

SAY GOODBYE TO ORDERING TRIMS THE OLD WAY



AND HELLO TO THE NEW EVOLUTION IN METAL TRIM ORDERING



USERGUIDE



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 maintain consistency 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.

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



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



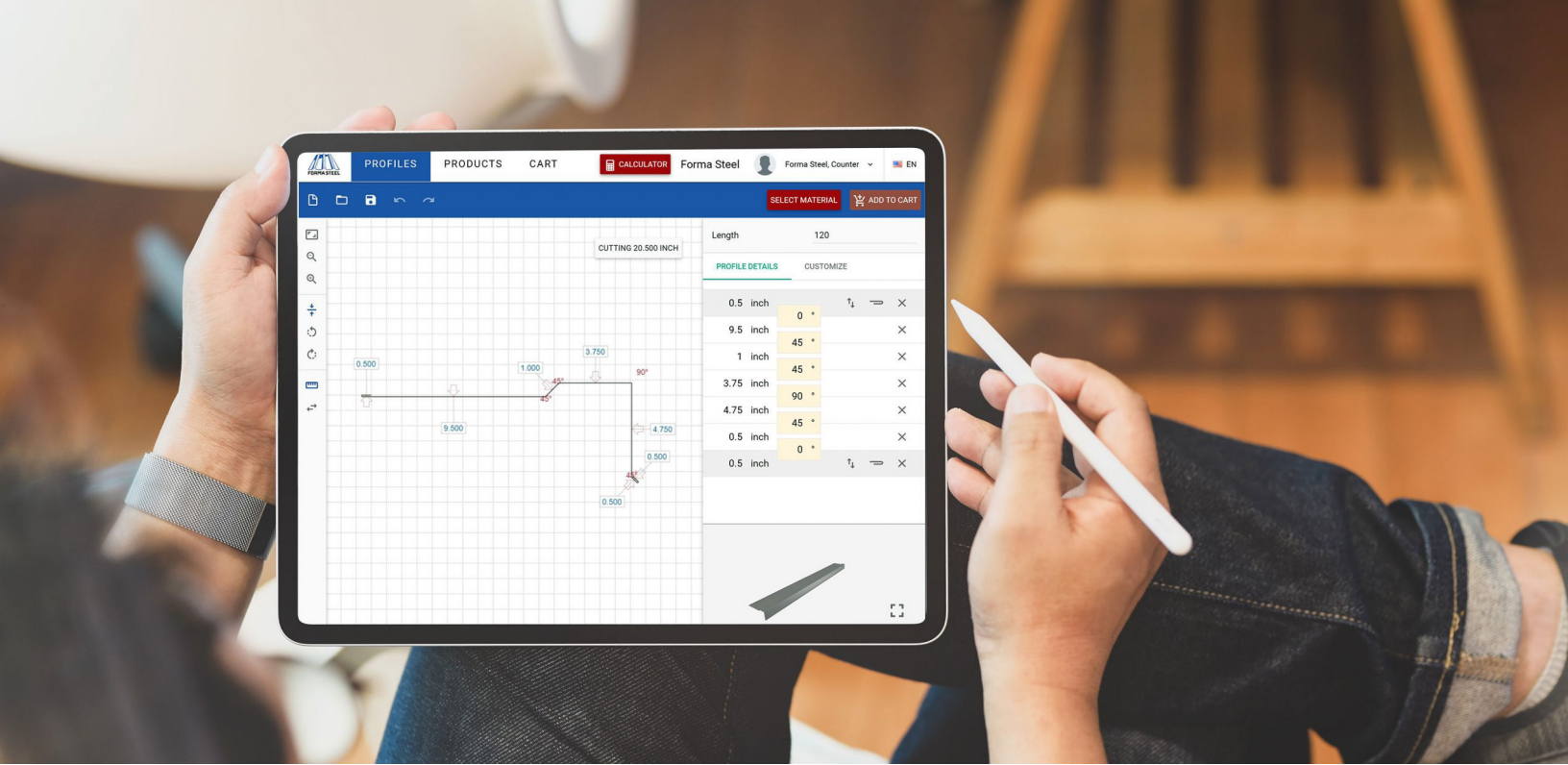
WORKING WITH SAVED PROFILES

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/

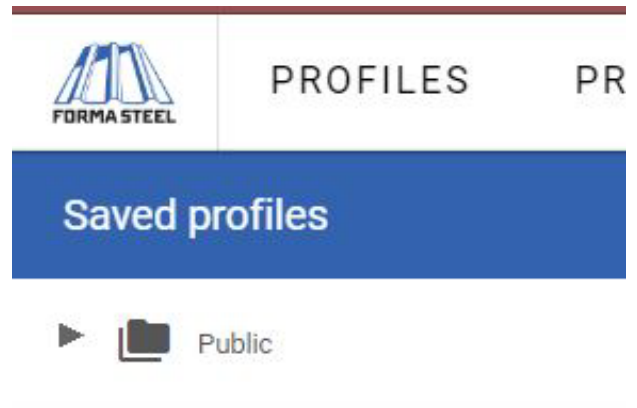


USER GUIDE | 2. CREATING TRIMS



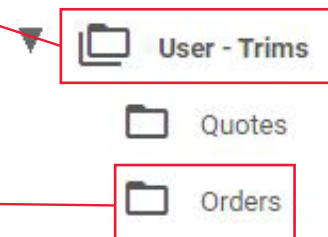
