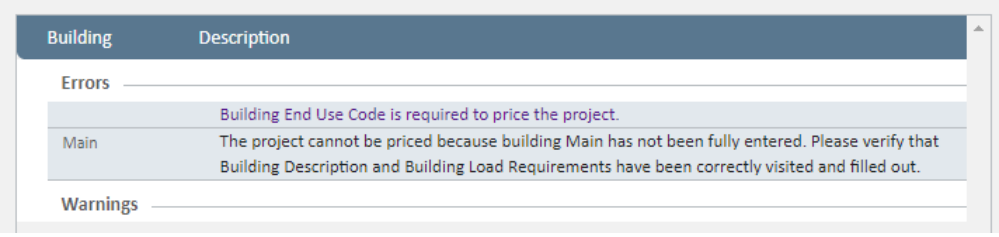
August 2021

Making the Most of the Task List in eQuote

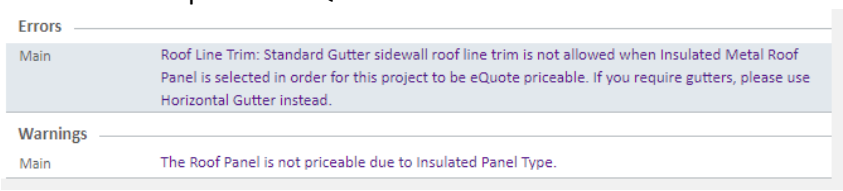
If you have been using eQuote for long at all, you are sure to have encountered the Task List with its list of warnings of which to be aware and errors to correct. Following are some tips to effectively use it.

1. Access the Tasklist by clicking the button with the title “Task List” near the right end of the eQuote taskbar. The color of the button will vary based on whether there are any warnings or errors. If the button is red there is at least one error included. If the button is yellow there are no errors but at least one warning. When there are neither errors or warnings, the button will be the normal background color. The number of items listed is shown in parantheses.

2. Once the Task List opens, you can observe the Errors at the top of the list with Warnings below. The building name (if applicable) is listed on the left side. The rule of thumb is that Errors have to be corrected because the input is incorrect or incomplete, while Warnings may require you to take action or just inform you that some items will not be priced. For example, if you create a new project from the Project Manager but leave without filling anything else out, when you come back to the project later, you may have a few reminders like this:



3. The Task List is populated by validation logic that runs as you save or navigate to another screen with the “Next” button or just by clicking away. Any broken rules will generate a warning to inform you or errors that need to be corrected before pricing or moving forward with the project. On screen validation helps guide your input on a specific screen, but the Task List helps with cross-screen validation where input may be contradictory or just indicate the need to double check that the desired options were chosen. For example, after switching the Roof Panel to Insulated Metal Panel, the Task List will remind you to switch to Horizontal Gutters and that the Roof Panel won’t be priced in eQuote.

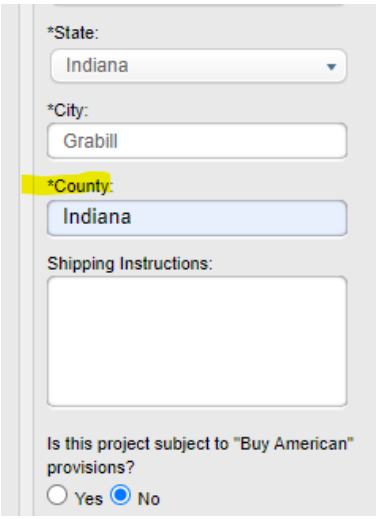
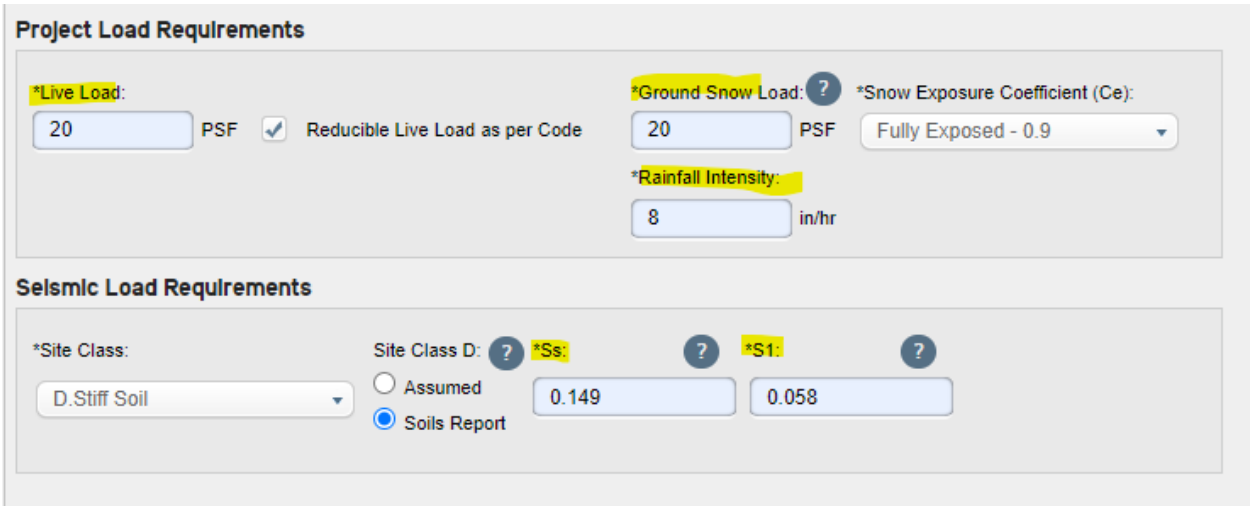


4. Most Task List items have a screen associated to them so you can click directly on the message in the Task List and eQuote will navigate to the screen where action is needed. If you have an informational item that you are trying to clear from the list, **click on the message** and let it take you to the impacted screen.

Browser Auto-Complete: Friend or Foe?

1. Most Internet browsers have the option to auto-complete fields for you. It can be very handy and timesaving to not have to type the same information over and over in the various websites you visit. The browser remembers previously entered information and suggests a value or list of values that you might want to use again. You will notice the same behavior when you visit eQuote. Since it is a website, your browser may offer values for addresses, loads, or other inputs.

2. Please keep in mind that if you use the browser's suggestions, it may very well change more than you intend. For example, when inputting the Buyer Address, the browser will attempt to put a State name in the County field in the Jobsite Address area! You can see the fields that are going to be populated via the browser with a blue background.



3. Finally, please remember that it's easy to mistake a browser suggestion as a suggestion coming from the website itself. For example, the loads below were populated from the browser based on previous entry. Our recommendation is always to locate the correct load information using a resource like https://hazards.atcouncil.org/ or by contacting your local code officials.