

# **AND HELLO** TO THE NEW EVOLUTION IN METAL TRIM ORDERING

# FORMA STEEL

**DEVO** USER**GUIDE** 



# **USER GUIDE |** 1. THE BASICS





# **CUSTOMER COMMITMENT FOR SOFTWARE USE**

Please watch all (4) How To Videos for the EVO Software, and keep this guide handy as you navigate through the new software for the first few times - there are multiple steps designed to maintainconsistency and accuracy from initial customer trim design through to shop production.



## **SUBMITTING ORDERS**

All orders that are Submitted (When you click SUBMIT ORDER) are final and will be sent to production. All orders are charged at the current dealer rate. By clicking SUBMIT ORDER you are agreeing to the terms and conditions that apply when placing any order with Forma Steel.



# MONITORING COMPANY EVO ACCESS

Each customer will be allocated only (1) EVO Account. Should you share your account with your team, it is your responsibility to monitor orders, maintain custom trims and ensure any team members are fully trained before they use the EVO Trim Software.

# **USER GUIDE |** 1. THE BASICS



# **LEARNING THE EVO BASICS**

Please watch these (4) quick videos on drawing your trims, utilizing the tools, customizing your trims and working with those saved trims

### LEARNING THE BASICS

Get an overview of the Basic Tools & Configurations

# Control Control

### **USING THE TOOLS**

Overview of the Menu & Toolbar: Adjust Measurements, Colours & Angles.



### **CUSTOMIZING YOUR PROFILES**

With Access to Your Profiles, Learn how to Customize & Save New



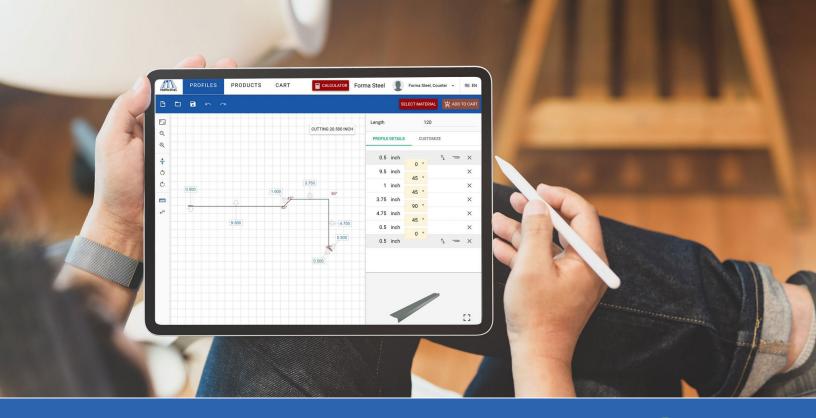
### WORKING WITH SAVED PROFILES

Load Saved Profiles From Your Custom Library For Faster In-Field Ordering



For easy access to all How To Videos:

www.formasteel.ca/welcome-to-evo/

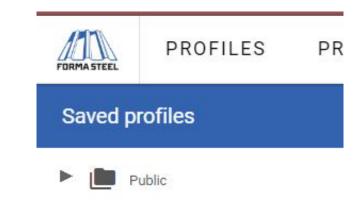


# **USER GUIDE |** 2. CREATING TRIMS

# **EVO**

## **SET UP CUSTOMER FOLDERS**

Set up a "**CUSTOMER TRIM FOLDER**" first, each user can then have their own folders and subfolders.



User - Trims

Quotes

Orders

## **ORGANIZING TRIMS (PROFILES)**

Set up a "**DESTINATION**" folder for new trim projects or customers. This organization will make finding existing trims much easier.



*Note:* There are multiple options for initial set-up of folders, please talk to your Forma Steel Rep to decide which structure is best for you and your team.



# **SAVING TRIMS AS PROFILES**

When a new trim is created, or an existing trim is modified, they should be saved as a "**PROFILE**", this will allow them to be reordered while being able to change things like colour, length etc.

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<b></b>	( )								IG 4.000 INCH	Length	
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+											
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	90°							SAVE			
			0.500								

# **NAMING TRIMS (PROFILES)**

Define trim specifics in file name. Example: Large J-Channel - Doug's Exteriors

*Important Practice:* If trim requires an <u>open hem or slope requirements</u> ensure to specify in file name. Unless slope is noted in the drawing name, standard angles will be utilized.

Save p	Cutting 4.000 inch Bendings 4	
2.6	Name *	
	<sup>00</sup> 1.000 0.500 ▼ □ User - Trims	
	🗅 🗌 Quotes	
	Public	
		SAVE

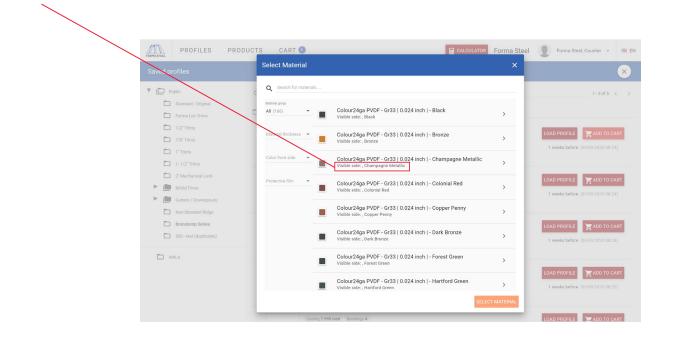
# **ORDERING TRIMS (PROFILES)**

Select your previously saved trims (profiles) from your saved folders on the left. Once you've located a trim, click "ADD TO CART".

