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SIMONTON®

WINDOWS & DOORS

AccuQuote

Quick Tips Training Guide

Table of Contents

Getting Started in Simonton Contractor AccuQuote

Step 1: Contractor Username and Password in AccuQuote.

- Please provide your Distributor a complete list of Names and Email Addresses for Contractor's employees needing access to AccuQuote

- Your Distributor will pass this information along o Simonton to have it incorporated into the AccuQuote system

- Simonton will add these accounts and provide user name(s) and temporary password(s)

- Once these account(s) have been added, Simonton will send the information to the Distributor

- All Contractors will get their approved usernames and temporary passwords from their Distributor

- If Contractor forgets their password, they will have the ability to be sent a temporary password based on contact information provided

Please Note: Processing of username(s) and assigning temporary passwords takes up to 2 Business Days

Step 2: Download AccuQuote From Website

- Have Contractor go to **www.simonton.com/AccuQuote**
- Download AccuQuote on their PC or Laptop

Step 3: Logging into Simonton AccuQuote for the first time

Once downloaded, Contractor should use assigned username and temporary password to enter Simonton AccuQuote.

Please Note: Contractor will be prompted to change their temporary password, after initial entry. It will be up to the Contractor to determine what they want their new password to be.

Initial Setup: User Logo and Preferences

Follow these instructions to add your company logo to the quote header and set your user preferences.

Adding Your Company Logo

Please make sure you have a saved copy of your company logo on your computer. The photo can be a JPEG, BMP, or PNG file but MUST be under 100 kb in size.
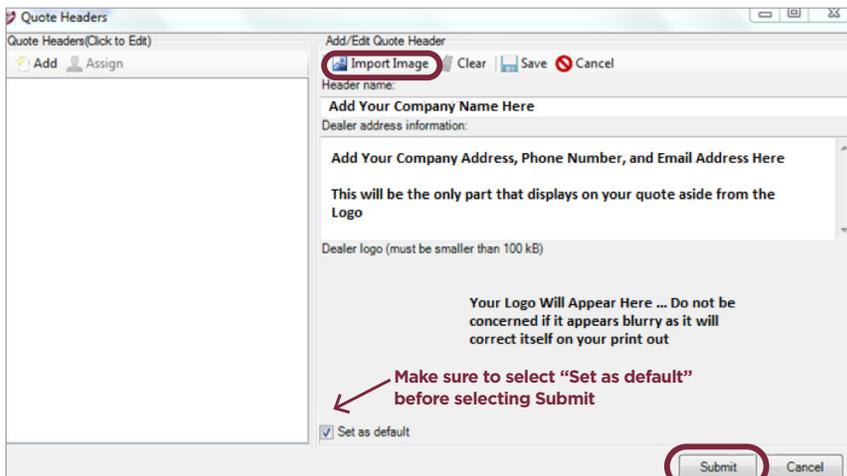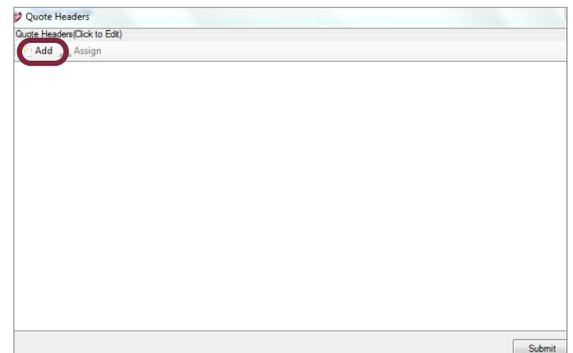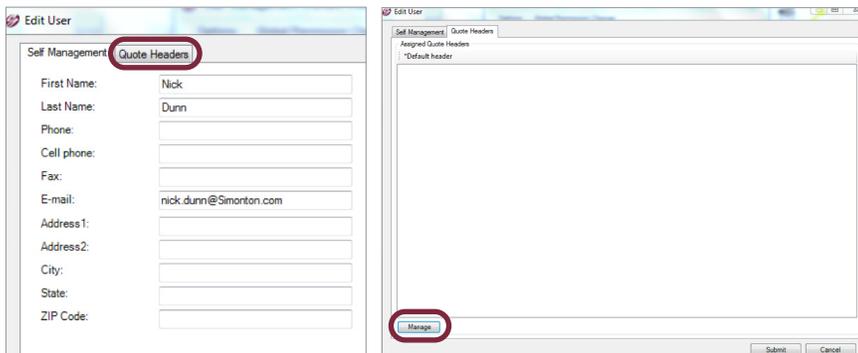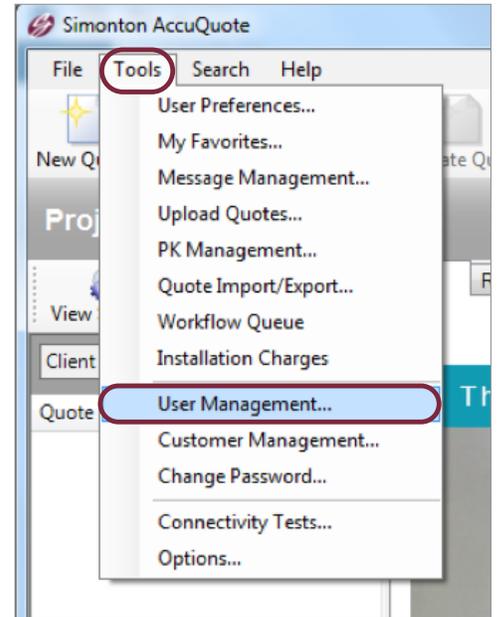
Step 1: Go to **Tools / User Management**

