

simso!®



Quick Start Tutorial

Version 8

Simsol's Quick Start Contents

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Welcome to Simsol's Quick Start Tutorial!

This guide will walk you through the essential steps to creating your first claim. Topics covered include: organization of claims, creating a claim, using the claim wizard, the most commonly used speed buttons, adding area dimensions, basic scoping, total page functionalities, as well as printing off your first estimate. All features within this tutorial are available to use during your 30-day free trial.

Should you need assistance with getting started beyond this tutorial, our team is on standby to help. We've created video tutorials, additional guides, and you have full access to 100% free-to-use technical support should you be unable to find what you're looking for. Let's get started!

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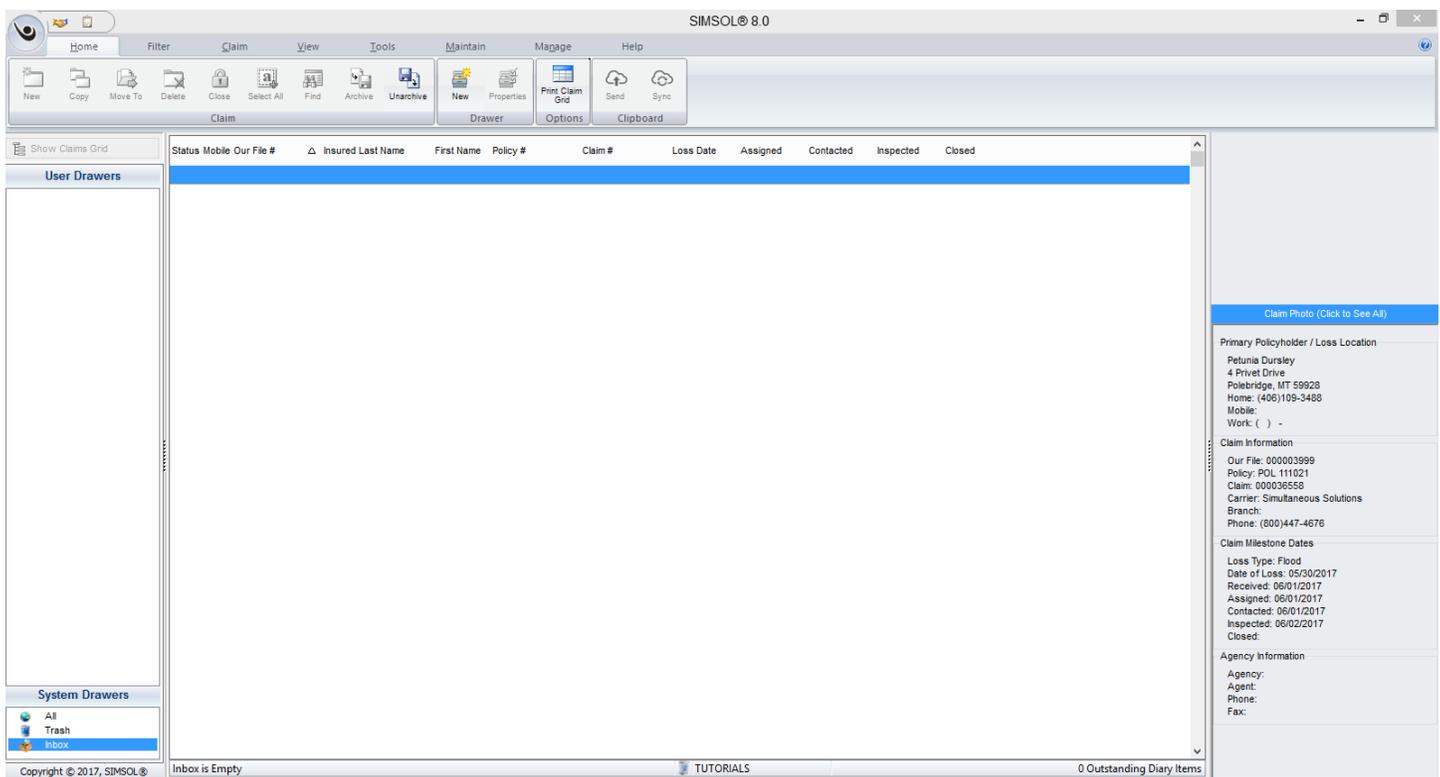
Claims Grid/Main Screen Overview

After successfully installing the Simsol software, you will use the Simsol 8 icon to open your software. This icon can be found on your desktop screen or in Windows program menu. Click the icon to open your Simsol software.



The Main Screen

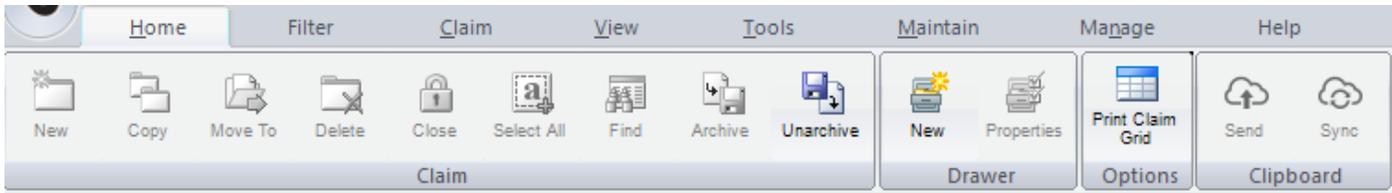
The first screen displayed after double clicking the Simsol icon is the Claims Grid screen.



(Extract of Claims Grid View)

Now that you have opened your Simsol software, you will be viewing the main screen of the program also known as the Claims Grid. Please note the various speed buttons towards the top, the claim preview window to the right, and the Claim Drawers listed to the left. Your screen will look pretty bare right now, but as you start to create and compile more claims they will be displayed on this screen for easy access.

Main Menu - Speed Button Bar

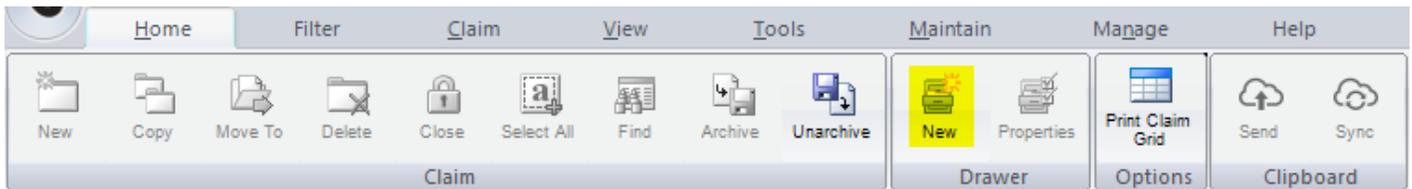


Along the top of the main screen is the Main Menu and the Speed Button Bar. Each speed button has a corresponding function in the system. Speed buttons can be used to create estimates, forms, diagrams and other components of a claim file. Before you create any claim files you first must create a Claim Drawer.

