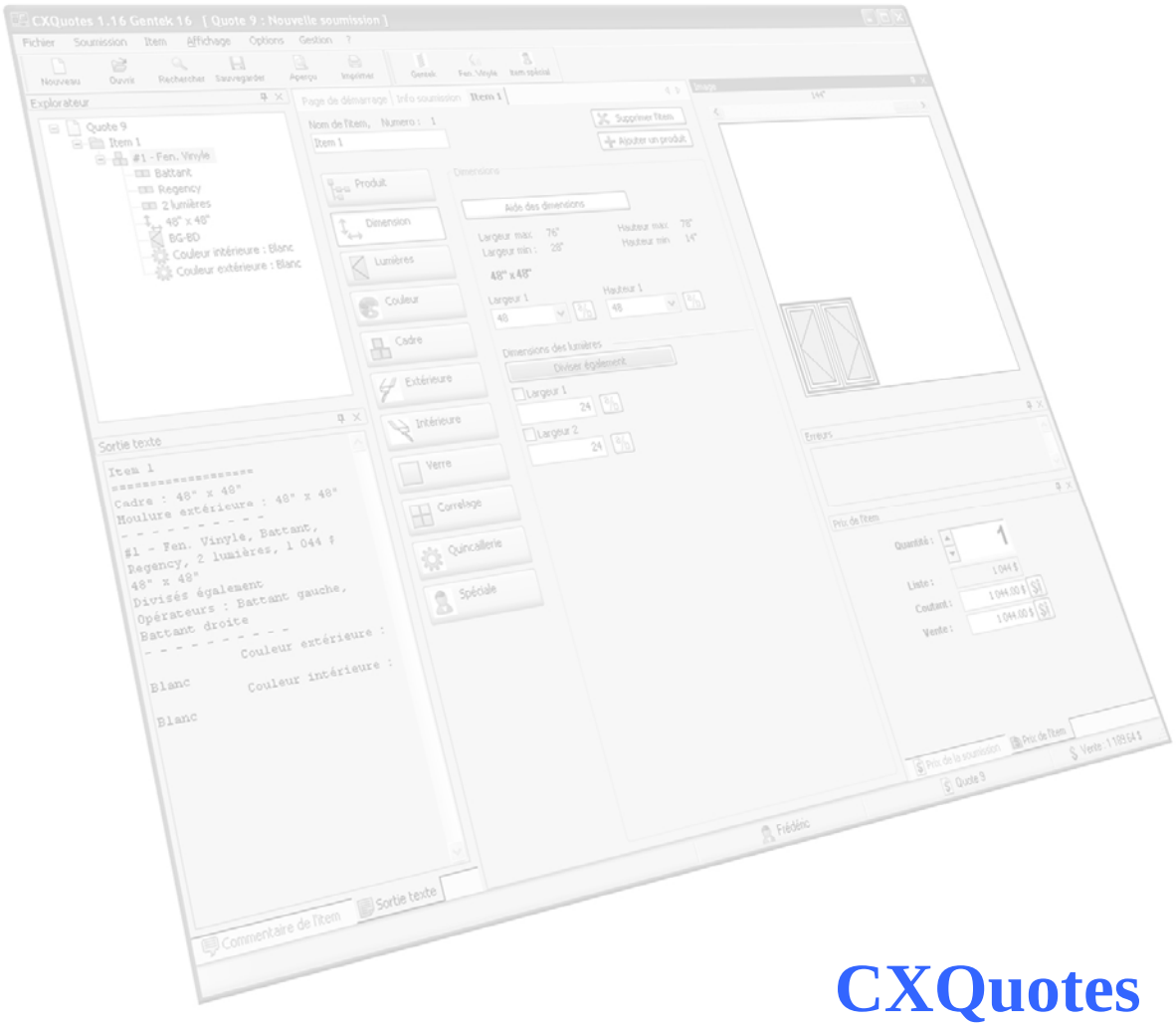

CXQuotes

Doors and Windows

Quotation software

Cogitrix

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Software features

Quick

Doing a quote using the software makes it possible to quickly carry out a quote with few mouse clicks. You don't need to search within a price list and look for available products and options.

Reducing errors

With this software, miscalculations of prices are reduced to a minimum level. Moreover, hidden prices such as minimum prices, extras, up charges on decorative shapes are never forgotten.

Print quality

Print quality gives a professional and constant look to each quote. The time of hand written quotes is gone.

Prices comparison

Imagine how long it would take to compare the price of a project with or without energetic glass or with or without grids? With this software, it is simple as adding and removing an option to compare prices. In addition, it is possible to see a cumulative price by options categories on the printed quote. Thus, at a glance, the user can see the price of energetic glass, grids or all other categories configured by the manufacturer.

Item picture

The software is able to generate dynamically an image for each item contained in the quote. It is of a major element to customers.

Customization vs. standardization

This software development was made with the objective of achieving a compromise between customization and the standardization.

Software created 100% custom requires a lot of time and money. On another side, purchasing software already developed can be constraining for a windows manufacturer because it could be difficult to configure the pricing of all products according to methods available in the software.

This software makes a compromise between the two approaches. It has a flexible architecture making possible to reuse some components needed to all windows manufacturers (users, user interface, items drawings, configuration of products, configuration of options etc.) while allowing to customize products pricing methods, options pricing methods, quote prints, languages etc.

Compatibility

The software is fully compatible with Microsoft Windows XP and Vista operating systems.

Automatic updates with internet

The software is compatible with an automatic updates system we developed and tested with other softwares. You could add this system to the quotation software is you want.

Users

User account

To use the software, users must have an account with a password. If a user forgot his password, he could contact the manufacturer to obtain a key, which would enable him to enter a new password.

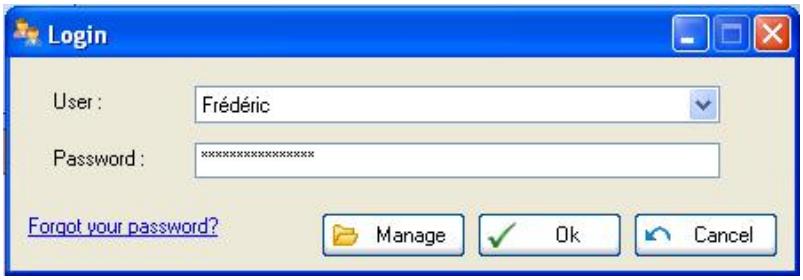

Figure 1 : User login

Account management

A user with privileges can create, modify or remove an account.

