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COVER PAGE (Modifications)

SEE ALSO: FILE REPLACEMENT (Replacing Default Cover Page)

PROBLEM: User wants to modify their cover page for an individual estimate or for all future estimates.

SOLUTION: The cover page can be modified for individual estimates or for all future estimates.

The cover page screen can be accessed from within the HomeTech Advantage program by choosing the EDIT pull-down menu and then choosing EDIT CLIENT INFORMATION.

Click on the COVER PAGE tab.

At this point the user can add and/or remove text and merge fields as desired to customize their cover page.

NOTE 1: To remove/delete a merge field from the cover page, the merge field must be HIGHLIGHTED and NOT BLINKING. To do this left-click once on the desired merge field (the merge field will be highlighted and blinking. Then, while holding the left mouse button down, drag your cursor across the merge field. If done correctly the merge field will still be highlighted but not blinking. At this point the user may choose DELETE from their keyboard to remove the merge field.

NOTE 2: If the user modifies the cover page with an estimate open, the changes will apply to that estimate only. If the user modifies the cover page with no estimate open, the changes will apply to all future estimates and the cover page then becomes the user's default cover page.

EMAILING BACKUPS TO HOMETECH

SEE ALSO:

DATA BACKUP Entire Set

DATA BACKUP Individual Estimate

DATA BACKUP Manual Data Backup

VERSION NUMBER

PROBLEM: User needs to email backup files to HomeTech.

SOLUTION: Should you need to email backup files to HomeTech for conversion, follow the steps below:

* User will need to do a DATA BACKUP from within the HomeTech program. See also DATA BACKUP for more information.

* Log on to the internet.

* Open a new email.

* Send the email to MARKFOSTER@hometechonline.com

* The subject will be HOMETECH BACKUPS.

* In the main body of the email type the following:

* YOUR NAME

* YOUR PHONE NUMBER

* BRIEF DESCRIPTION OF PROBLEM / ERROR #

* VERSION OF WINDOWS

* VERSION OF HOMETECH

* SERIAL NUMBER or REGISTRATION NUMBER (If applicable)

* Attach the backup files (HTDATAZIP.ZIP, ESTIMATE32.ZIP, DATABASE32.ZIP or the manual backup files) to the email.

* Send the email.

MARKUPS (Setting Item, Phase, & Estimate Markups)

PROBLEM: User changes markups within the HomeTech Advantage Cost Estimator, but the new markups do not appear to take affect.

SOLUTION: The HomeTech Advantage Cost Estimator has great flexibility in regards to setting estimate markups. It is important for the user to understand how modifying markups will affect line items, phases, and the estimate.

The various markups are not cumulative, meaning they are not added together. Listed below are the areas where the user can customize markups, and a brief description how modifying these markups will affect the estimate.

DEFAULT MARKUP FOR THE PROGRAM

Changing the Default Markup for the program will apply to all future estimates created, and does not apply to existing or current estimates. Use this feature to set estimate markups for all future/new estimates.

The Default Markup for the program can be modified/set by completing the following steps:

Choose UTILITIES pull-down menu.

Choose SETUP.

Choose the MARKUPS, OVERHEAD/PROFIT tab.

Enter new markups.

Choose OK to accept, ESC to cancel.

ESTIMATE MARKUP

The Estimate Markup can be set when creating a new estimate, or at any time while that estimate is open. Changing the Estimate Markup will override the Default Markup for the program for that particular estimate.

The Estimate Markup can be modified/set by completing the following steps:

Open the estimate you want to modify the Estimate Markups (Choose FILE, choose OPEN, choose/highlight the estimate from the list, choose OK).

Choose the EDIT pull-down menu.

Choose EDIT CLIENT INFORMATION.

Choose the PROJECT INFORMATION tab.

Edit the Estimate Markups as necessary.

Choose CLIENT INFORMATION tab.

Choose OK to accept, CANCEL to cancel.