Creating a Drawer

Claim Drawers will help you organize all claim files created and stored in the system. Think of them as virtual filing cabinets, as time goes on, you'll find your preferred organization method - whether it be by claim type, months, years, or status of claim - it's completely up to you!

To create a Claim Drawer, click the 'New Drawer' icon located in speed button bar at the top of the screen. You must be on the Home Tab in order to see the 'New Drawer' icon.



The system will display the new Drawer Properties screen. (shown below)

Drawer Properties

Building DB Building Factors Contents DB Contents Factors Help Cancel Done

Use Information Below as Drawer Cost Database Preferences

Name Of Drawer: Untitled Drawer

Claim Auto-Numbering

Prefix:

Auto # Start:

Auto # Width:

Suffix:

Next Available File #:

Building/A.P.S Options

Default Database: Complete Building Repair Registry

Default Global Pricing Table: 3rd Quarter Pricing 2017

Use First Estimate

Location Basis: SYSTEM DEFAULT

Materials:

Labor:

Equipment:

Contents Options

Default Database: SIMSOL Personal Property

Default Global Pricing Table: 2016 Price Guide - October

Location Basis: SYSTEM DEFAULT

Materials:

Labor:

Equipment:

Naming and Using Claim Drawers

Enter the name of your new drawer at the upper-left side of the screen. You'll call this drawer **'My First Claims'**. You can create as many Claim Drawers as you wish as this will help you organize your claim files more efficiently. You will want to name your Claim Drawers in a way that will help you know which claims are contained in each Claim Drawer. Some examples of Claim Drawer names might be: 'Flood Claims', 'Mobile Home Claims', or 'Open Claims'.



Setting the Default Pricing Database and Location for a Drawer

To help save time, you can also set the default pricing database and location for a Claim Drawer, which will automatically implement the chosen database, pricing table and location for every claim created in that drawer. Right click on the drawer you've just created and select 'Drawer Properties'. Alternatively, you can highlight the drawer and select the 'Properties' button on the Speed Button Bar.

When opened, you'll note the four speed buttons in the upper left corner of the Drawer Properties screen. Select the Building DB button for Building Database. Simsol will automatically select the Complete Building Repair database and display the most current GPT (Global Pricing Table) for pricing.



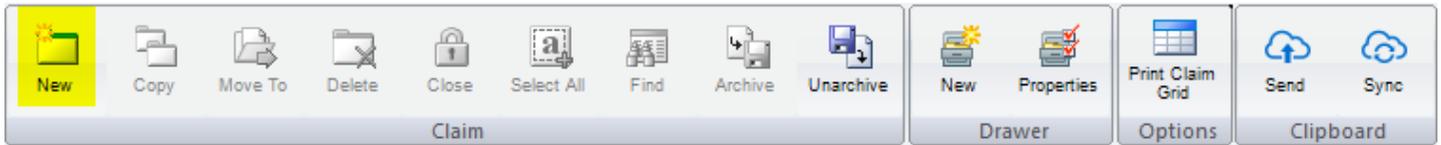
Click 'Done' and Simsol will automatically select the next button 'Building Factors for Building Location Factors' for you. Seeing as this is simply a quick start guide, we'll move on to the next stage.

Click 'Done' and then 'Yes' in the next window. Repeat this with the Contents DB (Contents database) and Contents LF (Contents Location Factors).

Now click 'Done' to save the new information. The Claim Drawer name will appear in the User Drawers section as seen in the Claims Grid. You can create as many Claim Drawers as necessary to better organize your claim files. Now that you have successfully created a Claim Drawer, you are ready to create a new claim!

Creating a Claim

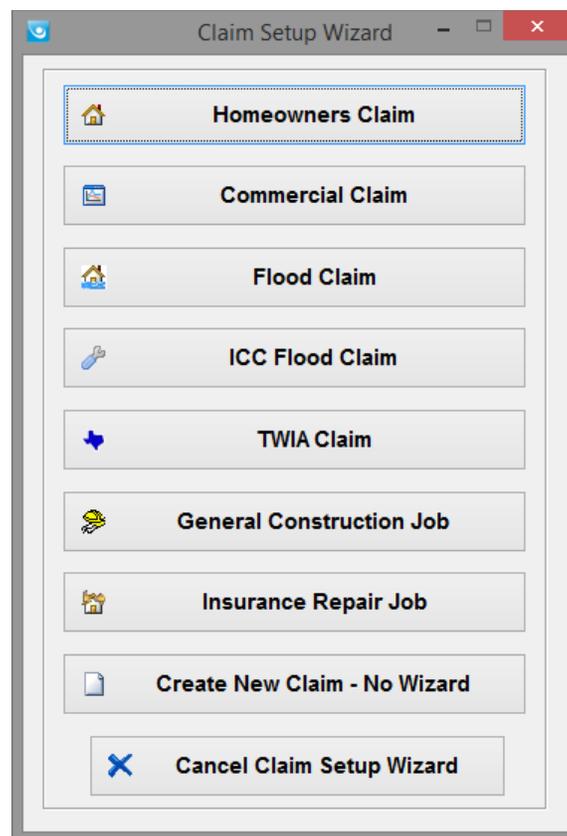
To create a new Claim File, click the 'New' claim speed button located in the top left corner of the screen, you must be on the Home Tab in order to see the 'New' claim icon. If this icon is grayed out, please make sure you have a drawer created, and that the drawer is highlighted.



Claim Setup Wizard

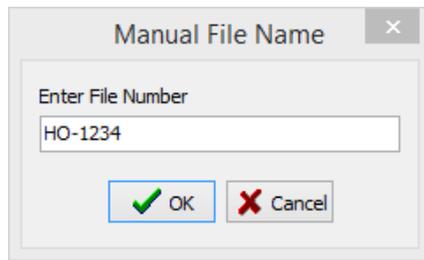
The Claim Setup Wizard allows you to create your claim with ease. Filling out the claim information here will allow all claim data to be correctly inputted into the correct fields. It's important to know, all information entered in this screen can be entered after the claim has been created, so if you forget to enter or don't know specific data when running through the wizard don't worry too much.

The Claim Setup Wizard is displayed after clicking the 'New' claim speed button. The first screen displayed offers us some choices for the type of claim you're about to write.



(Excerpt of Claim Setup Wizard)

Let's create a Homeowner's Claim File. After you select the Claim File type, you are prompted for a file name. For practice sake, let's call this Claim **HO-1234**.