SET UP CUSTOMER FOLDERS

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



ORGANIZING TRIMS (PROFILES)

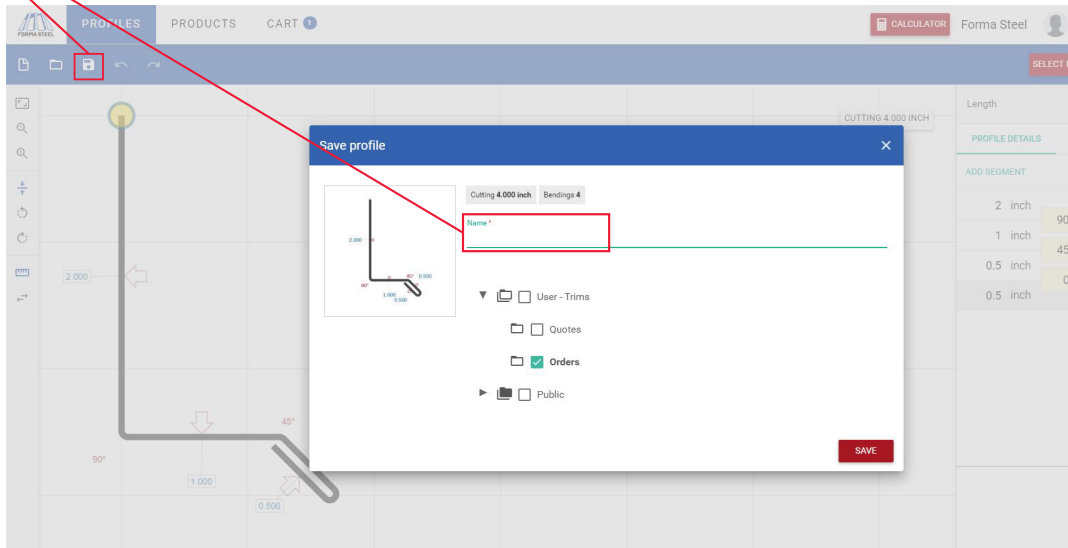
Set up a “DESTINATION” folder for new trim projects or customers. This organization will make finding existing trims much easier.



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

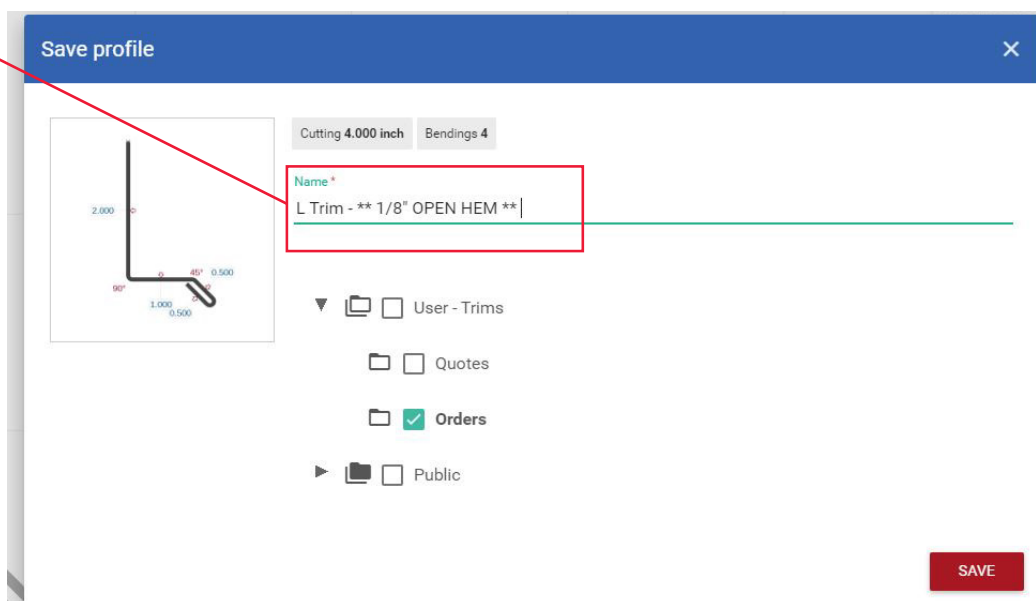
When a new trim is created, or an existing trim is modified, they should be saved as a **“PROFILE”**, this will allow them to be reordered while being able to change things like colour, length etc.



