

Go Digital!

One dealer's odyssey to the New World of technology.

I'm not an early adopter of technology. In fact, many associates have had digital cameras and electronic calendars for years, while I stayed analog. Often these devices advance in design as they drop in price. But in 2005, I went digital in a big way on three pieces of business equipment: PDA/calendar, laser measuring and computerized bids on a Tablet PC.

After about a year of experience with these tools (They sure aren't toys!) you might be interested in how digital equipment can help in the window coverings business. The purpose of this article is to share some ideas and experiences for window coverings professionals wanting to integrate new technology into their businesses.

PDA/PHONE/CAMERA

My first toe in the digital waters was to replace my paper and pencil calendar with an electronic PDA. It seems simple enough, but to trust your appointments to a device running on batteries takes an adjustment.

To ease the concern, the PDA is synchronized with Outlook on my computer. The

What I'm using for a PDA is a Pocket PC XV6600 marketed by Verizon Wireless. In addition to the common PDA functions, this device is also my cell phone and digital camera. I've found it very convenient to have all of these tools always at hand. A padded carrying case, found at a camera shop, attaches to my belt. If you want to take a picture of a window, while on site, you have your camera right there and it shoots video as well. An SD memory card stores data and photos.

This all-in-one PDA has been a big help when scheduling appointments and presenting a professional image to clients.

MEASURING BY LASER

The second digital tool was a laser measuring device to replace my tape measure for inside measures. The transition to digital measuring was even more challenging than going to the PDA. It was hard to start trusting the measurement of expensive window coverings to a laser meter.

During the digital transition I measured with the laser and with a tape measure until I gained confidence in the digital answer and how I was doing the measuring. Once over that hump I found that measuring with a laser is much faster and more accurate than using a measuring tape. A laser meter is especially helpful on wide windows and when measuring skylights.

The unit I'm using is Leica Disto A5 and has accuracy in the range of (+ or -) 1/16-inch, which is required in this industry. The A5 sends a

bright laser light down to the other side of the window, so you can clearly see exactly where you are measuring. I've found the laser to be fast and accurate. The only downside is that it reads out in 1/16 of an inch, and our industry is in 1/8 inch so you have to do that conversion, which is helped by a quick reference list I have pasted on the face of the A5. It comes with a nice case that attaches to your belt.

Plan on spending around \$400 for a high-quality laser measuring tool. You'll find it is money well spent. It saves a lot of time and customers appreciate the use of technology on their project.

COMPUTER BIDDING

The process of creating and producing accurate and professional window covering bids is time consuming and filled with opportunities for costly errors. For more than five years I used a laptop computer on the job site with a spreadsheet I created. It did all the multiplication and adding and produced a nice bid report, but I had to feed it all the list prices and do a lot of data entry.

I always had my eyes open for a better system and at the 2005 International Window Coverings Expo I discovered Solatech's software and hardware system made specifically to produce window coverings bids. After considerable research and seeing an online, interactive demonstration, I made the investment in its package. The transition to this digital system was the most challenging of the three purchases and I was glad I'd been getting used to the digital world through the PDA and laser meter. When you change from manually generated bids to this computer-based system, it takes effort that shouldn't be underestimated. There's both a financial and time investment in this conversion.

The Solatech package includes its own software and a really neat Tablet PC by



sync is automatic and quick, keeping all your data securely backed-up. I've had a couple of crashes, but the restore was complete and easy.

Motion Computing. I decided to purchase the hardware and software as a package to keep all support with one vendor. The company offers a lease on the hardware, but I purchased the equipment outright. Solatech maintains a database of more than a dozen window coverings manufacturers' product specifications and retail pricing. This information is constantly changing and your annual license (\$480 per year on the Basic package) provides phone/e-mail technical support, frequent product updates and software enhancements via the Internet.

The software package I have is the Basic system and there are many other levels of enhanced software available. I can't begin to fully describe all the features of the software. Even the Basic package is very robust. One upgrade the company offers is to have your laser meter automatically send measurements to the software, window by window. I'm satisfied with keying in the measurements on the touch screen as I walk around a client's house.

THE HARDWARE

A Tablet PC is a small, lightweight computer running a Windows operating system. Typically, the software would run on either Motion Computing's LS1600 platform (the size of a sheet of paper), or a more compact LS800. Although the screen is smaller, I chose the LS800, because it is lighter and easier to handle on the job site. Data entry is accomplished with the detachable keyboard or touch keypad that is on the screen. The flat screen is sensitive only to the digital pen, which is tethered to the Tablet.

The Tablet is powered by batteries, car charger or wall charger. Battery life is about two hours, so a second battery might be useful. I purchased a bump case for the Tablet, that helps protect the computer, but it also provides an essential carrying handle, shoulder strap and built-in stand.