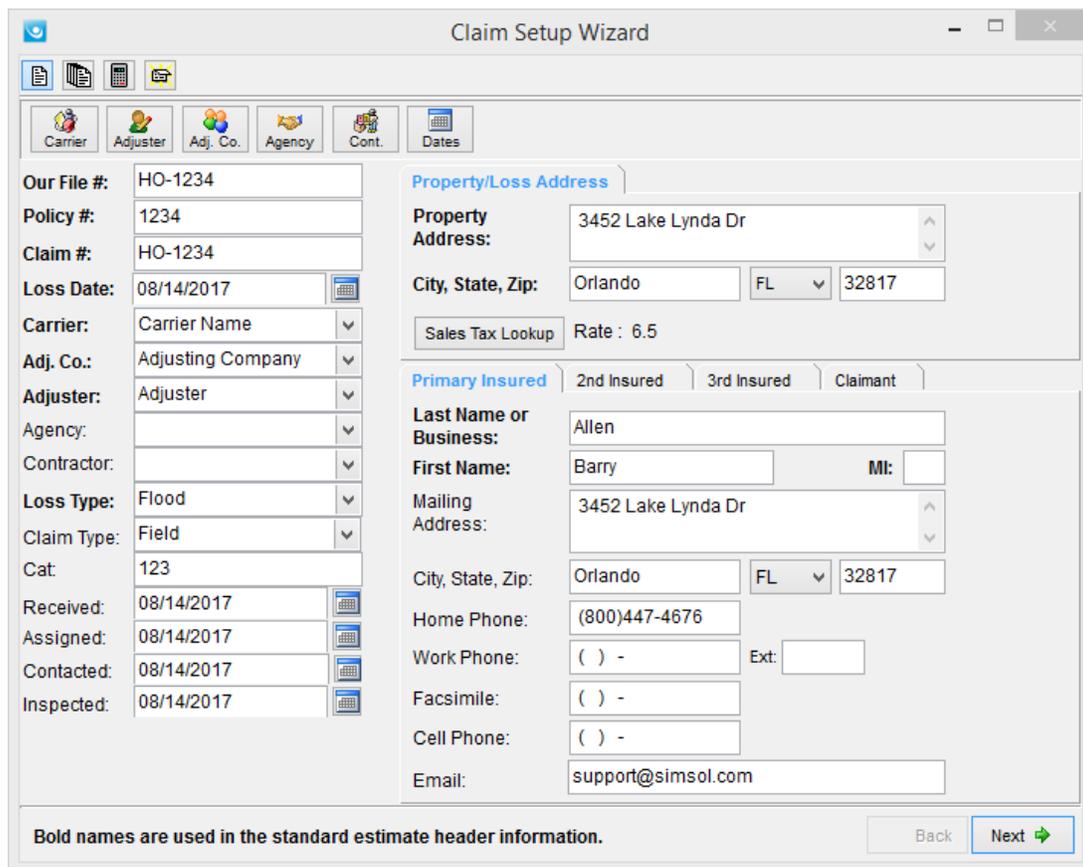


A dialog box titled "Manual File Name" with a close button (X) in the top right corner. It contains a text input field labeled "Enter File Number" with the text "HO-1234" entered. Below the input field are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

Select 'OK' to begin entering information into the Claim Setup Wizard.

Loss Information Screen

The first screen of the Homeowner's Claim Setup Wizard contains the Loss Information for all of the important parties involved with the claim. Fill out as much information as possible on this screen because much of the information found here will be used elsewhere in the claim.



The "Claim Setup Wizard" window displays the "Loss Information" screen. The interface includes a toolbar with icons for Carrier, Adjuster, Adj. Co., Agency, Cont., and Dates. The main area is divided into several sections:

- Our File #:** HO-1234
- Policy #:** 1234
- Claim #:** HO-1234
- Loss Date:** 08/14/2017
- Carrier:** Carrier Name
- Adj. Co.:** Adjusting Company
- Adjuster:** Adjuster
- Agency:**
- Contractor:**
- Loss Type:** Flood
- Claim Type:** Field
- Cat:** 123
- Received:** 08/14/2017
- Assigned:** 08/14/2017
- Contacted:** 08/14/2017
- Inspected:** 08/14/2017

The **Property/Loss Address** section includes:

- Property Address:** 3452 Lake Lynda Dr
- City, State, Zip:** Orlando, FL, 32817
- Sales Tax Lookup:** Rate : 6.5

The **Primary Insured** section includes:

- Last Name or Business:** Allen
- First Name:** Barry
- MI:**
- Mailing Address:** 3452 Lake Lynda Dr
- City, State, Zip:** Orlando, FL, 32817
- Home Phone:** (800)447-4676
- Work Phone:** () - Ext:
- Facsimile:** () -
- Cell Phone:** () -
- Email:** support@simsol.com

At the bottom, a note states: "Bold names are used in the standard estimate header information." Navigation buttons for "Back" and "Next" are located in the bottom right corner.

(Claims Setup Wizard Screen 1)

The first wizard screen contains some fields that access the information stored in the contact manager. You may enter information in these fields by simply typing in the information or, if the person or entity is in your system's contact manager, you may click on the drop down arrow button to display a list of available contacts.

Simply click on the contact's listing to enter the information into the claim, or use the Tab key to cycle through the fields and fill out the rest of the information. Do not use Enter key to fill out field boxes.

When all information is filled out, select 'Next' or use your enter key to advance to the second screen of the Homeowner's Claim Setup Wizard.

Policy Information

The second screen of the Wizard contains fields for the Policy Information. Enter a date for the 'Policy Start' and press the Tab key. The system automatically fills out a date one year after for the Policy End date. You may also fill out the type of policy, deductible and coverage limits for the policy. Be sure to fill out the amount for each coverage. This is how the Simsol Wizard will automatically create the individual estimates.

(Claims Setup Wizard Screen 2)

After you have entered all relevant policy information, click 'Next' or press the enter key to advance to the third screen in the Homeowner's Claim Setup Wizard.

Estimate Information Screen

The third screen contains the factors for the claim. This is where the Databases, Global Pricing Tables, and Location Factors are displayed. Note that the system has automatically selected the Database and Global Pricing Table that was set in the Drawer Properties when you created the drawer. You can use the drop down buttons or the speed buttons to change the Database, GPT or Location Factors. Also note that the Location Factors have been automatically selected based on the first three digits of the loss location zip code.

