



Important Bulletin E-Select Data Storage Clean up

I would like to thank everyone's efforts to use and better our online product selection program, E-Select. With the increased traffic to the site we have identified some areas of concern, mainly with data storage. Though we like to think that E-Select has infinite storage capabilities, the reality is that there is a limit to how much information we can store.

Starting on Monday (8-15-2022) E-Select will be removing expired or dead quotes.

This clean-up effects the quoting data not the project itself. All projects are going to remain unchanged so that if you need to recreate a quote that was removed you will still have access to the project it was created from.

The quotes that are being targeted are as follows:

- 1. All quotes with a creation date older than October 1, 2021
- 2. Any quote attached to a project that is 'dead', 'closed', or 'inactive' status
- 3. Any quote that is older than 180 days <u>without</u> any notation (see below) or have not been modified in the past 30 days
- 4. Any quote that is a 'test' or 'practice' quote

Steps to take:

• Add a note to the bottom of any quote that you would like to keep. Note section can be found below Pricing summary on any active quote.

Pricing Summary		(+)
Multiplier, Markup And Commissions	- Configured Products	+
Notes		<u> </u>
Included Notes		
	Description	Order
		\odot
H 4 0 F H		No items to display
Note Templates		
Туре		Description
\odot		\odot
H 4 0 F H		No items to display
All sales subject to terms of sales agreeme	nt	
Save Request Engineering Review C	roate Order Archive Conv Return	

• Hit the '+' button to add a note notifying that the quote is still active and any other important dates.

Notes	×
Note *	
Quote still active as of: 07/27/22 Project close expected: 10/01/22	
DisplayOrder	
1	
1	





Steps to take (Continued)

If you have any active quotes you can save an archived version so any agreed pricing is not lost. To do so select the 'Archive' button at the bottom of your quote in E-Select. This archived copy can be retrieved from the Project Documents > Project Information page in each project

Multiplier, Markup And Commissions - Configured Products						
Notes						
All sales subject to terms of sales agreement						
B Save	Request Engineering Review	Create Order	Archive Copy	Return		

Another option is to create an order and submit a PO (if applicable).

Project Maintenance

Finally in order to keep your project listing clean and up to date, you can set any dead or closed projects to inactive. This way it will not show on your main project page.

This can be done be unchecking the Status Box > Project Status > Project Information in each project •

Project Information					
General Project Information	-	Project Status and Type	-	Other Information	-
* Required Fields		Status: 🗹 Active Template: 🗌 Yes		Selection Defaults	
Created On: 7/14/2022				Fluid Type:	

This will hide the project so that it will not be on your main project listings page and can be found on your main project listings> My Projects tab.



If there are any questions or comments about the above bulletin please contact you Regional Sales Manager or:

AE-Air Support Team

E: Sales@AE-Air.com

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