

Getting Started with QuotePix™ for Creating Furniture Submittals

Using Visimation QuotePix with Visio's Furniture Stencils



06/30/14
Version 1.0

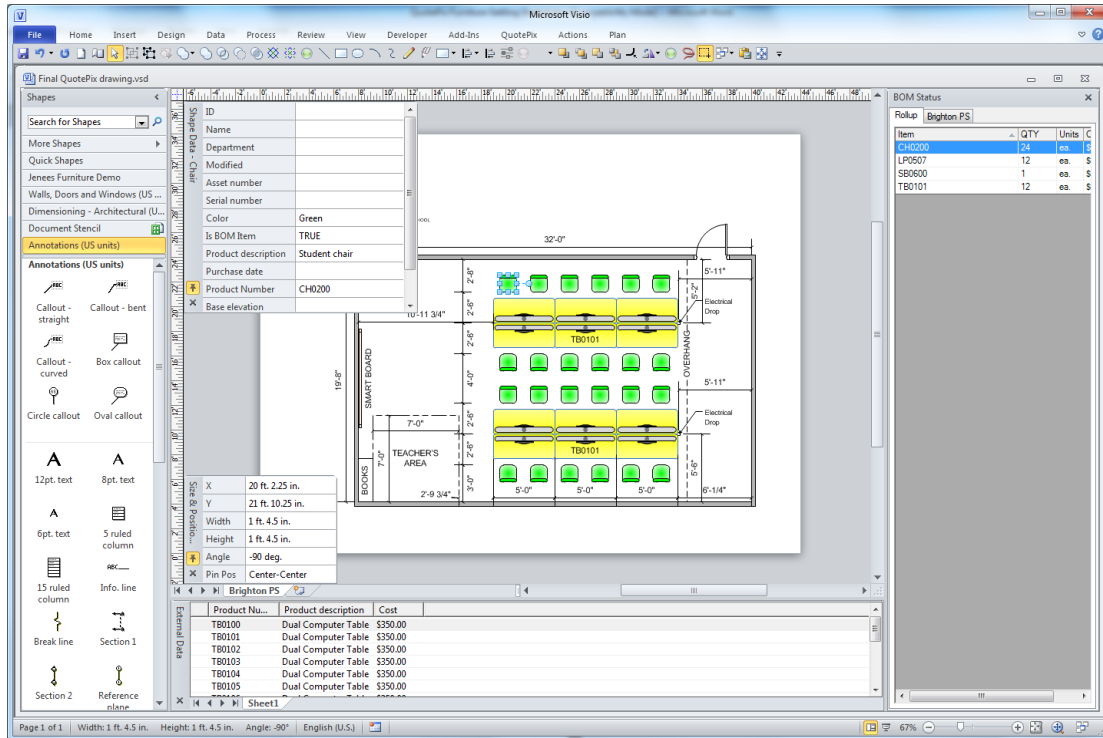


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Installation:

Installing QuotePix will add a series of sample templates into your My Documents\My QuotePix Templates folder. All QuotePix templates for Visio and Excel that you create from scratch or modify from existing samples must be placed in this directory. You can also place your own Visio stencil files in this folder or in the My Documents\My Shapes folder. For best results, your Visio template .vst files should be saved with the Visio stencil .vss files open in the Shapes window so that they open automatically when creating a new drawing.

Uninstallation:

To uninstall the templates and stencils, simply delete them from the folders where you placed them. To uninstall QuotePix, use the standard Windows Uninstall feature in your Control Panel.

System Requirements:

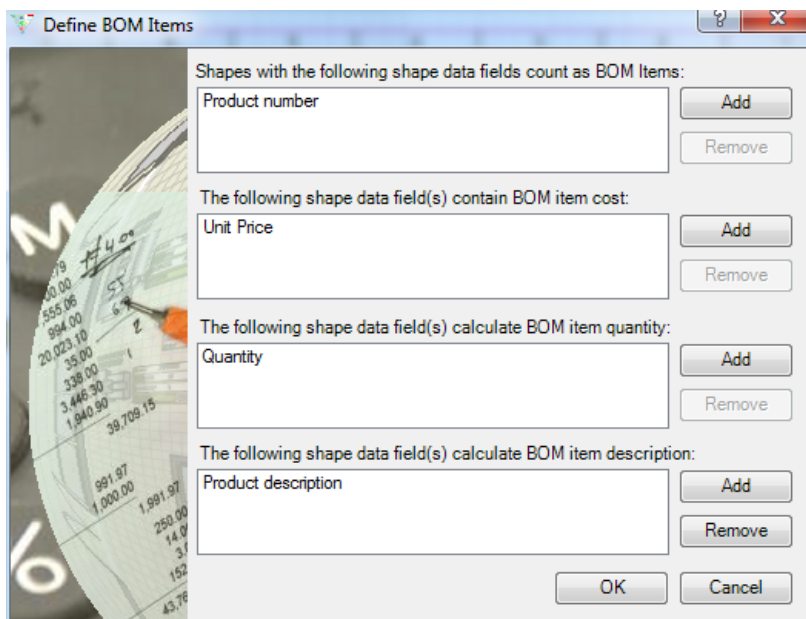
These templates are designed to work with Visimation's QuotePix and Microsoft Visio 2007 and later. Installation of these products is necessary for the QuotePix Furniture templates to work properly.

