

Inclusions and Exclusions (select – add - edit)


This article describes how to Add an Inclusion or Exclusion, then Select / Edit the Default Inclusions or Exclusions. Inclusions and Exclusions populate from Company Settings to a Contact, then from a Contact to a Quote. Default Inclusions or Exclusions can be set at Company Settings for new Contacts, OR at a Contacts for that contact's Quotes. Selected Default Inclusions or Exclusions populate from Company Settings to a Contact on Add Contact, then from a Contact to a Quote on Add Quote. Edited Default Inclusions or Exclusions at Company Settings must be pulled down from to a Contact from that Contact, this to not override any Contact Edited Default Inclusion or Exclusion selection.

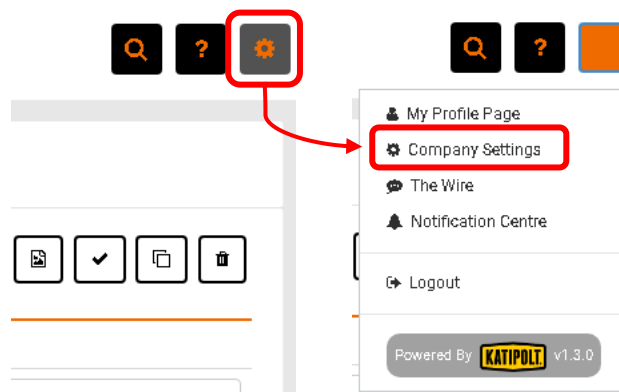
To Add, Select / Edit Inclusions and Exclusions

Adding or Selecting / Editing Default Inclusions or Exclusions is done from the DEFAULT INCLUSIONS AND EXCLUSIONS Subnav of the Company Settings Edit Window, OR a Contact's (Customer) Edit Window.

Quick Flow;

Company Settings OR Contact > [Edit] > DEFAULT INCLUSIONS AND EXCLUSIONS


1. Press on the **Settings** button  to display the Options Menu, then Press on the **Company Settings** option to display the Company Settings Window

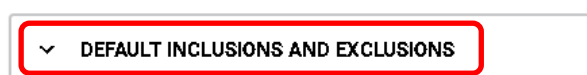


OR

Press on the **CONTACTS** Tab to display the CONTACTS Library, then press on a Contact to open the Contacts Window



2. From the Company Settings Window OR CONTACTS Window, Press on the **[Edit]** button  to display the Company Settings OR CONTACTS Edit Window. Go to step 3
3. Scroll down and Press on the **DEFAULT INCLUSIONS AND EXCLUSIONS** Subnav to expand




To Add a new Inclusion or Exclusion

Adding Inclusions or Exclusions is done from the Company Settings Edit Window *OR* Contacts (Customer) Edit Window's DEFAULT INCLUSIONS AND EXCLUSIONS Subnav *OR* a Quote's INCLUSIONS & EXCLUSIONS Subnav.

Quick Flow;

Company Settings *OR* Contact *OR* Quote > [Edit] > DEFAULT INCLUSIONS AND EXCLUSIONS > [New] > TYPE > NAME > DESCRIPTION > [Save]


1. From the **Company Settings** Edit Window *OR* **Contact** (Customer) Edit Window's **DEFAULT INCLUSIONS AND EXCLUSIONS** Subnav, Press the **[New]** button  to display a new Inclusion / Exclusion Line, then select a **TYPE**, enter a **NAME** and **DESCRIPTION**

TYPE	NAME	DESCRIPTION
Inclusion		

SELECTED	INCLUSION NAME	INCLUSION DESCRIPTION
<input checked="" type="checkbox"/>	Contract Act	We will require a contract based on NZS3810:2013 & the Construction Contracts Act 2002


2. Press on the **[Save]** button  to save

To Select or Edit Default Inclusions or Exclusions

1. From the Company Settings Edit Window *OR* Contact (Customer) Edit Window's DEFAULT INCLUSIONS AND EXCLUSIONS Subnav, *OR* a Quote's INCLUSIONS & EXCLUSIONS Subnav, from the **SELECTED** column, **Tick** or **Untick** the Inclusion or Exclusion, then Press on the **[Update Terms]** button  to save the selections

SELECTED	INCLUSION NAME	INCLUSION DESCRIPTION
<input checked="" type="checkbox"/>	Contract Act	We will require a contract based on NZS391
<input checked="" type="checkbox"/>	Quote Valid	Quote valid for 30 days from the date of iss
<input type="checkbox"/>	BTS Single Phase	Single phase builders temporary power sup
<input type="checkbox"/>	HPM Arteor 770	Switchgear is HPM Arteor 770 Series, White
<input type="checkbox"/>	HPM Excel	Switchgear is HPM Excel Series, White

NOTE: Master Inclusions / Exclusions are not editable. Installer Inclusions / Exclusions are not editable, if you make a mistake, simply delete and re-make

2. When exiting the Company Settings Edit Window *OR* Contacts Edit Window, Press the **[Save]** Button  to save