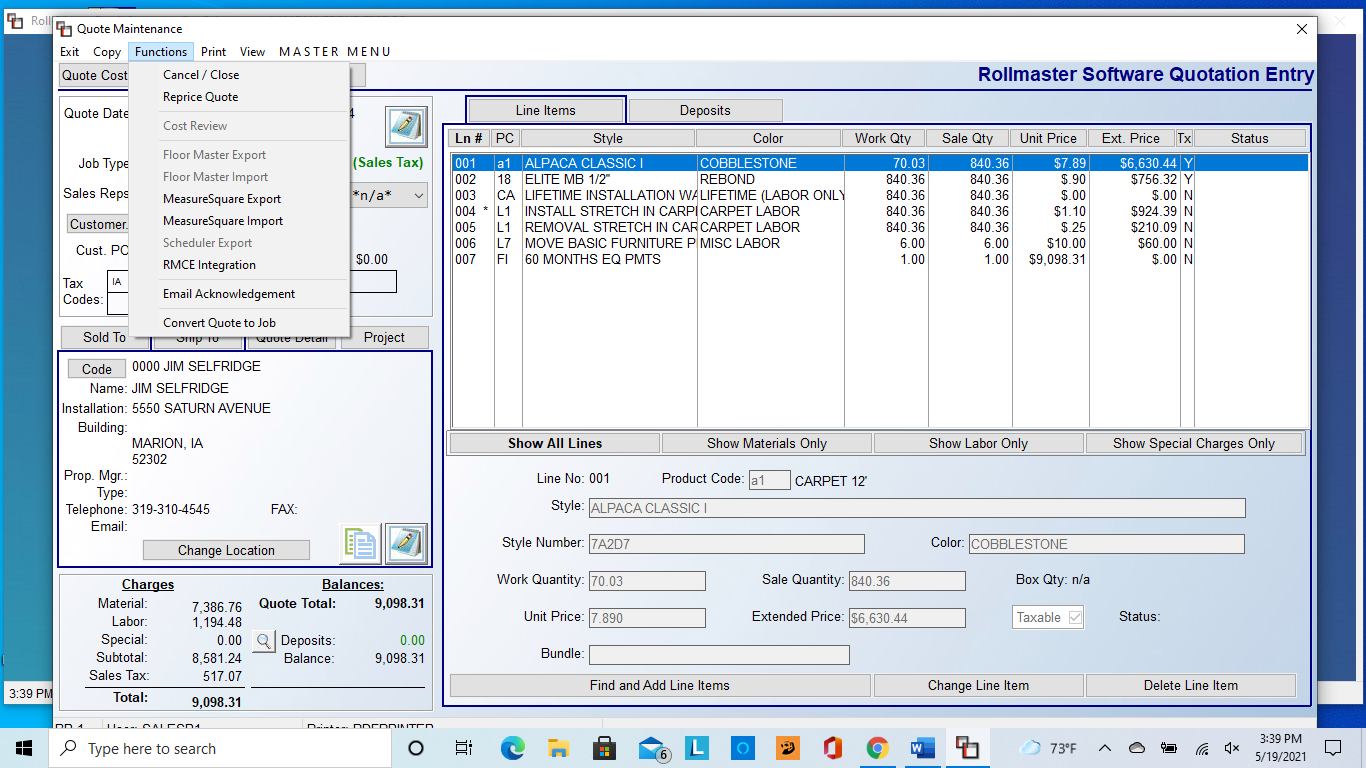
To select the type of payment, click on the Payment Type dropdown bar. Select the payment type and then select save



