



**Note:** Not all features listed in this manual are available for all User Types

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## 1. Getting Started

### Program Navigation

- **Home**
  - Here you will find the latest news, product information and all other important updates or downloads.
- **Project Management**
  - Manage projects and customers.
- **Fan Selection**
  - Choose a “**Select by**” option to choose a fan.
- **Products**
  - View, download or print all product literature
- **Orders**
  - View and track Open or Shipped Orders.
  - View our current average delivery cycles.
- **AMCA**
  - Quickly view which products are AMCA Certified.
- **Administration**
  - Maintain your account information and set your program preferences.
    - All preferences you choose will be the default every time you login.
- **Help**
  - Information to contact S&P, view FAQ and view the User Manual.

## 2. Project Management (Project Management/Projects)

Create Projects , Save Projects, Maintain Projects and Submit Orders

### Navigation:

- **Add (  Add )**
  - Add a new project.
    - Be sure to select the correct Delivery Option for the project, as this will determine the products you can choose.
    - You can enter Customer and Shipping Info for the project but it is not necessary at this time.

- **Edit** (  Edit )
  - Edit Project information (Name, Sharing, Delivery, Customer Info, ect.)
- **Copy** (  Copy )
  - Copy an entire project.
- **Copy/Move Items** (  Copy/Move Items )
  - Copy a fan saved one project to another project.
- **Delete** (  Delete )
  - Delete an entire project.
- **Build Fan** (  Build Fan )
  - Add a fan to a project, this will take you to your default “Select by” method.
- **Add Stock#** (  Add Stock# )
  - Add a Stock Fan or Accessory to a project. See page 7 for more info.
    - Note: You will not get Submittals for products you add with this option.
- **Fan Details** (  Fan Details )
  - Takes you to view the details of the project, you can also click on the project name to go to view project details. See **Fan Details** section for navigation information.
- **Sharing** (  Sharing )
  - Use the sharing feature for Projects that you set to Public. Here you can choose who you want to share the project with and the level of permission you grant them. Allows you to choose other users within your company or S&P users.
  - **Note:** This will override the defaults you have set for “Default User Sharing” under the Administration menu for the project you are working on.
    - **Read Access:** User can only view the project
    - **Full Access:** User can view and make changes to a project.
- **Submittals** (  Submittals )
  - View, Print or Save submittals for a project.
- **Print Project** (  Print Project )
  - View, Print or Save a Project Summary.
    - **ALL Pop-up blockers must be turned OFF to export or print this report.**
- **Project List** (  Proj. List )
  - View a list of all Projects you have created and their status.
    - **ALL Pop-up blockers must be turned OFF to export or print this report.**
- **Order** (  Order )
  - Submit an Order for processing.
    - Once you submit an order you can no longer make any changes to a project
- **Separate Curbs** (  Separate Curbs )
  - Allows you to move curbs from one project to a new project.
    - Use this feature when you need the curbs to ship separately.
- **Freight Quote** (  Freight Quote )
  - Most projects will calculate an instant quote when you enter you shipping information.
  - Some projects will still need to get a Custom Freight Quote from our shipping department, however the program is set up to know when this is necessary.
    - Our Shipping Department will enter a quote within 2 hours of the request on normal business days.
    - You will receive an email when your freight quote is entered.

#### - Bid Price ( Bid Price )

- Allows you to create a bid using the Gross Profit Margin of an entire project for a Bid, or you can enter bid prices for each product in a project.

#### - Print Bid ( Print Bid )

- Create a report that only shows the bid price you set on the project. This report will not show pricing for individual parts, only the Project Bid Total you set or the Bid Price per fan that you set.

**- ALL Pop-up blockers must be turned OFF to export or print this report.**

#### - Custom Quote ( Custom Quote )

- Using the button on the Projects screen you can add an entire product to your project.
  - If you have a Part Number you can enter it in on this screen
  - If you don't have a Part Number just enter the quantity and you can enter a description for that product.
  - You have the choice either List Price or Net Price, depending on the quote
  - You will need to obtain a quote number from Sales or Customer Service in order to use this feature.

#### - Fan Schedule ( Fan Sched. )

- Create a Fan Schedule of your project.

