

# QuoteSoft Duct Advanced Training Agenda

The Advanced Training class is designed for existing QuoteSoft Duct users to get an in depth walk through of the new Duct 4.0 software.

## Topic 1. Central Data – Data File and Pressure Files

- Navigation using the Central Data Tree
- Data File Component page review
- Editing existing and creating components such as Materials, Joints, Liners, etc
- Exporting Components to Excel for price updates and importing back in
- Pressure File navigation and setup
- Editing and creating pressure files using global changes and export to Excel

## Topic 2. Catalogs – Accessory Items and Equipment

- Catalog navigation through Categories, Groups, and Items
- Editing existing and creating new Catalogs, Categories, Groups, and Items
- Walk through on duplicating Legacy Accessory File in the Catalog

## Topic 3. Job File – Job and Zone Management

- New to Duct 4 is the Folder level of job management. An explanation of recommended use of folders and how to manage them
- Customizing your experience with Workspaces
- Filtering and Grouping in the Folder, Job, and Zone lists

## Topic 4. Takeoff – New Takeoff Tools and Procedures

- Customizing your experience with Workspaces
- Filtering and Grouping in the Audit Trail
- Customizing the fields shown in the Audit Trail to your liking
- Exporting the Audit Trail to Excel
- Using Bookmarks to recreate Accessory File palette for Takeoff
- Updated Components palette showing all connectors and reinforcements
- Item Details review showing the depth of information available in Takeoff
- Advanced Tools:
  - o Using Global Edit (Global Wizard replacement tool)
  - o Install Factors
  - o Overrides
  - o Default Colors by System/Phase/etc
  - o Copy/Paste annotations with flip vertical and horizontal
  - o Custom Catalog Tags – when and why
- Duct 4.0 Assemblies and their uses
- Create new zone from Takeoff and switching zones

## Topic 5. Reporting – Excel Export and Static Reports

- QuoteSoft Duct Summary Template
  - o Updated Bid Recap Sheet
  - o Job Summary Tab for a short summary
  - o Component Breakout
  - o Detail Tab (like pipe)
- Static Reports (like Crystal Reports)
  - o Extended Summary
  - o List Report
  - o One page Summary
- Analytics is your entire job Audit Trail
  - o How to group, filter and sort the list of items
  - o How to save the layout you create
  - o How to export and share the layouts you create
  - o Export Analytics to Excel