Authentification

Authentification software generates a key by entering three random letters and the date. These keys are required to load a manufacturer's module, if required by the manufacturer, or when a user wants to change a forgotten password.

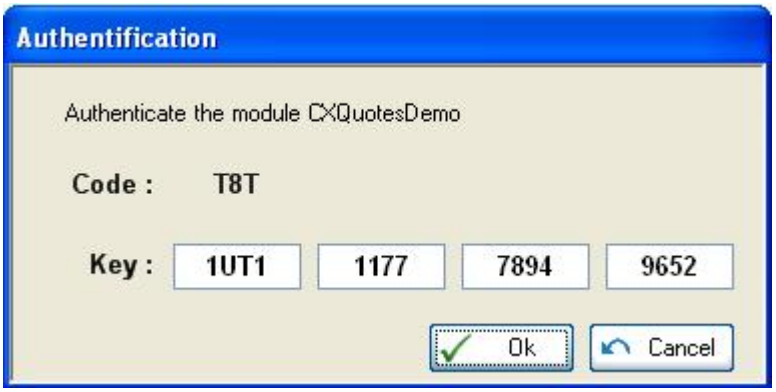

Figure 2 : Software authentification

Languages

Bilingual

The software works perfectly in French and English. The user can configure his default language in his preferences and selecting the current language. By a single click, the software can be translated without restarting.

Customizing languages

The language database can be customized for each manufacturer. The manufacturer has to fill only a table with both languages with its own words. The manufacturer can also customize products and options names.

Price

Real time pricing

The prices are calculated in real time according to actions of users. Modify a dimension, add or remove an option as well as moving a product updates the price automatically. There is no need to click a button to update the price.

Price types

3 price types are used in the software: list price, net price and the selling price.

The net price (cost price of the distributors) is evaluated from the list price by applying a discount. The selling price (selling price of the dealer) is evaluated from the net price by applying a profit.

The net price and the selling price can also be obtained starting from the list price by using a factor.

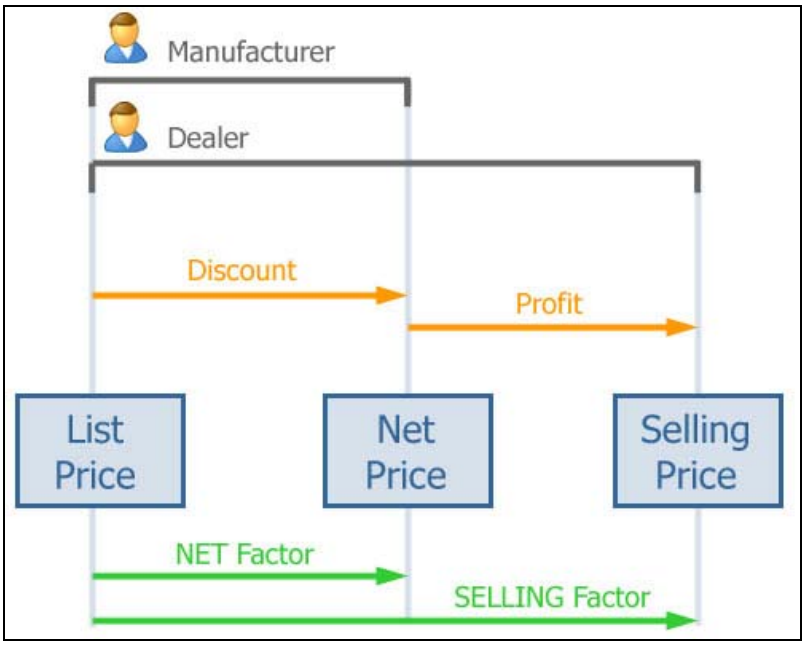

Figure 3 : Price types

Configure discounts

The manufacturer can configure discounts for each dealer in his customers list. Discounts of the quotes change according to the selected dealer. A dealer can also change his discounts. The discounts can be added specifically on a product, or on a whole product family (window vinyl), or a product series. The software automatically uses a factor to evaluate net price for each products.

Configure profits

Dealer can configure 3 profit values to sell his products. For each product, the discount value and profit value make possible to calculate the selling factor of the dealer from the list price.

User interface

XP Style user interface

The software uses XP Style. The main menu and context menus have icons associated to important menu item and easily identifiable.

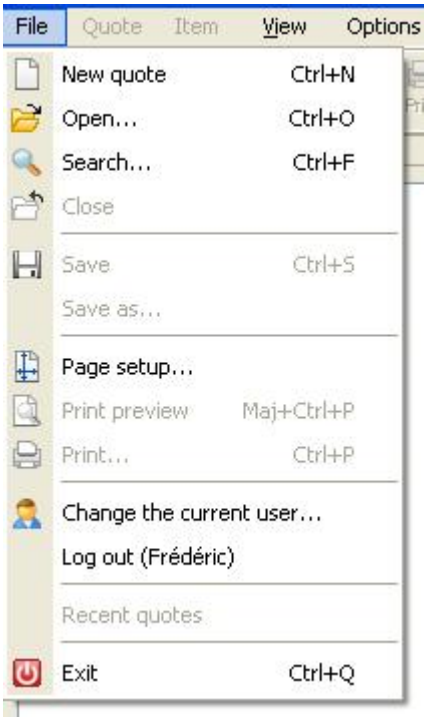

Figure 4 : XP Style menu

Customize interface

User interface can be configured in multiple ways. The windows can be laid out as users want to suit their needs to ensure easy-to-use software.

