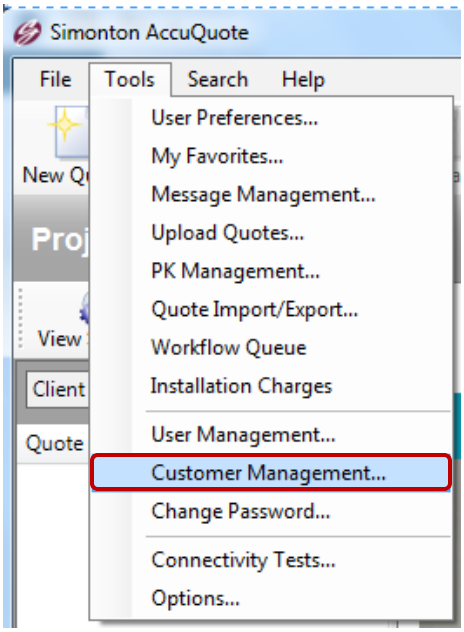
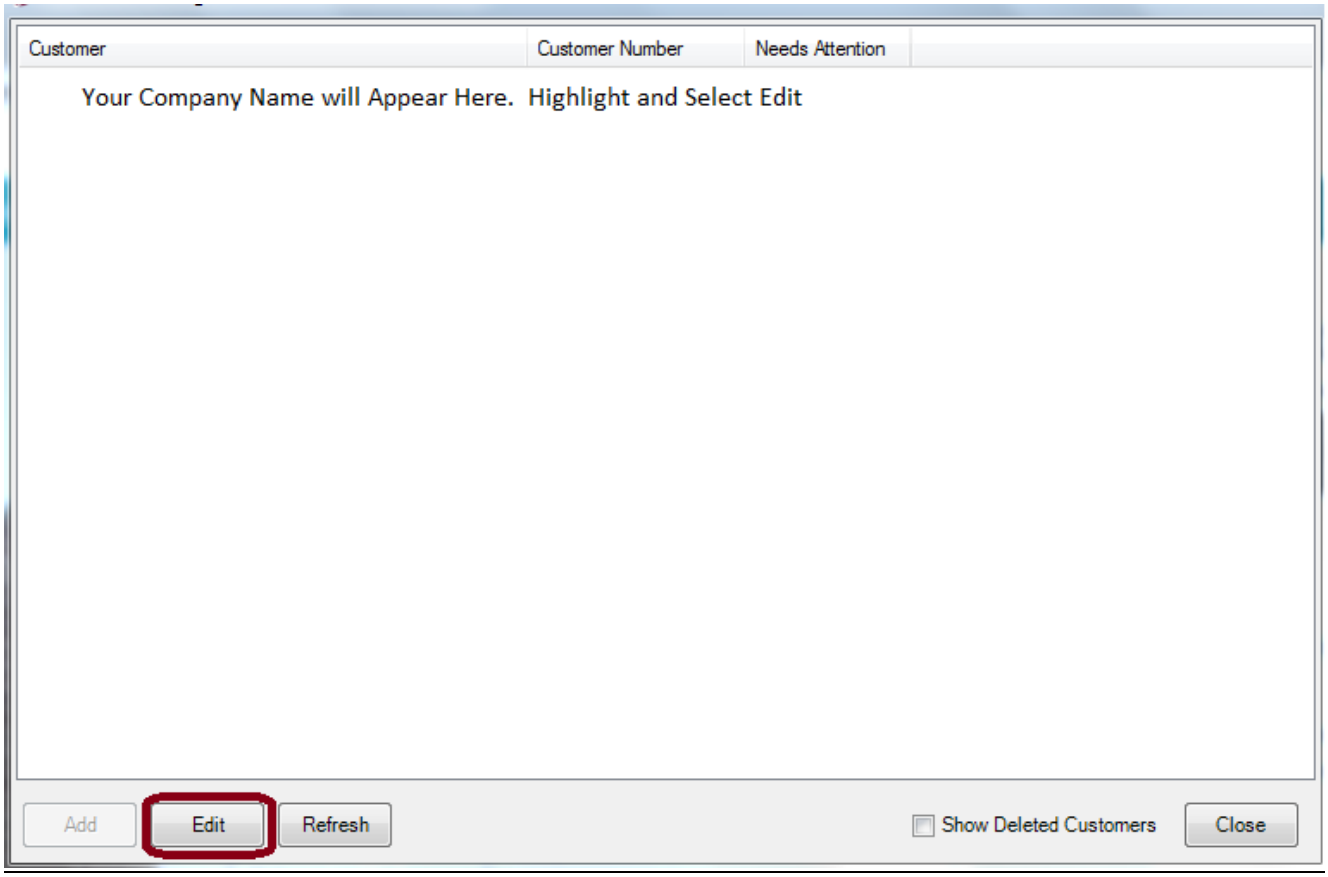
Preferences/Pricing/Contractor Setup