The deposit you added will appear below the Add Deposit button

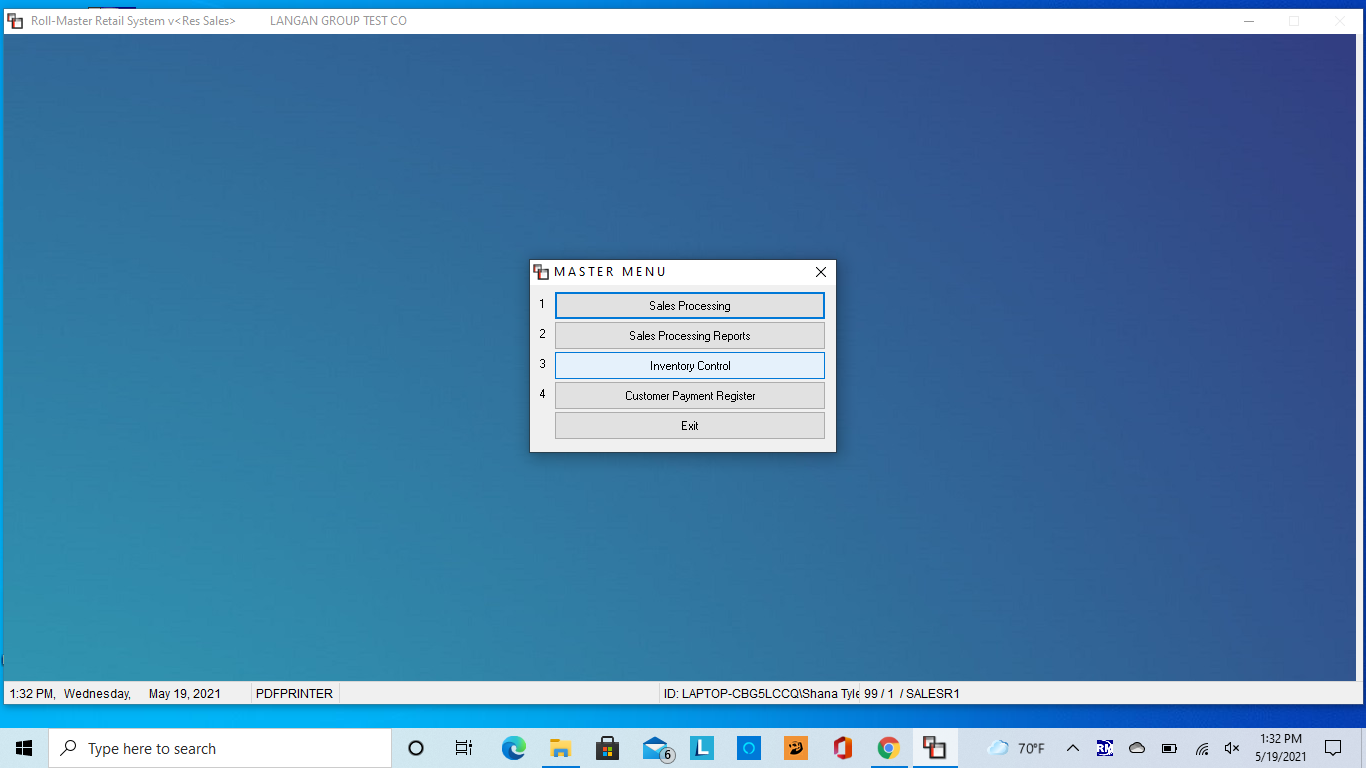
If your quote is complete, you can exit out of this screen.

