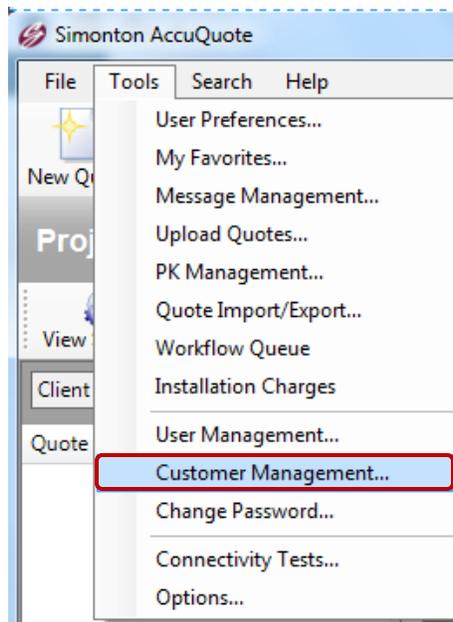
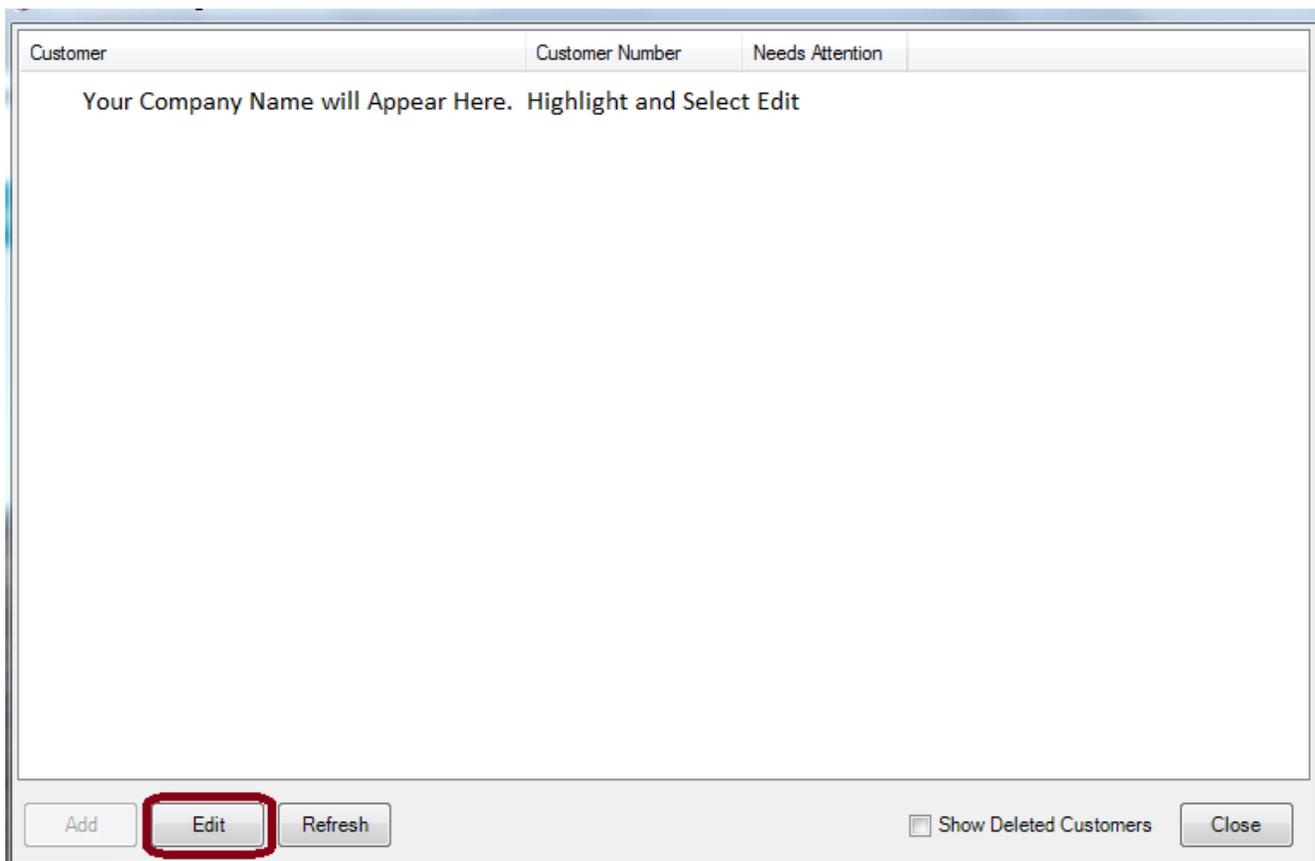


Preferences/Pricing/Contractor Setup

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.