NAMING TRIMS (PROFILES)

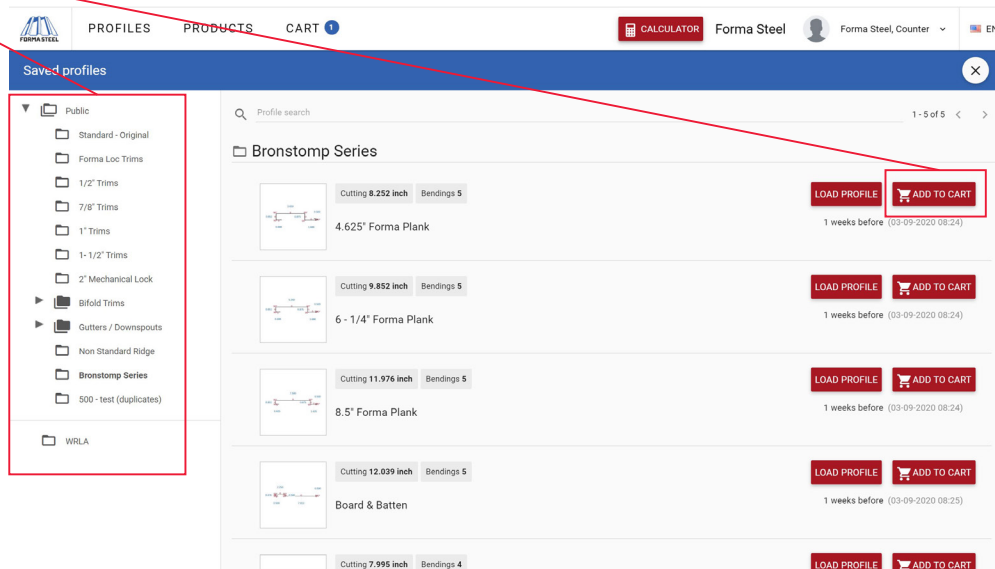
Define trim specifics in file name. Example: Large J-Channel - Doug’s Exteriors

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



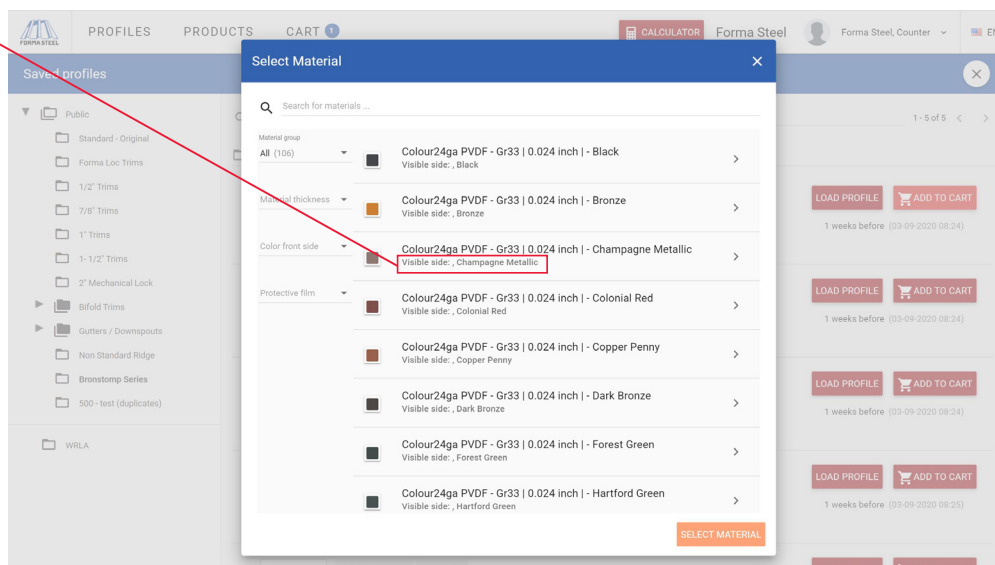
ORDERING TRIMS (PROFILES)

