

November 2023

Tips to Improve Your Entry Skills in eQuote

eQuote is our tool for scope definition and communication with the sales and estimating teams to obtain a quote either from the software or from our estimating department. 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.

The following are some tips you may not be using yet or not using anymore. Take a look and see if we can get your speed of entry kicked up a notch! Have fun!

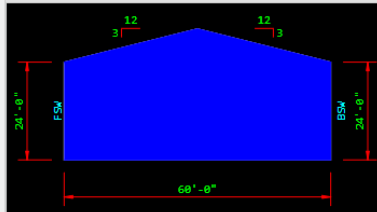
Sharpen Your Keyboard Skills

While many of our interactions these days are with a phone or a tablet, most business users still find themselves in front of a keyboard and mouse. eQuote allows you to utilize keyboard speed with things like the TAB key, spacebar, arrow keys, and ENTER key. It's amazing how other devices have made us forget some of these habits as we move to more visually based inputs. You can use these in a lot of other places, too, not just in eQuote!

1. Let's walk through an example or two. On the Building Description screen, you can use the mouse just once for the whole screen.
 - a. Mouse click into the first field on the screen, the "Building Name".
 - b. Next, TAB to the "Building Geometry" and use the arrow keys to choose the desired option.
 - c. TAB and enter "Building Width".
 - d. TAB and enter "Building Length".
 - e. TAB and enter eave heights and roof slopes.
 - f. TAB until the "Next" button is highlighted and hit "Enter".

Description

*Building Name:



Geometry

*Building Geometry: *Building Width:

*Building Length: *Distance to Ridge from FSW:

Eave Height **Roof Slope**

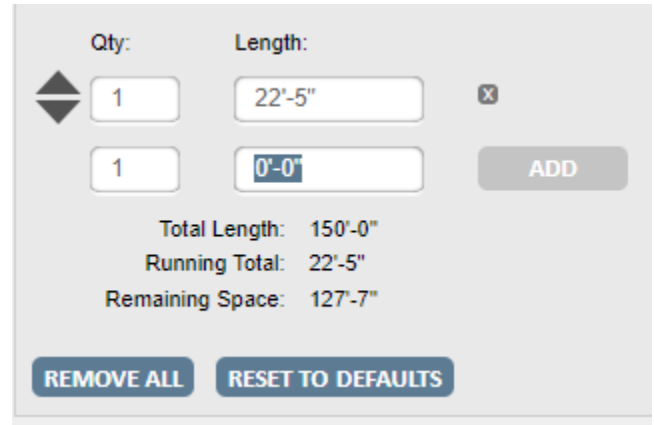
*Front Sidewall (FSW): *Back Sidewall (BSW): *Front Sidewall (FSW): :12" *Back Sidewall (BSW): :12"

Leave one field above blank to have that field automatically calculated.

*Requested Clear Ht (FSW): *Requested Clear Ht (BSW):
(From FF to Frame Haunch) (From FF to Frame Haunch)

Note: The input eave height is subject to change in order to accommodate the requested clear height. Pricing adjustments may be required.

2. Let's do one more: on the Sidewall Bay Spacing, you might have several specific bay lengths to enter.
 - a. Either start with the default bays or hit "Remove All" and click into "Qty."
 - b. Type your quantity and TAB and enter the length and TAB and notice the "ADD" button is highlighted.
 - c. Just hit ENTER and the cursor will advance to the next row where a default quantity of 1 is used. If that is correct, just TAB and do it all again, or backspace and put in your quantity and then TAB.



Qty: 1 Length: 22'-5" x

Qty: 1 Length: 0'-0" ADD

Total Length: 150'-0"
Running Total: 22'-5"
Remaining Space: 127'-7"

REMOVE ALL RESET TO DEFAULTS

3. This principle works on all the screens! Here are some additional keyboard tips.
 - a. If you encounter a Yes/No selector and you want to switch the selection, hit the spacebar while on the option you want to select.
 - b. For checkboxes, use the spacebar to select and deselect the checkmark.
 - c. If you TAB too far, use the Shift and TAB to TAB backward.
 - d. Most dropdown menus will allow you to type the first letter of a selection to jump to that one.

Use the Tools at Your Fingertips (Pun Intended)

Your web browser and operating system have efficiency tools of which you can take advantage.

1. Use key combinations like the following (for Windows).
 - a. Ctrl and C to Copy, Ctrl and V to Paste, and Ctrl and A to Select All. No need for the frustration of trying to select a whole chunk of text in a textbox when you can tap Ctrl and A.
 - b. A favorite tip: use the advanced clipboard options by pressing the Windows button and V. Here, you can paste not just the last thing you copied but several previously copied items by selecting them. Pin or remove items from the list.
2. Use these tips in your browser:
 - a. Zoom in with Ctrl and + and zoom out with Ctrl and - and get back to the 100% zoom level with Ctrl and 0.
 - b. Open a new tab with Ctrl and T. Reopen the tab you just closed with Shift and Ctrl and T. Close your current tab with Ctrl and W.
 - c. Switch to the next tab with Ctrl and TAB and the previous tab with Shift and Ctrl and TAB. Switch to a specific tab with Ctrl and 1 (for first tab) and 2 for second tab, etc.

- d. Open a link in a new tab by holding Ctrl while clicking it. Open it to a new window by holding Shift while clicking.
- e. If you have lots of tabs open and some of them are related, simply sort them into groups which you can expand or collapse and color code. You can even move the groups around just like you would move a single tab (drag and drop).
- f. After downloading a file and the notifications go away and you want to get back to it quickly, just hit Ctrl and J to open the download history.