The screenshot shows the 'Claim Setup Wizard' window with the 'Estimate Information' tab selected. The window contains three main sections for configuring estimate data:

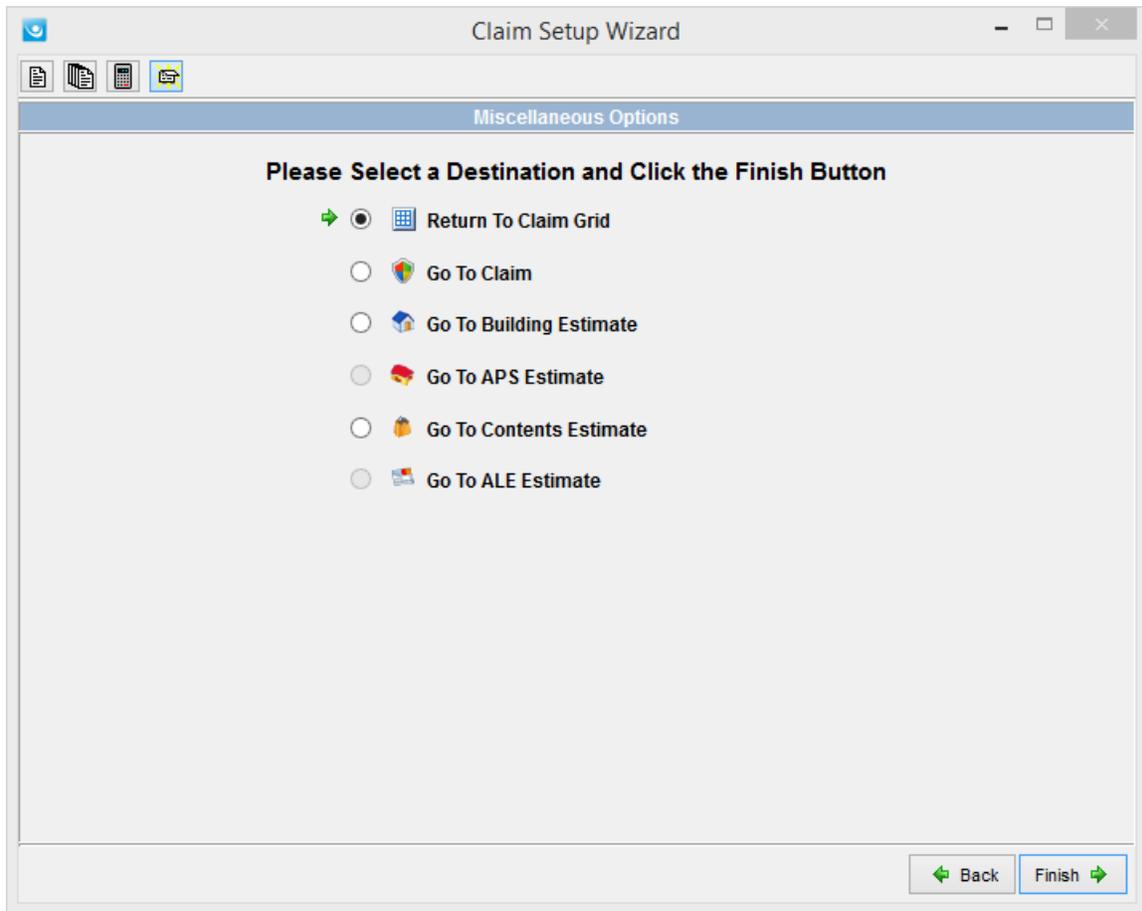
- Building Estimate Database:** Includes a dropdown for 'Complete Building Repair Registry', a 'Location Factors' section with 'Based On ...' set to '328 (Orlando, FL)', and numerical fields for 'Mat' (100), 'Lab' (105), and 'Eq' (100). It also features a 'Dep. Table' button and a 'User Defined' button.
- A.P.S. Estimate Database:** Includes empty dropdowns for the database and global pricing table, and empty fields for 'Location Factors' and 'Based On ...'.
- Contents Estimate Database:** Includes a dropdown for 'SIMSOL Personal Property', a 'Location Factors' section with 'Based On ...' set to '328 (Orlando, FL)', and numerical fields for 'Mat' (100), 'Lab' (105), and 'Eq' (100). It also features a 'Dep. Table' button and a 'User Defined' button.

At the bottom right of the window, there are 'Back' and 'Next' navigation buttons.

(Claims Setup Wizard Screen 3)

From the Estimate Information screen you may also enter or select a predefined Depreciation Table. Since you have not set up any depreciation tables in the system, we can move on from this screen. Click 'Next' to advance to the final screen of the new Claim Setup Wizard.

Wizard Exit Screen

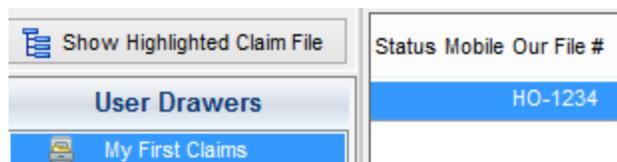


(Claims Setup Wizard Screen 4)

The last screen is a navigational screen. To return to your Claim Drawer, click on the 'Return to Claims Grid' option and then click 'Finish'. The system closes the Setup Wizard and displays your Claim Drawer with your newly created claim displayed in the list.

Opening your Claim

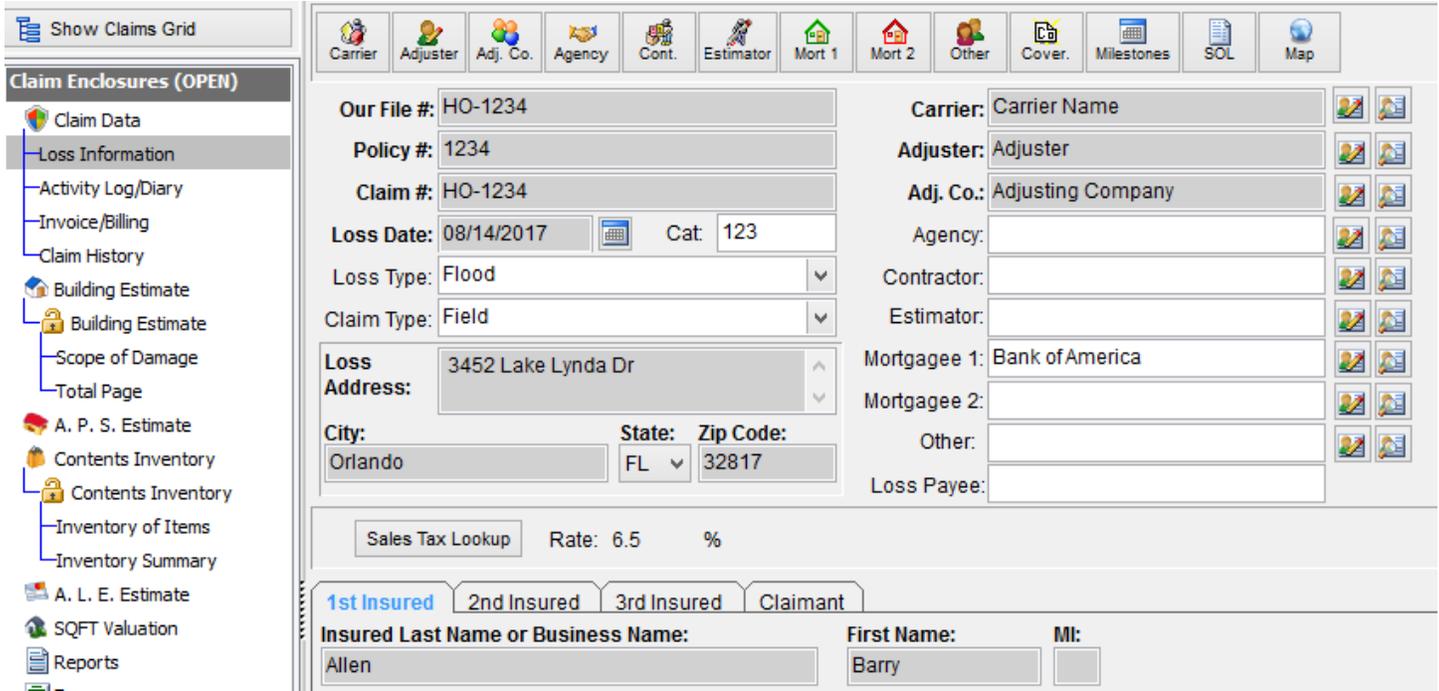
Congratulations, you have just created your first Simsol claim file! Now you are ready to dive in to your claim and start building your estimates, writing reports, drawing diagrams, importing digital photos, and much more. To get started, you can either double click the claim we've just created in the Claims Grid or click the 'Show Highlighted Claim File' button found on the left side of the main screen.