Step 2: Select the **Quote Headers** tab and click **Manage** in the bottom left corner.

Step 3: Click **Add** and select **Import Image** as shown below

Step 4: Make sure to select **Set as default** before selecting **Submit**

Step 5: Click **Submit** again

You are now complete and can select the **x** to exit

YOU ARE NOT DONE YET. CLICK SUBMIT AGAIN.
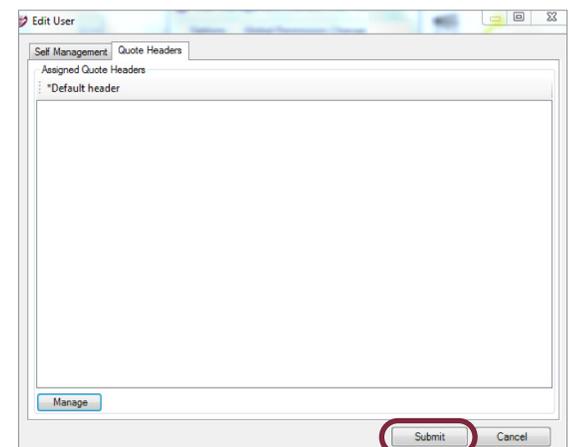
Setting Your User Preferences

Each individual user will need to set up their own preferences. Please make sure the entire company sets up their preferences the same.

**Step 1:** Go to **Tools / User Preferences**

Step 2: Select Preferences

Step 3: Here you see (3) tabs:

- **Product Knowledge:** Set Products defaults
  - Example: Extruded half screen, two air latches, color
- **Pricing:** Set your Global Margin & Tax Percentage
  - Only allows one tax %
- **Disclaimer:** Create your own to show on the bottom of your confirmations.