To convert a quote to a job

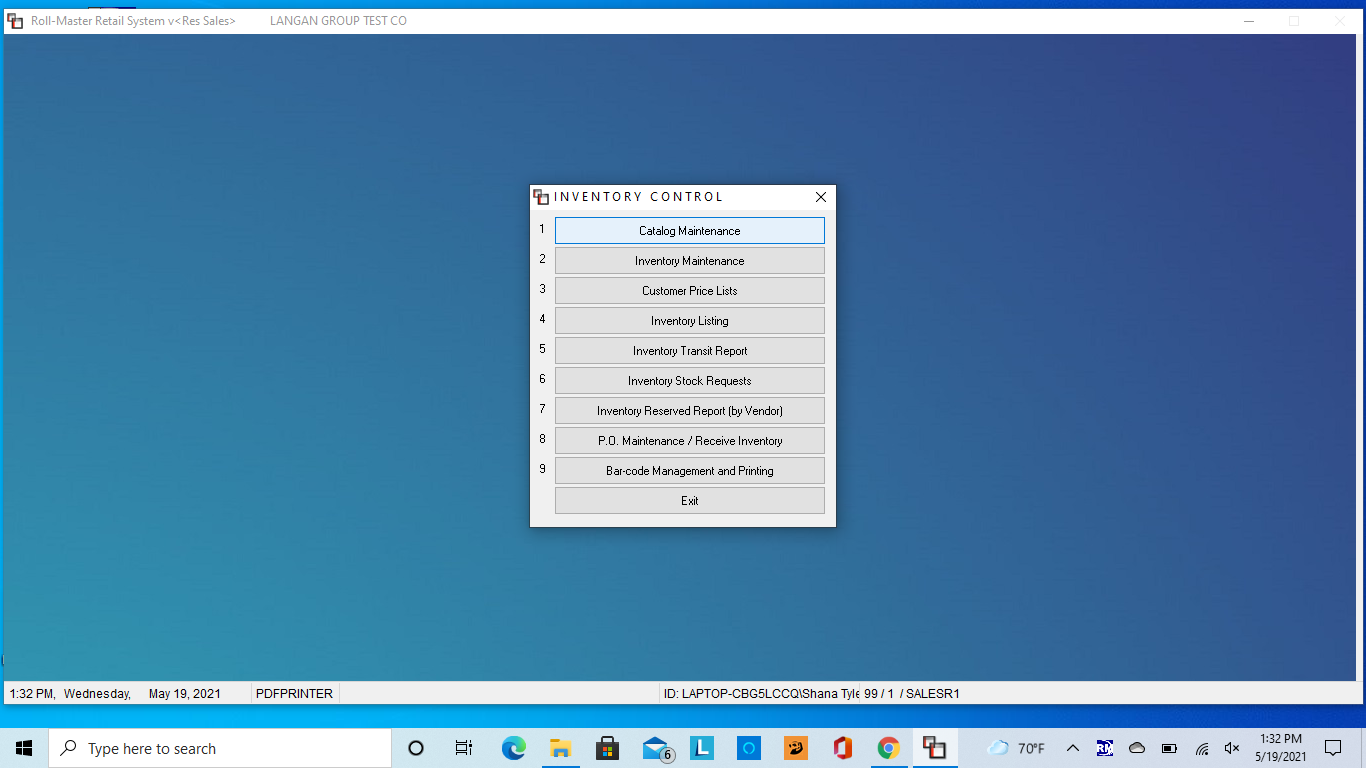


Open the quote you want to convert, click Functions at the top, and select Convert Quote to Job