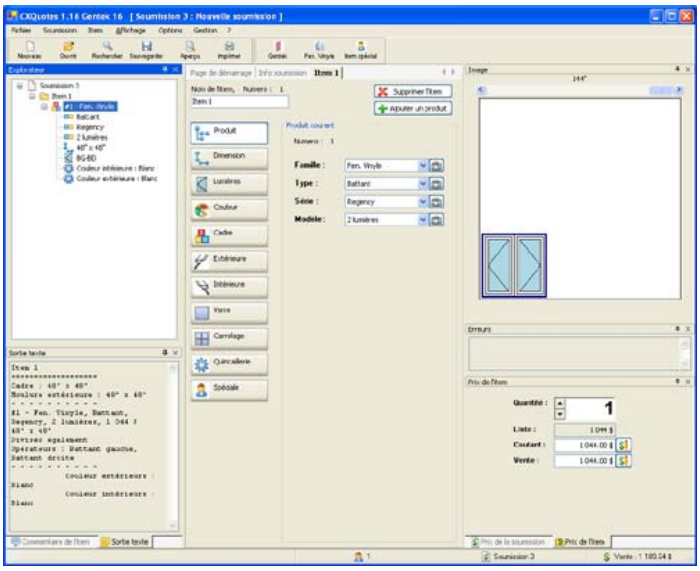

Figure 5 : Main user interface sample

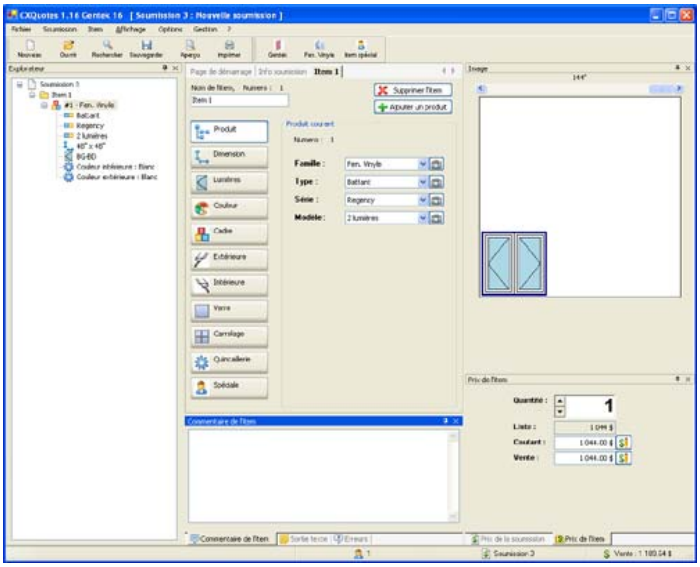

Figure 6 : Main user interface sample

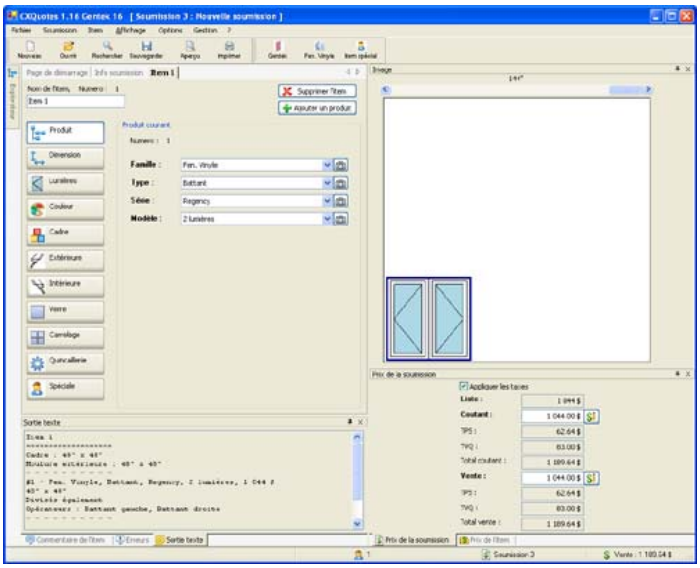

Figure 7 : Main user interface sample

Save user interface layout

The configuration of the user interface is automatically saved for each user. Moreover, it is possible to save the layout in a file to share it with someone else.

Customize splash screen

The splash screen, when the software is launched, can be customized for each manufacturer using the software.

Errors indicators

Send a bug by email

If an error occurred while the software is running, it is possible to send an error report to the development team to help them to fix the bug. It is a good way of ensuring the quality of the software.

Disabled functions when a quote contains error

Some functionalities of the software become disabled when a quote is not valid (for instance, printing the quote or add an item).

Error messages

When an option, a product or one item becomes invalid, the error message window becomes highlighted in red and contains a message indicating the error to the user. For instance: Anchors are not valid, surface is greater then maximum surface allowed, invalid position of product, etc.

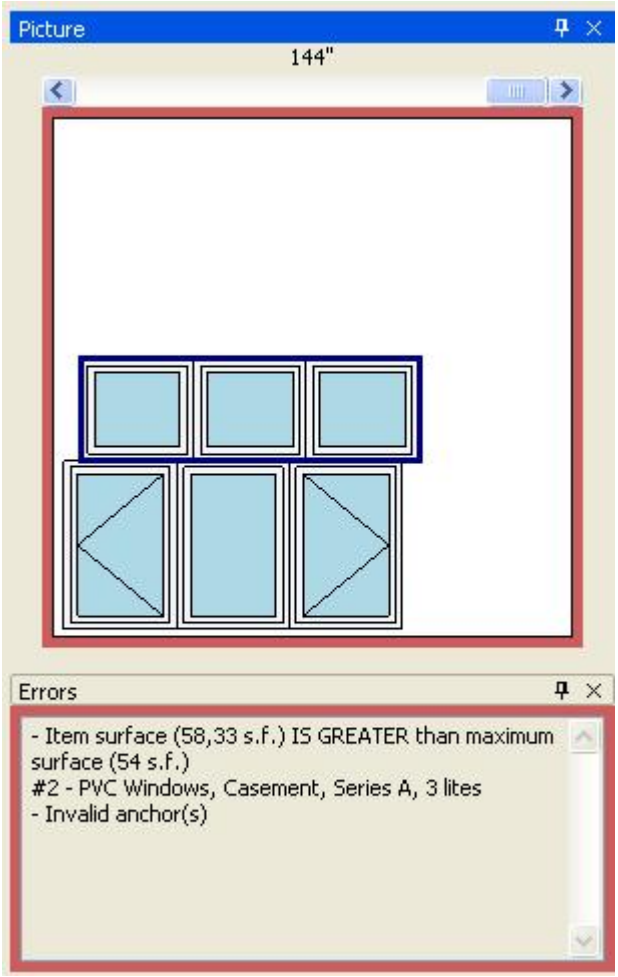

Figure 8 : Error message

Explorer error indicators

When an option, a product or an item contains an error, the quote explorer will automatically indicate the quote, item or the product containing an error to make it easier to the user to fix the error.

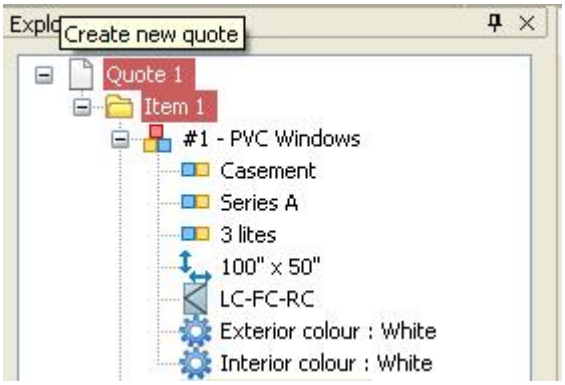

Figure 9 : Explorer error indicator

Options and products error indicators

Options categories and product button are highlighted in red if they contain an error. For instance: a missing option, an invalid option, etc.