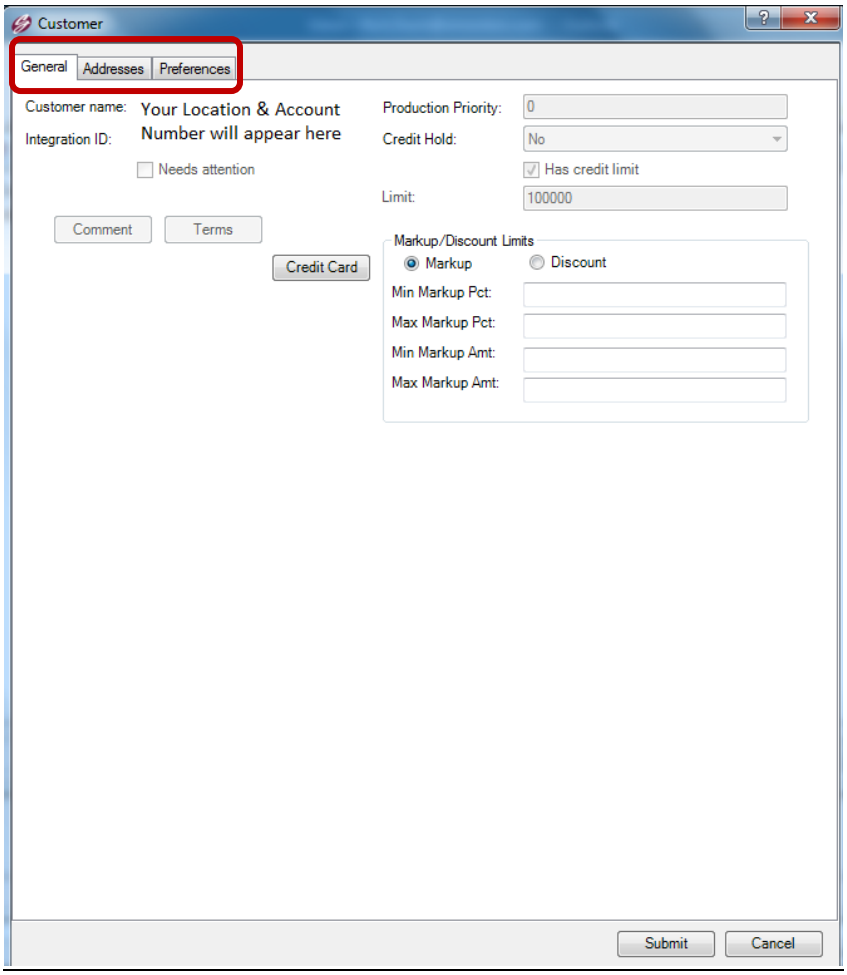
1. To Set Your Global Pricing and Product Preferences, Select Tools an Customer Management.



