DISTRIBUTORS

Ply Gem

SIMONTON

WINDOWS & DOORS

AccuQuote
Quick Tips Training Guide

Table of Contents

Getting Started in Simonton Distributor AccuQuote

Step 1: New Customer Set-Up

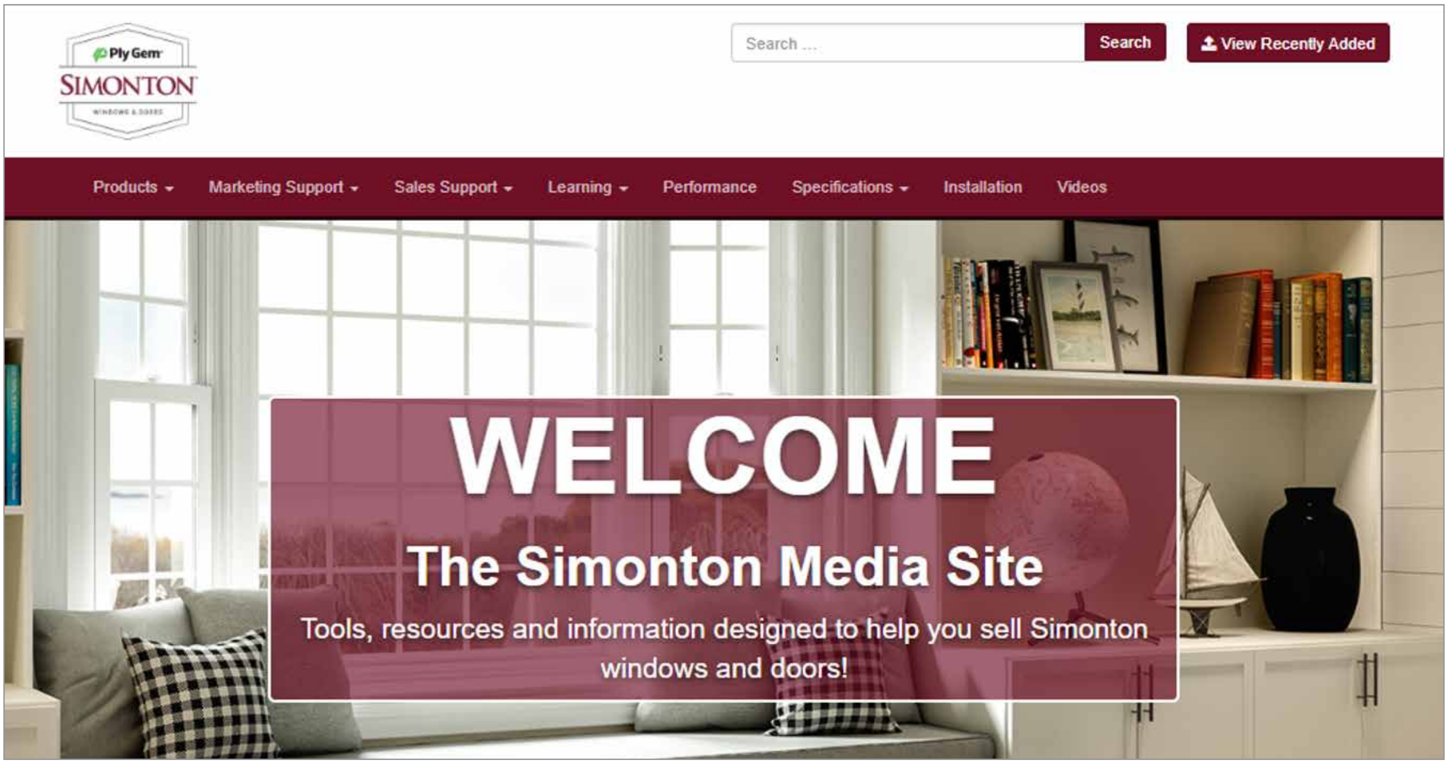
- During Initial Account Setup, Distributors need to inform TSMs the name of the Branch Dealer Admin.
- Dealer Admin at each location will be responsible to set up other users

Step 2: Branch Downloads AccuQuote From Website

- Follow Instructions to download AQ at **www.simonton.com/AccuQuote**
- Customer may need to consult with their IT department to download

Step 3: Send Username/Password to Customer

- Within 1-2 business days, the Branch Dealer Admin will receive an email from their TSM with their username and password to log into AQ
  - **Note:** On first login, the Dealer Admin will be prompted to change their password
- TSMs will provide instructions to Dealer Admin on how to add additional users at the branch
  - **Note:** Users must be added and have logged in before TSM can conduct training
- For training videos and cheat sheets on how to add users into AccuQuote, please visit the "Sales Support" tab on the Simonton Media Site: **marketing.simonton.com**



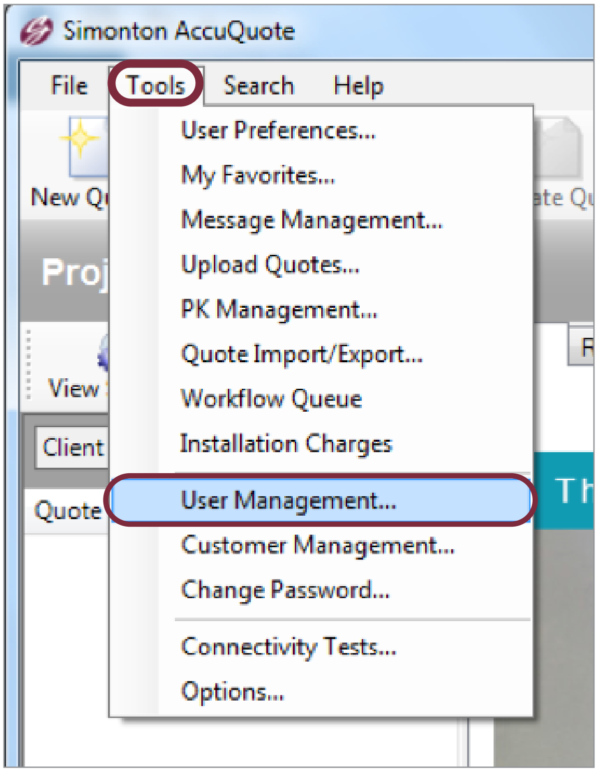
INITIAL SETUP:

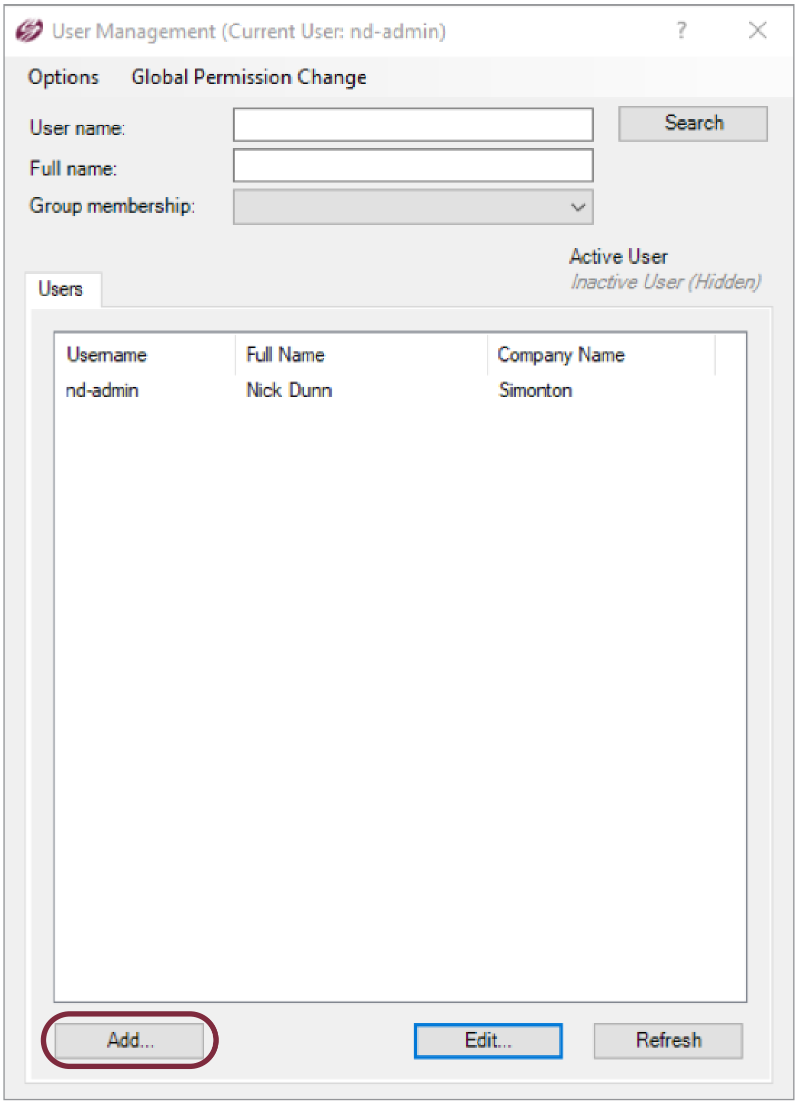
Dealer Admin Creating Branch User Accounts

Follow these instructions to set up new users and manage existing users.

Step 1:

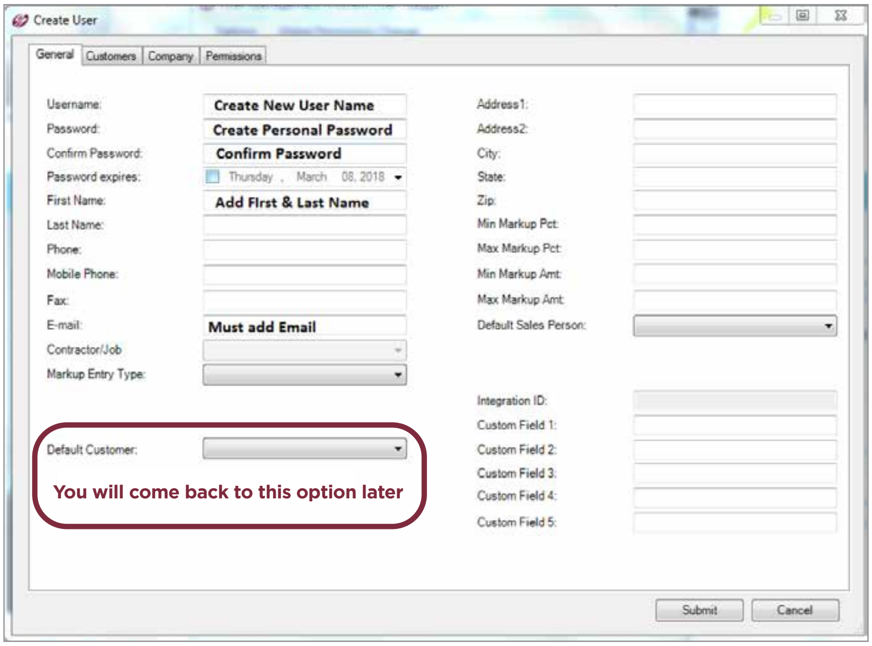
- Select **Tools / User Management**
- Click the **Add** button on the bottom left to create a new user