Getting Started Instructions

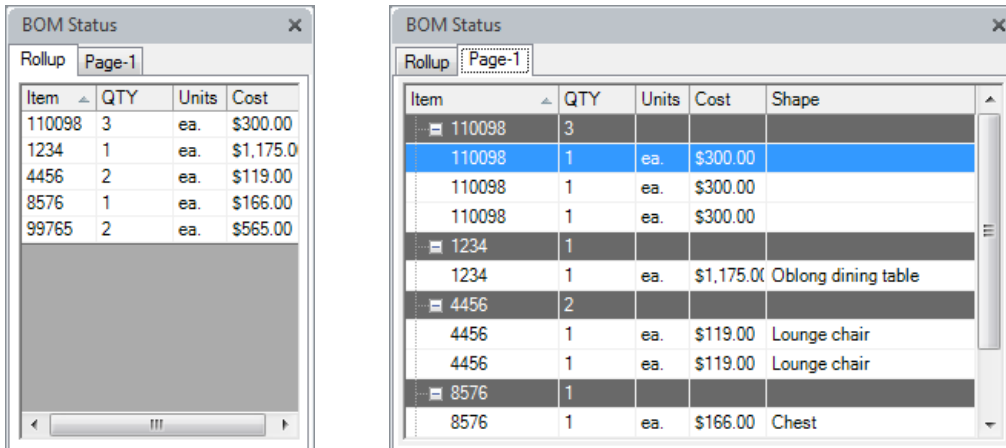
Following are some common usage scenarios and brief help for getting started with QuotePix.

Starting from a new blank QuotePix Furniture Systems drawing

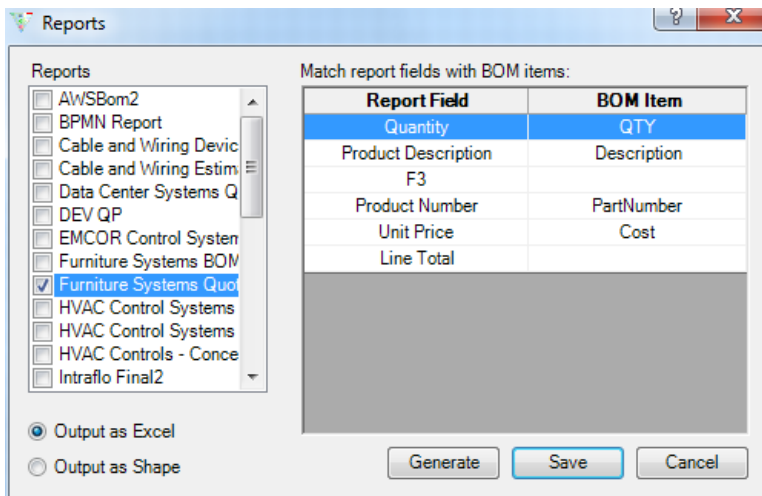
1. From Visio choose QuotePix > New Document and choose Furniture Systems. A new blank drawing based on the Furniture Systems template will be created.
2. The Project Properties dialog is automatically displayed. You can fill in values in this dialog now or come back to it later by choosing QuotePix > Project Properties.
3. Create your drawing using the stencils opened by the template.
4. You do not need to use the Define BOM Items feature because the definitions of what are BOM items are contained in the template. For other conditions you may need to define the BOM items yourself. See later sections for details on how to do this.



- The BOM status window at the right side of the screen gives a current listing of all shapes currently included in the BOM. If you do not see the BOM Status window it can be turned on with the menu QuotePix > View BOM Status Window.