Step 4: Example of **Product Knowledge** Options

- **Pro Tip:** The more options you default, the less questions you will be asked when quoting each line.
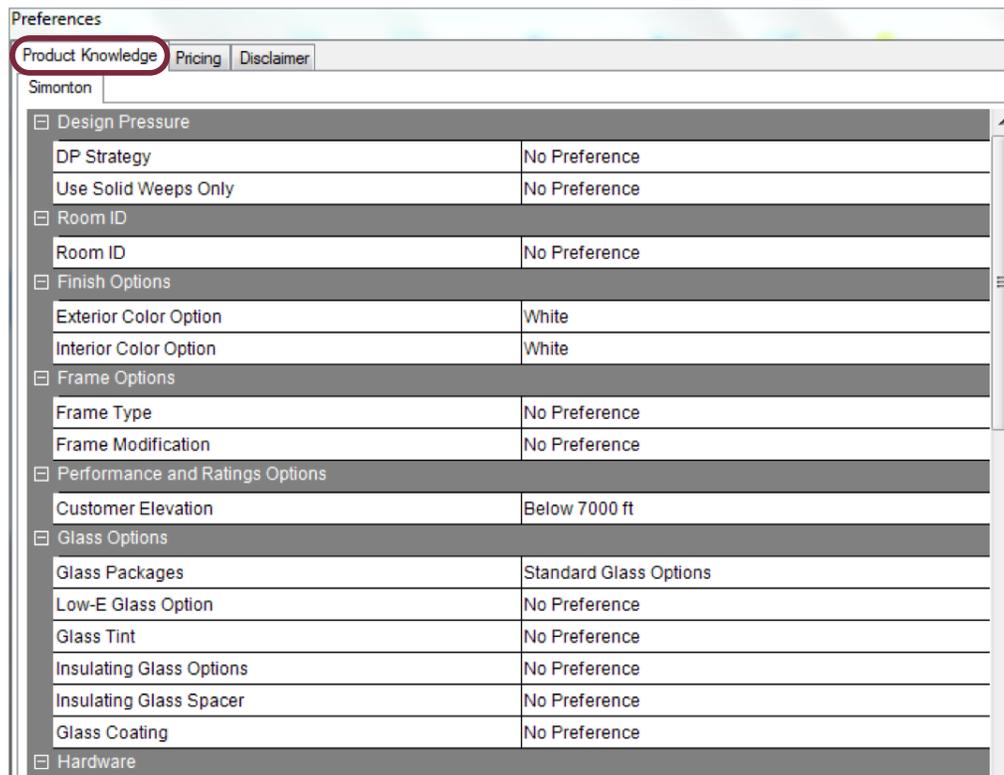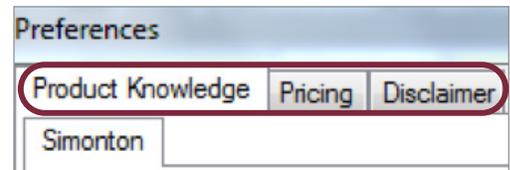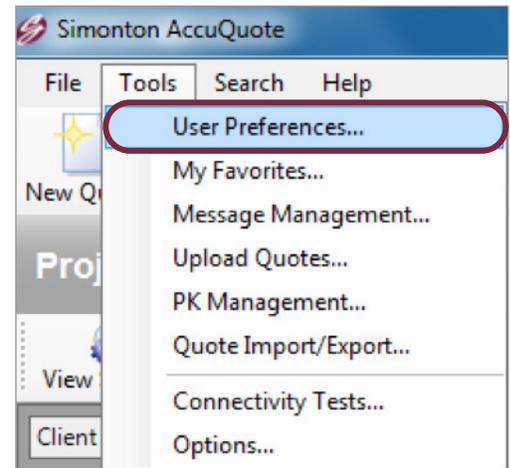
Step 5: Example of **Pricing** Options

- You can add a **Labor Amount**. This amount will automatically be applied PER line item.
- This same rule applies to **Freight Charges**

Step 6: Optional **Disclaimer**

- Add your **Disclaimer** here to show up on the bottom of your quotes/orders
  - Example = Contractor/Homeowner must sign off on all orders and provide a 50% down payment

To complete setting up your user preferences you must click **Save**.

You may need to **Log Off** and log back in to see your preferences added.

Quoting

Follow these instructions create new quotes and learn basic instructions on using AccuQuote.

Step 1:

Select **New Quote Icon**
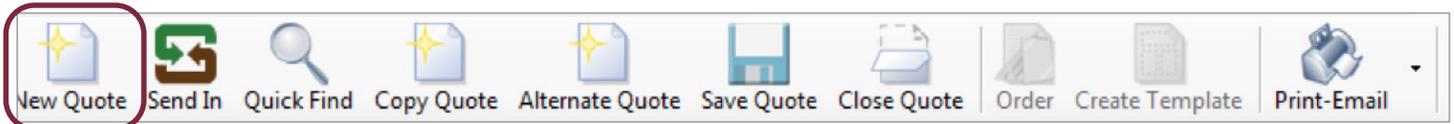
Step 2:

- Type the Homeowner Address under the **Quote Name** box

- Type the Homeowner Name under the **Project Name** box *(Name will save in drop down after saving first quote)*