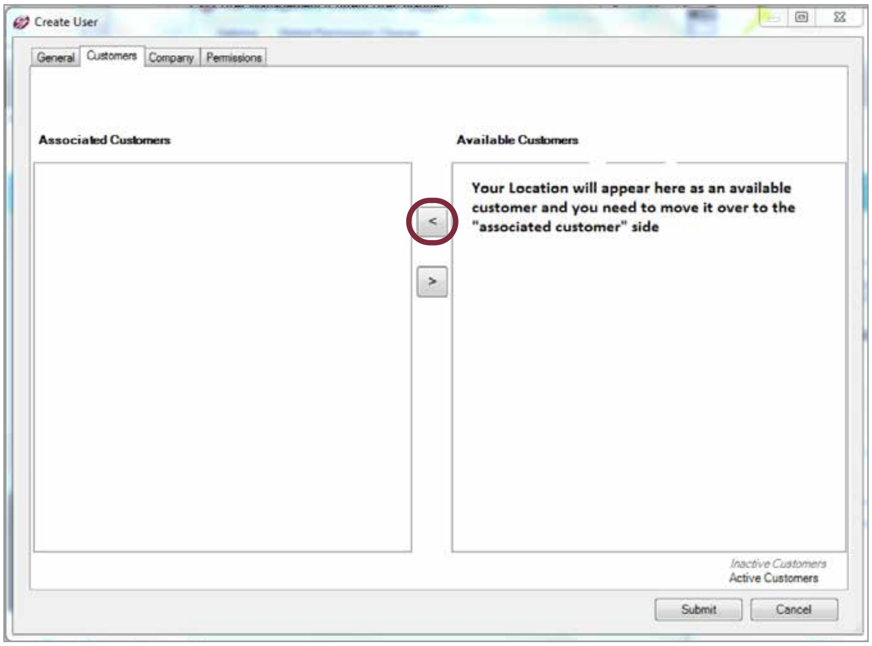
Step 2: General Tab

- Create **Username –** typically first initial of their first name and full last name
  - Ex: Nick Dunn = ndunn
- Create personalized **Password** and **Confirm Password**
  - You can push the expiration date of your password out to your desired date
- Add User **First Name** and **Last Name**
- Add **E-mail**
  - This will be used for the “Forgot Password” option on the login screen



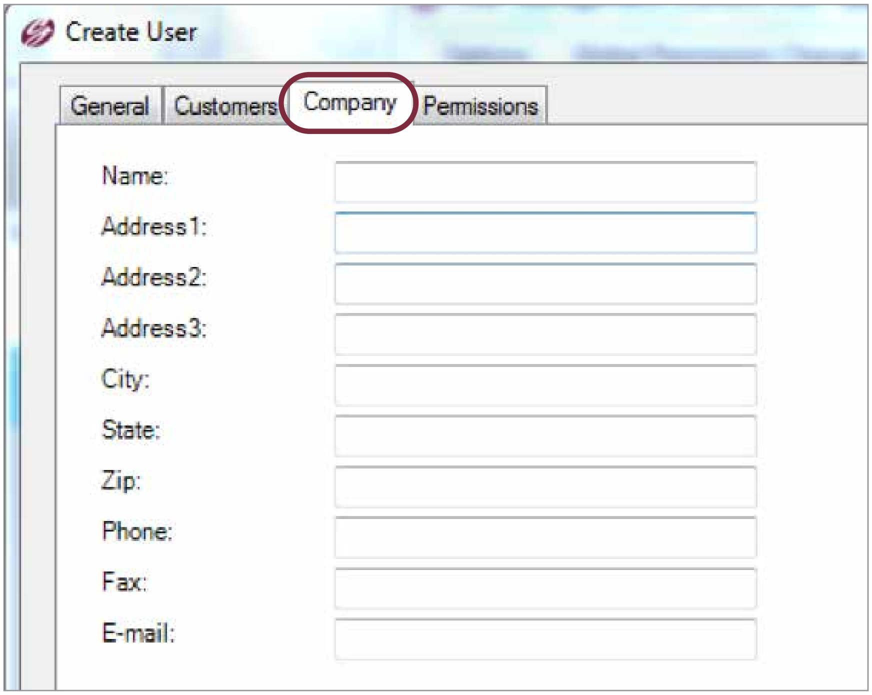
Step 3: Customers Tab

Move company name from **Available Customers** over to **Associated Customers**



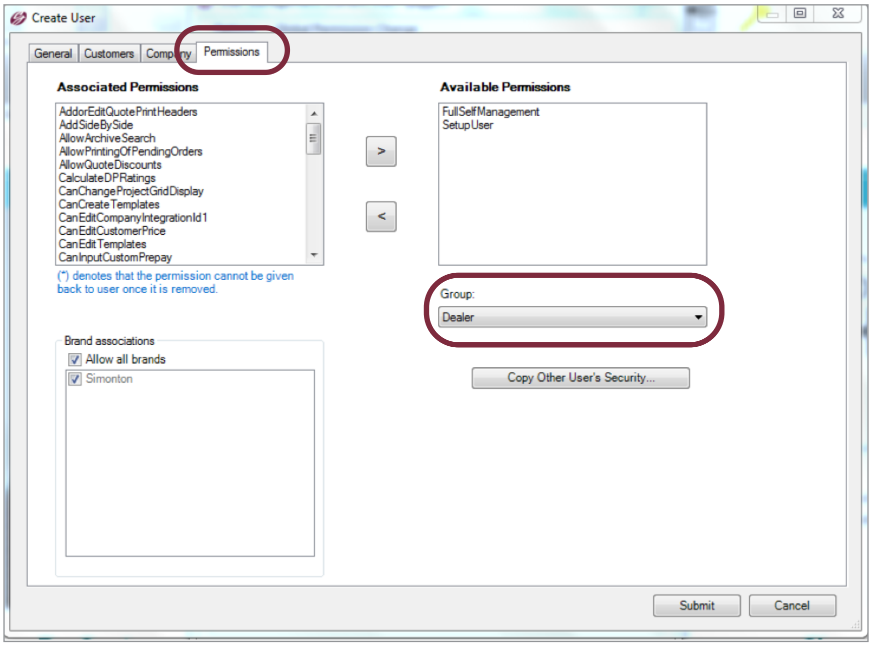
Step 4: Company Tab

Add Branch Information under the **Name** option



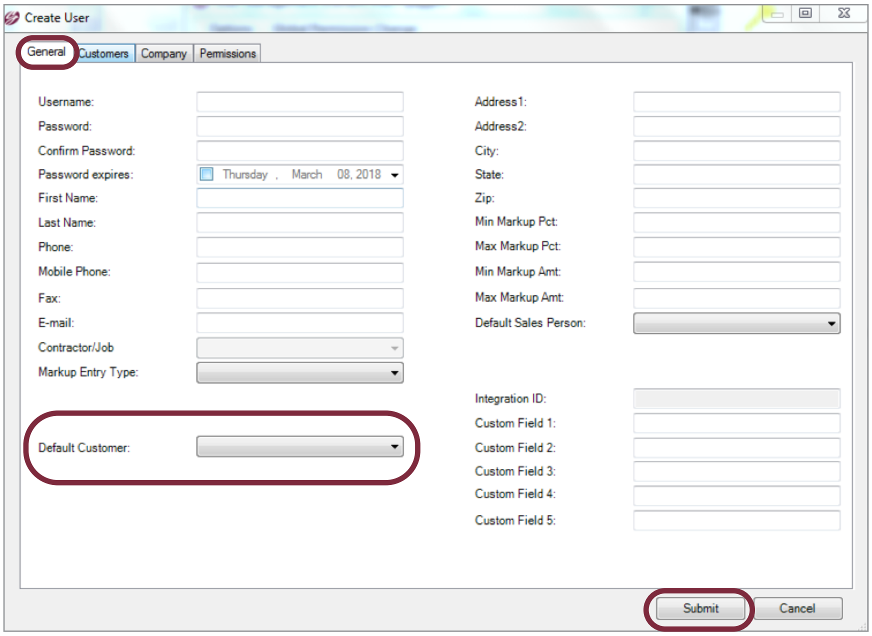
Step 5: Permissions Tab

- **Dealer:**
  - Standard Order Entry options but **CANNOT** Add/Delete users
- **Dealer Admin**
  - Same as dealer but CAN Add/Delete users
- **Dealer No Cost:**
  - Allowed to Quote/Order but **CANNOT** see branch cost (rarely used)
- **Dealer No Order:**
  - Ability to quote, see cost BUT **CANNOT** Order



Step 6: Submit

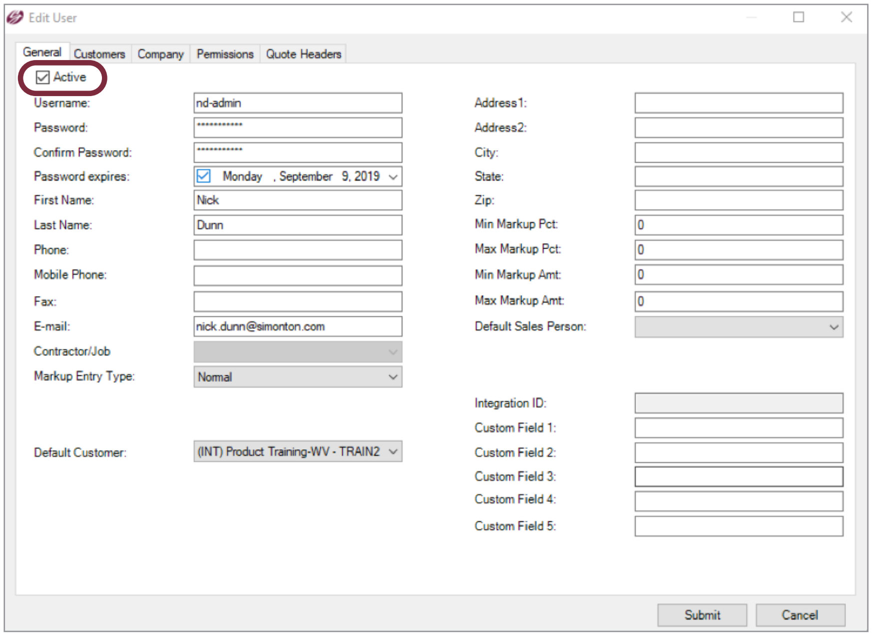
- Go back to the **General Tab**
- Select your location as the **Default Customer**
- Click **Submit**



If sales rep is terminated or leaves on their own accord, branches are responsible for setting their username inactive to prevent form the old sales rep from accessing the system under their account.