Figure 10 : Options and products error indicators

Quotes

Quote name

The user can give a name to each quote.

Customers database

You can configure the customers list in the software. Enter details like name, phone number, fax number, contact name etc.

For each manufacturer's customers (dealer), it is possible to configure discounts. Thus, when a manufacturer makes a quote to this customer, the discounts is automatically applied.

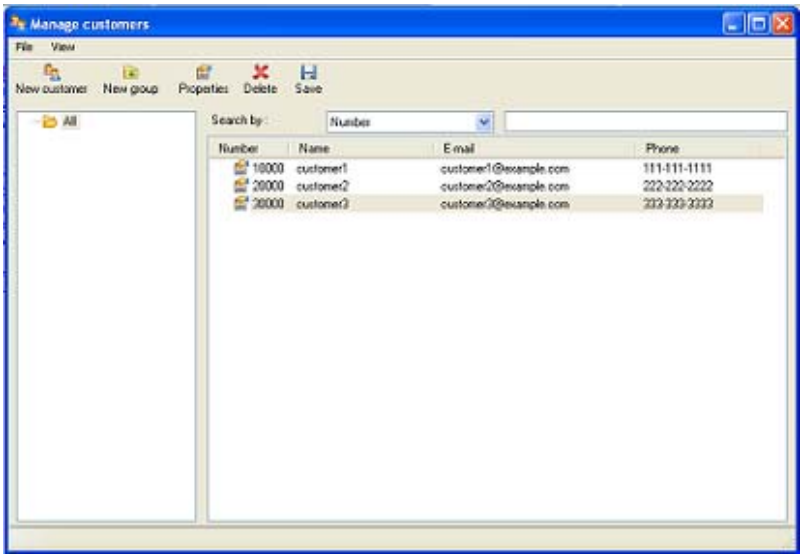

Figure 11 : Customer database management

Search quote

You can search in a folder in order to find a quote created before. The search criteria are date, name, phone number etc.

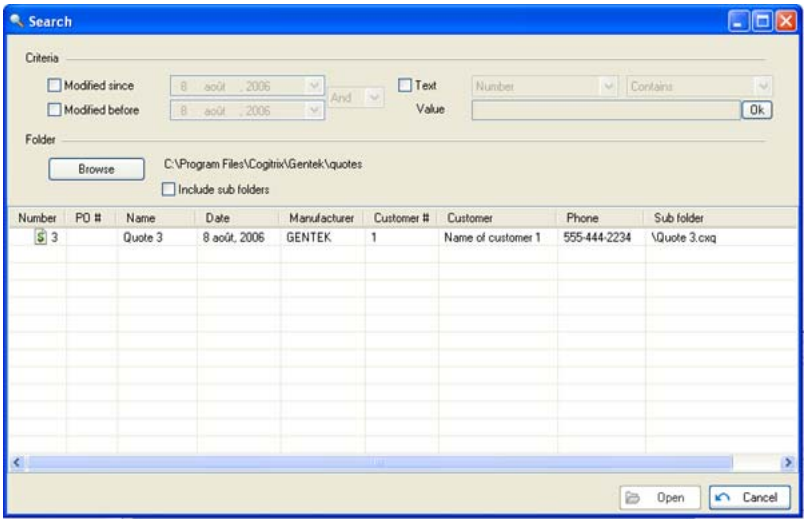

Figure 12 : Search quote

Quote explorer

The quote explorer displays a hierarchical representation of the open quotes. The quotes, the items, the products and the options are visible there.

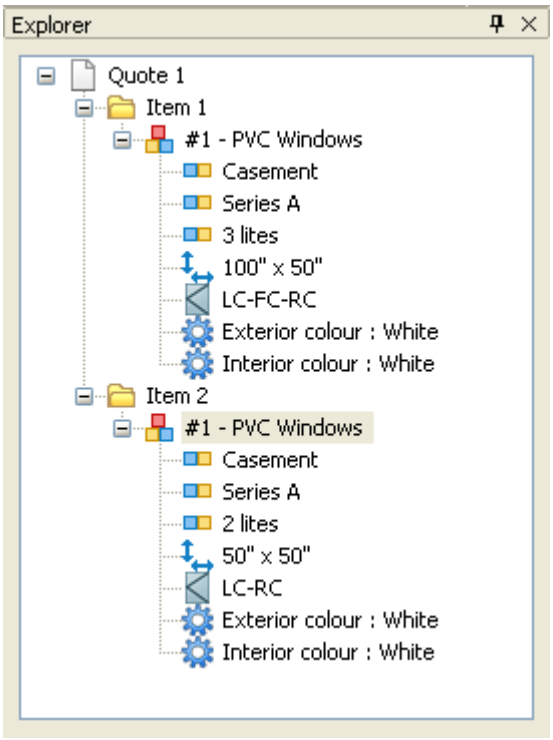

Figure 13 : Quote explorer

Open more than one quote at the same time

It is possible to work on more than one quote at the same time. That makes it possible to use a quote and copy some items towards another quote without creating an item frequently sold.

Recently user files

The software preserves a list of last quotes that were used. This list is accessible in the main menu and allows a fast access to the recent files.

Modify quote price

You can modify the quote price directly by adding a discount or by adding an up charge.

Transform to a purchase order

When the quote is done, it is possible to transform it into order by entering a purchase order.

Print preview

You can take a look at a print preview to see exactly what will be printed later.

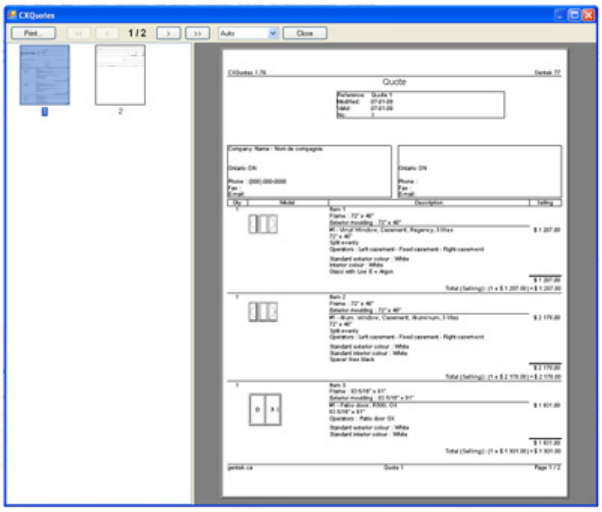

Figure 14 : Print preview

Print a quote

The software can print a quote in order to give a copy to the customer.