PHASE MARKUP

The Phase Markup allows you to customize your markups on a particular phase in an estimate. The Phase Markup can be set when creating/adding a phase to your estimate, or at any time while that estimate is open.

Often times, you may want to set the Phase Markup to be different from the Estimate Markup. You cannot modify the Overhead and Profit markups from the "Phase" level markup. The Overhead and Profit markups must be modified at the "Estimate" level markup. The Phase Markup will override the Estimate Markup for that particular phase. The Phase Markup for a new phase can be set when you are initially adding the phase to your estimate.

The Phase Markup for an existing phase in an estimate can be modified/set by completing the following steps:

Open the estimate you want to modify the Phase Markups (Choose FILE, choose OPEN, choose/highlight the estimate from the list, choose OK).

In the estimate window/grid, choose/highlight a line in the phase you want to modify.

Choose the EDIT pull-down menu.

Choose EDIT PHASE SETUP.

Modify the Phase Markups as necessary.

Choose OK to accept, CANCEL to cancel.

INDIVIDUAL/MULTIPLE ITEM MARKUP

The Item Markup allows you to customize your markups to an individual item or to a group of line items in an estimate. The Item Markup can be set at any time while that estimate is open.

Often times, you may want to set the Item Markup to be different from the Phase Markup and/or the Estimate Markup. You cannot modify the Overhead and Profit markups from the "Line Item" level markup. The Overhead and Profit markups must be modified at the "Estimate" level markup. The Item Markup will override the Phase Markup and the Estimate Markup for that particular line item or group of line items.

The Item Markup for individual line items or for a group of line items can be modified/set by completing the following steps:

Open the estimate you want to modify the Line Item Markups (Choose FILE, choose OPEN, choose/highlight the estimate from the list, choose OK).

In the estimate window/grid, choose/highlight the line item(s) you want to modify.

You can highlight a range of items by holding down the SHIFT key on your keyboard

while selecting the items.

You can choose multiple items by holding down the CONTROL (CTRL) key on your keyboard while selecting the items.

With your cursor over the highlighted area, choose CHANGE MARKUP.

Modify the Line Item Markups as necessary.

Choose APPLY to accept, EXIT to cancel.

VERSION NUMBER (Determining The Version Of HomeTech Advantage On Your Computer)

To determine the version of HomeTech Advantage installed on your computer follow the following steps:

Choose the HELP pull-down menu at the top of the HomeTech screen.

Choose ABOUT HOMETECH ADVANTAGE.

The version number will be in the middle of the window that appears.

INSTRUCTION MANUAL (Printing The Instruction Manual)

PROBLEM:

User did not receive an instruction manual upon receiving the software update package for the HomeTech Advantage Cost Estimator program. User wants to review and/or print a copy of the instruction manual for the HomeTech Advantage Cost Estimator program.

SOLUTION:

HomeTech Information Systems, Inc. includes in the software update package a booklet entitled 30 MINUTE GUIDED TOUR. The 30 Minute Guided Tour reviews the basics of creating estimates, in addition to other features.

For more detailed descriptions about the features and usage of the HomeTech Advantage Cost Estimator program, the user will want to refer to the Instruction Manual. HomeTech Information Systems, Inc. does not mail a "hard copy" of the instruction manual with the software update package for the HomeTech Advantage Cost Estimator program. Rather, the instruction manual is actually within the software and can be accessed, reviewed, and printed at any time while in the program. The benefit of this feature is that the user always has the instruction manual with them when they are using the program. Another benefit is that the user can print only the

pages they wish to review.

Should the user want to view and/or print the instruction manual, this can be accomplished by completing the following procedure:

- * Open the HomeTech Advantage Cost Estimator Program.
- * Choose HELP pull-down menu.
- * Choose PRINT DOCUMENTATION.
- * Choose PRINT DOCUMENTATION to print the instruction manual, EXIT to cancel.