(Show Highlighted Claim File - Claims Grid)

The Claim Enclosures Tree

You are now inside the HO-1234 file. You will notice the many different components of your claim listed on the left side of the screen. This panel is called the Claim Enclosures Tree. The Claim Enclosures Tree has 12 main components, these components will expand or change depending on information added.



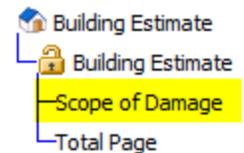
(Loss Information Screen)

The 12 major components of the Claim Enclosures Tree are:

- | | | | |
|-------------------|-------------------|-------------------|--------------------|
| Claim Data | Contents Estimate | Reports | Digital Photos |
| Building Estimate | A.L.E. Estimate | Forms | Attached Documents |
| A.P.S. Estimate | SQFT Valuation | Sketches/Diagrams | Notebooks |

Starting your Building Estimate

Let us get started with the Building Estimate since this is where you'll be spending most of your time. The Building Estimate component has 3 modules; the Building Estimate Information Screen with the padlock, the Scope of Damage screen, and the Total Page. Click the 'Scope of Damage' screen, you will begin here. This screen is where you will create your Building Estimate's areas.

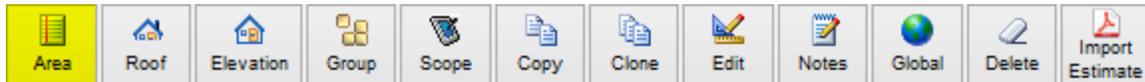


Adding an Estimate Area

There are three types of structures that can be created within the Scope of Damage:

1. An Area - a three dimensional area such as a living room (L x W x H)
2. A Roof - a roof that is flat or two-dimensional (calculated by shape)
3. An Elevation - which is also flat or two-dimensional (L x H, by shape)

Let's start by creating a standard room such as a bedroom or living room. Click the 'Area' button to create the new area. This will display the Area Component Entry screen.



Area Component Entry - Entering Dimensions

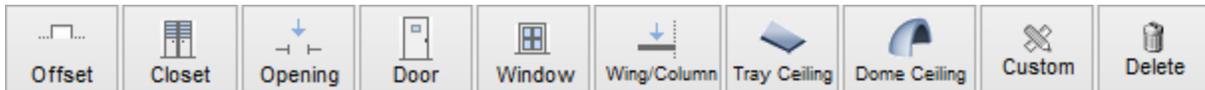
(Area Component Screen)

You may either type in the name of the area or you may select the name from the dropdown list. Simsol will automatically fill in the name of the area as you type. Once you've named the area, press your tab key to begin filling out the main dimensions of the area.

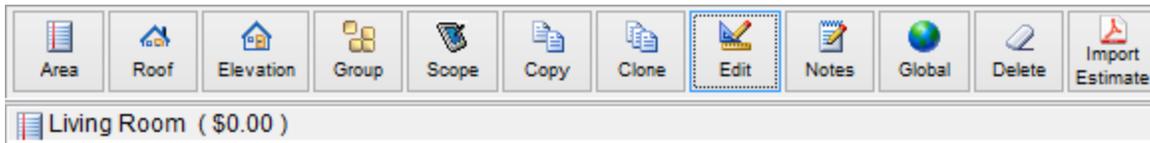
Dimensions may be entered by typing in a whole number for a dimension with no 'inches'. If both feet and inches are required type the number of feet, press the spacebar once, then type the number of inches. For instance, for a measurement of 18'3" type 18 (SPACE) 3.

Press the tab key after the dimensions are entered to confirm the entry and move to the next entry field. As you can see, the system has automatically entered the feet and inches symbols to your measurements.

To enter an offset, closet, or other area component, click the corresponding speed button at the top of the screen. Dimensions are entered for components the same way as in the Main Area.



We're done with this area now. Click 'Done' to save the area and its offset component.



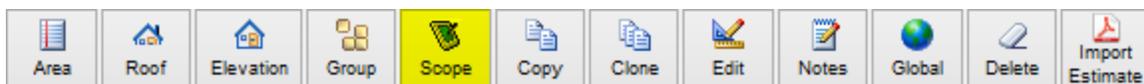
You will now be returned to the Scope of Damage screen and your newly created area will be displayed. Once your area has been created, you can continue creating areas until you have completed all the rooms that will need line items. Areas can also be copied or cloned (clone is two areas or more) by using the 'Copy' and 'Clone' speed buttons found at in the speed bar.

Deleting an area can be done by either right clicking on the area you wish to delete and selecting the delete option, or by highlighting the desired area and then selecting the 'Delete' speed button found on the speed button bar. The 'Group' button allows you to combine multiple areas into a single group for better organization. This is a useful tool when writing an estimate on multi-family properties, townhomes, or apartment complexes.

If you decide that you need to change the dimensions of a room or area that you have already created, highlight the desired area by single clicking the room and then select the 'Edit' button in the speed button menu. This will display the 'Area Component Entry' screen once again which allows you to alter or edit dimensions, closets, offsets, doors, etc.

