

Visbuild (Overview)

Visbuild is Katipolt's dedicated Visual Quote Builder where the User can Drag & Drop a Plan, then Drag & Drop Kitset Icons onto the plan to build a Quote.

To Use Visbuild;

Using Visbuild is done from the Visbuild Browser Tab accessed from a Katipolt Quote

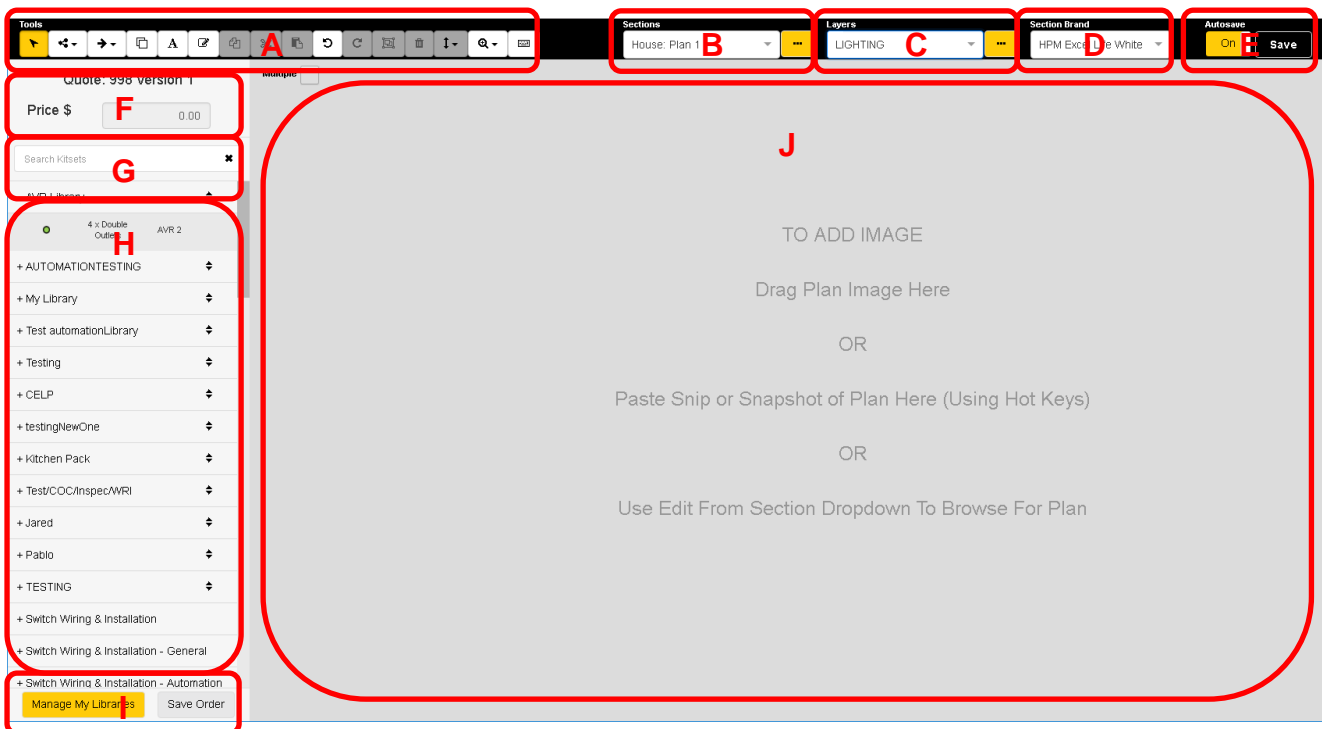
Quick Flow;

WORKS > QUOTES Subnav > **[Add Quotes]** > **[Save]** > **[Edit Plans]** OR Quote > **[Edit Plans]**

To access Visbuild, press the **[Edit Plans]** button  of a Quote to open a Visbuild Browser Tab

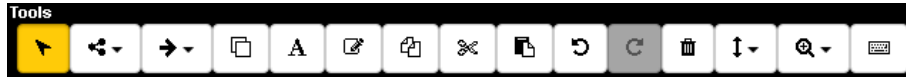


Visbuild Window Layout



- A – Tools
- B – Sections Selector/Editor
- C – Layers Selector/Editor
- D – Brand Selector
- E – Auto Save / Save button
- F – Quote Price Rolling Total display
- G – Kitset Search
- H – Kitset Library
- I – Manage My Library and Save Order
- J – Main Window