Setting a User Inactive

- Go to **Tools / User Management**
- Check **Refresh**
- Highlight the name you want to remove
- Select **Edit**
- Uncheck the **Active Box**
- Click **Submit**

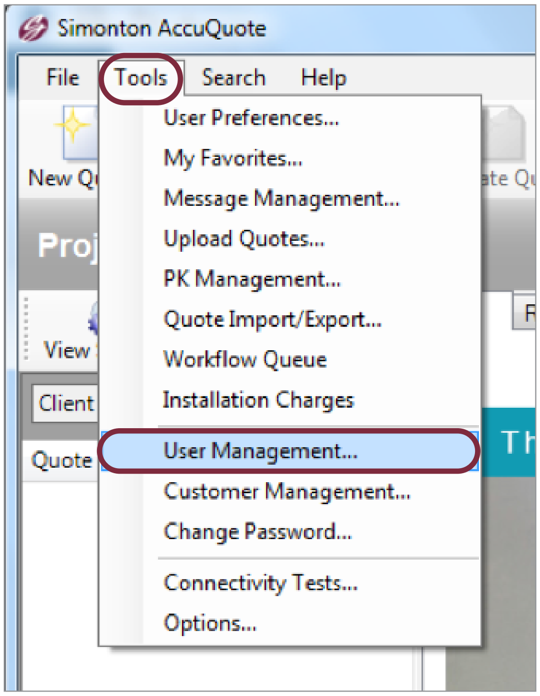


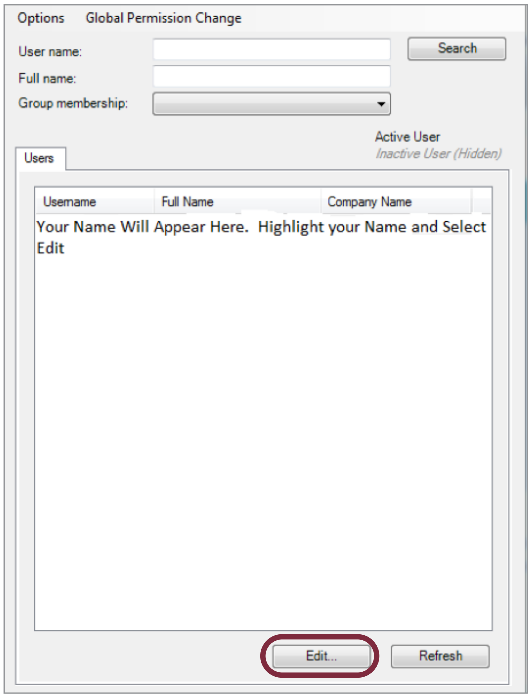
INITIAL SETUP:
Non-Dealer Admin Adding Logo & Forgot Password Email

Follow these instructions to add your email and to add your logo to the quote header

Step 1:

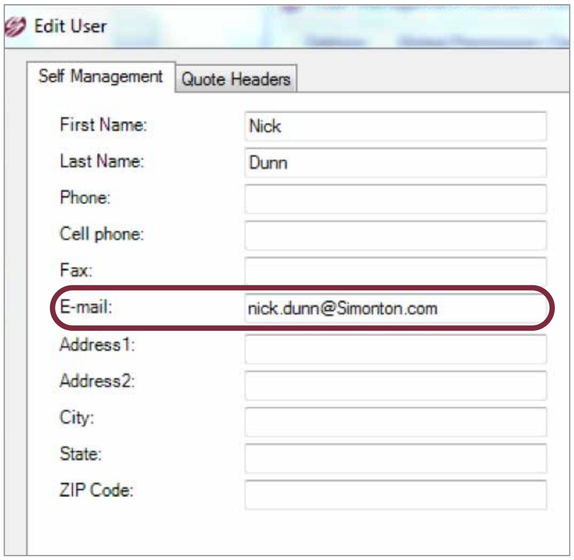
Select **Tools / User Management**





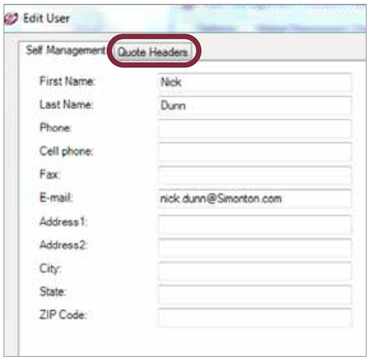
Step 2:

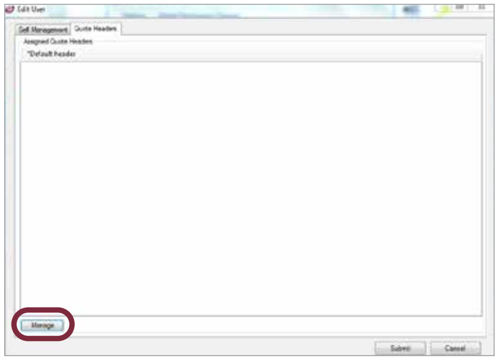
Add your **E-mail** to your user information as shown below

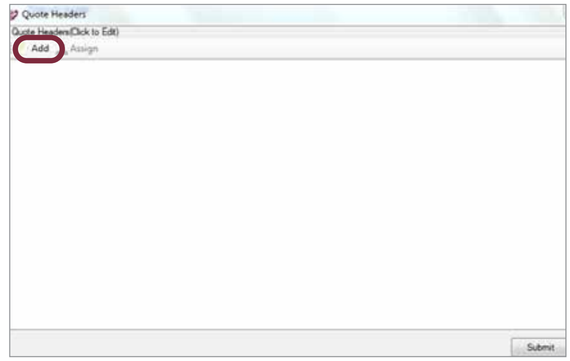


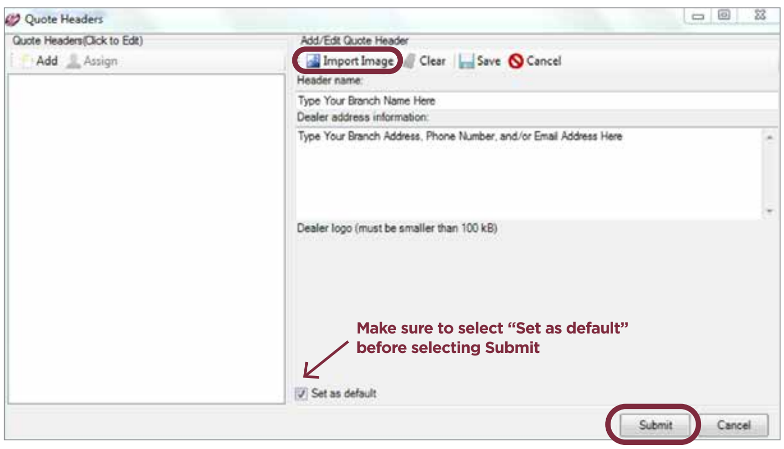
Step 3:

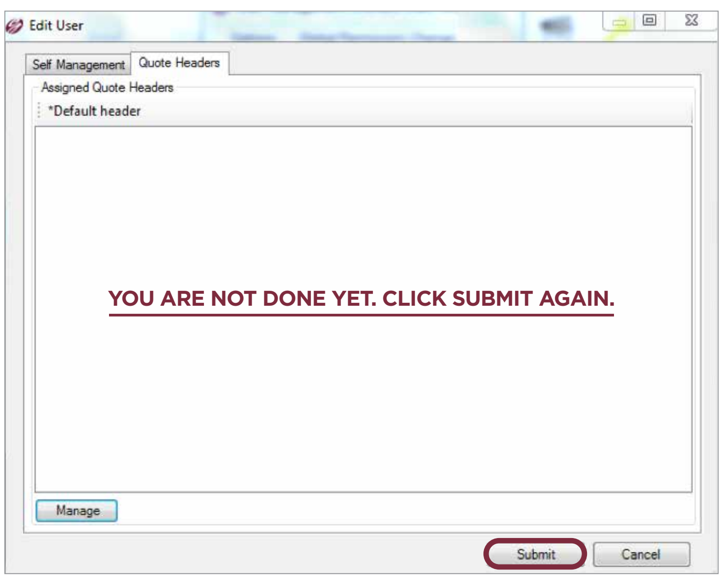
- To add your logo, click **Quote Headers/Manage/Add** then click **Import Image** as shown below
- Please make sure you have a saved copy of your company logo on your computer. The photo can be a JPEG, BMP, or PNG file but MUST be under 100 kb in size. *For Citrix customers, finding your logo can be a challenge so please work with your IT Department on how to locate your saved logo.*









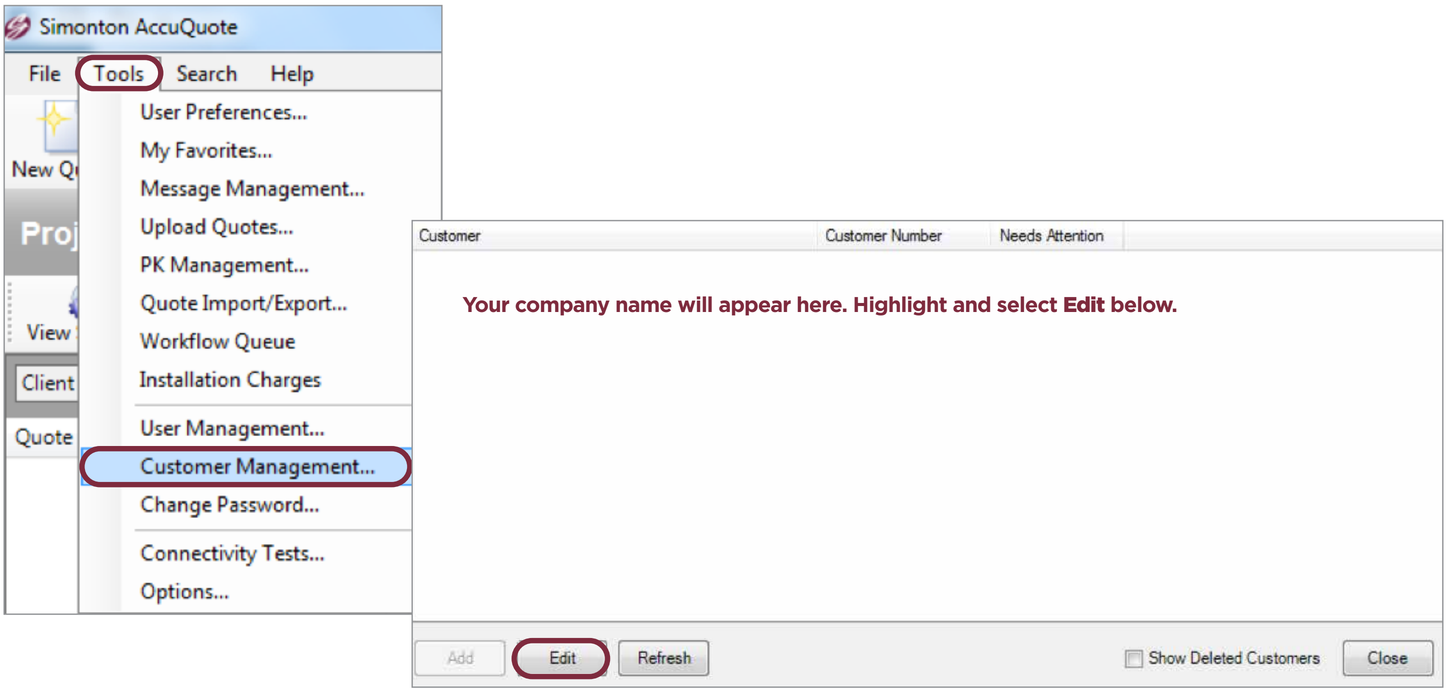


This will bring you back to your User Management screen. You are now complete and can select the **x** to exit.