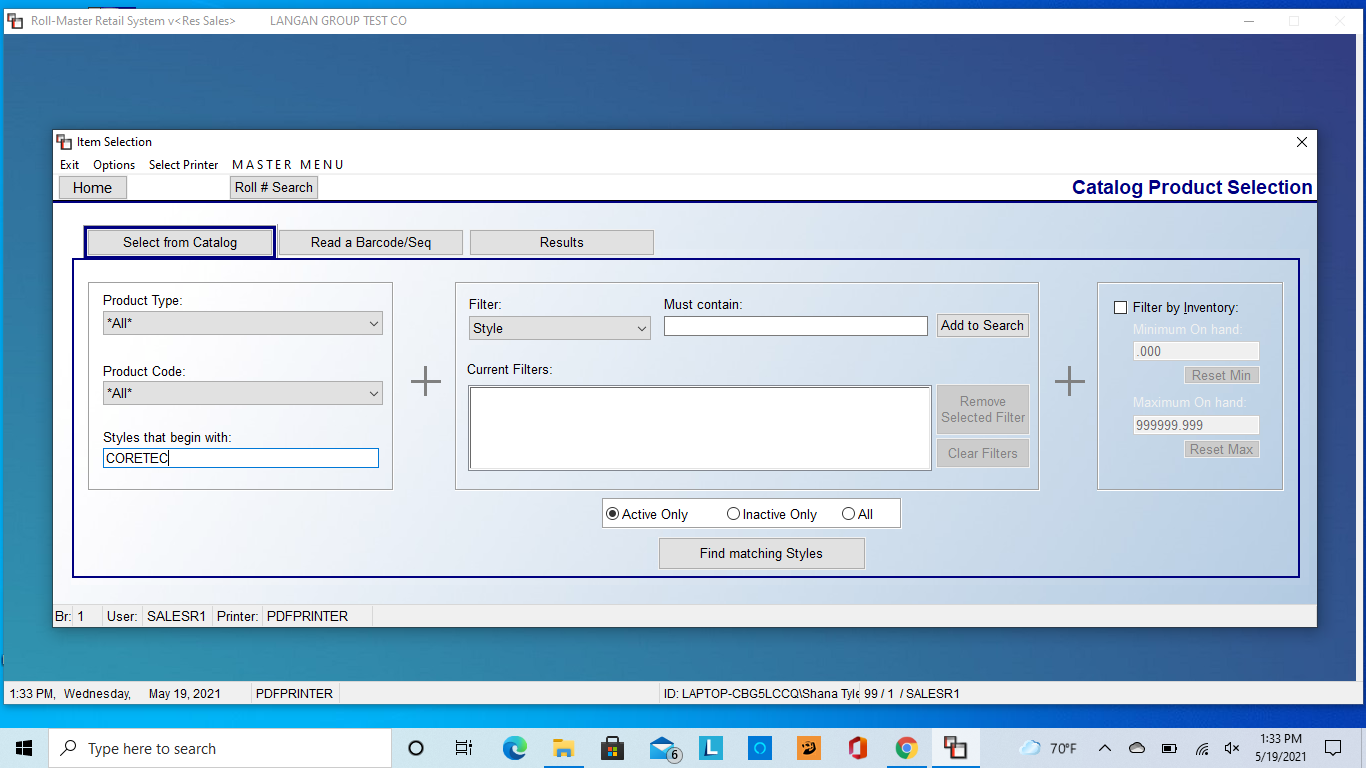
There are multiple ways to search for products