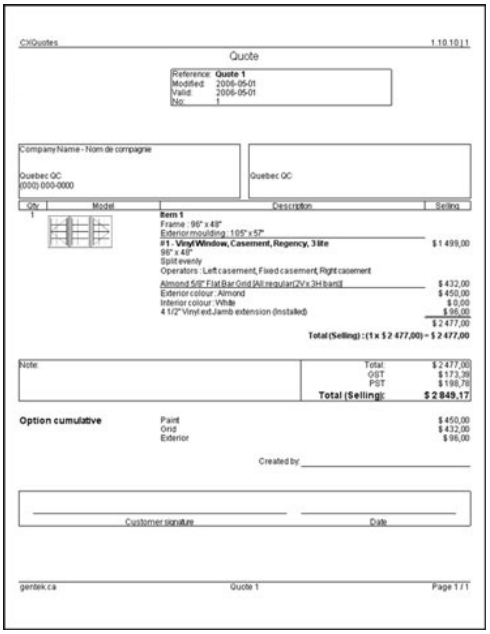

Figure 15 : Quote print

Customize prints

Quote prints is entirely customizable according to requests of the manufacturer. Each manufacturer can provide a quote print template.

Generate pdf file

You can generate a pdf file directly from the software and send pdf files to your customer so they can easily see their quotes.

Send quote by email

You can send a quote by email directly from the software.

Items

Item name

The user can give a name to each item contained in the quote. For instance, "Bedroom", "Kitchen", "Basement" etc.

Move an item

You can move one item directly in the quote explorer by using *Drag&Drop*. All you have to do is to move a node where you want it in a quote. You can move an item in the same quote or towards another quote.

Duplicate an item

Create a copy of an item makes it possible to create an exact copy of an item. That can be useful when you need the exact copy of an item with minor changes such as another operator.

Modify item's price

You can modify the price of an item directly by adding an additional discount or by adding an up charge.

Item text output

The software creates a textual representation of an item in the main user interface. This text makes it possible to read a description on the products list, dimensions and options in item.

Item comment

The user can enter a comment to an item to indicate an important detail or any other information.

Custom item with picture

It is possible to create custom items and associate an image to these items. The picture is saved in the quote file to make it easier to share quotes.

Item image

Item image

The item image is updated in real time according to product properties such as positions, dimensions, external color, operators etc. You can change product position and operator directly in the item image.

Item image zoom

If the feature is enabled, the software will evaluate the best zoom value to make sure you can see the whole item with the best view available.

Actual decorative light pictures

You can have the actual decorative light pictures inside the steel door image in order to provide to your customers a real preview of what they are buying.

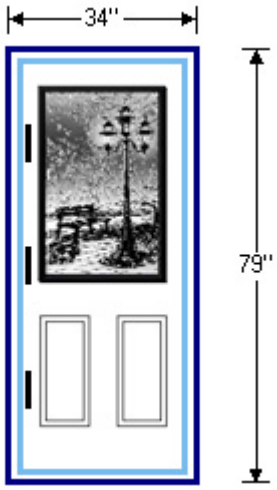

Figure 16 : Actual decorative light pictures

Image context menu

Move your mouse over product or a light in the image item and use the context menu to modify the product or the operator of the light.

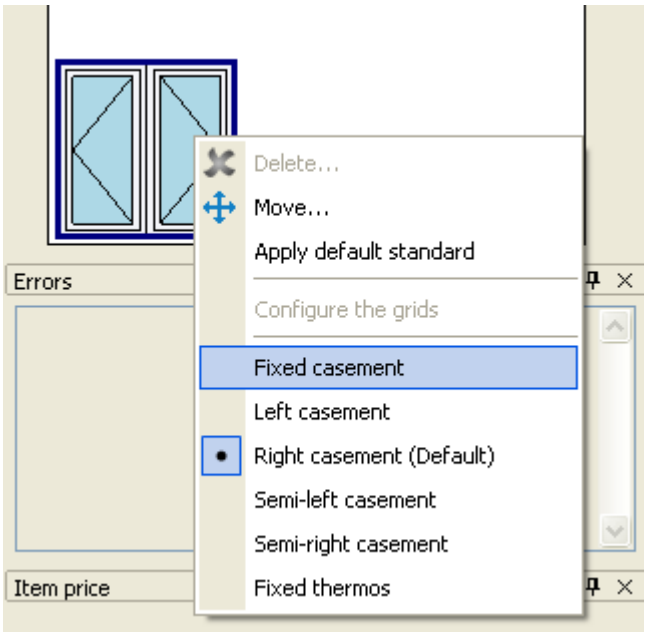

Figure 17 : Context menu on a light

Products

Available products

This software can handle the following products:

- Casement
- Awning
- Hung
- Slider
- Fix
- Bay
- Bow
- Patio door
- Steel doors
- Hardware
- Custom item

Architectural shapes

The software is able to work with several shaped windows. Each shape has its drawing, dimensions input as well as an image of dimension help. Constraints of manufacturing can be affected for each model available.

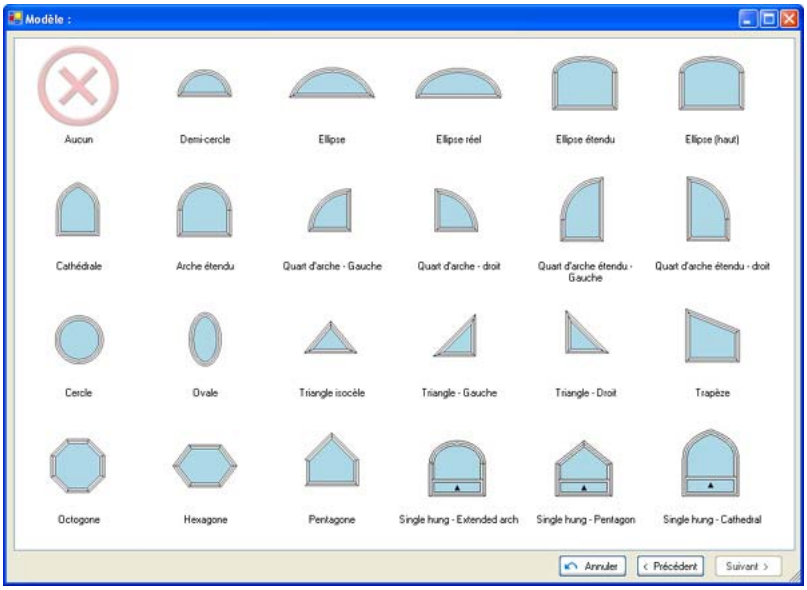

Figure 18 : Architectural shapes

Products assembly

Automatic snap detection

For product displacement in an item using *Drag&Drop*, the software will detect automatically possible points of control for an easy move.