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

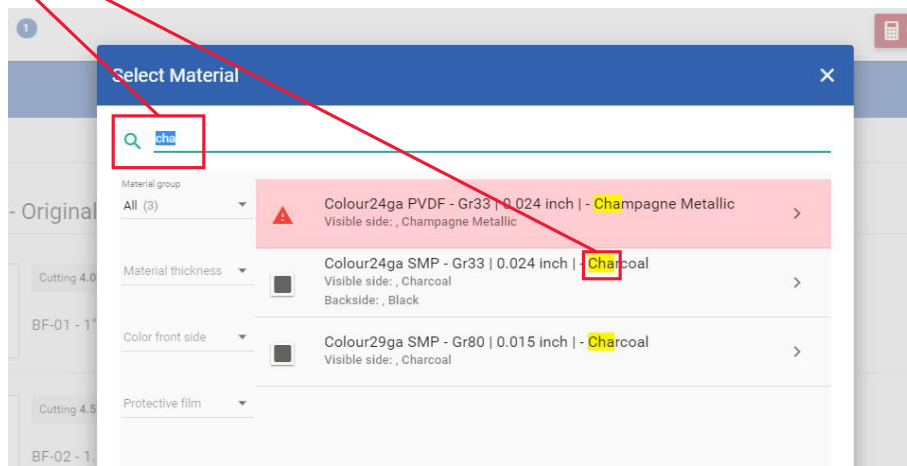


SELECT THE MATERIAL FOR THE TRIM (PROFILE)

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.

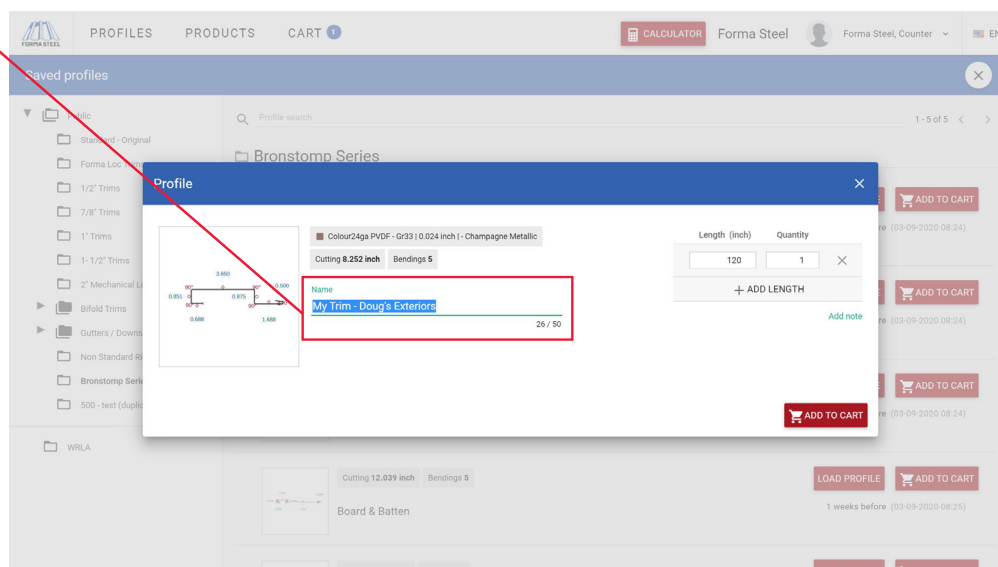


Note: If certain materials seem to not be available when selecting material, continue to type into the search bar what material you are looking for to find the one you need.