Go to Inventory Control

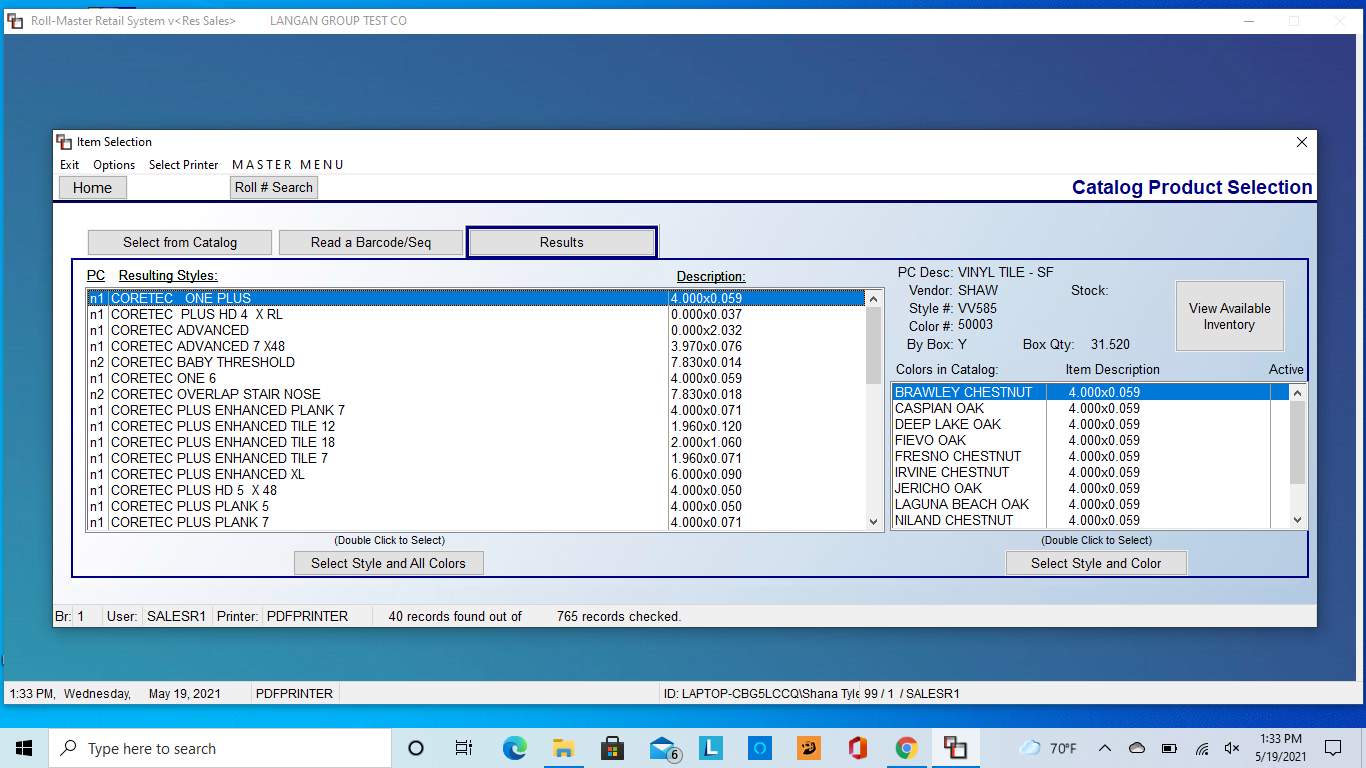


Then Catalog Maintenance

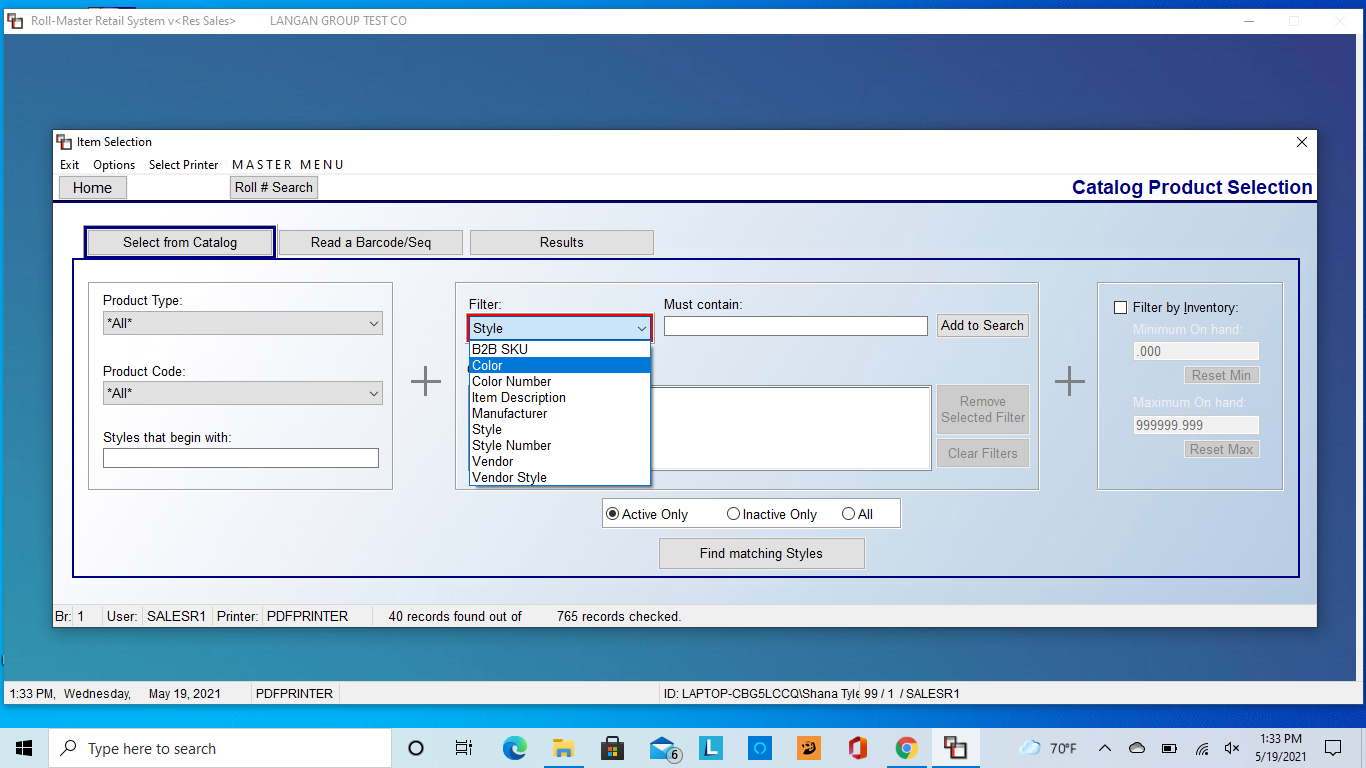