- Then click **Accept**
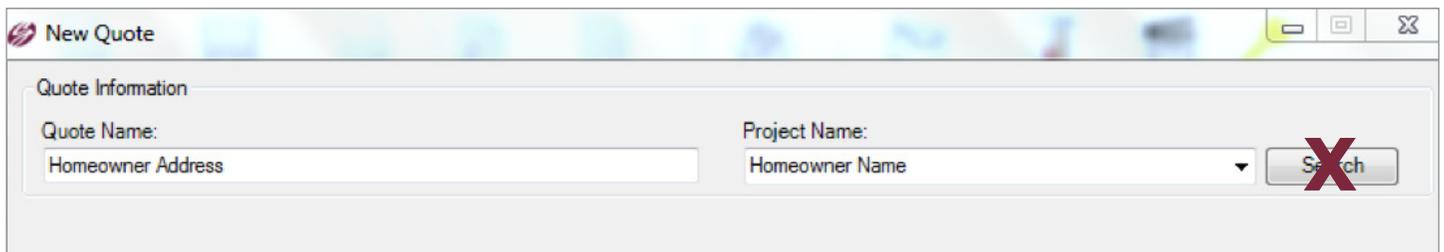
Step 3:

Your account should appear under the **Contractor / Job** drop down box as shown below

Example: 01 Training is the "Contractor"

Step 4:

Optional: Add in a new homeowner account

- Uncheck Use **Contractor/Job Address**

- Check **Create New Existing Customer Contact**

Step 5:

- Fill in Homeowner Info

- You can fill out as much Info as you would like but make sure to add your **Homeowner's Zip Code**
  - This will make sure you only see their regional Energy Star option and will eliminate the "ZIP CODE" question while quoting

- Next, click the **Billing** tab, click **Copy from Shipping**

Step 6:

- Select **Line Items** & confirm **Preferences** prior to quoting *(Including Product Knowledge and Pricing)*

- Save time by setting up User Preferences Prior to Quoting *(see page 5 / User Preferences)*

Step 7:
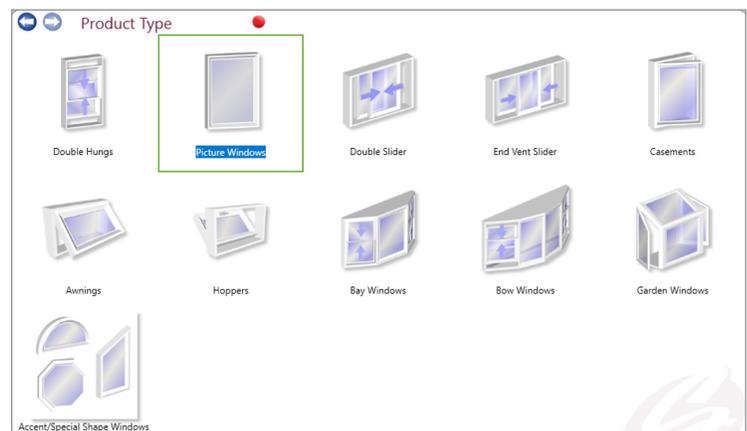
Click **New** to start quoting
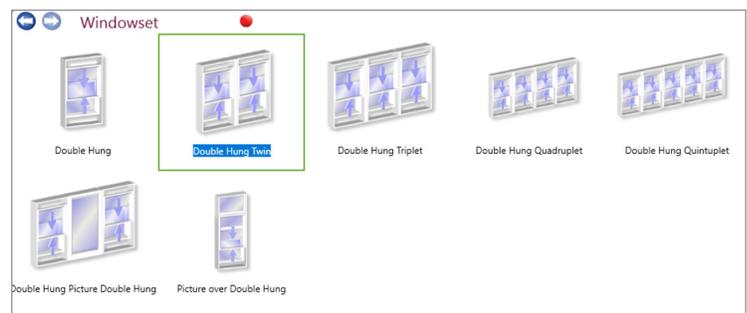
Step 8:

- Choose Your Product Selection by clicking the Windows or Doors icon

- Choose your Series by clicking the icon
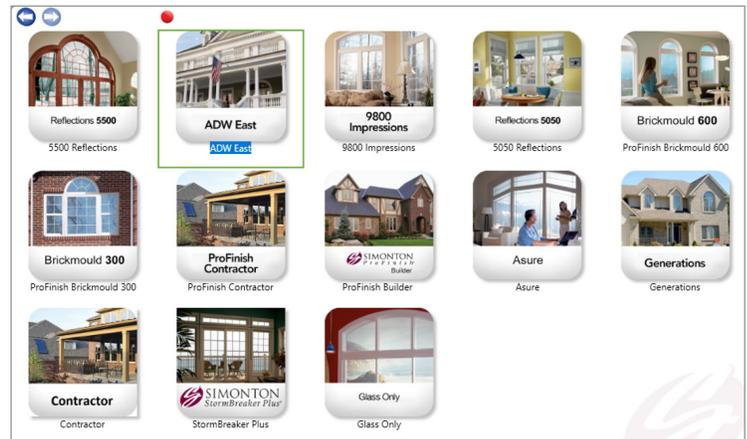
- Choose your Product Type by selecting the icon

- Choose your Window Set — Single, Twin, Triple or another preset configuration

Step 9:

- Select Your Product Type, Series and Style

- Work panel from Top to Bottom

- Let AccuQuote ask you the questions

  (all "Preferences" will be automatically applied)

Answer North to South

Step 10:

Once green checkmark appears, you can go change any other specs per line that were not asked during the product line configurator. At the top right portion of the quote, you can adjust the total quantity of the line item. To save, you have (3) options:

- Finish & Copy – Save current line item, creating a replica on next line

- Finish & New – Saves line and starts new configurator

- Finish & Exit – Saves line and brings back to quote home page

Step 11:

To change pricing after lines are quoted you have two options:

- Adjust Entire Quote - change **Gross Margin** and make sure to check **Apply to all** before selecting **Update Lines**

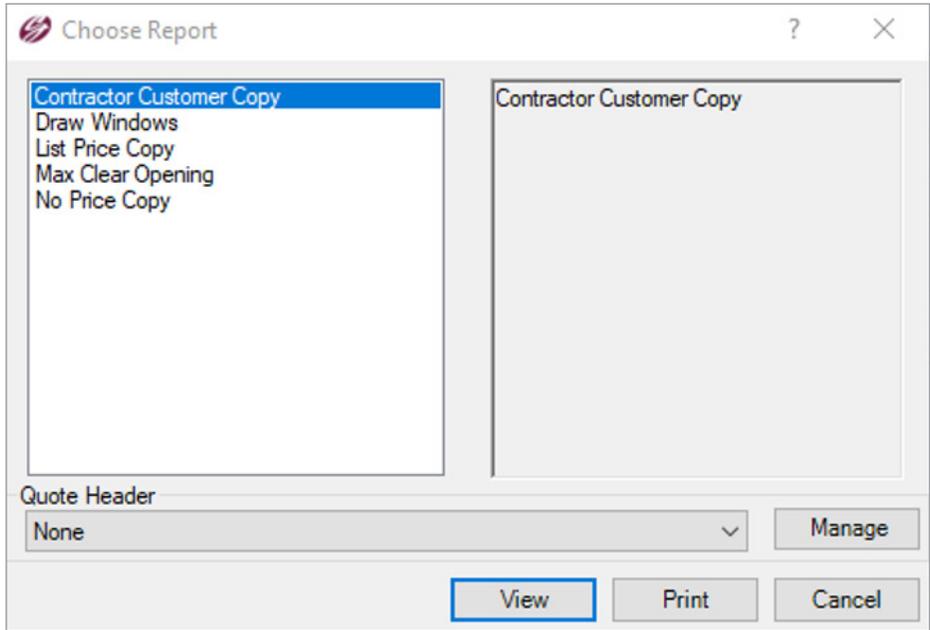- To adjust the individual line pricing, select the **Customer** button for each line and change **Gross Margin**

- You can add labor and freight charges per line under Customer Button

Step 12:

To save a copy of your quote select the icon in the top task bar. For the pricing to your customer, please highlight the Contractor Customer Copy and select View.
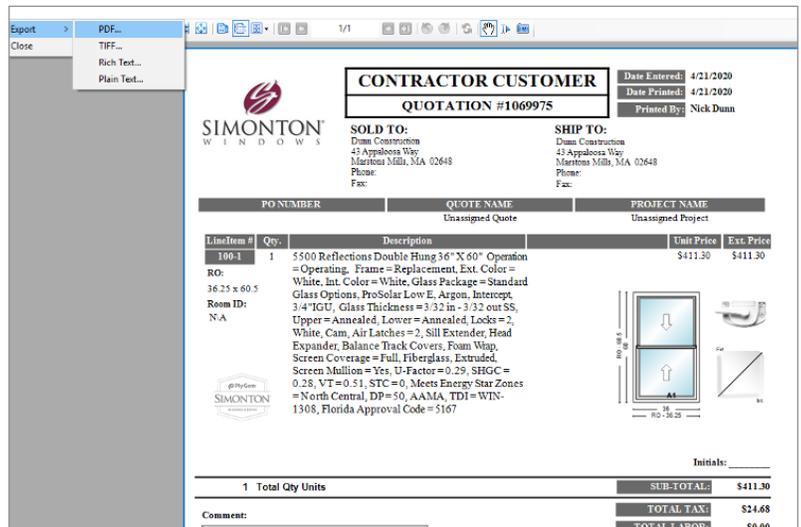

This secondary pop-up box will appear. We recommend the "Show Watermark" section be checked if you wish to have the Simonton logo on the copy of your quote.
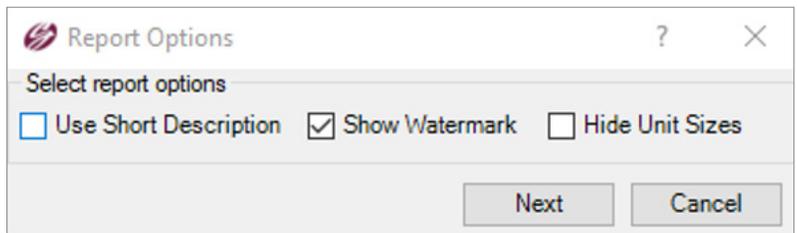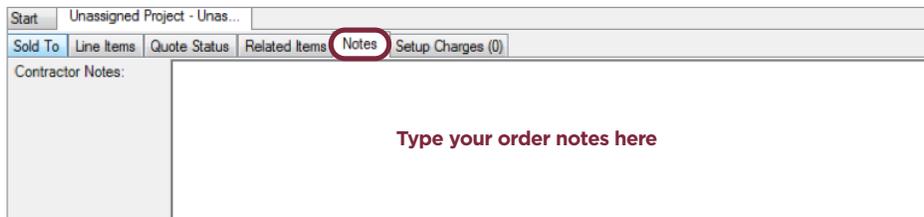

At your quote view, you'll need to save your document by selecting File > Export > PDF.

This will allow you to save a PDF to your computer and then submit your quote as an attachment through your company email.
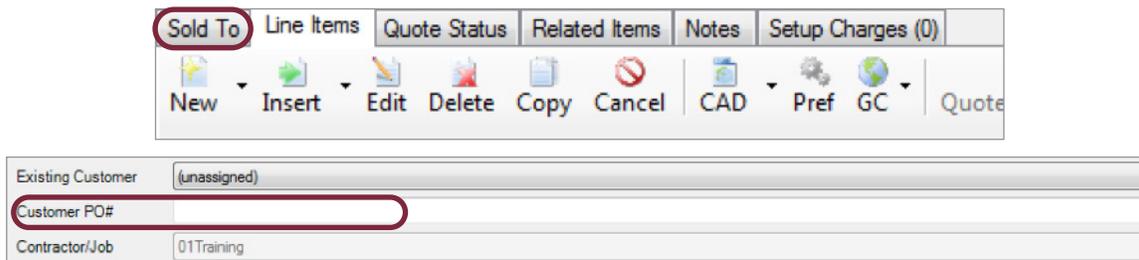
Step 13:

Before ordering, please add any important comment to your distributor using the **Notes** tab.