Adding Repair Items to your Estimate – Virtual Scope Sheet

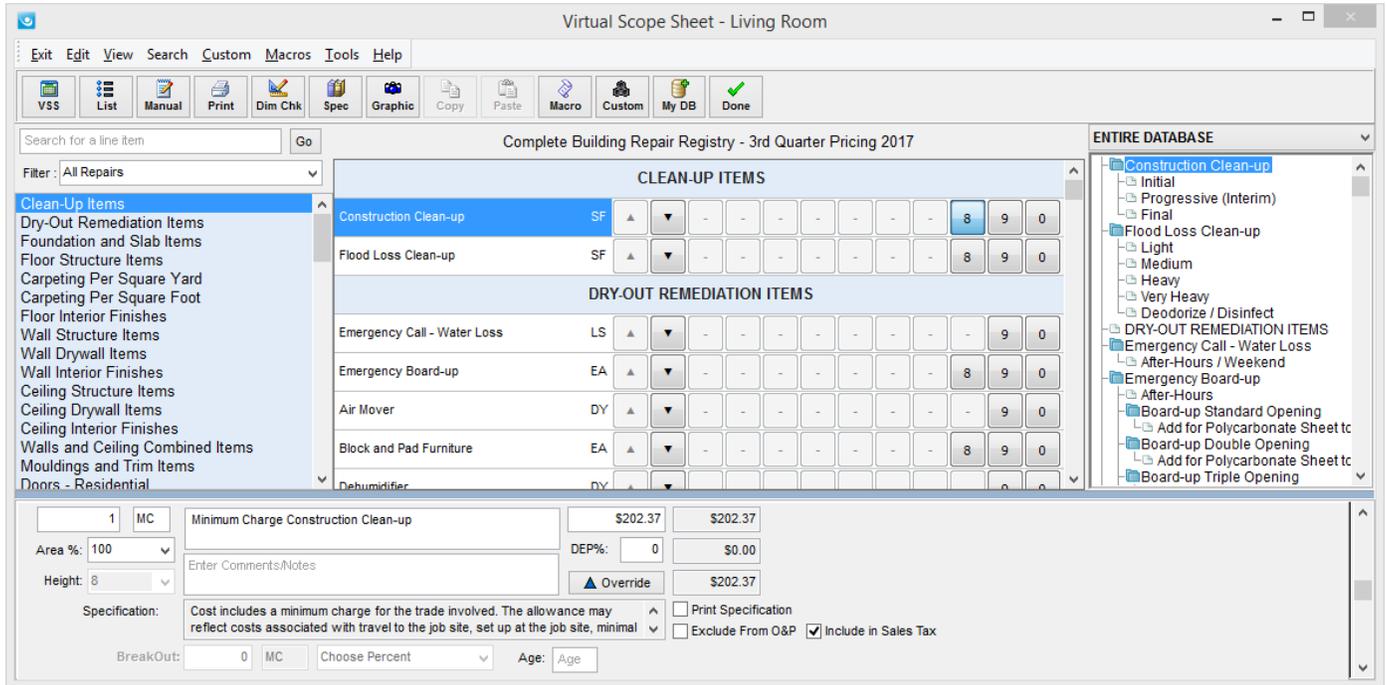
Now that you have created an area, you are ready to add repair items to your estimate. Double click the area you've created or highlight it and click the Scope button located in the speed button bar to bring up the system's estimating screen – Simsol's Virtual Scope Sheet (VSS).



(Area Listing Screen - Scope Button)

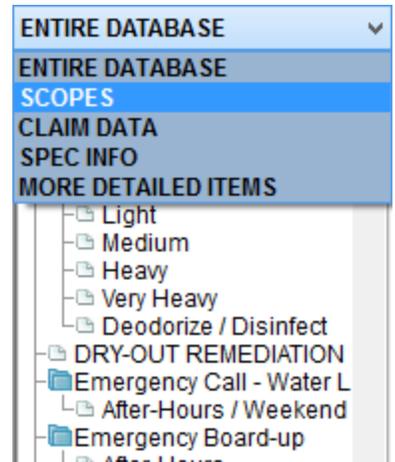
The Virtual Scope Sheet (VSS)

The VSS screen is comprised of five primary sections; the speed button bar located along the top of the screen, the Category Listing section is located on the left, and the Repair Item Database and Scopes are located in the center section of the screen.



(VSS - Screen)

Along the bottom of the VSS is the Mini-Override Screen, which displays estimate repair items and their details as repair items are added to your estimate. The Mini-Override Screen allows you to quickly make changes to basic information for each repair item. The other important section of the VSS is located on the right side of the screen. This section can display different bits of estimate information based on the preferences of the user. The top drop down list contains options for viewing additional information for the repair item currently highlighted in the center section of the VSS. Your options include More Detail (items on the subsequent database level for the currently highlighted repair item), a listing of the available Scopes for the repair item, Claim Data for the current file, and Spec Information (specifications) for the available scopes for the repair item. For your first estimate, make sure this is set to the



AREA TOTALS	
RCV:	\$0.00
DEP:	\$0.00
ACV:	\$0.00

'Scopes' option. The bottom-right drop-down contains options for the type of estimate totals to be displayed on the VSS. Users have an option to display either Area Totals which displays only the totals for the current area, Estimate Totals which displays totals for the entire estimate or Estimate Trade Totals which displays Trade breakdown totals for the entire estimate.

Entering Estimate Repair Items

CLEAN-UP ITEMS													
Construction Clean-up	SF	▲	▼	-	-	-	-	-	-	-	8	9	0
Flood Loss Clean-up	SF	▲	▼	-	-	-	-	-	-	-	8	9	0
DRY-OUT REMEDIATION ITEMS													
Emergency Call - Water Loss	LS	▲	▼	-	-	-	-	-	-	-	-	9	0
Emergency Board-up	EA	▲	▼	-	-	-	-	-	-	-	8	9	0
Air Mover	DY	▲	▼	-	-	-	-	-	-	-	-	9	0
Block and Pad Furniture	EA	▲	▼	-	-	-	-	-	-	-	8	9	0
Dehumidifier	DY	▲	▼	-	-	-	-	-	-	-	-	9	0

(VSS - Line Items Region)

Entering estimate repair items in the VSS is done by first selecting the appropriate category from the Categories Listing. The Repair items and scope numbers for the corresponding category are then displayed in the center of the screen. For this example, let's find the repair item 'Wall Drywall on Wood Framing'.

Go

Filter : All Repairs
Complete Building Repair Registry - 3rd Quarter Pricing 2017

	WALL DRYWALL ITEMS													
Clean-Up Items	Wall Drywall on Wood Framing	SF	▲	▼	1	2	3	4	5	6	7	8	9	0
Dry-Out Remediation Items	Wall Drywall on Metal Framing	SF	▲	▼	1	2	3	4	-	6	7	8	9	0
Foundation and Slab Items	Wall Drywall - Vinyl-clad Type	SF	▲	▼	1	2	3	4	5	6	7	8	9	0
Floor Structure Items	2' Flood Cut Wall Drywall (1/2") - 100%	LF	▲	▼	1	2	3	4	5	6	7	8	9	0
Carpeting Per Square Yard	4' Flood Cut Wall Drywall (1/2") - 100%	LF	▲	▼	1	2	3	4	5	6	7	8	9	0
Carpeting Per Square Foot														
Floor Interior Finishes														
Wall Structure Items														
Wall Drywall Items														
Wall Interior Finishes														

You first click the category listing on the left 'Wall Drywall Items'. The system then displays all wall related repair items contained in the database. To select a wall-related repair item, simply click the appropriate repair item description and then click the corresponding scope number. Let's select Wall Drywall on Wood Framing and scope number 3 for 'Remove and Replace'. Clicking the number 3 turns the scope **blue** and adds the single repair item 'Remove and Replace Wall Drywall on Wood Framing' into your estimate.