INITIAL SETUP:
Creating Branch-wide Pricing & Preferences

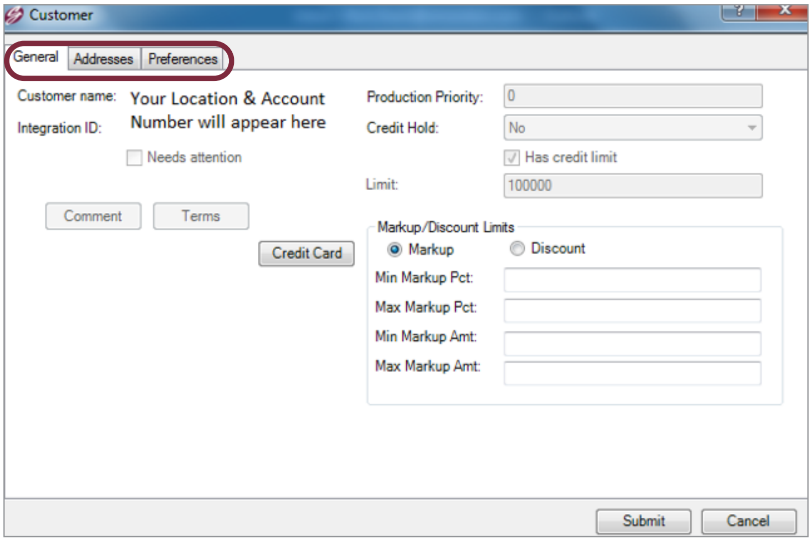
Step 1:

- To set your Global Pricing and Product Preferences, select **Tools / Customer Management**
- Select your branch and click **Edit**



Step 2:

- You will now see three tabs: **General, Address** and **Preferences**. These will set your global options and the tabs go as follows:
  - **General** – Not Used
  - **Addresses** – Where to add/edit/delete your Contractor List. This is what special pricing is tied to
  - **Preferences** – Set your global quoting defaults for product and pricing

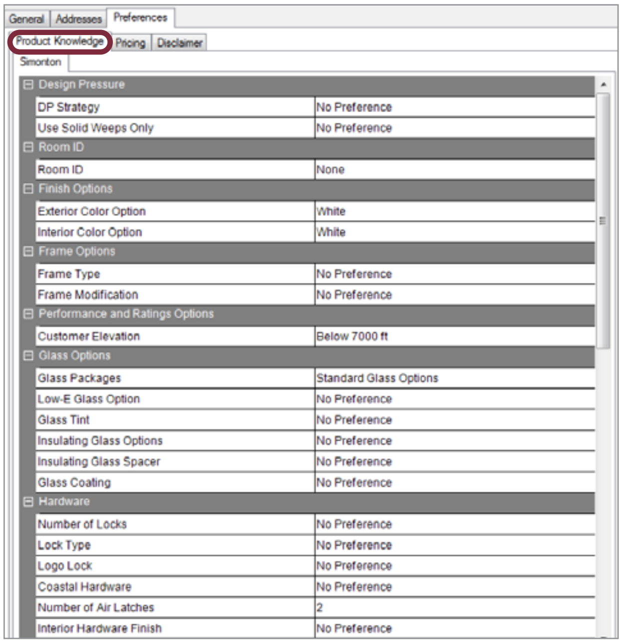


Step 3:

- First, select **Preferences**
- Here you see three tabs: **Product Knowledge, Pricing** and **Disclaimer**
  - **Product Knowledge –** Set product defaults (i.e. extruded half screen, two air latches, color, etc)
  - **Pricing –** Set your Global Margin & tax percentage (only allows one tax %)
  - **Disclaimer –** Create your own to show on the bottom of your confirmations.
    - Example: Contractor must confirm all specs, quantities on quote provided

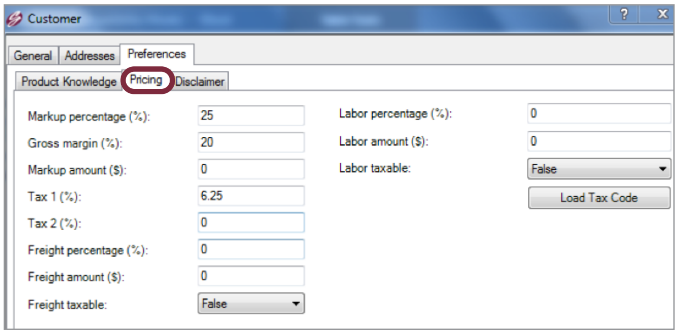
Step 4:

Example of **Product Knowledge** options:



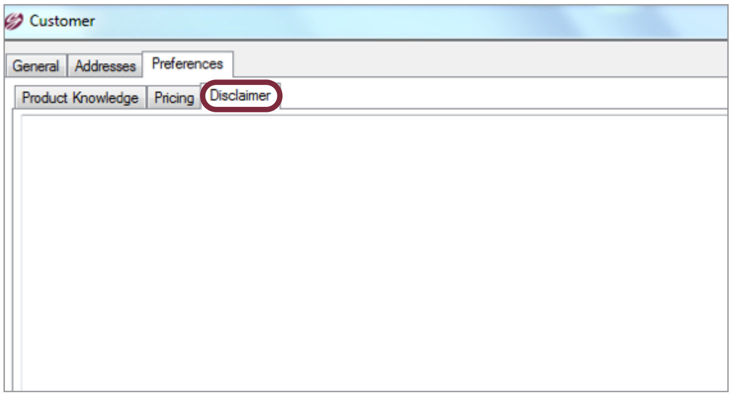
Step 5:

Example of **Pricing** options:



Step 6: Optional **Disclaimer**

- Add your **Branch Disclaimer** here to show up on the bottom of your quotes/orders
  - Examples: This quote is based on the information provided by the contractor and must be signed off before order. [Branch Name] will not be responsible for any errors on this quote. All specs, sizes, quantities must be verified, etc.



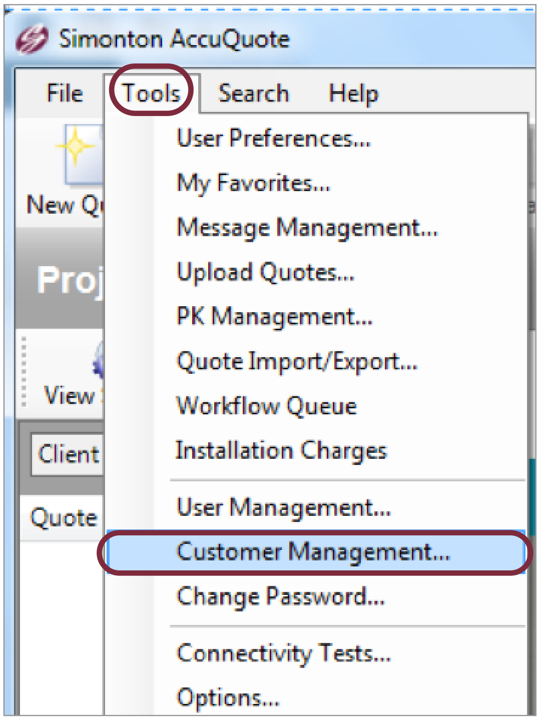
To complete setup, you must select **Submit**, click **Close**, then **log off** & **log back on**.

Contractor/Job Account Set Up

Follow those instructions to add a Contractor/Job Account. This will be required for any contractor or project special pricing, ProNetwork Point Accrual, as well as Contractor Version access. **Pro Tip**: We recommend adding Branch Cash Sale Account using your location Zip Code.

Step 1:

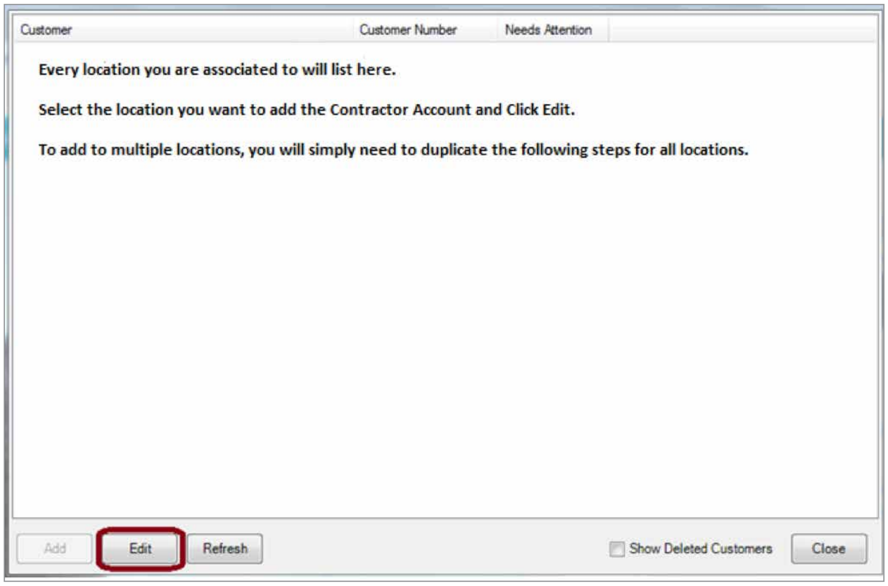
Select **Tools / Customer Management**



Step 2:

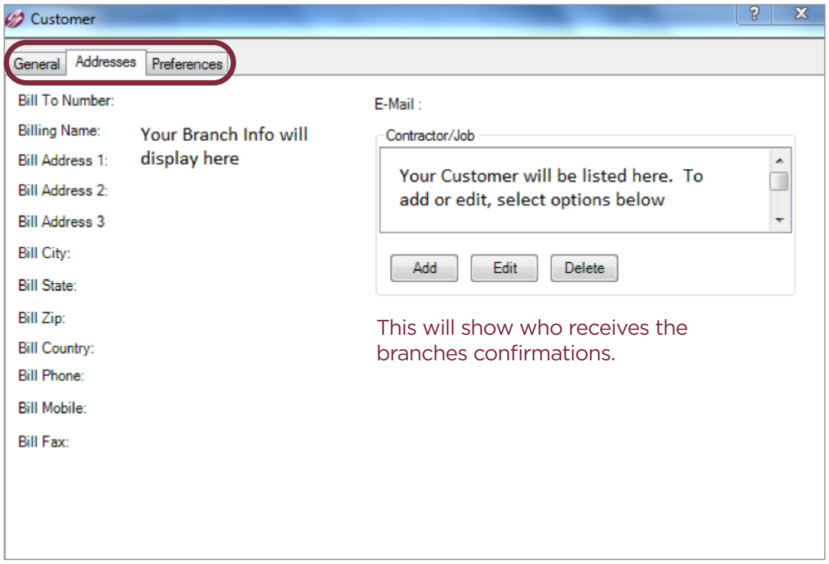
Select the branch you want

to work with and click **Edit**



Step 3:

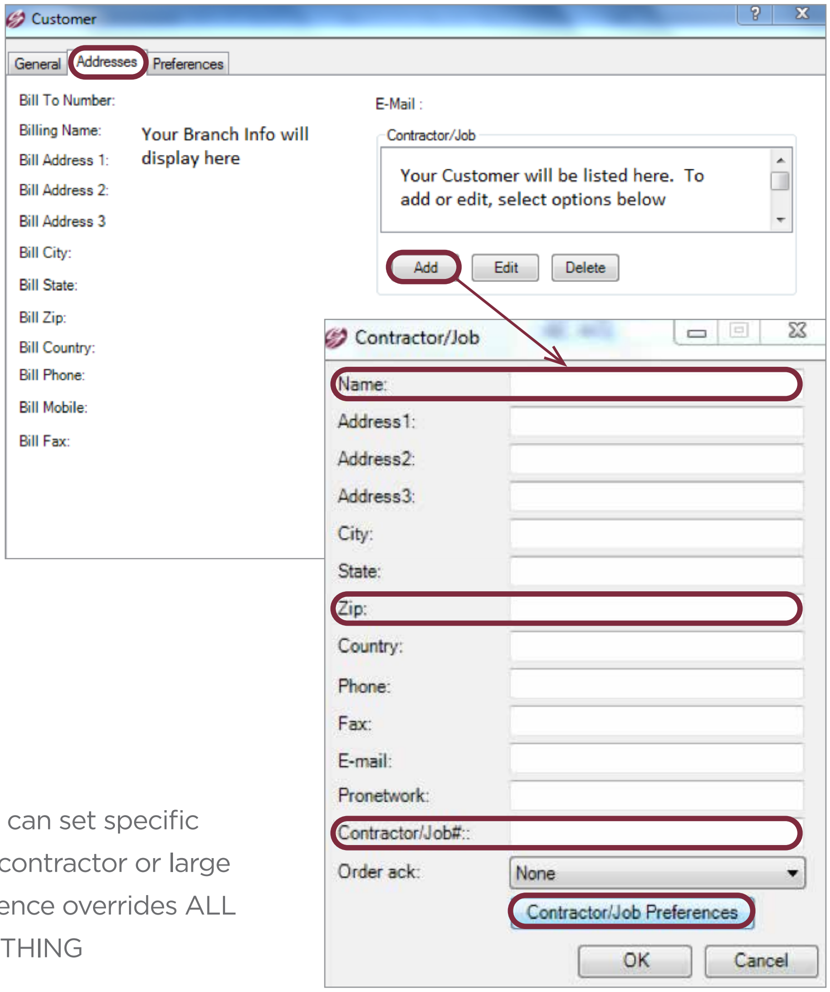
- You will now see three tabs:
  General, **Addresses** and Preferences
- Select **Addresses** to add/edit/delete your Contractor List
  - This is what special pricing is tied to and can be selected in a quote under the SOLD TO tab, Contractor/Job Account Drop Down Box
- **Please DO NOT change anything under General or Preferences.** This is specific to each location and will affect their system
  - **General – DO NOT USE**
  - **Preferences – DO NOT USE**



Step 4:

Mandatory Information

- **Contractor Name** or **Project Name**
  - Info must be provided to TSM to submit special pricing or contractor version access. It's recommended to create a Branch Cash Sale Account for every day use.
- **Zip Code:** Will make sure correct Energy Star glass package will appear for your customer. Eliminates Zip Code Question
- **Contractor/Job #:** Similar to the Old EPOPS Customer Number.
  - Cannot have any spaces and must be provided to TSM in order to submit special pricing or contractor version access.



Additional Information

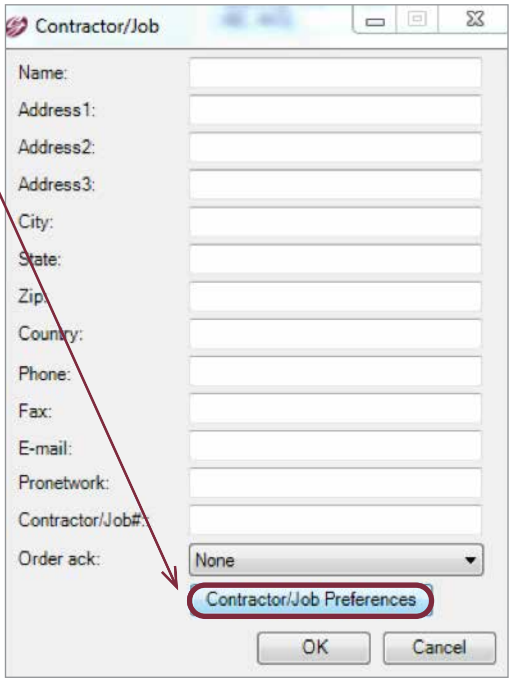
- **ProNetwork**
- **Contractor/Job Specific Preferences**-You can set specific product and pricing preferences for your contractor or large job. Reminder, adding a contractor preference overrides ALL global preferences so COMPLETE EVERYTHING

- Click **OK** to Save

To complete a contractor setup, you must select Submit, click Close. Entire branch may need to log off then log back in to see contractor in Contractor/Job drop down box in Sold To tab of quote.

Reminder for Any Contractor Version Set-Up

- Email TSM Rep with **Contractor Name** & **Contractor/Job #** as well as all the individual names and email of contractor's personnel who need access to software
- Add **Product/Pricing Preferences** to Contractor/Job Account. Adding a margin or markup is required or your contractor will not see their accurate pricing.



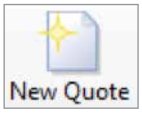
To complete a contractor setup, you must select **Submit**, click **Close**, then **log off** & **log back on**.
If you don't, you will not see the customer when you start your next quote.

Basic Quoting Instructions

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

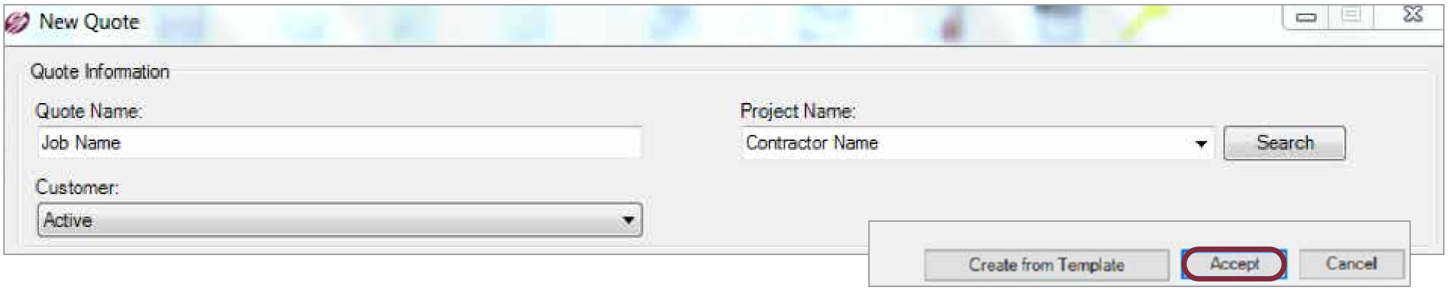
Step 1:

Select **New Quote Icon**



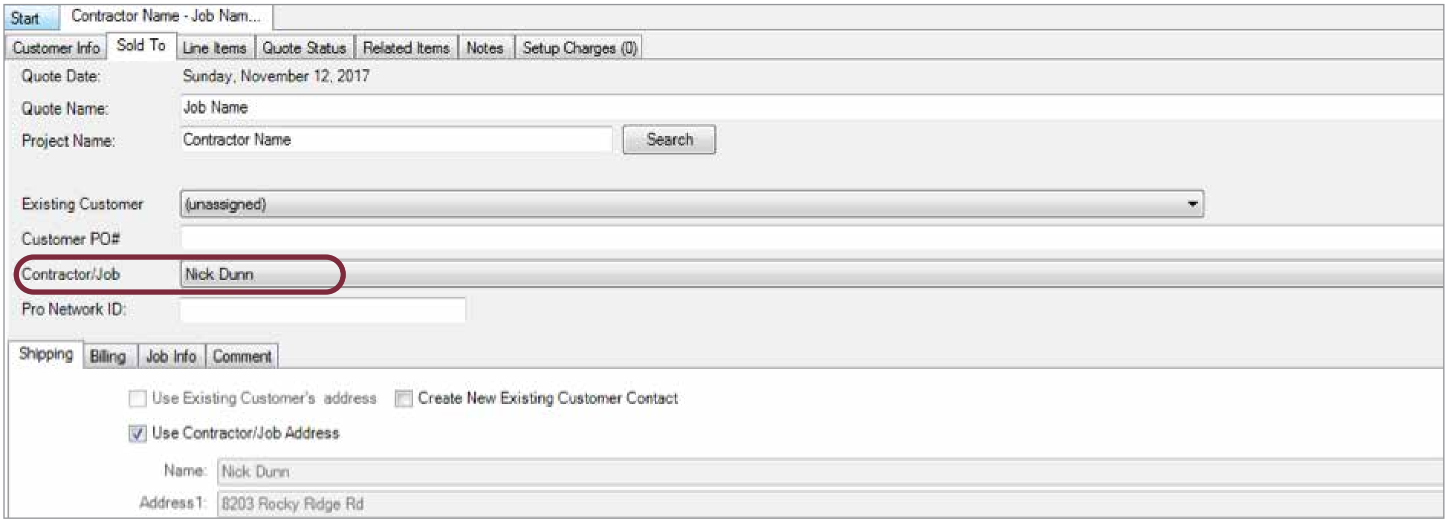
Step 2:

- Type the Job Name under the **Quote Name** box
- Type the Contractor's Name under the **Project Name** box
- (Contractor's name will save in drop down after saving first quote)
- Click **Accept**. Do not click search