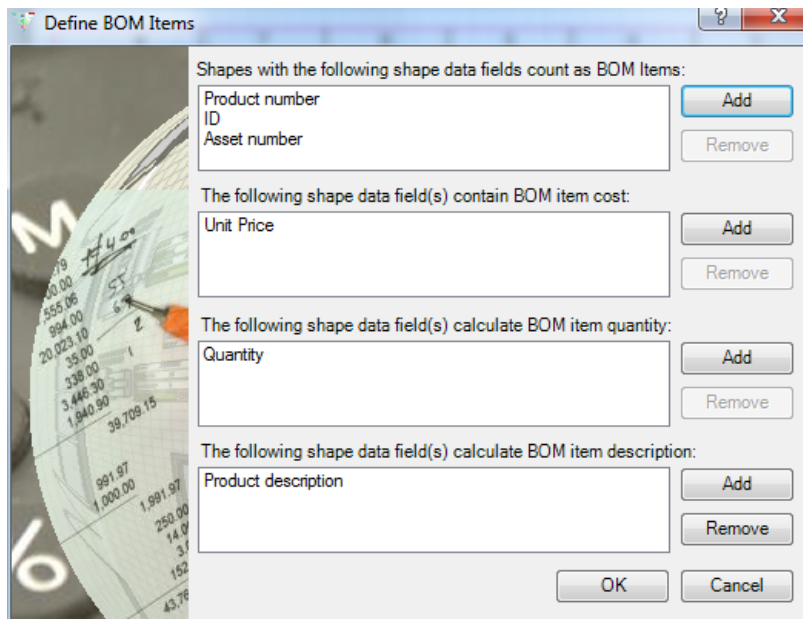
- Generate the BOM report using QuotePix > Reports to open the Reports box



- Check the box next to the Furniture Systems Quote title. You may check multiple boxes to generate more than one report at the same time, for example Furniture Systems BOM
- Click Generate to open the report in Excel

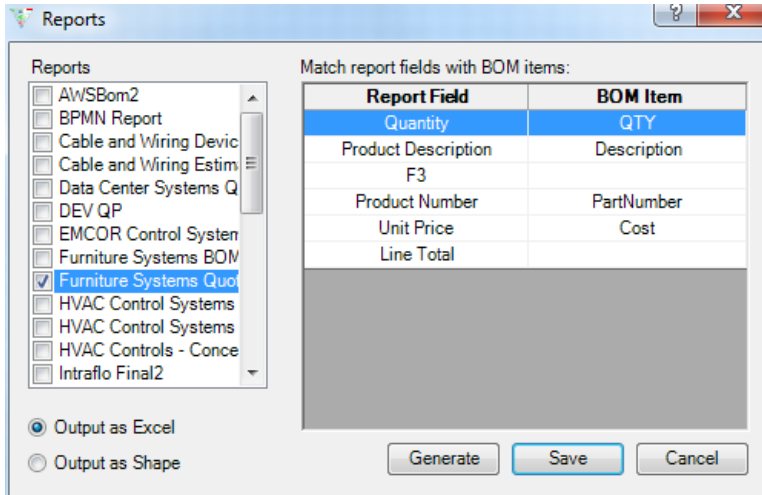
Starting from an existing drawing that was created using shapes from the Visio Furniture stencils

1. Configure your non-QuotePix Visio drawing for QuotePix. From Visio choose QuotePix > Define BOM items.
2. From the Define BOM items dialog, in the first list add Part Number as the shape property that defines a shape as a BOM item. Your drawing may contain shapes with differing Shape Data sets and field name so you can tell QuotePix to scan for more than one BOM identifier as in the screen below. In the second list add Unit Price as the shape property that defines the BOM item cost. Again, if your shapes contain differing Shape Data fields you can add several for the cost. Do the same for Quantity and Description. When complete the Define BOM Items dialog may look like the image below.



3. Choose OK to close the dialog. All shapes in the drawing that have Part Number, ID, or Asset Number as a shape data field will be added to the BOM item list.
4. The BOM status window gives a current listing of all shapes currently included in the BOM. If you do not see the BOM Status window it can be turned on with the menu QuotePix > View BOM Status Window.
5. As a reminder, if there are other shapes that should be included in the BOM item list, but are not yet included, there are two ways to have them included.
 - a. Check the shape's properties to determine if it already has a property that can serve as a BOM item identifier, such as P/N, Part ID, etc. If such a field is found Add this field to the BOM item identifier list using QuotePix > Define BOM items. QuotePix will search for multiple Shape Data fields as BOM items... they don't all need to be the same.
 - b. If the shapes do not have a property that can serve as a BOM item identifier, use the menu Convert Shape(s) to BOM Items to convert them. To do this, select the shape and choose QuotePix > Convert Shape(s) to BOM items. QuotePix will add the Part Number property to the shape. This will cause it to be added to the BOM item list.
6. Choose a BOM reporting template. There are two templates predefined to be compatible with these BOM items: Furniture Systems BOM.xlt and Furniture Systems Quote.xlt. To select a BOM reporting template choose QuotePix > Report. The Report dialog is displayed as in the previous section where you can check the Report template to use.