WALL DRYWALL ITE
i Remove and Replace: \$1.79 / SF

Wall Drywall on Wood Framing	SF	▲	▼	1	2	3	4	5	6	7	8	9
------------------------------	----	---	---	---	---	---	---	---	---	---	---	---

You may select multiple scopes for a single repair item. For example, clicking on the 'Mouldings & Trim Items' category displays the 'Base Moulding' repair item. Let's say the estimate calls for the removal, replacement, and painting of the 'Base Moulding'. That's a total of 3 scopes for the 'Base Moulding' line item. First select 'Base Moulding', and then click on scopes '1' for remove, '2' for replace and then '7' for paint.



Deleting an item is just as simple. Click on the repair item name and the **blue** scope for the corresponding item. The scope returns to the original color and the item is removed from the estimate. In our example, let's return to the 'Wall Drywall on Wood Framing' item and delete scope 3. As you can see, clicking on the now **blue** scope '3', turns it back to its original color and removes the 'Wall Drywall on Wood Framing' item from the Mini-Override section of the VSS. Clicking on the scope numbers acts just like a toggle switch, each click either enters an item that is not currently in the estimate, or deletes an item that has already been selected.

Changing Item Costs

Sometimes a repair item's cost is not exactly what you want it to be, and needs to be adjusted to reflect a different price point. To change a unit cost on the fly, double-click the Unit Cost Field in the Mini-Override window located at the bottom of the screen. The Unit Cost will then be highlighted - enter the new Unit Cost and press tab to accept the amount. The new amount is displayed in **red**, indicating the override.

36.5	LF	Paint / Finish Base Moulding	\$1.55	\$56.58
Area %: 100		Enter Comments/Notes	DEP%: 0	\$0.00
Height: 8			▲ Override	\$56.58
Specification:	Includes labor and material for two coats of paint.		<input type="checkbox"/> Print Specification	<input type="checkbox"/> Exclude From O&P <input checked="" type="checkbox"/> Include in Sales Tax

(VSS – Mini Override Screen)

Changing Item Quantities

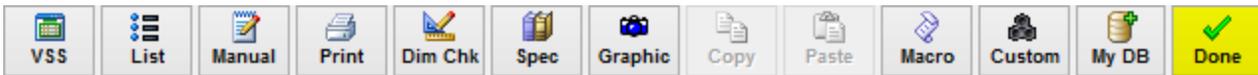
Most item quantities are calculated automatically by the system based on the dimensions entered in the Scope of Damage/Area Listing Screen. Sometimes these quantities must be changed. To change a quantity, double click the Quantity Field in the Mini-Override region located at the bottom of the screen. The item's quantity is highlighted; enter the new quantity and press tab to accept the new quantity. The new quantity is displayed in **red**, indicating the

quantity has been changed.

36.5	LF	Paint / Finish Base Moulding	\$0.75	\$27.38
Area %: 100		Enter Comments/Notes	DEP%: 0	\$0.00
Height: 8			Override	\$27.38
Specification:	Includes labor and material for two coats of paint.		<input type="checkbox"/> Print Specification <input type="checkbox"/> Exclude From O&P <input checked="" type="checkbox"/> Include in Sales Tax	

(VSS - Mini Override Screen)

The quantity can also be changed by selecting a specific amount in the Area % and Height fields using the drop down button, or by typing an amount in the fields. When you are finished entering scopes click on the 'Done' button at the right end of the speed button row at the top of the VSS.



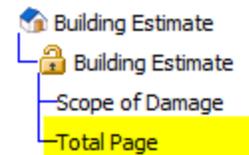
Estimate Total Page

Now that you've finished entering areas and repair items into the estimate, you want to total up the estimate and review those totals. In Simsol, these functions are done on the Total Page screen.

O & P Add-ons Sales Tax Other Tax Deductible Notes Salvage Non-Ded Summary Job Cost Audit SQL Help												
Description	RCV	Difference	ACV									
Repair Item Totals	\$ 640.58	\$ 0.00	\$ 640.58									
Less Excluded O&P Trade(s)	\$ 0.00	\$ 0.00	\$ 0.00									
Subtotal for O&P Calculation	\$ 640.58	\$ 0.00	\$ 640.58									
General Contractor Overhead	\$ 0.00	\$ 0.00	\$ 0.00									
General Contractor Profit	\$ 0.00	\$ 0.00	\$ 0.00									
Plus Excluded O&P Trade(s)	\$ 0.00	\$ 0.00	\$ 0.00									
Estimate Totals With O&P	\$ 640.58	\$ 0.00	\$ 640.58									
Additional Items Totals	\$ 0.00	\$ 0.00	\$ 0.00									
Applicable Sales Tax	\$ 41.64	\$ 0.00	\$ 41.64									
	\$ 0.00		\$ 0.00									
Estimate Grand Totals	\$ 682.22	\$ 0.00	\$ 682.22									
Less Salvage	\$ 0.00		\$ 0.00									
Less Deductible	(\$ 1500.00)		(\$ 1500.00)									
Plus Non-Deductible Items	\$ 0.00		\$ 0.00									
BUILDING FINAL TOTALS	\$ 0.00	\$ 0.00	\$ 0.00									

(Building - Total Page Screen)

The estimate Total Page screen is displayed by selecting the Total Page listing on the Claim Enclosures Tree. The Review Audit Screen is displayed to allow the user to review the estimate for possible errors, simply click 'View Audit Report' to see report. To exit, click the 'Ignore Advisory' located to the right. If not ignored, the Electronic Audit Report will now open as a PDF. You can review this, then select the red 'X' at the top right to close and return to your Total Page.



(Building – Total Page Speed Buttons)

Total Page consists of two main sections - the speed button bar, located along the top of the screen, and the Summary Description and Estimate Totals in the main area of the screen. You cannot directly alter the figures displayed on the Total Page. Values may only be edited by selecting one of the screen's speed buttons or by changing repair item values from within any of the areas in the estimate.

From the Total Page, users may enter General Contractor Overhead and Profit, Estimate Additional Items, Sales Tax, Total Page Notes, as well as other, less commonly used items. General Contractor Overhead & Profit entry is your next step.

Entering Contractor O&P

To enter Contractor Overhead and Profit from the Total Page, begin by clicking on the O&P speed button. The system displays the Overhead and Profit Work Screen.



Now select the checkbox next to Variable Overhead and Profit and enter the amount as a whole percent for our Overhead and Profit. In our example you are entering 10% for Overhead and another 10% for Profit.

If you want to subtotal the estimate before the 10% profit is calculated, place a bullet in the 'Percentage of RCV&ACV'. The system calculates the Overhead and Profit Totals and displays them on the Total Page.