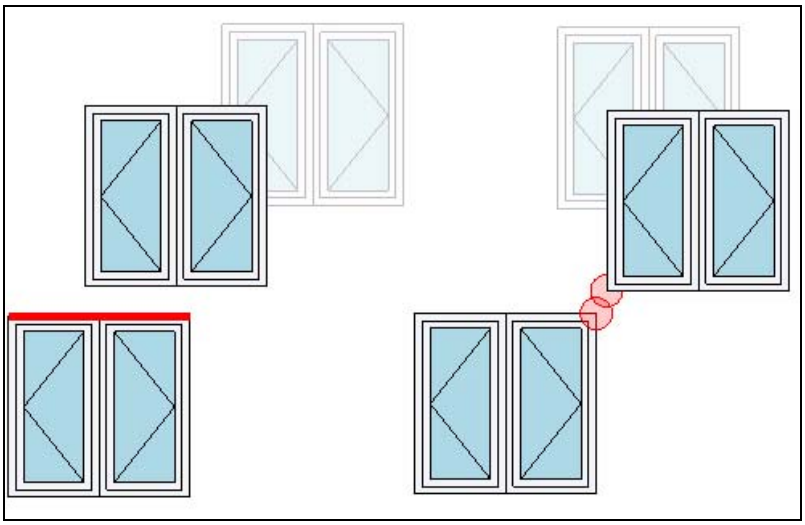

Figure 19 : Products move

Move by coordinates

It is possible to move a product with a high degree of accuracy by providing X and Y coordinates.

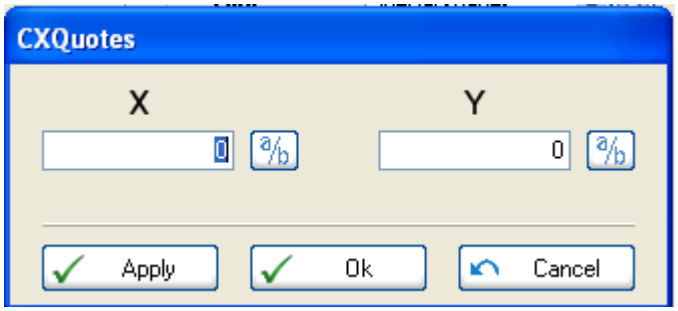

Figure 20 : Move by coordinates

Assembly constraints

The creation of an assembly must respect some basic constraints. For instance, a product cannot float in the air or to be wider than the product below. The software will validate the assembly and will inform the user of errors in the assembly.

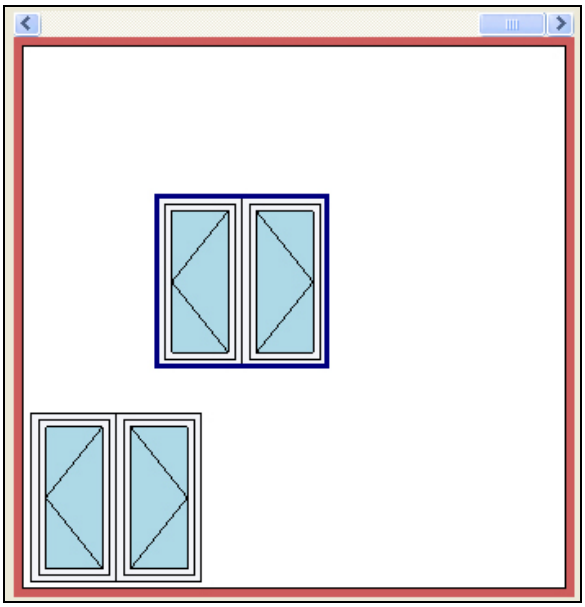

Figure 21 : Assembly constraints

Dimensions

48.5
48,5
48 1/2

Fraction dimensions value

Dimensions can be entered with to 3 different methods: 1) In decimal number with a comma (48,5); 2) in decimal number with a dot (48.5); 3) In fraction (48 1/2). Each value will be converted into a fraction at the nearest 1/16.

Dimensions with a interface

It is possible to enter dimensions using a graphic interface instead of using the keyboard.

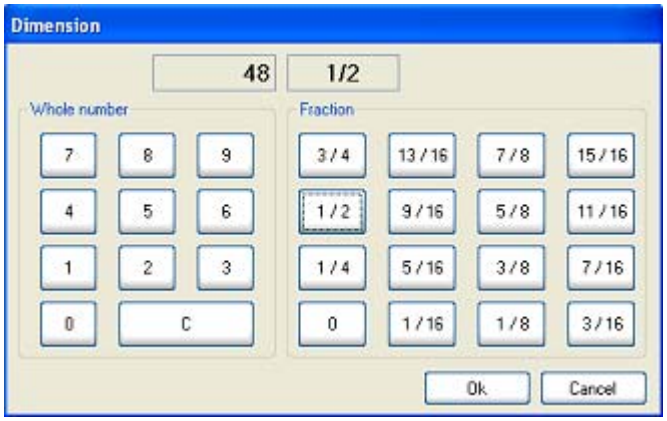

Figure 22 : Dimensions with an interface

Preserve last product dimensions

You can ask the software (in your preferences) to preserve last current product dimensions so that dimensions are automatically entered to the next product created.

Dimensions limits display

The minimum and maximum dimensions of the product are displayed in the user interface.

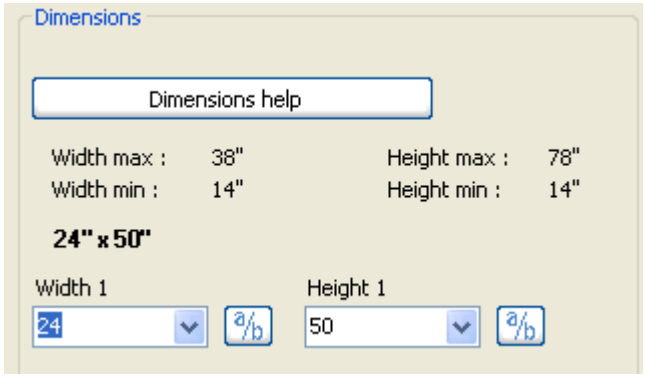

Figure 23 : Dimensions limits display

Dimensions help images

An image can indicate to the user how to enter dimensions of a product. In the case of the complex architectural shapes requiring more than one width and/or heights, this image becomes an important support for the user.