**- ALL Pop-up blockers must be turned OFF to export or print this report.**

#### - Fan List ( Fan List )

- Create a report for a project that shows the fans on the project with model, motor and performance information for each fan.

**- ALL Pop-up blockers must be turned OFF to export or print this report.**

#### - Recalculate Price ( Recalculate Price )

- Use this feature to update your pricing to the most current price.
  - Pricing in Optimizer is good for 60 days based on the pricing date indicated on the project. When ordering a project Optimizer will notify you that the pricing is over 60 days old.

**- When you Recalculate Price you cannot undo any pricing changes.**

### 3. Customer Management (Project Management/Customers)

- Optimizer2 allows you to maintain a Customer Database, which eliminates the need to enter frequent customer information each time you order.

#### Navigation:

#### - Add a Customer ( Add a Customer )

- Add a new customer

#### - Edit ( Edit )

- Edit customer information

#### - Copy ( Copy )

- Make a copy of a customer.

#### - Delete ( Delete )

- Delete a customer.

## - Locations ( Locations )

- Add Ship to Locations for a customer.
  - Use this feature when you frequently ship to the same location for a customer.

## - Sharing ( Sharing )

- Use the sharing feature for Customers that you set to Public. Here you can choose who you want to share the customer with and the level of permission you grant them. Allows you to choose other users within your company or S&P users.
- **Note:** This will override the defaults you have set for “Default User Sharing” under the Administration menu for the customer you are adding or editing.
  - **Read Access:** User can only view the customer.
  - **Full Access:** User can view and make changes to a customers information.

## 4. Fan Selection (Fan Selection/Select by...)

- Optimizer2 gives you 5 different Fan Selection options based on the criteria you already know to pick a fan.

### “Select by” Options:

- Select by Series
  - When you know what fan series you need (i.e. DB, TXB, TD).
- Select by Application
  - When you know the application of the fan, but do not know which series is best.
- Select by Cross Reference
  - When have a competitors fan you need to match.
- Select by Type
  - When you know the type of fan you need, but not the exact series.
- Select by Group
  - When you know the group of fans it falls into, but not the exact series.

## Selecting a Fan

1. Use one of the “Select by” options above to choose the fan series you need.
2. Use the Next (  ) and Back (  Back ) buttons to navigate through the selection.
3. Enter the Performance Criteria.

- The Selection Constraint is the percent of difference you allow the program to use when selecting fan options against your criteria (0-50%).

**\* All other Selection Steps will vary based on the product you choose.**

4. Follow the Selection Steps (Figure 1) in the selection process.
  - Steps will turn “bold” when you have successfully completed the step.
5. Finalize & Save
  - You can choose to:
    - Save to a New Project (you will be prompted to create a new project)
    - Save to an Existing Project (you will be prompted to choose from a list of projects)
    - Save to Current Project (if you are selecting fans in a project)

Figure 1	
Selection Steps	
1 - Select a Series	
2 - Performance Criteria	
3 - Select a Model	
4 - Select a Motor	
<b>5 - Select Fan Properties</b>	
6 - Select a Disconnect	
7 - Select a Damper	
8 - Select a Curb	
9 - Select Accessories	
10 - Select Paint	
11 - Finalize & Save	