Step 14:

To order your Quote, you have two steps:

- Step #1: Enter your **PO#** under the **Sold To** tab

- Step #2: Select the **Send In** button on the top task bar.
  - This will send your order to your corresponding distributor.
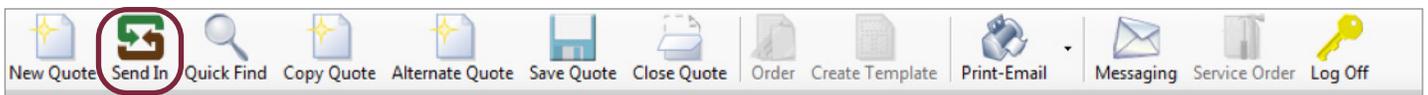
Your System will prompt a FINAL attribute display to confirm your Order before sending to your Distributor. If your order has what we perceive as a discrepancy, *i.e. a difference in exterior finish colors between two lines*, the system will automatically check off "show inconsistencies only" and the discrepancy columns will be highlighted in yellow.
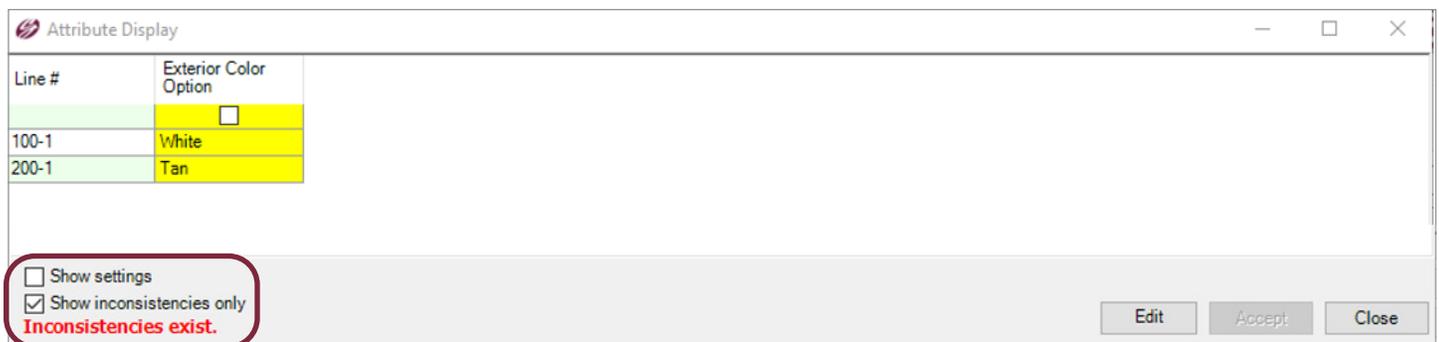
To see all rows and columns, uncheck "show inconsistencies only"
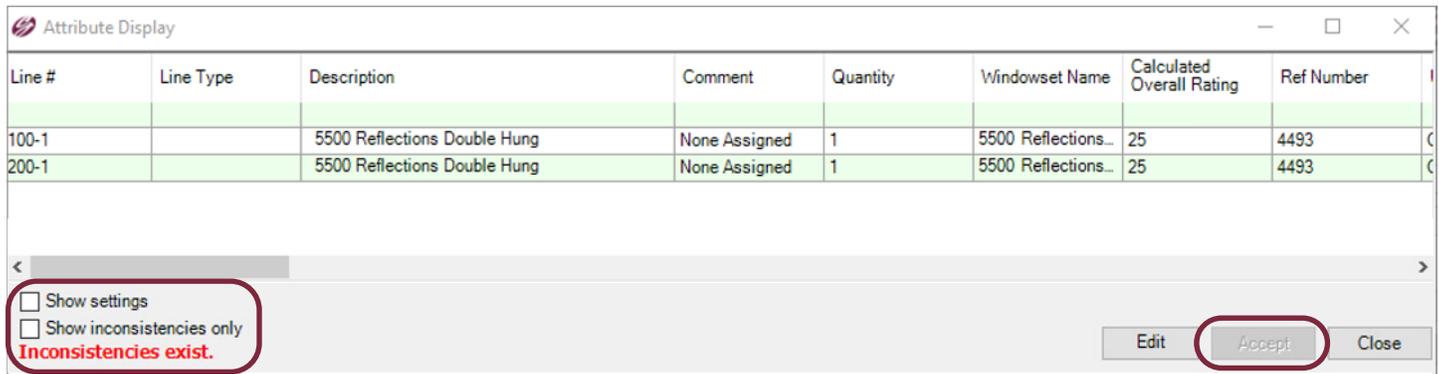
If inconsistencies exist, **you must manually check the box above the highlighted yellow columns**. These show inconsistencies that we require you approve before order. If you need to make changes, you can click on the line with the inconsistent option to make a change.
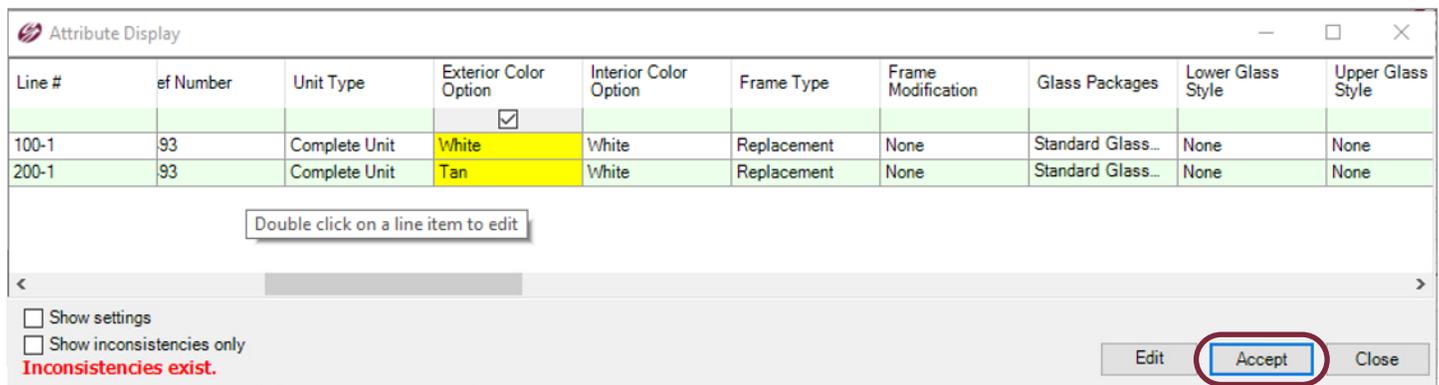
If you approve the inconsistency, please check the box above the highlighted yellow column. Your accept button will now appear and you can select it to order. **REMINDER: ALWAYS CHECK ALL COLUMNS BEFORE CLICKING ACCEPT. THE SYSTEM IS NOT PERFECT AND MAY NOT DEEM ONE OF YOUR ERRORS TO BE INCONSISTENT.**