You will be able to search for product the same way you would when building a quote

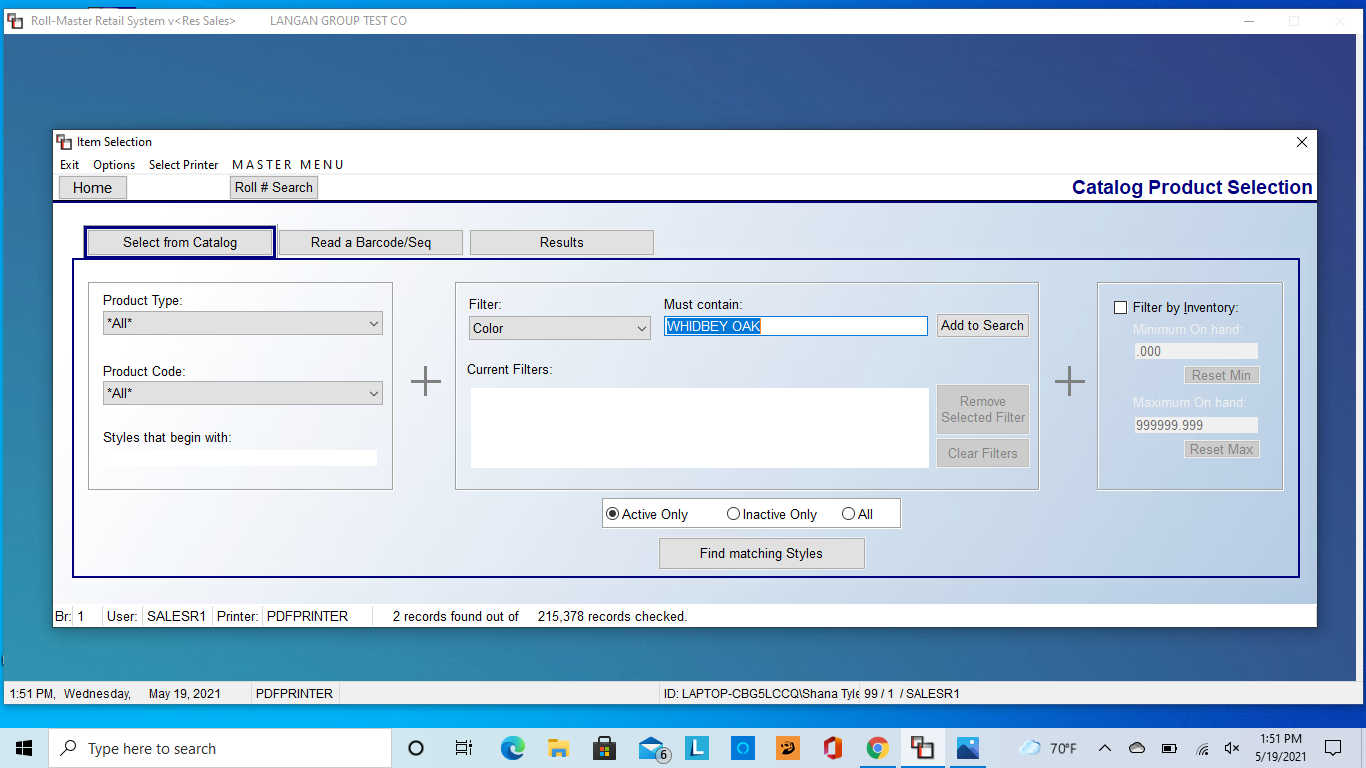
In this case, I am searching for a COREtec product