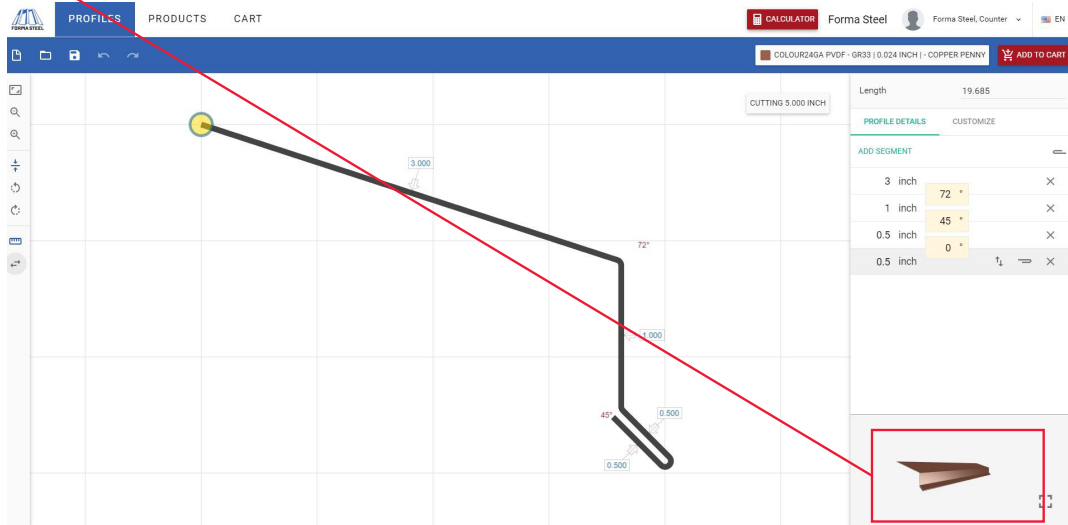
CONFIRM ALL TRIM (PROFILE) DETAILS

- 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)



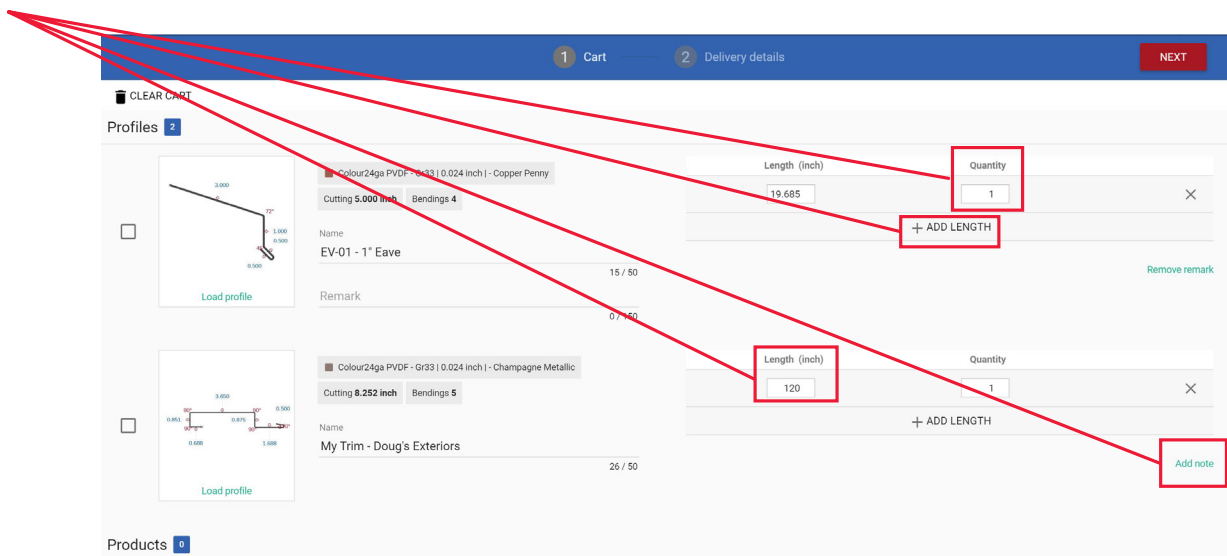
CONFIRM VISIBLE COLOUR SIDE OF MATERIAL

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: Note in the project name if order is for Pick Up as well as here.

Overview

Position: 1
Quantity of parts: 1
Maximum length: 10' x 85 inch

Address

Metal Store A
Joe Metal
1234 Metal Road West
CA-12234 Metalltown

Comments on address 0 / 150

Shipping type*
Delivery Shipping address equivalent to billing address

Project*
Doug's Lumber / New Retail 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.

Overview

Position: 1
Quantity of parts: 1
Maximum length: 10' x 85 inch

Address

Metal Store A
Joe Metal
1234 Metal Road West
CA-12234 Metalltown

Comments on address 0 / 150

Shipping type*
Delivery Shipping address equivalent to billing address

Project*
New Retail Storefront Project

Comments on this order 0 / 150

Create an offer: (In doing so, no order is made, you can change and order the offer later)

Completion date: 03-12-2020

REQUEST OFFER **SUBMIT ORDER**

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