## 5. Fan Details (Project Management/Projects/Fan Details)

### Navigation:

- **Build Fan** (  Build Fan )
  - Add a fan to a project, this will take you to your default “Select by” method.
- **Add Stock#** (  Add Stock# )
  - Add a Stock Fan or Accessory to a project. See page 7 for more information.
    - Note: You will not get Submittals for products you add with this option.
- **Edit** (  Edit )
  - Edit a fan selection, this will take you to the Select a Motor Screen.
- **Copy** (  Copy )
  - Copy an entire fan selection.
- **Delete** (  Delete )
  - Delete a fan from the project.
- **Delete Accessories** (  Delete Accessories )
  - Delete accessories for a chosen fan selection.
- **Quantity** ( **5**  Quantity )
  - Change the quantity of a chosen fan selection.
- **Tags & Notes** (  Tags & Notes )
  - Change or Add tags and notes for a chosen fan selection.
- **Submittals** (  Submittals )
  - View, Print or Save submittals for a chosen fan selection.
- **Resequence** (  Resequence )
  - Rearrange the order of the fans in your project to match a Fan Schedule.
- **Custom Part** (  Custom Part )
  - Using the button on the Project Details screen
    - This will allow you to add a part or accessory to a configured product (i.e. Purple Polka dot Epoxy Paint)
    - Just enter in your description, and choose List or Net Price
    - You will need to obtain a quote number from Sales or Customer Service in order to use this feature.
- **Order** (  Order )
  - Submit an Order for processing.
    - Once you submit an order you can no longer make any changes to a project
- **Freight Quote** (  Freight Quote )
  - Most projects will calculate an instant quote when you enter you shipping information.
  - If the freight is calculated the freight quote will automatically update when you make changes to a project.
  - Some projects will still need to get a Custom Freight Quote from our shipping department, however the program is set up to know when this is necessary.
    - Our Shipping Department will enter a quote within 2 hours of the request on normal business days.

## - Custom Quote ( Custom Quote )

- Using the button on the Projects screen you can add an entire product to your project.
  - If you have a Part Number you can enter it in on this screen
  - If you don't have a Part Number just enter the quantity and you can enter a description for that product.
  - You have the choice either List Price or Net Price, depending on the quote
  - You will need to obtain a quote number from Sales or Customer Service in order to use this feature.

## - Bid Price ( Bid Price )

- Allows you to create a bid using the Gross Profit Margin of an entire project for a Bid, or you can enter bid prices for each product in a project.

## - Print Project ( Print Project )

- View, Print or Save a Project Summary.
  - **ALL Pop-up blockers must be turned OFF to export or print this report.**

## - Print Bid ( Print Bid )

- Create a report that only shows the bid price you set on the project. This report will not show pricing for individual parts, only the Project Bid Total you set or the Bid Price per fan that you set.
  - **ALL Pop-up blockers must be turned OFF to export or print this report.**

## - Fan Schedule ( Fan Sched. )

- Create a Fan Schedule of your project.
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## - Fan List ( Fan List )

- Create a report for a project that shows the fans on the project with model, motor and performance information for each fan.
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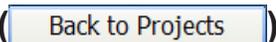
## - Recalculate Price ( Recalculate Price )

- Use this feature to update your pricing to the most current price.
  - Pricing in Optimizer is good for 60 days based on the pricing date indicated on the project. When ordering a project Optimizer will notify you that the pricing is over 60 days old.
  - **When you Recalculate Price you cannot undo any pricing changes.**

## 6. Printing a Report

- For the Project Summary, Bid Summary, Fan List, Fan Schedule and Project List reports we use a 3rd party report building software, which has its own navigation bar that you must use to correctly print and save the file.
- **For these reports to work correctly you must allow pop-ups for [www.optisizer.com](http://www.optisizer.com).**  
*Remember to change the pop-up settings in your browser tools and any extra toolbars you may have running (i.e. Google Toolbar)*

### Navigation:

- **Export** ()
  - Export allows you to save your project in different file formats (.pdf, .doc, .xls)
- **Print** ()
  - This will create a PDF document for you to print.
- **Back** ()
  - This is the ONLY time in the program when you cannot use your browsers back button. Be sure to use the Back to Projects button, which will take you back to your projects list screen.

## 7. Add Stock # Add Stock#

- With the Add a Stock # feature you have the option to enter a stock # if you know what you need, search for a stock # based on the information you know, or use a selection wizard to find the stock #.

### - Enter a Stock/Part Number

- After clicking the Add Stock # link, you'll see a list of options. If you know the stock number, select "Enter a Stock/Part Number", then click next. Enter the part number(s) and quantity/quantities. If you know the tag number, you can enter it now. If not, it is not required. Also, If you know the wiring, you can type it in here as well. If you don't know it, after you click submit you will see the options in a drop down menu. When you are ready and have entered all of the part numbers, click submit. You will see a page with the total net price of your order and a list of the products you just added.

### - Add a Stock # Wizard

- Using the Wizard, first you should choose the category that you need. Then, select the appropriate criteria for your project. A list will be returned with the options that will work for your needs.