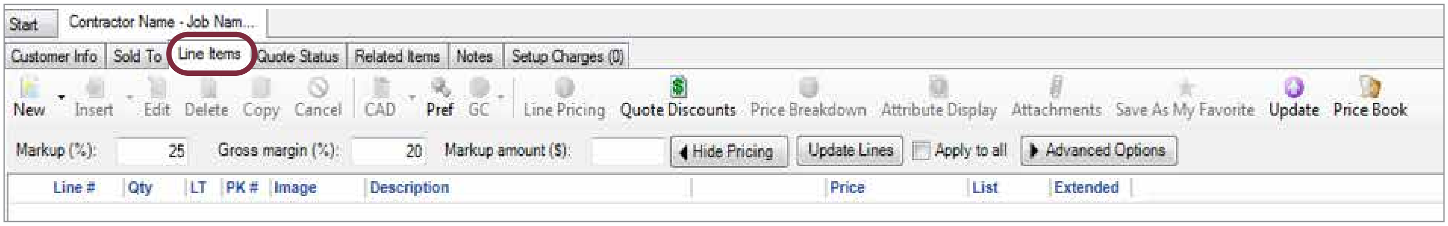
Step 3:

Select **Contractor/Job** Account



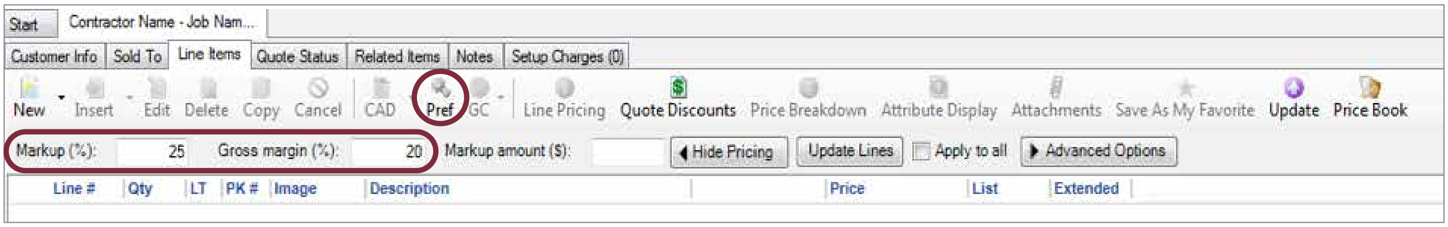
Step 4:

Select **Line Items** Tab

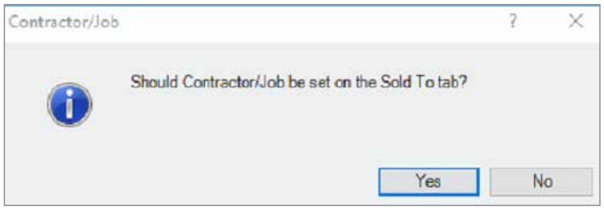


Step 5:

Confirm **Quote Preferences** *(Including Product Knowledge and Pricing)*

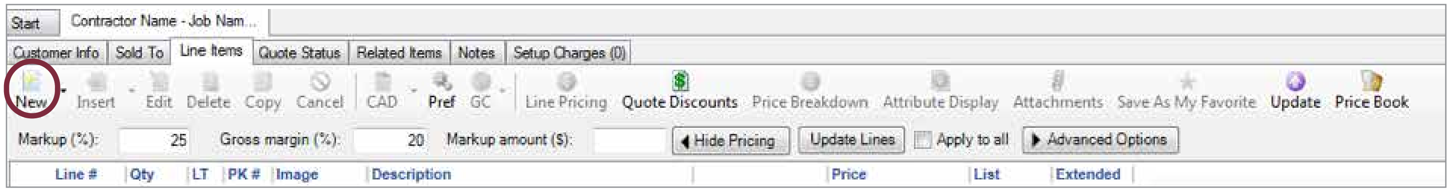


The following pop-up box may appear if **no contractor/job name is selected in Sold To tab**. Answer accordingly.



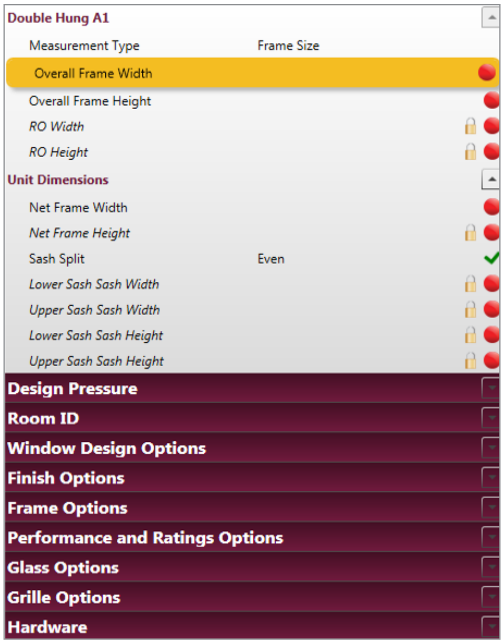
Step 6:

Select **New** to choose your products



Step 7:

- Select Your Product Type, Series and Style. Work Panel on Left from Top to Bottom.
- Let AccuQuote ask you the questions *(all "Preferences" will be automatically applied)*

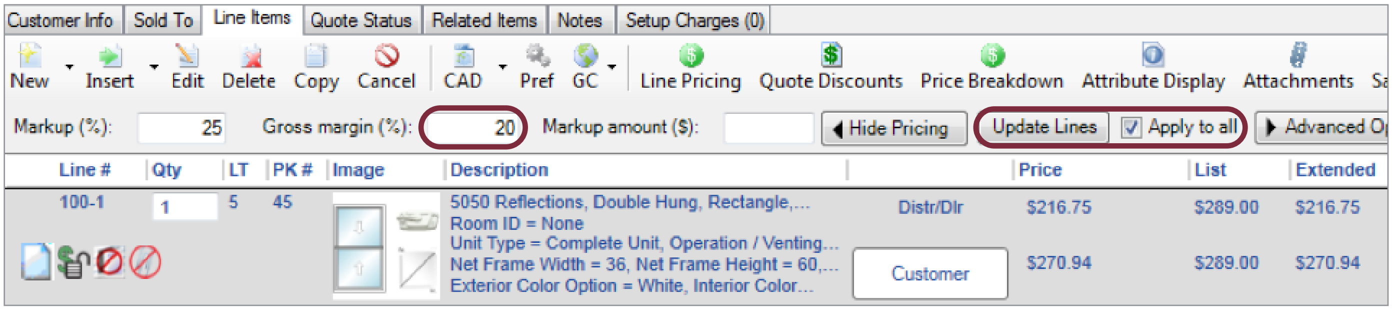


Answer North to South

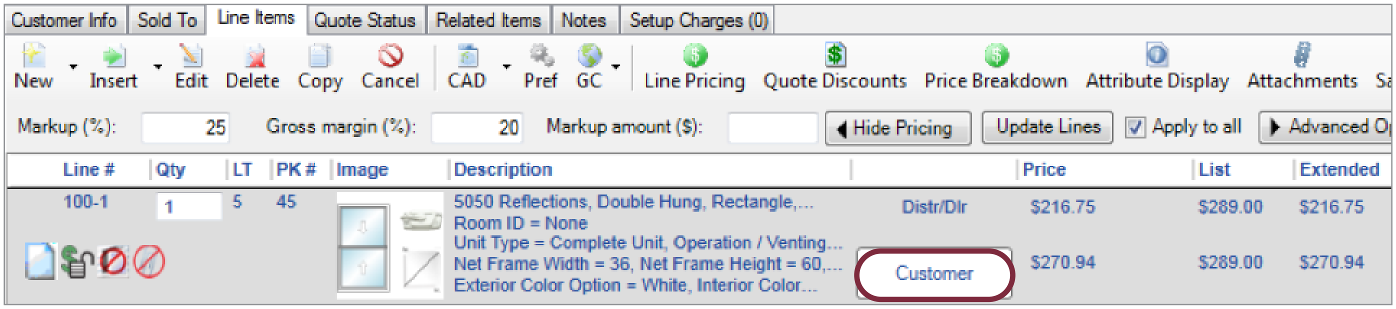
Step 8:

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

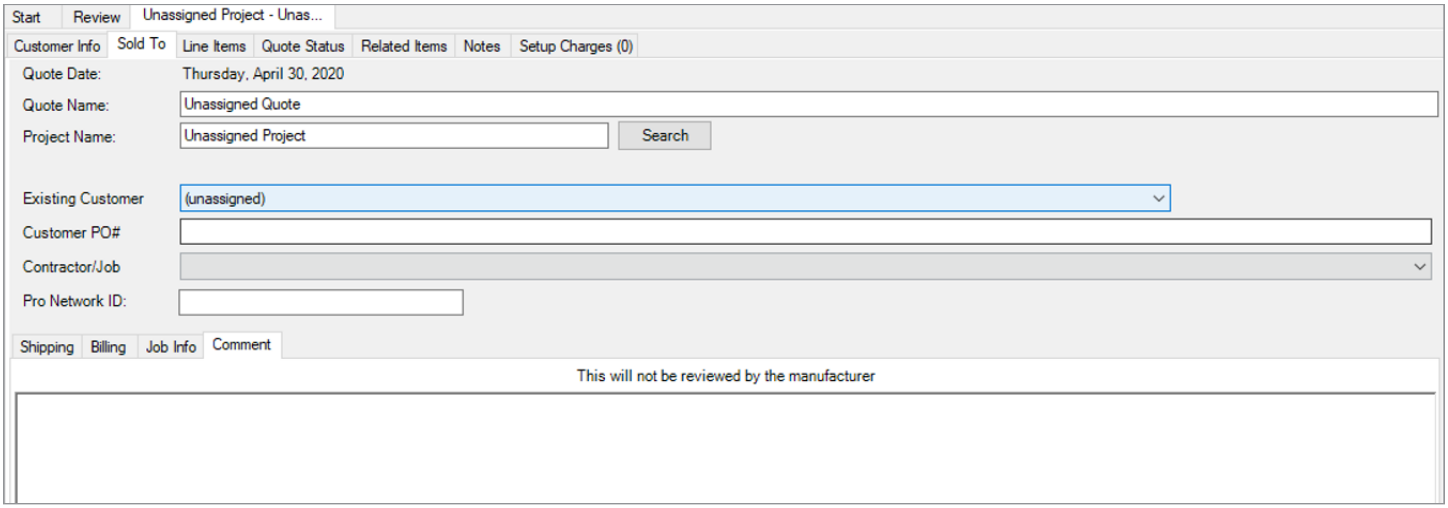
- Adjust Entire Quote - change **Gross Margin** and make sure to check **Apply to all** before selecting update lines.