We recommend you email your distributor to make sure they received your order!
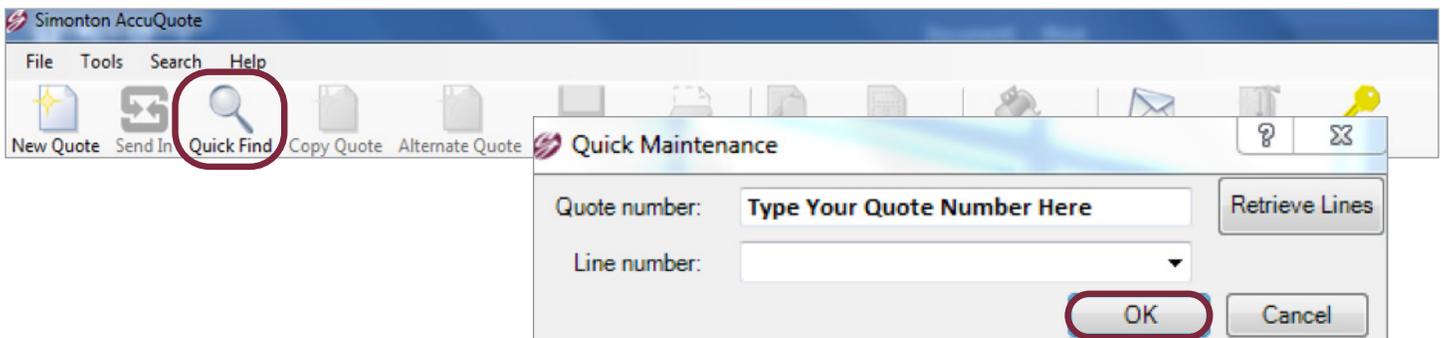
Finding Quotes

Follow these instructions to find quotes in AccuQuote.

How to Find Quotes

Option 1: Select the **Quick Find** icon

• Use when you are provided with the quote number

• After clicking **OK** your quote should download. If you are asked to update to newest version, click yes.

Option 2: Find the **Quote** tab

• Use if you want to search by Project Name/Quote Name/PO Number, Date or User

• You only need to choose one option but must make sure to use an asterisk as shown