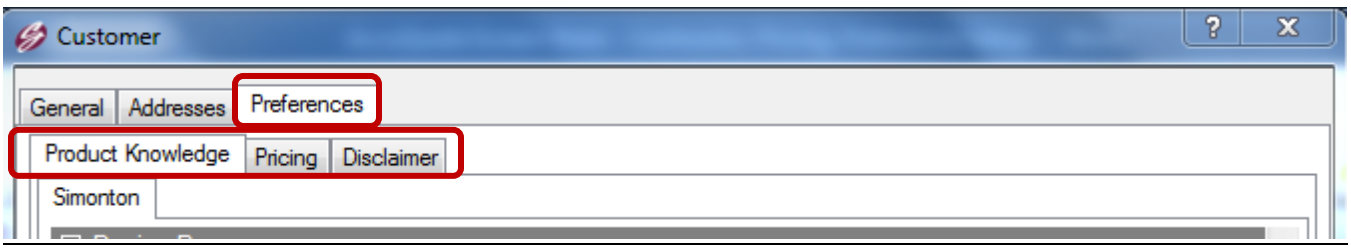
2. Select your branch and click edit



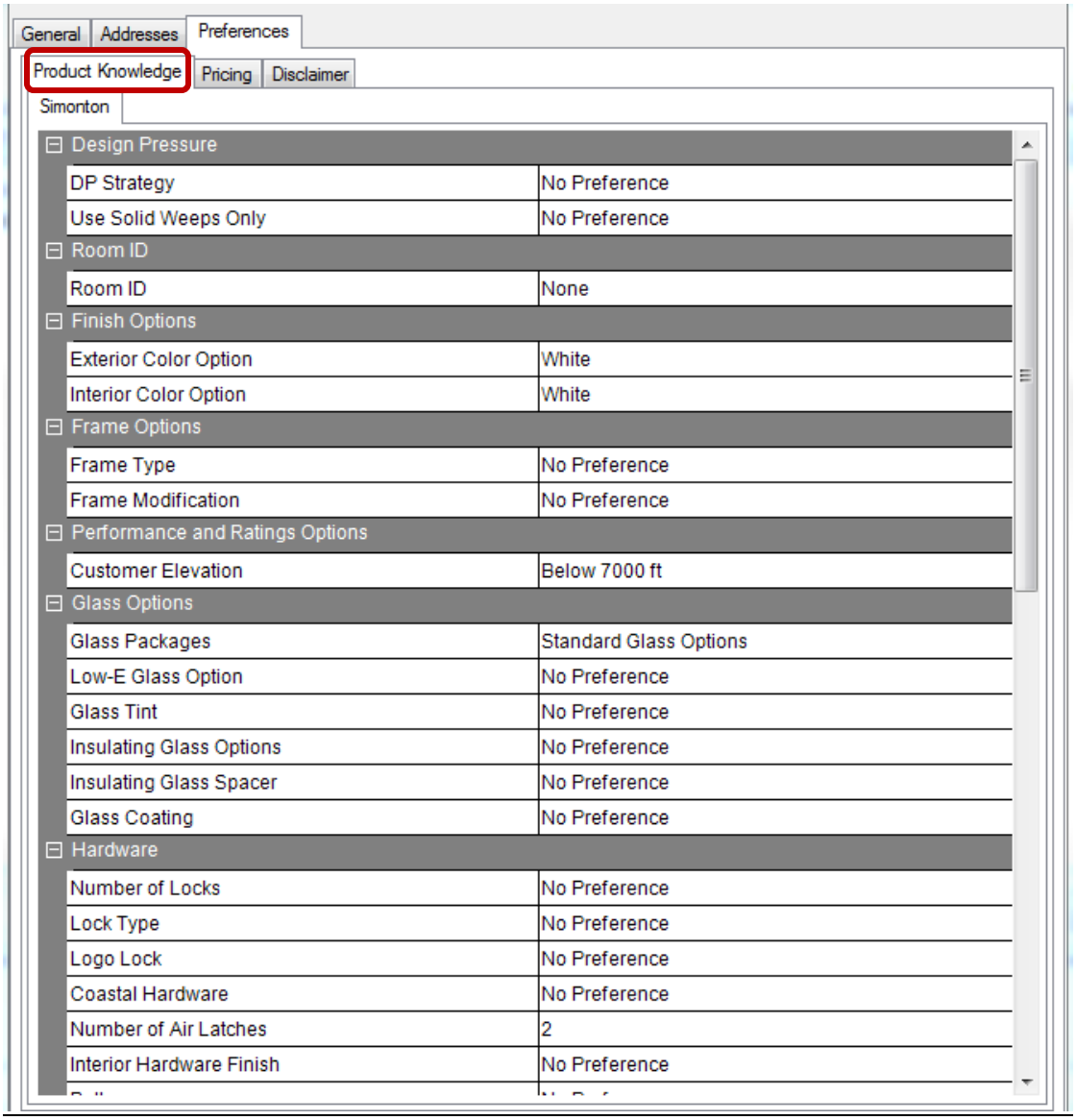
3. You will not see three tabs, General, Address, and Preferences. These will set your global options and the tabs go as follows:
    a. General – Not Used
    b. Addresses – Where to add/edit/delete your Contractor List. This is what special pricing is tied to.
    c. Preferences – Set your global quoting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