The screenshot shows a software window titled "Customer" with three tabs: "General", "Addresses", and "Preferences". The "Addresses" tab is selected and highlighted with a red box. The form contains the following fields and controls:

- Customer name: Your Location & Account
- Integration ID: Number will appear here
- Needs attention
- Buttons: Comment, Terms, Credit Card
- Production Priority: 0
- Credit Hold: No
- Has credit limit
- Limit: 100000
- Markup/Discount Limits:
 - Markup
 - Discount
 - Min Markup Pct: [text box]
 - Max Markup Pct: [text box]
 - Min Markup Amt: [text box]
 - Max Markup Amt: [text box]
- Buttons: Submit, Cancel

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 ...

The screenshot shows the same "Customer" window, but now the "Preferences" tab is selected and highlighted with a red box. Below the "Preferences" tab, three sub-tabs are visible: "Product Knowledge", "Pricing", and "Disclaimer", all of which are also highlighted with a red box. The text "Simonton" is visible in the main content area.

5. Example of Product Knowledge Options

The screenshot shows a software window with tabs for 'General', 'Addresses', and 'Preferences'. Under 'Preferences', there are sub-tabs for 'Product Knowledge', 'Pricing', and 'Disclaimer'. The 'Product Knowledge' sub-tab is selected and highlighted with a red box. Below the sub-tabs, the name 'Simonton' is displayed. The main area contains a list of product knowledge options, each with a checkbox and a corresponding value:

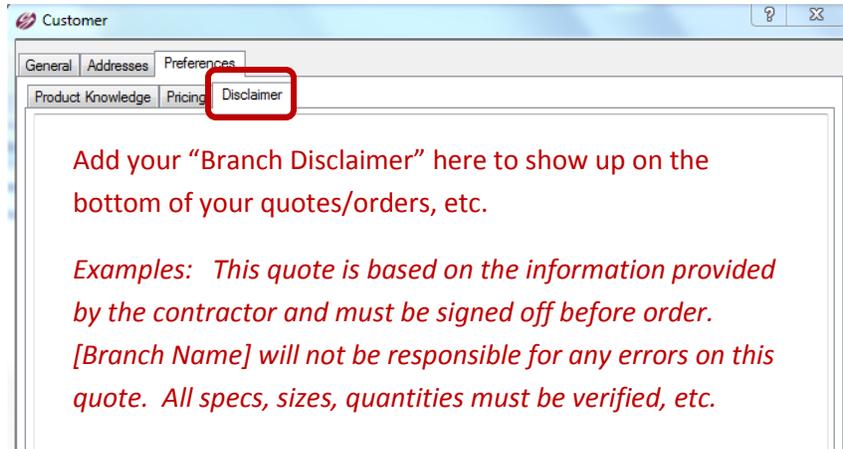
[-] Design Pressure	
DP Strategy	No Preference
Use Solid Weeps Only	No Preference
[-] Room ID	
Room ID	None
[-] Finish Options	
Exterior Color Option	White
Interior Color Option	White
[-] Frame Options	
Frame Type	No Preference
Frame Modification	No Preference
[-] Performance and Ratings Options	
Customer Elevation	Below 7000 ft
[-] Glass Options	
Glass Packages	Standard Glass Options
Low-E Glass Option	No Preference
Glass Tint	No Preference
Insulating Glass Options	No Preference
Insulating Glass Spacer	No Preference
Glass Coating	No Preference
[-] Hardware	
Number of Locks	No Preference
Lock Type	No Preference
Logo Lock	No Preference
Coastal Hardware	No Preference
Number of Air Latches	2
Interior Hardware Finish	No Preference

6. Example of Pricing Options

The screenshot shows a software window titled 'Customer' with tabs for 'General', 'Addresses', and 'Preferences'. Under 'Preferences', there are sub-tabs for 'Product Knowledge', 'Pricing', and 'Disclaimer'. The 'Pricing' sub-tab is selected and highlighted with a red box. The main area contains pricing options, each with a label, a text input field, and a dropdown menu:

Markup percentage (%):	<input type="text" value="25"/>	Labor percentage (%):	<input type="text" value="0"/>
Gross margin (%):	<input type="text" value="20"/>	Labor amount (\$):	<input type="text" value="0"/>
Markup amount (\$):	<input type="text" value="0"/>	Labor taxable:	<input type="text" value="False"/>
Tax 1 (%):	<input type="text" value="6.25"/>	<input type="button" value="Load Tax Code"/>	
Tax 2 (%):	<input type="text" value="0"/>		
Freight percentage (%):	<input type="text" value="0"/>		
Freight amount (\$):	<input type="text" value="0"/>		
Freight taxable:	<input type="text" value="False"/>		

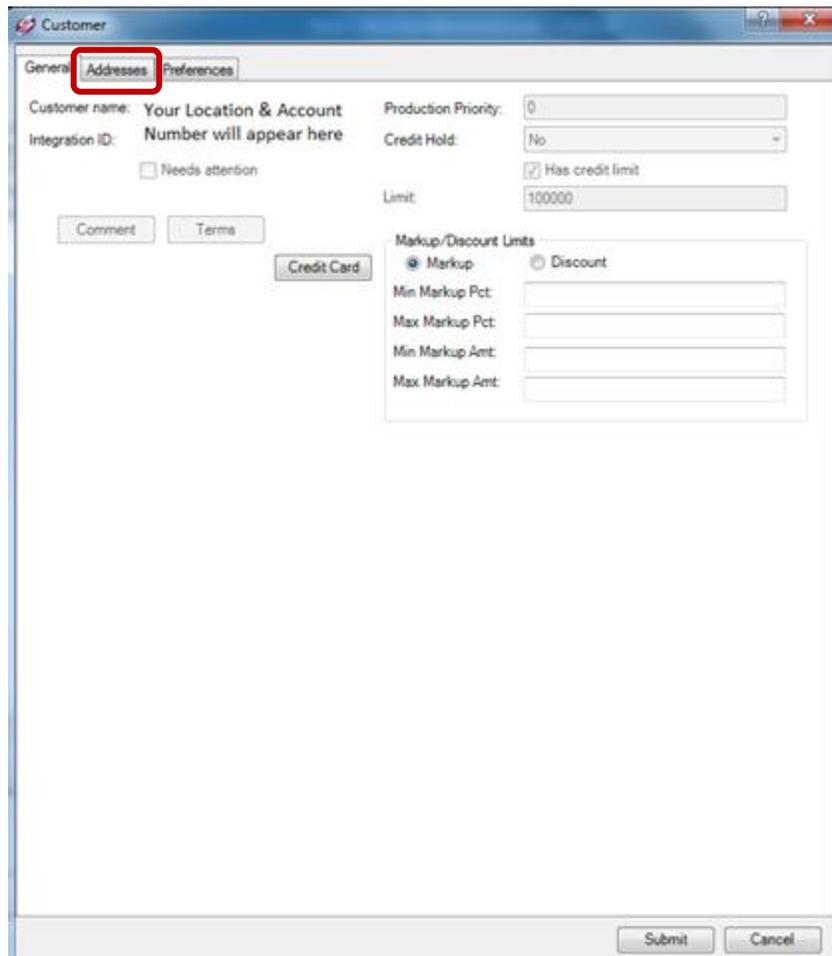
7. Optional Disclaimer



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

Customer

General Addresses Preferences

Bill To Number:

Billing Name: Your Branch Info will display here

Bill Address 1:

Bill Address 2:

Bill Address 3:

Bill City:

Bill State:

Bill Zip:

Bill Country:

Bill Phone:

E-Mail :

Contractor/Job

Your Customer will be listed here. To add or edit, select options below

Add Edit Delete

Contractor/Job

Name:

Address 1:

Address 2:

Address 3:

City:

State:

Zip:

Country:

Phone:

Fax:

E-mail:

Pronetwork:

Contractor/Job#:

Order ack: None

Contractor/Job Preferences

OK Cancel

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. **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.**
3. **Click OK to Save**

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.

Submit Cancel