

Quote from a Plan

This article describes how to build a Quote from a Plan using Katipolt's in built drawing software Visbuild. Kitset Icons are Dragged & Dropped onto the plan, Miscellaneous Works are added to the plan. The plan data is synchronised with Katipolt where the Quote can be formatted for presentation to a Customer.


To build a Quote from a Plan;

Building a Quote from a Plan is done from Katipolt's inbuilt drawing software Visbuild


NOTE: Any clipping / tidying up of the plan needs to be done externally before Dragging & Dropping the plan into Visbuild

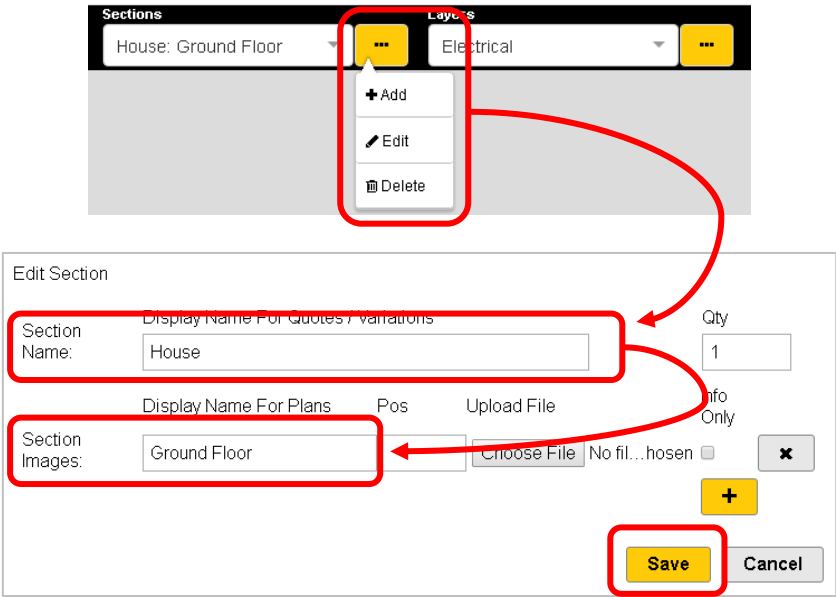
Quick Flow;

QUOTE: XXXX Window > [Edit Plans] > Plan > Sections > Layers > Kitset Icons > Misc Works

1. From the **QUOTE: XXXX VERSION X** Window, Press the **[Edit Plans]** button  to open a new Tab and display the Visbuild Window, then Drag & Drop the clipped / tidied **Plan** into the Main Window of Visbuild




2. From the Visbuild Window's Sections **Section Actions** dropdown options list, Press the **[Edit]** option  to display the Edit Section Window to give or edit the Section name

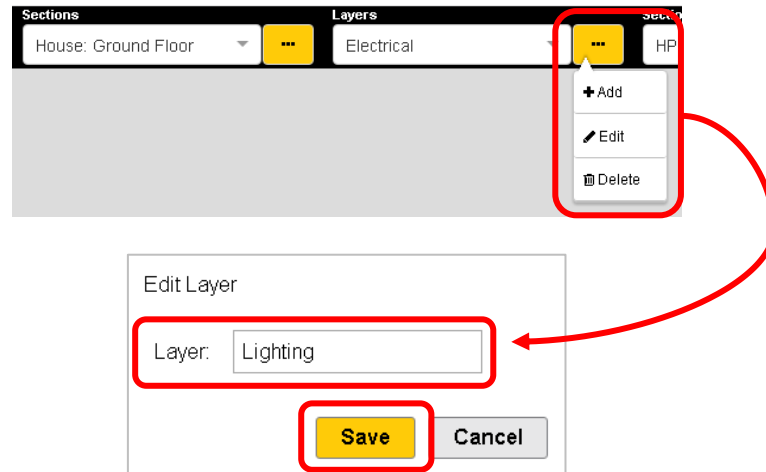


NOTE: "Section Name" is a "Place", IE "House", "Granny Flat", "Garage". "Section Images" is used for "Ground Floor", "First Floor"

3. Press the **[Save]** button  to save the entry/editing

NOTE: To add further Sections, Press on the **Section Actions** Add option, then repeat steps 2 and 3

4. From the Visbuild Window's Layers **Layers Actions** dropdown options list Press on the [Edit] option  to display the Edit Layer Window to give or edit the Layer name



NOTE: A "Layer" is a "Service", IE "Lighting", "Power", "TV & Data"
A "Layer" will lay over all "Sections" / "Images" of the Quote, so you could have;

- "House" "Ground Floor" "Lighting"
- "House" "Ground Floor" "Power"
- "House" "Ground Floor" "TV & Data"


5. Press the **[Save]** button  to save the entry/editing

NOTE: To add further Layers, Press on the **Layers Actions** Add option, then repeat steps 4 and 5


NOTE: Selected Layer displays on the selected Section / Image with Kitset Icons coloured. Non-selected Layers display on the Section / Image with Kitset Icons greyed out

To Add Kitsets to the Plan;

1. From the Visbuild Window's Kitset Library Section, Press a Kitset Category to expand, then Press and Hold on a **Kitset Icon** to Drag & Drop onto the Plan and build the Quote

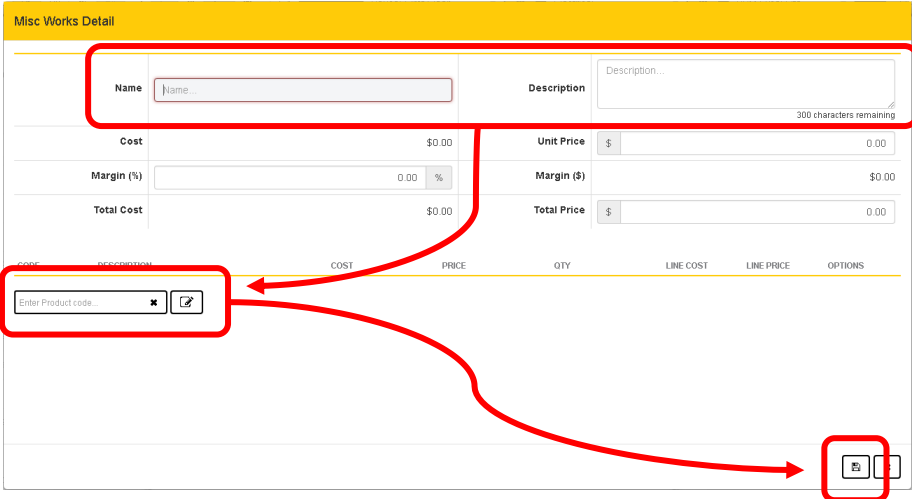
NOTE: If you Press on a Kitset Icon in the Kitset Library, this initiates the Stamp Tool, you can then stamp the selected Kitset multiple times on the Plan. To Cancel the Stamp feature, Press on the Tools Section's Pointer Tool (Esc) 


To Add Miscellaneous Works to the Plan;

- 1. From the Visbuild Window's Tools Section, Press the **Misc Works (M)** Tool  , then Press on the Plan to add and display the Misc Works Window



- 2. From the Misc Works Window give the Miscellaneous Works a Name and Description, then enter Product codes to enter product



- 3. Press the **[Save]** button  to save the entry/editing of product and

NOTE: To Cancel the Miscellaneous Works feature, Press on the Tools Section's Pointer Tool (Esc) 