To configure the dialog for the template Furniture Systems Quote set up the dialog as shown below:



7. To create the BOM report click Generate.

Adding Project Properties to your drawing

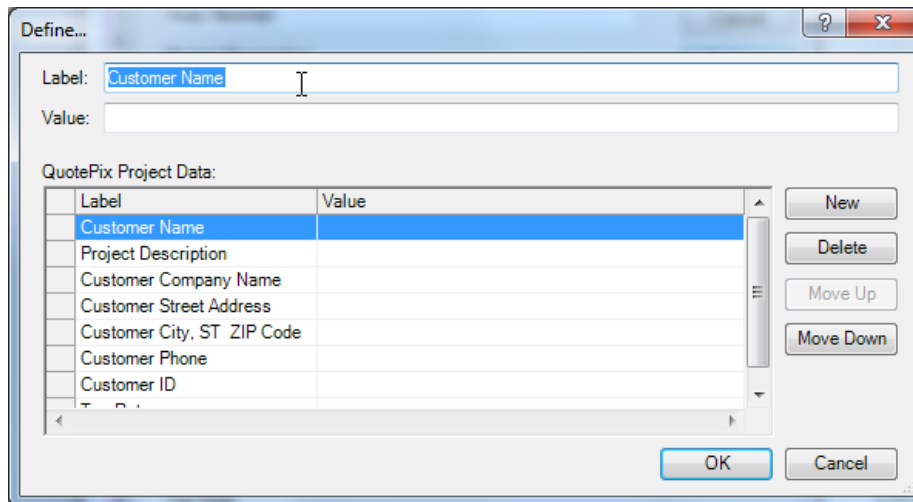
1. Add project properties to the drawing using QuotePix > Project Properties. The project properties needed are often determined by the fields defined in the chosen BOM report template. In the BOM report template look for fields of the form [Customer Name], i.e., a property name surrounded by square brackets. Add these fields as project properties to the drawing and set values for them. When a BOM report is generated, the values of these properties will be automatically transferred to the BOM report.

The screenshot shows the 'QuotePix Project Data' dialog box with the following fields and values:

Customer Name	Huey Newman
Project Description	Office furniture
Customer Company Name	Visimation Inc.
Customer Street Address	11167 High Street
Customer City, ST ZIP Code	Sonoma, CA 95476
Customer Phone	425-555-3456
Customer ID	78001
Tax Rate	8.5%

Buttons for 'OK', 'Cancel', and 'Define...' are on the right side.

Below is an example of the Define properties dialog. Use this dialog to create or change the properties defined for your document. For more information on using this dialog see QuotePix > Help.



8. To create the BOM report that contains the project data, choose QuotePix > Report > Generate as described previously.

Adding furniture shapes in Visio to a drawing created as a .dwg file.

This is a scenario that comes up often where floor plan drawings have been created as Autocad files. You want to augment those drawings by overlaying them with furniture information and then generate a bill of materials for the furniture items in the drawing. Following are steps for this process.

1. From Visio choose QuotePix > New Document and choose Furniture Systems. A new blank drawing will be created.
2. The Project Properties dialog is automatically displayed. You can fill in values in this dialog now or come back to it later by choosing QuotePix > Project Properties.
3. Import the .dwg file into the new Visio drawing. From Visio choose Insert > CAD Drawing. For more help on this topic use Visio > Help.
4. Add the furniture shapes to the drawing using the stencils opened by the template.
5. Configure the shapes as BOM items as previously described
6. Generate the BOM report using QuotePix > Report > Generate.

Using Visio Data Linking to add Shape Data from a catalog or price list.

You can easily add Shape Data to your shapes from a product listing using Visio's Data Linking feature. Please see Visio's Help or Microsoft's online tutorials for an explanation on how to do this.

With this technique you will see a Data Window at the bottom of your screen as in the screen capture at the beginning of this document. You can drag data fields from the Data Window to items on your drawing and they will take on the data fields as Shape Data. If the items on your drawing have unique identifiers that match key identifiers in your data file, it's easy to automatically link them all at once without manual intervention.

More Help

For further instructions on how to use QuotePix see the help file by choosing QuotePix > Help.

For further instructions on how to use Visio choose the Help menu from Visio.

About Visimation:

Since 1997, Visimation has helped companies improve their productivity by providing visual software tools for various business and technical tasks. We offer a broad range of services focusing on Microsoft Visio as a platform for rapid development of efficient automation applications.

Draw on our expertise...

Save time and money by automating drawing creation tasks with visual solutions from Visimation. Using the power of Microsoft Visio as a graphics engine, Visimation can develop applications that create graphically rich, visually complex diagrams with minimal user intervention.

Visimation specializes in linking graphics with corporate data, and in leveraging the XML collaboration features of Microsoft® Office™, MapPoint®, Project™, and SharePoint® to improve the efficiency and quality of any business operation.

Our consulting and development services:

<http://www.visimation.com>

Our Visio-based products:

<http://www.shapesource.com>

Our Microsoft Visio training courses:

<http://www.visimation.com>

Contact us

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