The Tablet can get very hot, even too hot to handle without the bump case, so I'd consider the bump case (\$80) as absolutely essential. There's no chassis fan on the LS800, so cooling is by convection. There's some chatter on blogs about the overheating issue, and it seems to be under control with recent changes in the bios by Motion Computing,

which were sent to me via the Internet.

A tutorial will train you on the amazing features of the Tablet PC. I've hardly scratched the surface—such as hand writing recognition, voice recognition, USB camera input, which allows you to imbed still photos and streaming video into Microsoft One Note program (included). When doing your initial walk-through at the customer's site you can open One Note and write notes to yourself, draw sketches or take photos for later reference. You can minimize the One Note pad and switch back and forth between Solatech and One Note, while preparing the bid.

THE SOFTWARE

The Solatech software is everything in this package. The complexities of window coverings product rules and limitations are built-in to the software, minimizing the learning curve for new employees and the chance for errors.

I have discovered a few mistakes and omissions, which have been corrected. There is always the chance for software or salesperson errors in a system like this, but errors are much more likely on manually produced bids. Training and practice are essential for success.

THE SET-UP AND START-UP

Using a printed manual and built-in Solatech tutorial, you are walked through the steps required to prepare the system to produce bids. You provide the discounts per product and other information including measurement and shipping charges and sales tax rates. You have to allow time to set-up your discounts and learn how the system works, before taking the Tablet into the field. This took place over about a month for me.

Frequent Webinars help you upgrade your skills on the system.

It takes practice to learn how to produce a bid, compare products and print a proposal.

In the beginning, I had to force myself to use the Tablet instead of falling back to the old systems. I finally reached a tipping point when I enjoyed using the new system and was completely comfortable with it. Then I

never wanted to go back to the old ways.

The process of preparing a bid goes like this: With the Solatech software running and your customer data entered ahead of time, you use the touch pen to select the product manufacturer, specific product and style, then enter room location, sizes and select any other options desired. Click "add" and it goes on the list. There's a batch entry mode for faster input. Adjusting a line item is easy using the "update" button. All the pricing is done for you instantly.

I remember starting to prepare a bid at a job with the new Tablet and then getting to a point where I was stuck. At that point in the learning process, I didn't say anything to the customer, but just went back to the manual process to complete that bid. Later I discovered my problem on the system, so I wouldn't make that mistake again. That happened a few more times, until I was easily using the Tablet computer software to do all bids. Now I love using it. It even makes the job a lot more enjoyable.

For vendors and products that are not in the system's database, you can manually enter that information and include those items on the automated proposal, but you will have to feed in the prices. An example would be a line item for "Travel time."

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PORTABLE PRINTING AND OTHER CONSIDERATIONS

The software has the option to produce a printed bid or a print image of the bid on the Tablet's screen. When the customer is still in the decision phase, I often produce the bid on the screen and show it to the customer. Once the bid is final I convert the Proposal to an Order and have the customer review the invoice on the screen and then electronically sign the Tablet's screen. This becomes my electronic copy and then I print a hardcopy for the customer.

The printer is really amazing. Its Pentax's Pocket Jet 3 model and is about the size of a three-hole punch. It uses thermal paper, so there are no ink cartridges to buy. Its batteries print up to 100 pages between power-ups via the wall plug. The Tablet wirelessly beams the print image to a port on the side of the printer, so you don't even need a cable to the computer or any drivers to run that printer. Drivers are a nuisance!

There's an SD memory card port in the

LS800 Tablet, so I can take the SD card from my PDA/Phone/Camera and plug it into the Tablet. The card is instantly recognized and you can show pictures of window coverings on the Tablet's generous screen. You could even build an entire electronic photo album on an SD card and have it available to show on the Tablet.

The LS800 does not have a CD-ROM drive for back-ups. Instead I take advantage of the wireless high-speed Internet running in my office. A consultant set up a system that allows me to drag data files to a folder on my Tablet's desktop, that is also on my office PC's desktop. This copies the data to my main PC via the Internet hub and then I back-up the files from that PC.

When I'm in the office I find it convenient to have the Tablet PC running on my desk to handle phone bids. The system really makes fast work of the calculations and is especially useful when bidding more complex products that have a variety of options.

SETS YOU APART

Customers are fascinated by this whole process of preparing a bid on a touch screen computer and quickly printing out the bid on the wireless printer. It can't help but set you apart from your competitors and establish trust and confidence in you as a seasoned provider of window coverings.

These automation tools are really worth the investment. It makes the job easier, quicker, even fun! It improves accuracy and boosts sales.

I hope this overview article has given you some ideas on how you can go digital, too. ●

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