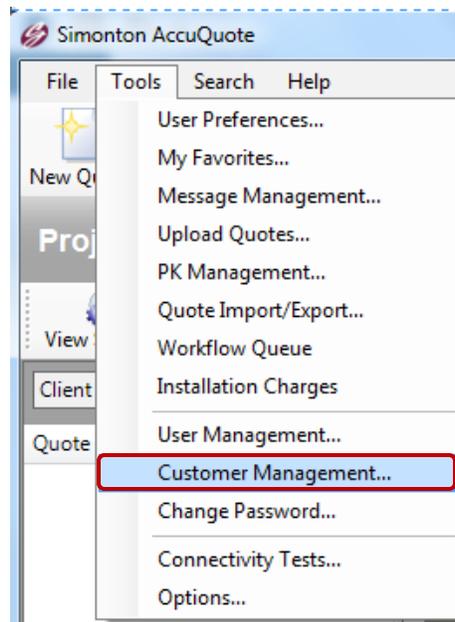
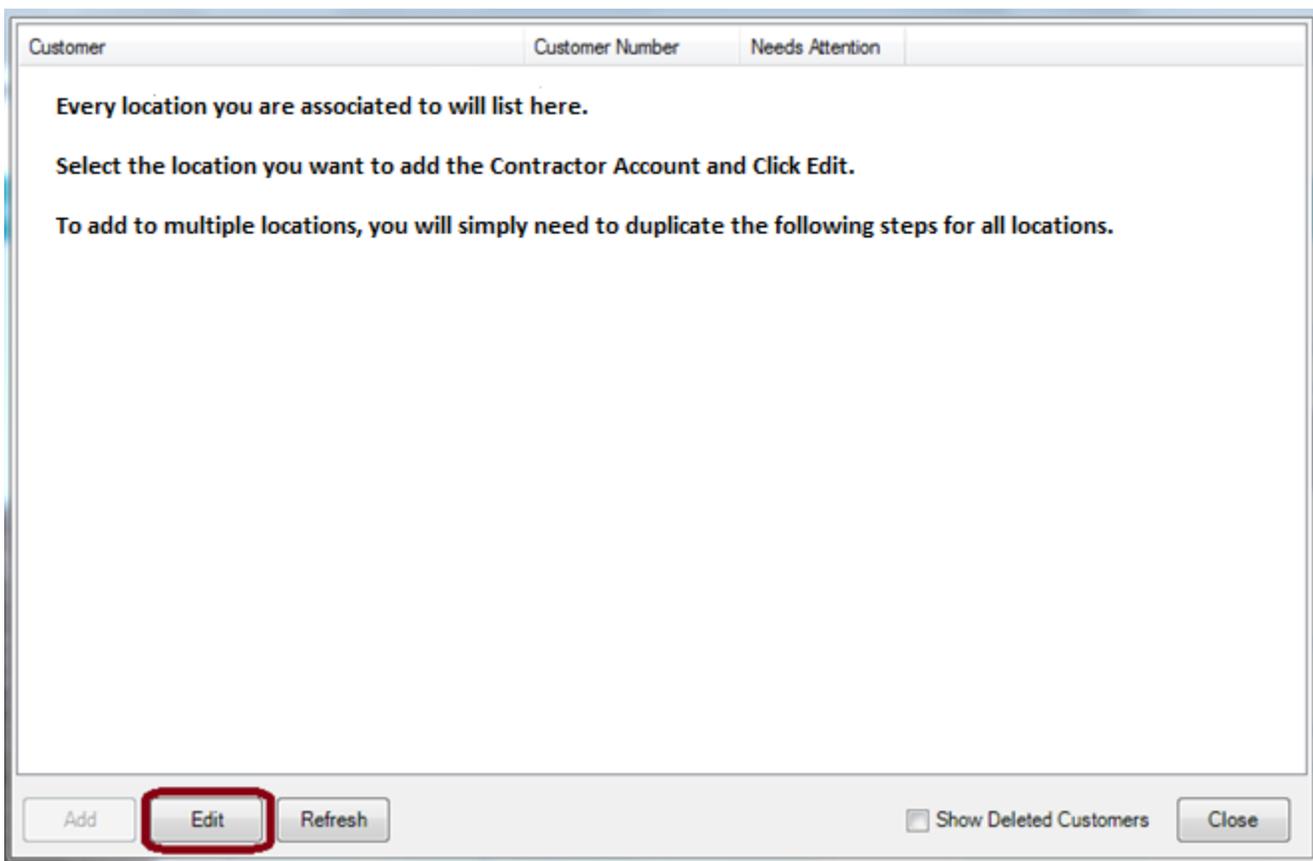


Contractor Setup

1. To Add a Contractor/Job Account, Select the Tools Drop Down and Click CUSTOMER MANAGEMENT.



2. Select the branch you want to work with and click EDIT



3. You will not see three tabs, General, Address, and Preference. **Please DO NOT change anything under General or Preferences.** This is specific to each location and will affect their system.
 - a. **General – DO NOT USE**
 - b. **Addresses – Where 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.**
 - c. **Preferences – DO NOT USE**

Customer

General | **Addresses** | Preferences

Customer name: Your Location & Account
 Integration ID: Number will appear here
 Needs attention

Production Priority: 0
 Credit Hold: No
 Has credit limit
 Limit: 100000

Comment Terms Credit Card

Markup/Discount Limits
 Markup Discount
 Min Markup Pct:
 Max Markup Pct:
 Min Markup Amt:
 Max Markup Amt:

4. 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:
 Bill Mobile:

E-Mail :
 Contractor/Job
 Your Customer will be listed here. To add or edit, select options below
 Add Edit Delete

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. Eliminates Zip Code Question
3. **Contractor/Job #** - Similar to 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 so COMPLETE EVERYTHING**
3. **Click OK to Save**

Contractor/Job

Name:
 Address1:
 Address2:
 Address3:
 City:
 State:
 Zip:
 Country:
 Phone:
 Fax:
 E-mail:
 Pronetwork:
 Contractor/Job#:
 Order ack: None
 Contractor/Job Preferences
 OK Cancel

REMINDER FOR ANY CONTRATOR VERSION SETUP

1. Email DSM REP with Name & Contractor/Job #
2. Add Product/Product Preferences to Contractor/Job Account

The screenshot shows a window titled "Contractor/Job" with the following fields: Name, Address1, Address2, Address3, City, State, Zip, Country, Phone, Fax, E-mail, Pronetwork, Contractor/Job#:, and Order ack. The Order ack field is a dropdown menu currently set to "None". A red arrow points from the top left towards the "Contractor/Job Preferences" button, which is highlighted with a red box. Below the dropdown are "OK" and "Cancel" buttons.

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.

A close-up of two buttons: "Submit" and "Cancel". The "Submit" button is highlighted with a red box.