NOTE: In order to access, review, and print the instruction manual for the HomeTech Advantage Cost Estimator program, the user must have installed on their computer ADOBE ACROBAT READER version 5 or higher.

SPEEDY RECKONER (Locating The Speedy Reckoner In The Program)

PROBLEM: User cannot find the Speedy Reckoner database/line items in the HomeTech Advantage Cost Estimator program.

SOLUTION: You can access the Speedy Reckoner line items with or without an estimate open. You will need to have an estimate open with at least one phase in that estimate to actually transfer any Speedy Reckoner line items into that estimate. The speedy Reckoner line items can be tagged, transferred, and edited in the same manner as any other normal database line items.

To find and access the Speedy Reckoner database/line items, the user should complete the following procedure:

- * Open the HomeTech Advantage Cost Estimator program.
- * From the Estimate Window, choose the costbook from which you want to view the Speedy Reckoner line items (Example: Remodeling Costbook). You can choose the costbook from the vertical menu on the left-side of the estimate window, or choose the DATABASES pull-down menu, and choose your database of choice (Example: Remodeling Costbook).
- * In the Costbook Window, there is a navigational menu to the left-side of the database which lists the 25 HomeTech Divisions, the User Divisions, and the Speedy Reckoner.
- * In this navigational menu, scroll down using the arrow keys on your keyboard until you see the Speedy Reckoner, and click on the words Speedy Reckoner to highlight. This will take you to the Speedy Reckoner section in the database.

DISPLAY SETTINGS (Adjusting The Screen Settings For Your Computer)

SEE ALSO: ESTIMATE WINDOW - Customizing Screen Layout

PROBLEM: User may be having one or more of the following display issues when viewing the HomeTech Advantage Cost Estimator program on their monitor:

1. Can't see the OK or CANCEL buttons on the Client Information screen.
2. Can't see all of the HomeTech Advantage screen (Please note that in the HomeTech Advantage 4.0 in the estimate window there are more fields (columns) available to the user than in previous versions of the program. In HomeTech Advantage 4.0, by default, not all fields (columns) will be visible regardless of which display settings you choose.)
3. The HomeTech screen does not fill the entire HomeTech window.

SOLUTION: Check the following settings in DISPLAY PROPERTIES (With your cursor somewhere on your desktop, RIGHT CLICK, choose PROPERTIES):

1. In DISPLAY PROPERTIES choose the SETTINGS TAB.
2. The recommended SCREEN AREA setting for the HomeTech Advantage program is 800 x 600 pixels. You may have to try several settings to find one that works for your particular monitor.
3. Choose ADVANCED.
4. Choose the GENERAL TAB.
5. Choose SMALL FONT or NORMAL FONT (96 dpi).
6. If your monitor won't accept SMALL FONT and keeps defaulting back to LARGE FONT, then select OTHER font size and adjust as necessary (ex. 96 DPI).

NOTE: If your monitor can't handle the recommended settings and you still can not see the OK or CANCEL buttons, you can use ALT+O to accept the client information in the client information screen.

DATA BACKUP (CD-ROM/R/W Drive)

PROBLEM: User cannot make a backup directly to their CD-ROM/R/W drive from within the Data Backup feature in the HomeTech program.

SOLUTION:

1. Make sure your CD Drive is in fact capable of "burning" CD's. If you cannot create your own CD's, you will have to make your backups to another format (ex. Zip Drive, Floppy Drive, or Hard Drive).
2. Most CD Burners come with their own software or drivers, and this software must be used to transfer the information from the user's computer to a CD disk. Therefore, backing up from the HomeTech Advantage program to a CD-ROM disk requires an additional step. This step requires that you first make your HomeTech backup to your hard drive (ex. C:\). Then, using your CD Burner software, transfer the HomeTech backup file to the CD disk
3. You can, however, restore your HomeTech ADVANTAGE Backup (HTDATAZIP.zip) directly from a CD-ROM.