- To adjust individual lines, select **Customer** tab as shown below and change margin for that single line

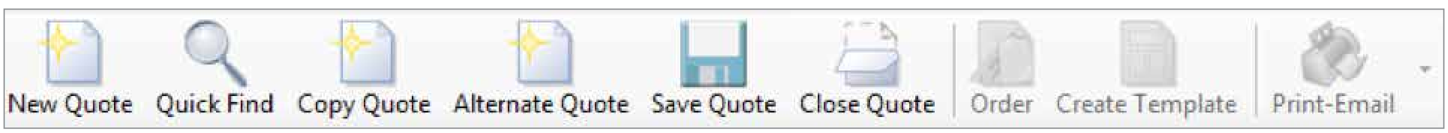


Note: If you would like to **add comments** about your quote to your contractor, you can do so under the **Sold To** tab and select the "**Comment**" option. This comment is quote specific and it will appear on the left side of the totals section on the acknowledgement.



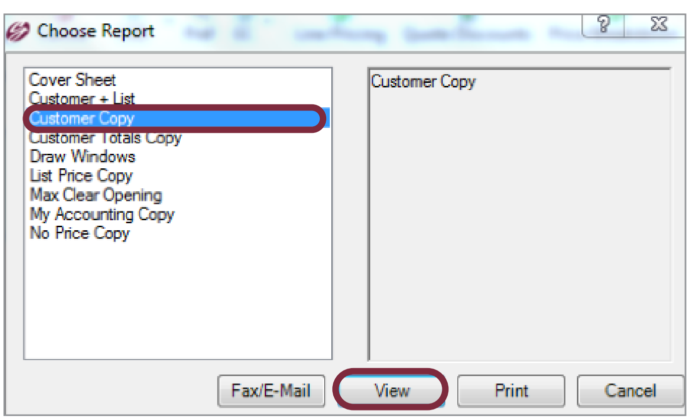
Step 9:

Use top task bar to **Save, Print & Order Quote**. You always want to **Save** to server before printing.



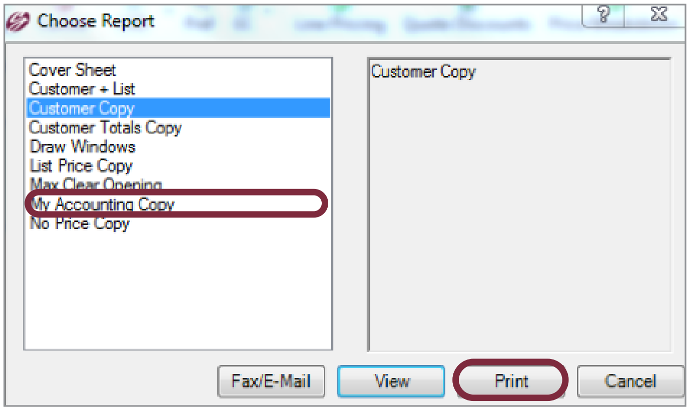
Step 10:

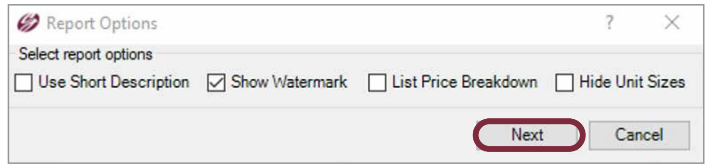
- To E-mail your customer a copy of the Quote, click the **Print-Email** icon and select to **View** your **Customer Copy**.
- Check **Show Watermark** only (Simonton Logo) and click **Next**. It will prompt you to save your quote, click **YES**.
- Once your quote appears, select **File** in the top left, select **Export**, then select **PDF**.
- This will allow you to save the quote to your computer then send the quote through your email as an attachment.



Step 11:

- To print your cost copy of the Quote, click the **Print-Email** icon and select to **Print My Accounting Copy.**
- Check **Show Watermark** only (Simonton Logo) and click **Next**. It will prompt you to print your quote, click **YES**.

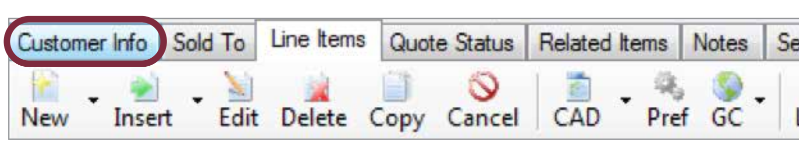


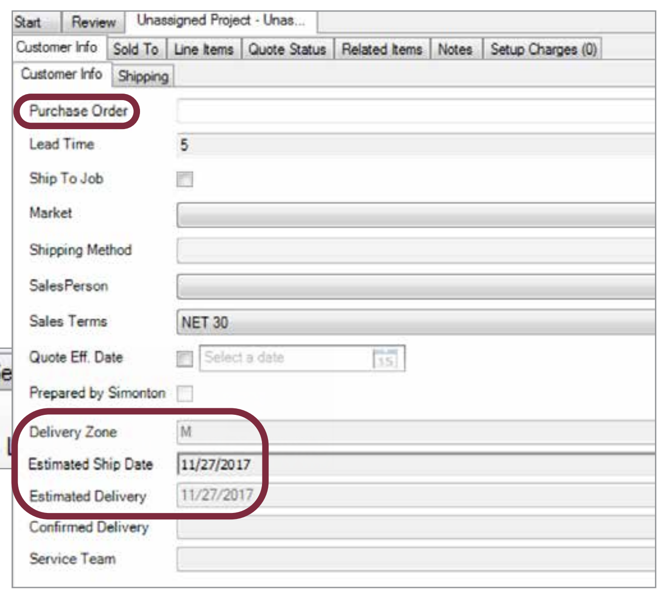


Note: Before ordering, please add any comments to Simonton in the **Notes** tab. All notes will flag Simonton Super Service to look at the order before it is sent to the plant. **The "Contractor Notes" option does NOT work.** Refer to the COMMENTS instructions above Step 9 for notes to your contractor.

Step 12:

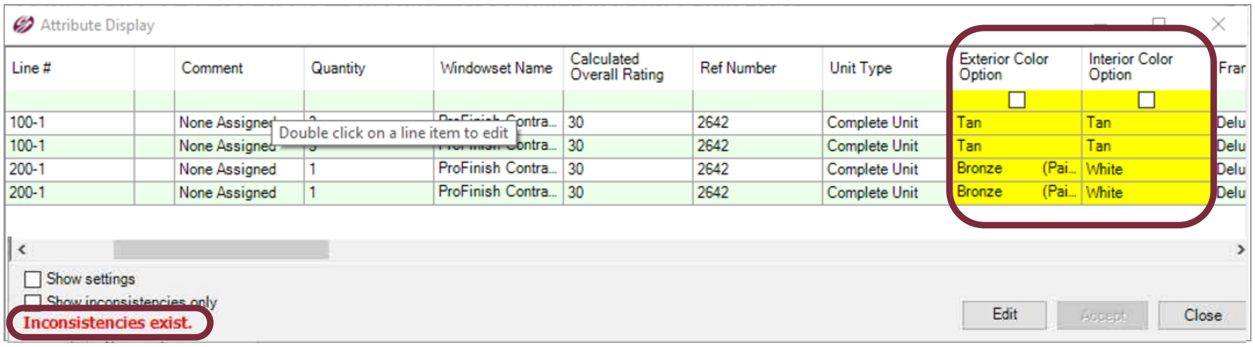
- To order your quote, go to the **Customer Info** tab.
- Add your **Purchase Order** then select the **Order** button on the top task bar
- Under the **Customer Info** tab, you will have an **Estimated Ship Date** based on your delivery zone



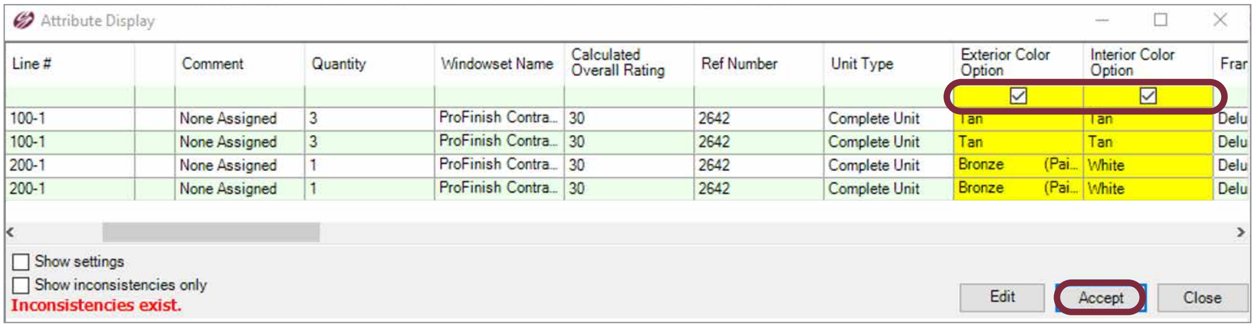


Step 13:

- Your system will prompt a FINAL **Attribute Display** to confirm your order before sending to Simonton
- All yellow columns reflect any information we consider an **inconsistency** in your quote, i.e. different grid options, screen frame type, or glass. You will be **required to check the box** for all yellow columns before ACCEPT button will appear.
- If no yellow columns or inconsistencies appear, the ACCEPT button will be visible to select immediately



Pro Tip: If any inconsistencies exist, you can double-click on the incorrect option and it will open that line item



Important Note: Not all errors will prompt an "inconsistent" column so please verify all quotes before hitting the ACCEPT button.

Step 14:

In your LEFT column, you should now see a $ next to your order. You are now complete and Simonton should email/fax you a confirmation. **If you do NOT receive your confirmation, please contact your Super Service representative, 1-800-746-6691.**

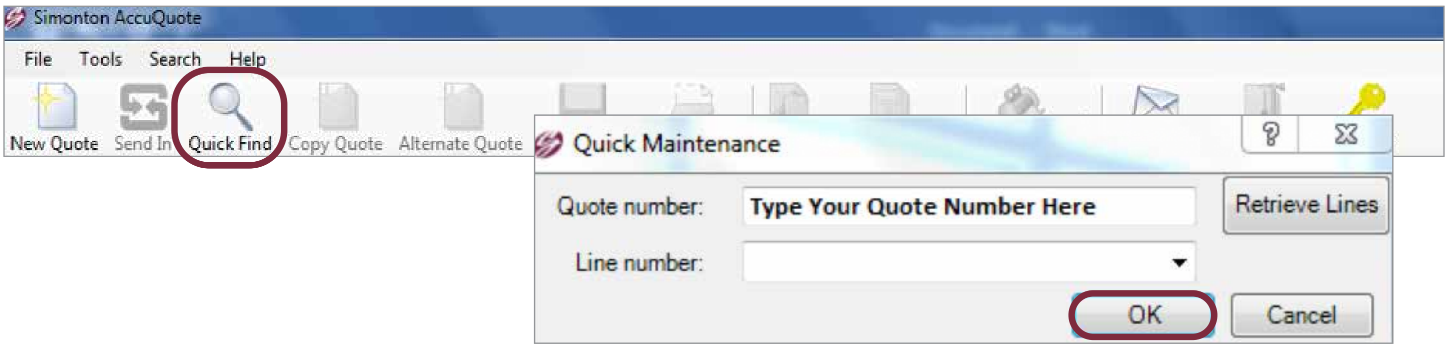
Finding Quotes, Converting Quote to an Order

Follow these instructions to find quotes, convert quotes and submit quotes to Simonton.