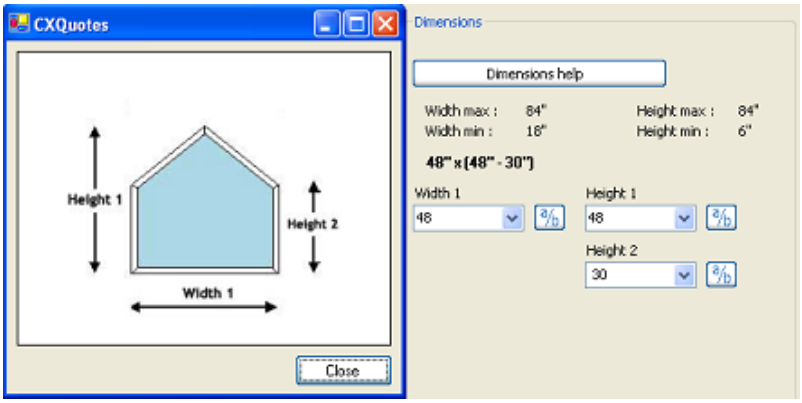

Figure 24 : Dimension help images

Modify module dimensions

It is possible to modify dimensions of each module individually if the product allows it. For instance, in the case of a 3 lights casement, the user could create a product with other division that "1/3-1/3-1/3" or "1/4-1/2-1/4".

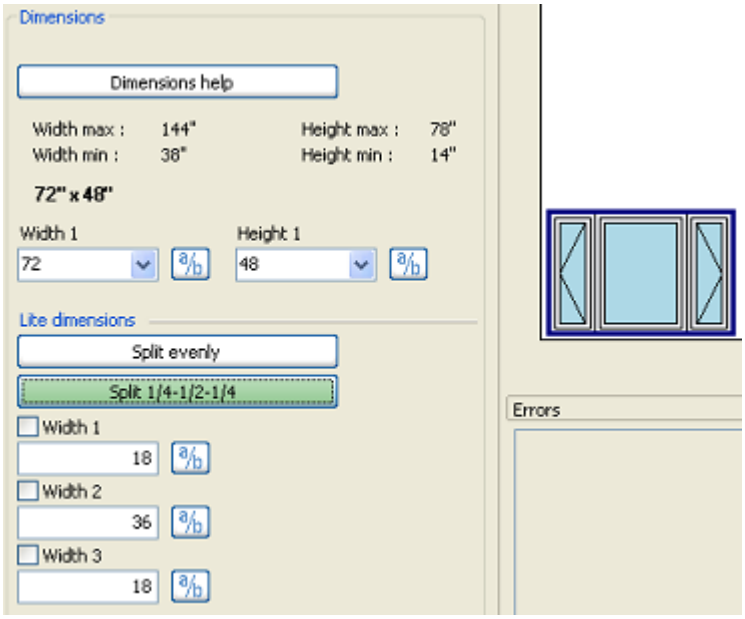

Figure 25 : Modify module dimensions

Freeze a dimension

For the dimensions adjustment of modules, the software will automatically adjust dimensions to obtain symmetry within the product. If the user does not want symmetry, he can freeze dimensions so that they are not modified by the software anymore.

Adjust dimensions with macro

It is possible to use macros to modify in one click the dimension of the all modules (or sashes) to apply values used frequently such as "Split evenly", "split 1/4-1/2-1/4" etc.

Dimension constraints

The software validates each dimension entered by the user. For instance, it validates the minimum/maximum width, the minimum/maximum height, minimum/maximum surface, the minimum/maximum perimeter etc. The software makes sure that all dimensions entered are valid.

Bay window top view

The user can visualize dimensions of a bay window to see the dimension of the modules as well as the projection of the window. The top view image is updated in real time according to changes of dimensions.

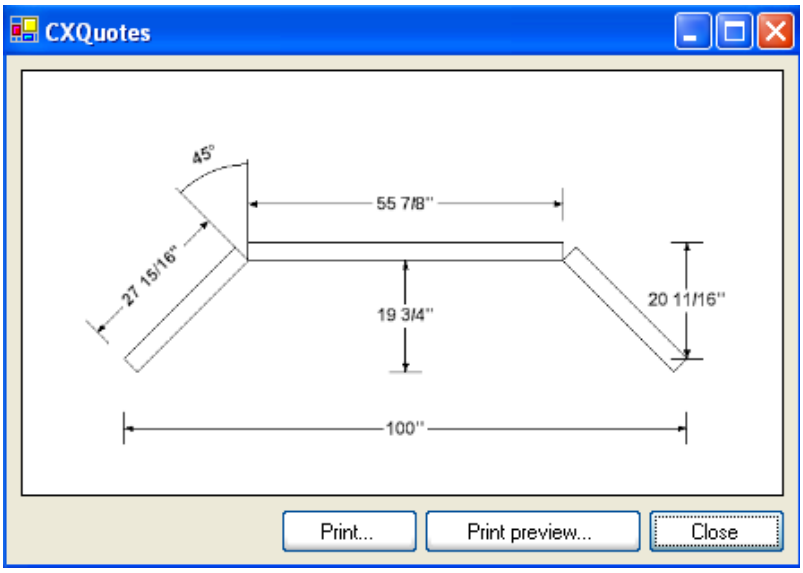

Figure 26 : Bay window top view

Operators

Default operators

You can apply the default operator to a single light or to the whole product.

Valid operators

You can configure the list of valid operators in each light.

Options

Options selection order

There is no mandatory way to add options to products. The user can start with any category of options (hardware, painting, molding, etc.) and go freely back and forth between each category.

Preserve last product options

You can ask the software (in your preferences) to use the options of the last current product so that it reapplies these options automatically to the next product created.

Global options

You can select a list of options you wish to automatically include in products when you add them to a quote. This list is customizable by user.

Exterior color display

The exterior color is displayed in item image.