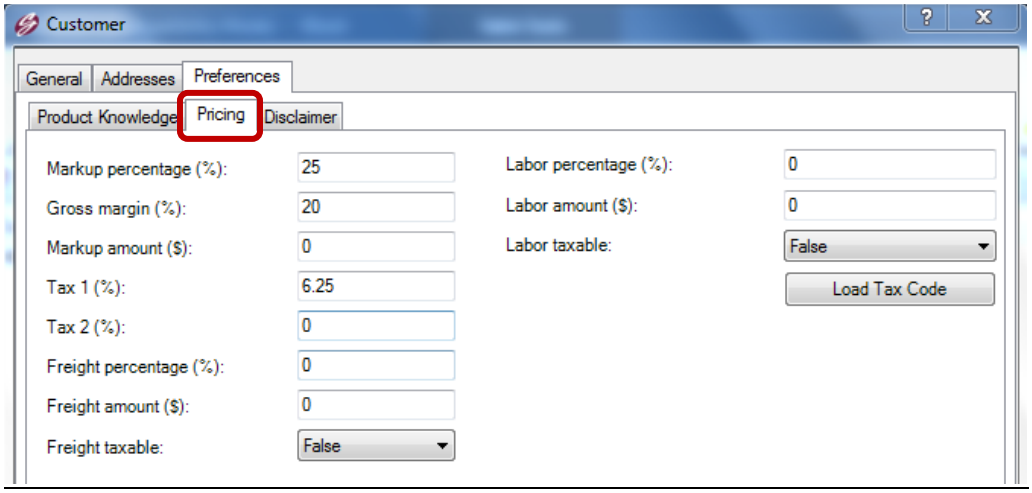
4. First, Select Preferences. Here you see (3) tabs: Product Knowledge, Pricing, and Disclaimer
    a. Product Knowledge – Set Products defaults (i.e. extruded half screen, two air latches, color, etc)
    b. Pricing – Set your Global Margin & tax percentage (only allows one tax %)
    c. Disclaimer – Create your own to show on the bottom of your confirmations.
        i. Example: Contractor must confirm all specs, quantities on quote provided …