How to Find Quotes

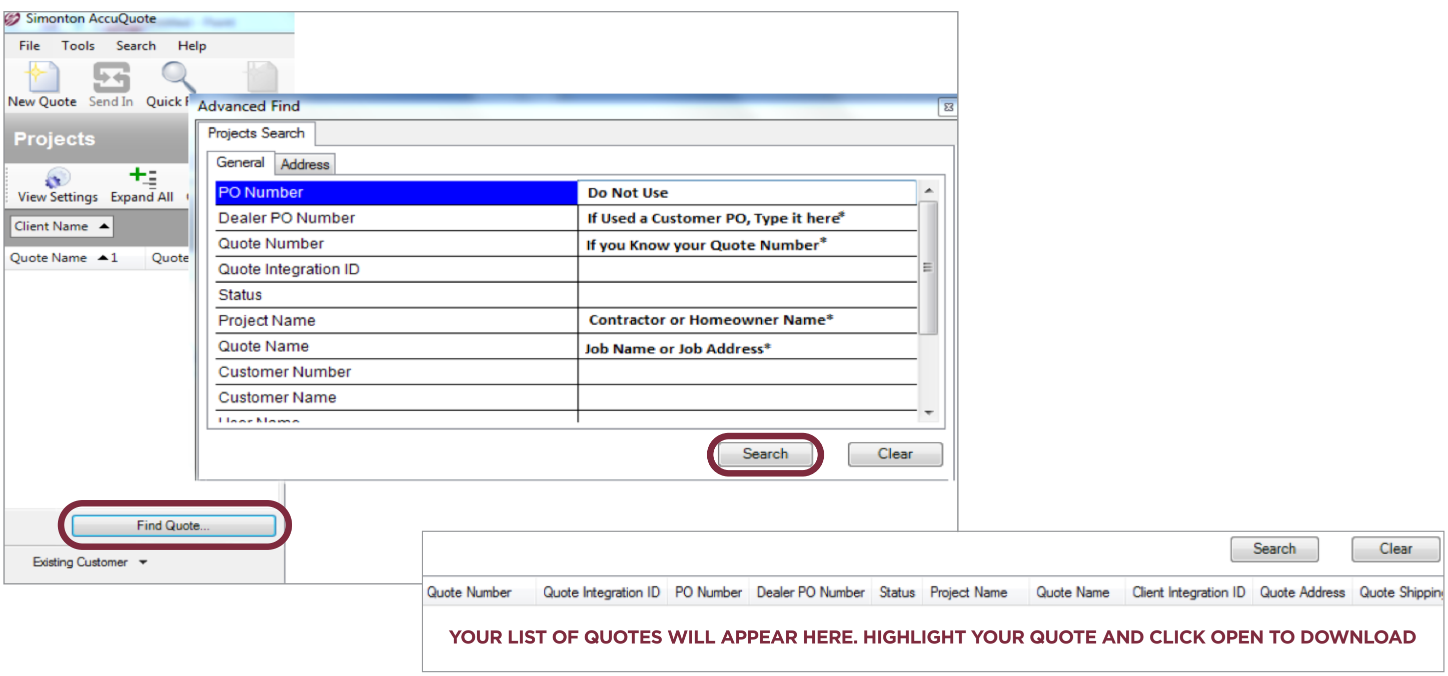
Option 1: Select the **Quick Find** icon

- 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.



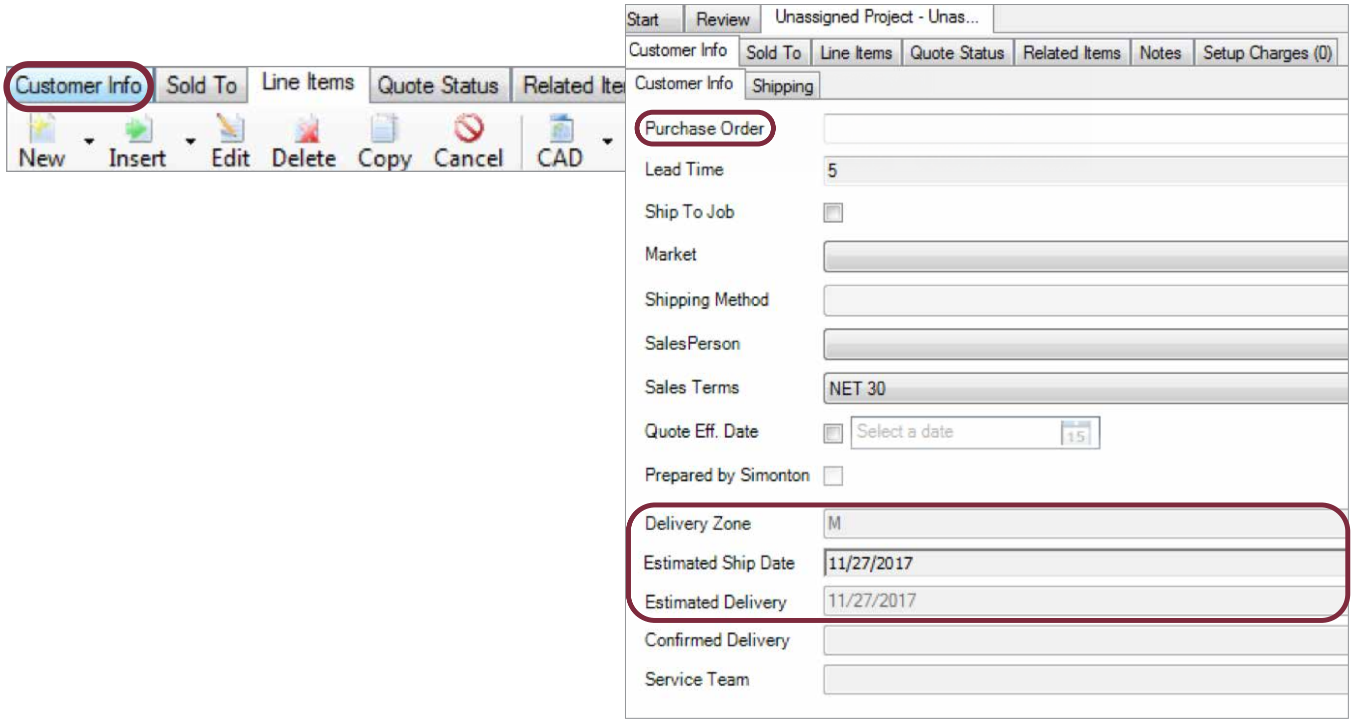
Option 2: Find the **Quote** tab

- 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

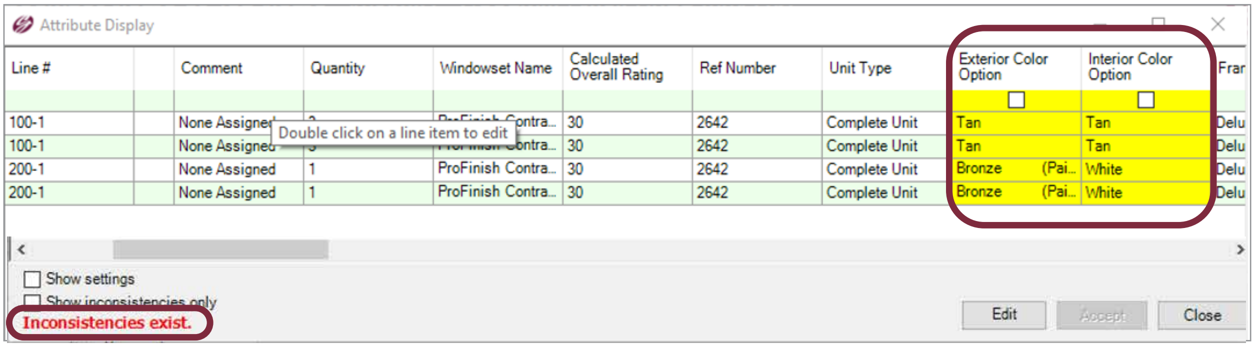


Converting a Quote to an Order

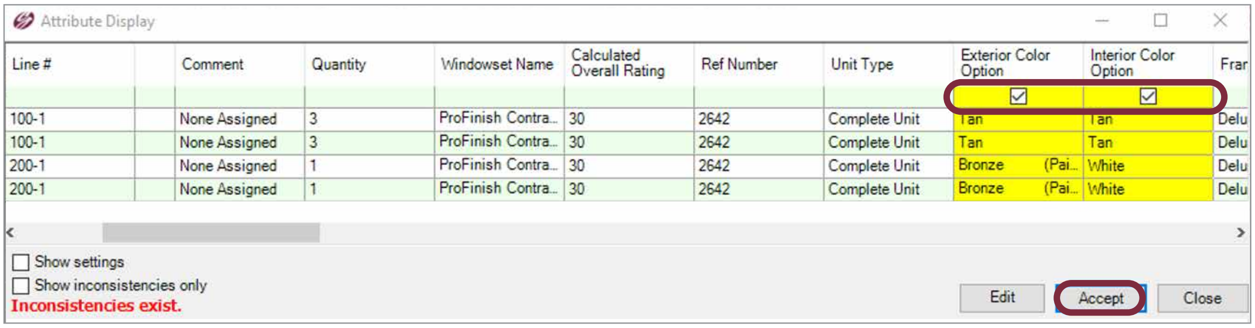
- To order your quote, go to the **Customer Info** tab
- Add your **Purchase Order** then select the **Order** button on the top task bar
- Under the **Customer Info** tab, you will have an **Estimated Ship Date** based on your delivery zone



- Your system will prompt a FINAL **Attribute Display** to confirm your order before sending to Simonton
- All yellow columns reflect any information we consider an **inconsistency** in your quote, i.e. different grid options, screen frame type, or glass. You will be **required to check the box** for all yellow columns before ACCEPT button will appear.
- If no yellow columns or inconsistencies appear, the ACCEPT button will be visible to select immediately



Pro Tip: If any inconsistencies exist, you can double-click on the incorrect option and it will open that line item



Important Note: Not all errors will prompt an "inconsistent" column so please verify all quotes before hitting the ACCEPT button.

You're Done!

In your LEFT column, you should now see a $ next to your order. You are now complete and Simonton should email/fax you a confirmation. **If you do NOT receive your confirmation, please contact your Super Service representative, 1-800-746-6691.**