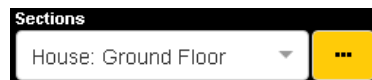
A – Tools



- ▶ **Pointer Tool** – Reset button, cancels any Tool selection and allows the User normal “Drag & Drop” functionality
- ↔ **Jointer Tool** – Used for joining Kitset Icons with a line
- **Arrow Tool** – Used for placing a line with an arrow
- **Stamp Tool** – Used for stamping a selected Kitset Icon on a Plan (multiple pasting)
- A **Text Tool** – Used to place a Text Box on the Plan
- ✎ **Misc works Tool** – Used to place a Miscellaneous Works
- 📄 **Copy** -
- ✂ **Cut** -
- 📄 **Paste Tool** -
- ↶ **Un-Do** -
- ↷ **Re-Do** -
- 🗑 **Delete/Bin** -
- ↑ **Arrange Tool** – Used to align Kitset Icons
- 🔍 **Resize Tool** – Used to resize the Plan, Icons and/or Text

Press on a Tool to select or display any Tool Options for selection. The selected Tool displays colour Orange

B – Sections Selector/Editor



Press on the Sections drop down button ▼ to display the Sections. Press on the [Section Actions] button ■ to Add, Edit or Delete a Section.

C – Layers Selector/Editor



Press on the Layers drop down button ▼ to display the Layers. Press on the [Layer Actions] button ■ to Add, Edit or Delete a Layer.

NOTE: The default wording for Sections and Layers can be set at Company Settings > Visbuild Subnav

D – Brand Selector



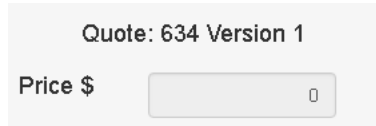
Press on the Brand drop down button ▼ to display the Brand options. Press on a Brand to select

E – Save button



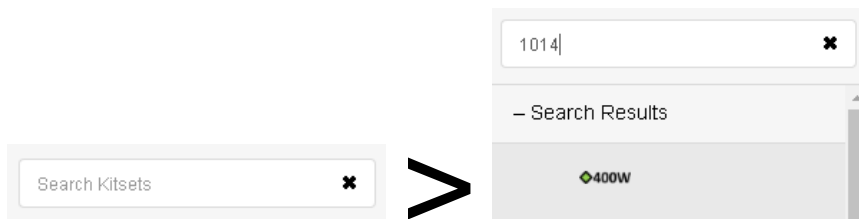
[Save] button displays coloured Orange when there are changes to Save. Visbuild does an Autosave every 30 seconds. To turn Autosave off, press the Autosave button

F – Quote Price Rolling Total display



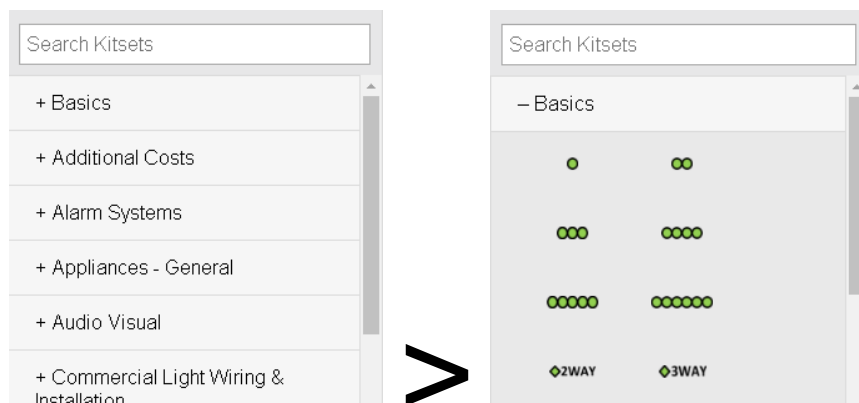
As Kitset Icons are added to, or deleted from the Plan, the Running Total will display the Quote's Price. The Running Total calculates using the selected Price Book Rule

G – Search Kitsets



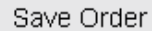
Search for Kitsets entering the Kitset Name or Code. Results will display in the Search Results section below the Search entry field

H – Kitset Library



Press on the required Kitset Icon Category to expand the Library and display the Kitset Icons

I – Manage My Libraries and Save Order

A yellow rectangular button with rounded corners and a black border, containing the text "Manage My Libraries" in black.A light gray rectangular button with rounded corners and a black border, containing the text "Save Order" in black.

Press on Manage My Libraries to create a library to save commonly used Kitsets. Move the My Libraries up and down then Save Order. The top Library auto expands on opening Visbuild

J – Main Window

Here a formatted Plan can be “Dragged & Dropped” to provide a place to build the Quote

NOTE: Pressing and holding the [Ctrl] key while pressing the “+” OR “-” key, the size of the plan can be increased or decreased (including any Kitset Icons).

NOTE: While a Kitset Icon is highlighted, pressing and holding the [Alt] key while pressing the “+” OR “-” key, the size of the Kitset Icons only can be increased or decreased.

NOTE: The Main Window displays a “**Multiple**” tick box, that when ticked allows the User to select multiple Kitsets on a Tablet by pressing on them.