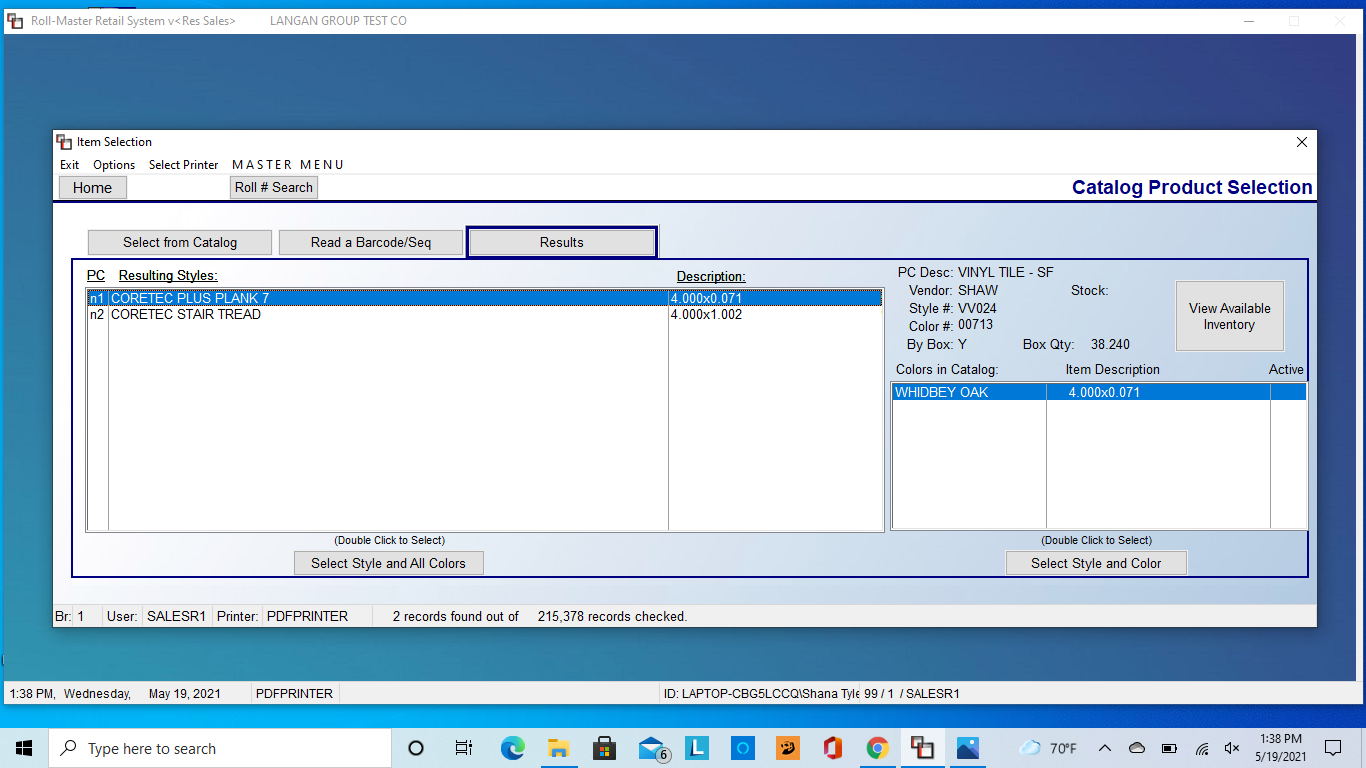
When I hit Find Matching Styles, a ton of results come up. Instead of sifting through it, I can search for the specific product I am looking for a different way.



Under Filter there are several parameters I can search under. The easiest search is for color name or number, as this will narrow the results significantly



I am looking for COREtec, color Whidbey Oak. Under Filter, I select Color then type Whidbey Oak under Must Contain. Then click Add to Search. It will appear under Current Filters. Then click Find Matching Styles.



The results are much narrower this time, and I am able to easily find the product I am searching for