

## Learning Objectives

Upon completion of this course, you will:

- Have increased understanding of the selection, configuration and quoting process.
- Identify the new and improved common features.
- Understand the importance of a rules based Configuration
- Understanding the power of Quote Manager
- Have increased confidence in planning.
- Be able to control preferences.
- Know how to review, find and revise documents
- Understand the full life cycle and workflows
- Understand how training is an integral piece to success in using the tool.
- Adding "Specials" to pump configurations
- How to handle "RFQ"

## Course Description

This course presents a comprehensive overview of PACO Express Suite (PXS). This course presents how to use the Suite focusing on the key areas of Selector, Configurator, and Quote Manager. Participants will learn how to select, configure and quote a project.

The course also addresses problematic areas of the Suite. Participants are shown how to voice their questions. Participants will learn how to gain the knowledge needed to effectively use the Suite.

## Course Agenda

Individual instructors may order this outline as fits the needs of their individual courses. In addition, they may place more emphasis on some areas than on others. What is assured is that this particular list is covered in the course. Other topics may be added to a course as the instructor sees fit, and as time and interest allow.

### General

- Logging in
- Forgot Password
- System Requirements
  - Browser Support

- Use of "I" buttons
- Selector vs. Quote Manager – Workflows
- Registration
- Frequently Asked Questions (FAQ)
- How to get help.

#### Selector

- Pick from a list – Select from model number.
- Default Quote
- Conditions of Service (COS) – Select from head and flow. Add GPM/TDH
- Variable Speeds (Warning)
- Pumps in Parallel.
- Multiple Conditions
- Multiple conditions for multiple speeds.
- Changing Pump Trim
- Changing Speeds
- Plotting Multispeed curves
- Customize plots
- Add additional properties (fluid, temp, etc...)
- Use of thumbnails
- Changing Motor Sizes

#### Configurator

- Changing Scope of Supply.
- Configure special motors by inputting frame size
- Price Override
- Set Multipliers
- Set Distributor Margin
- Add custom materials, buyouts, etc...
- Adding additional items to configuration
  - Freight
- Add accessories
- Change items in Configurator
- Change motor options
- Quick Save
- Adding Suction diffusers and combination values.
- BIM Drawings
- Internal Price Sheet

#### Quote Manager

- Customer List – Creating and managing customers.
- Setting up a Quote
- Finding documents
- Arrange submittals
- Copy quote
- Copy line items
- Searching for quotes, Wild card searches.
- Complete document package
- Library Documents
- Header Information
- Quote Docs
- Item Summary