PROFILES PI	RODUCTS CART	LATOR Forma Steel Forma Steel, Counter 🗸
Saved profiles		
Public     Standard - Original     Forma Loc Trims	Q Profile search	1-5d5 <
1/2" Trims     7/8" Trims     1/1/2" Trims     1/1/2" Trims	Cutting 8.352 inch Bendings 5	LOAD PROFILE
2' Mechanical Look  Image: Im	Cutting 9.852 inch Bendings 5	LOAD PROFILE FADD TO CA
Wrenstown Series     Soo - test (duplicates)     WRLA	Cutting 11.976 inch Bendings 5 - L	LOAD PROFILE
L Wida	Cutting 12 039 Inch Bendings 5 Board & Batten	LOAD PROFILE ADD TO CA

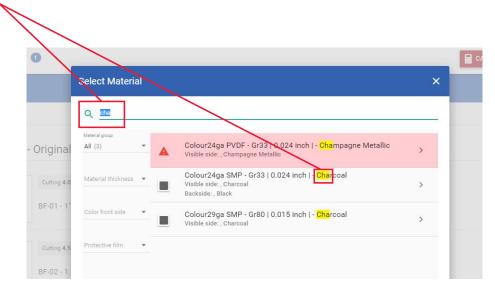
# **SELECT THE MATERIAL FOR THE TRIM (PROFILE)**

*Important Practice:* When you Select Material make note about what colour will be on the visible side of the trim (profile). Many of our 24gauge finishes have colour on both sides of the steel.



# **USER GUIDE |** 3. ORDERING TRIMS

*Note:* If certain materials seem to not be available when selecting material, continue to type into the search bar what material you are looking for to find the one you need.



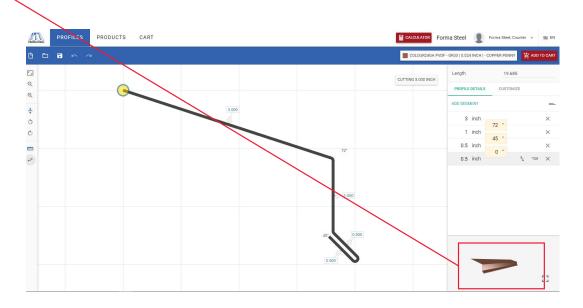
# **CONFIRM ALL TRIM (PROFILE) DETAILS**

- Verify trim name is correct (and that open hem or slope requirements are included, if applicable)
- Specify Quantity
- Specify Length (Only if you require custom lengths)

PORMASTEEL	DDUCTS CART 🚺	CALCULATOR Forma Steel Forma Steel, Counter - EN
Seved profiles	Colour24ga PVDF - Gr23 (0.024 mch) - Champagne Metallic Cating & 252 lineh Bendings 5 Same My Trime-Doug(s) Exteriore: 26/30	
U WRLA	Cutting 12.339 Inch Bendings 5 Board & Batten Cutting 7,995 Inch Bendings 4	LOAD PROFILE TADD TO CART

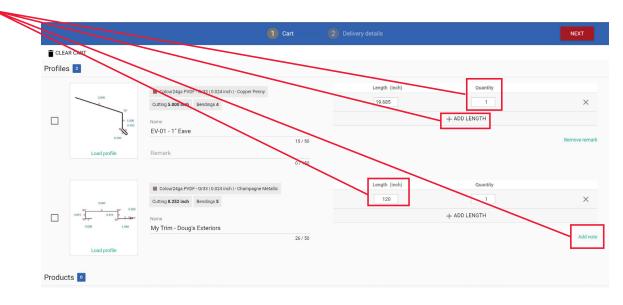


To confirm colour is on correct side of trim, you can at any time "**LOAD PROFILE**" to view in more detail. Make use of the 3D render to accurately confirm visible colour side of trim,



## **FINALIZING YOUR ORDER**

Once you have added all trims (profiles) to your cart, click **"CART"** on the top menu bar to review your entire order. On review of your cart, you are able to adjust profile dimensions and quantities, add profile notes, and add custom lengths prior to submitting.





# **DELIVERY DETAILS**

**For Project:** Please list Lumber Yard or Contractor / Project Name / PO # **Example: Doug's Lumber / New Retail Storefront / 20-2526 For Shipping Type:** <u>Note in the project name if order is for Pick Up as well as here.</u>

PROFILES	PRODUCTS CART 1			Forma Steel	Forma Steel, Counter ~	🞫 EN
BACK		Cart	2 Delivery details			
Overview Position 1	Address					
Quantity of parts 1 Maximum length 19:685 inch	Metal Store A Joe Metal 1234 Metal Road West CA-12234 Metaltown					
	Comments on address					0/150
	Delivery			🚽 🔽 Shippi	ng address equivalent to billing a	address
	Project* Doug's Lumber / New Ref	ail Storefront / 20-2526				
	Comments on this order					0 / 150

# **SUBMIT ORDER**

Once you have reviewed your entire order and included delivery details, click SUBMIT ORDER. Your order will be received by our Sales Team and submitted to Production per the customers exact order details. Submitted orders will be charged at the current Dealer Pricing Rate.

PROFILES	PRODUCTS CART 1			Forma Steel	Forma Steel, Counter 👻	-
васк		🔗 Cart — 2 D	elivery details			
Oveniew Position 1 Quantity of part 1 Maximum length 19145 inch	Address Metal Store A Joe Metal 1234 Metal Road West					
	CA-12234 Metaltown Comments on address Shipping the* Delivery			Shipt	ping address equivalent to billing	0 / 15
	Project* New Retail Storefront Project					
	Create an offer: (in doing so, no o and order the offer later)	rder is made; you can change	Completion date* 💼 03-12-2020	i		0/1

# **ORDER CONFIRMATION**

After your order has been submitted you will receive a few documents via email which will include a Cover Sheet, Sales Confirmation & Detail Views from **evo@formasteel.ca** 