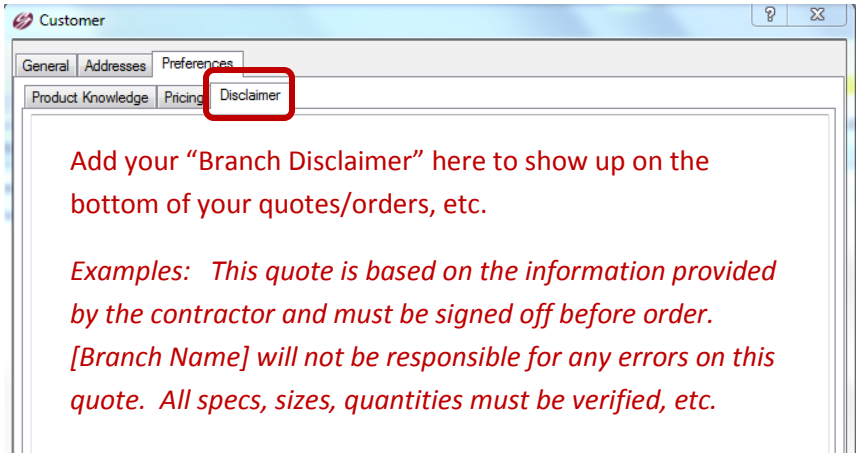
5. Example of Product Knowledge Options



6. Example of Pricing Options

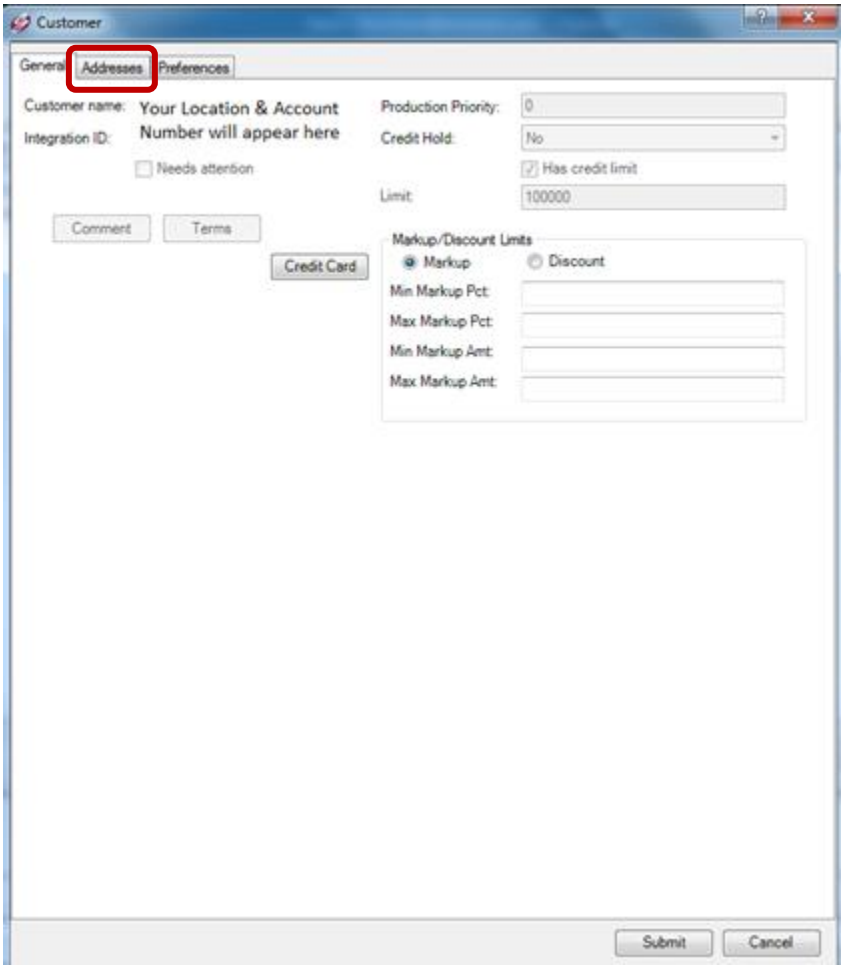


7. Optional Disclaimer

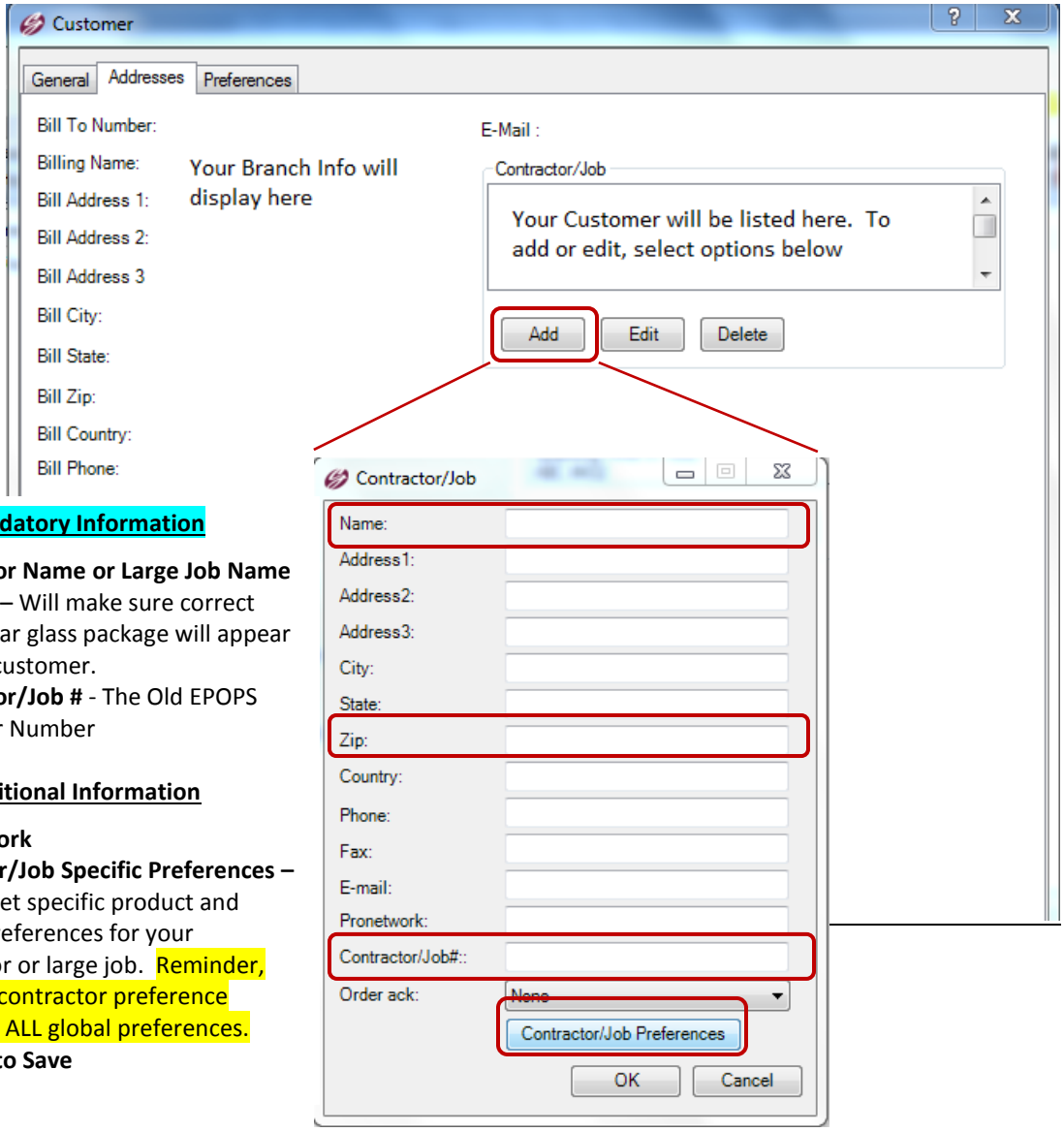


TO COMPLETE A CONTRACTOR SETUP, YOU MUST SELECT SUBMIT/CLICK CLOSE/THEN LOG OFF & LOG BACK ON. IF YOU DON'T, YOU WILL NOT SEE THE CUSTOMER WHEN YOU START YOUR NEXT QUOTE.

8. To add customers, you will follow the same steps as you did with the preferences.
    a. Tools/Customer Management/Highlight Location/Select Edit/Address Tab



9. Address Tab Layout



Mandatory Information

1. **Contractor Name or Large Job Name**
2. **Zip Code** – Will make sure correct Energy Star glass package will appear for your customer.
3. **Contractor/Job #** - The Old EPOPS Customer Number

Additional Information

1. **ProNetwork**
2. **Contactor/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.
3. **Click OK to Save**

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