You are also able to remove trades from the calculation of Overhead and Profit. Let's say that in our estimate you know that the insured is going to do the painting himself. You want to remove the estimate's subtotal for all painting before you do the calculation of Overhead and Profit.

To remove an item's trade or subtrade figures from the calculation of Overhead and Profit, you first find the Trade name and double-click on the Trade name to display the sub-trades. You then select the sub-trade name and click the Right Arrow button to send it to the list of 'Trades Excluded from O&P.' The item is still in the estimate, but now you're not paying Overhead and

Profit on it. When you've got the appropriate amounts entered and any trades excluded, click 'Done' to add the amounts to the estimate.

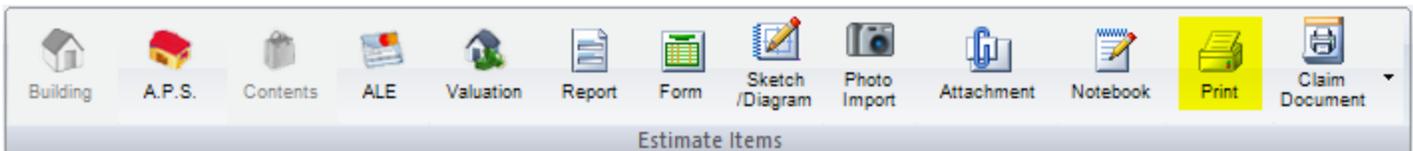
Entering Sales Tax

Now you're going to add Sales Tax to your Estimate. This is done from the Total Page by first selecting the 'Sales Tax' speed button and displaying the Sales Tax Calculator.

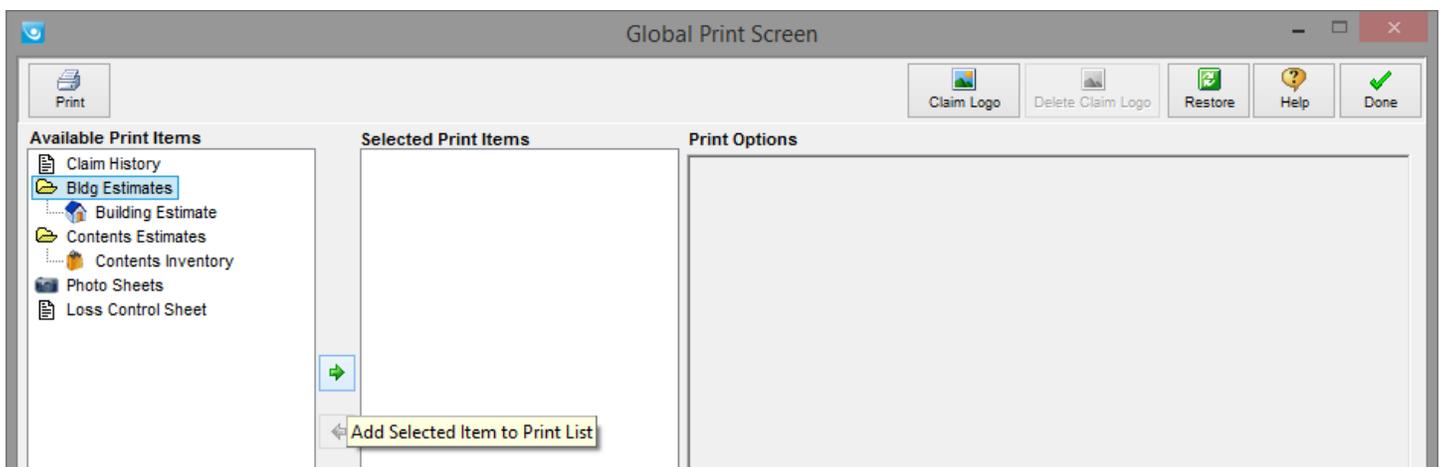


In our example, you only want to apply sales tax to the material costs within the estimate, so you will uncheck every option but the Material Totals. Let's use a sales tax percentage of 6%. You click on the field asking us for a Sales Tax rate and type in 6. You then click 'Done' to add the sales tax amount to our estimate.

Printing an Estimate

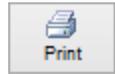


Click the 'Print' speed button located at the very top of the screen under the Home Tab. After clicking the print speed button, the system displays the Global Print Screen. The Global Print Screen gives you the option of printing one item or multiple items at one time. Simply select the item to print from the Available Print Items list and send it to the Selected Print Items list by clicking on the right arrow in the center. Multiple items can be selected and sent to be printed using the right arrow.



After an item is selected and sent to the Selected Print Items list, choose the Print Options for each selected print item by checking the appropriate boxes in the right panel. For the Building Estimate, General Options are located near the top of the Print Options screen, followed by the Estimate Cover Page options, Estimate Body printing options, Total Page, and Appendices. Print Templates can be saved as a template for use later or in other claims. Use the New button in the Print Group Templates pane in the lower left to do so.

When all items for the print have been selected and options chosen for each, click the Print speed button located in the top left corner. The system displays the 'Report Setup' window allowing you to print or preview the estimate; or you can generate a PDF file for easy file transfer.



Report Setup

Selected Printer
Brother HL-5250DN on

Report Destination

Printer

Preview

Queue XXXXXXXXXXXXXXXXXXXX

PDF C:\Users\Username\Desktop\My Firs

File C:\

Format: Simsol Format (SFP)

Options

Copies 1

Collate

Duplex

OK

Cancel

Setup

(Report Setup Screen)

Generating a PDF

To generate a PDF document, select the PDF option, then click the 'Save As' button to the immediate right of the PDF option. Designate where you would like to store this PDF file, enter a filename, and click 'Save'. This will return you to the Report Setup screen, where you will click 'OK' to create the PDF file.

Report Setup

Selected Printer

Report Destination

Printer

Preview

Queue XXXXXXXXXXXXXXXXXXXX

PDF C:\Users\Username\Desktop\My Firs

File C:\

Format: Simsol Format (SFP)

Options

Copies 1

Collate

Duplex

OK

Cancel

Setup

(Report Setup Screen - PDF)



Need More Help?

This concludes Simsol's Quick Start Tutorial, but that doesn't mean you're on your own. We've gone over the basic steps on how to write and print a Building Estimate using Simsol Software - the APS (Appurtenant Private Structure) and Contents Inventory Estimators are very similar to the Building Estimator and are, therefore, not discussed in this Getting Started Tutorial. We have also not discussed other program modules found in Simsol such as the diagramming or digital photo module. If you need assistance with these modules, check out our vast, free, video library located at MySimsol.com/tutorials. If you'd like to attend a training workshop or training webinar, contact us at info@simsol.com.

If you have further questions, our support team is here to help. Simsol Support can be reached by chat, by phone at 1.800.447.4676, or send them an email at support@simsol.com.

For Sales Inquiries, please contact our Sales team at sales@simsol.com