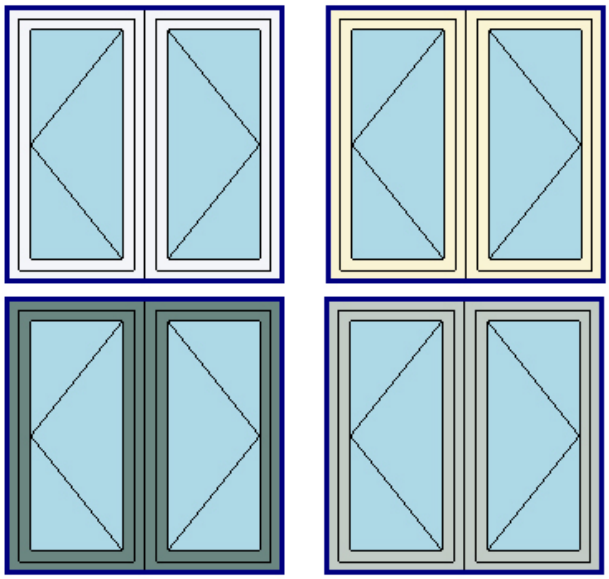

Figure 27 : Exterior color display

Grid configuration

Each type of grids (regular, contour, double contour, horizontal bar, circular etc.) is configurable in each light of a product independently of others.

Grids drawings

Many types of grids are drawn in the item image to give an idea of the final result.

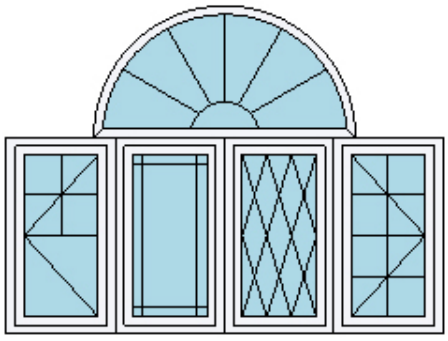

Figure 28 : Grids drawings

Select options by pictures

When an image is linked to an option, the user can visualize this image to make the selection.

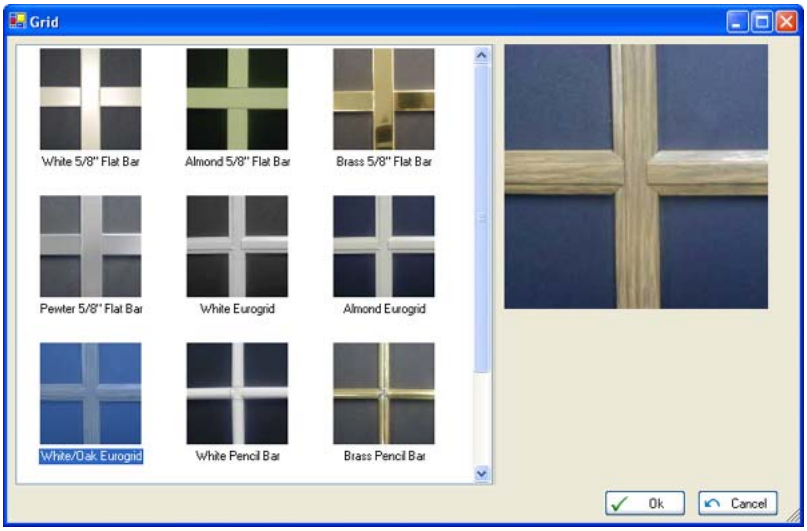

Figure 29 : Select options by pictures

Decorative light selection by pictures

When an image is linked to a decorative light, the user can visualize the image to make his selection. The supplier price list is not needed anymore because the software uses these pictures too.

Required option constraint

If an option is required with another option, it will be automatically added by the software if the user adds the option.

Obligatory option constraint

If a group of options must obligatorily be selected (for example, the measurement of the framework or an integrated molding), the software will indicate an error until the user selects one of the options contained in the obligatory group.

Incompatible options constraint

When you add an option which is incompatible with one or more already selected options, a dialog will inform you of the situation and ask you to confirm if you want to add the new option or to preserve the old ones.

Assembly options

Some options like painting, external and interior moldings are applied to the product assembly. It is not necessary to add the option on each product of the assembly because the software will detect that the option needs to be added on the assembly. Consequently, each product of the assembly will have the option automatically.

Add an option on all item's products

You can item add (or remove) an option on all the products contained in an item.

Add an option on all quote's products

You can item add (or remove) an option on all the products contained in a quote.

Custom option with picture

It is possible to create custom option and associate an image to these options. The picture is saved in the quote file to make it easier to share quotes.

File system

Save folder

All quotes are saved by default in the save folder of quotes. This folder can be changed in user preferences.

Compressed files

Files of quotes are compressed in order to minimize their size. For instance, a quote of 10 items will need about 30Ko instead of 450Ko. That is more than 90% of compression ratio.

Encrypted files

Files are encrypted in order to ensure the protection of the information contained in quotes.

User assistance

Html help file

The software is installed with a help file accessible from the software by using the F1 key or in the main menu.

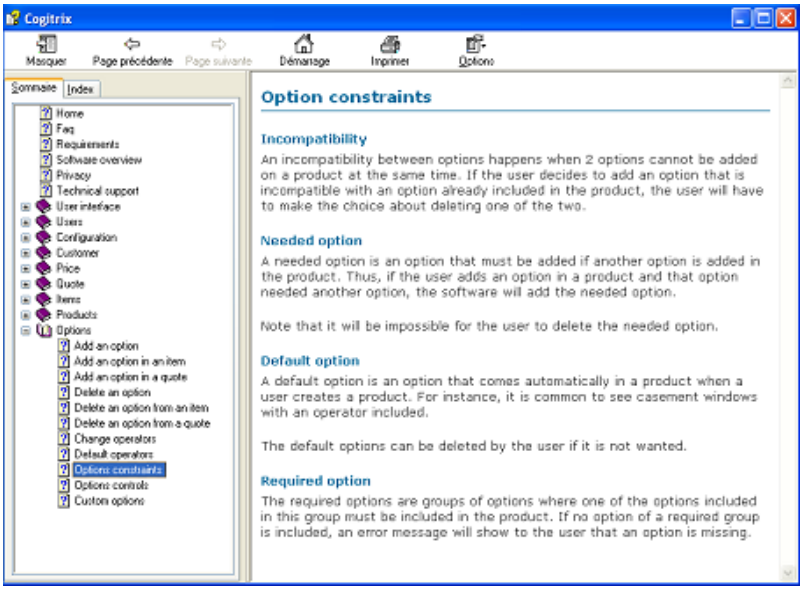

Figure 30 : User assistance help file

Reference document

A document (pdf) of about 40 pages containing the help file allows user to print the complete help file for a consultation without a computer.