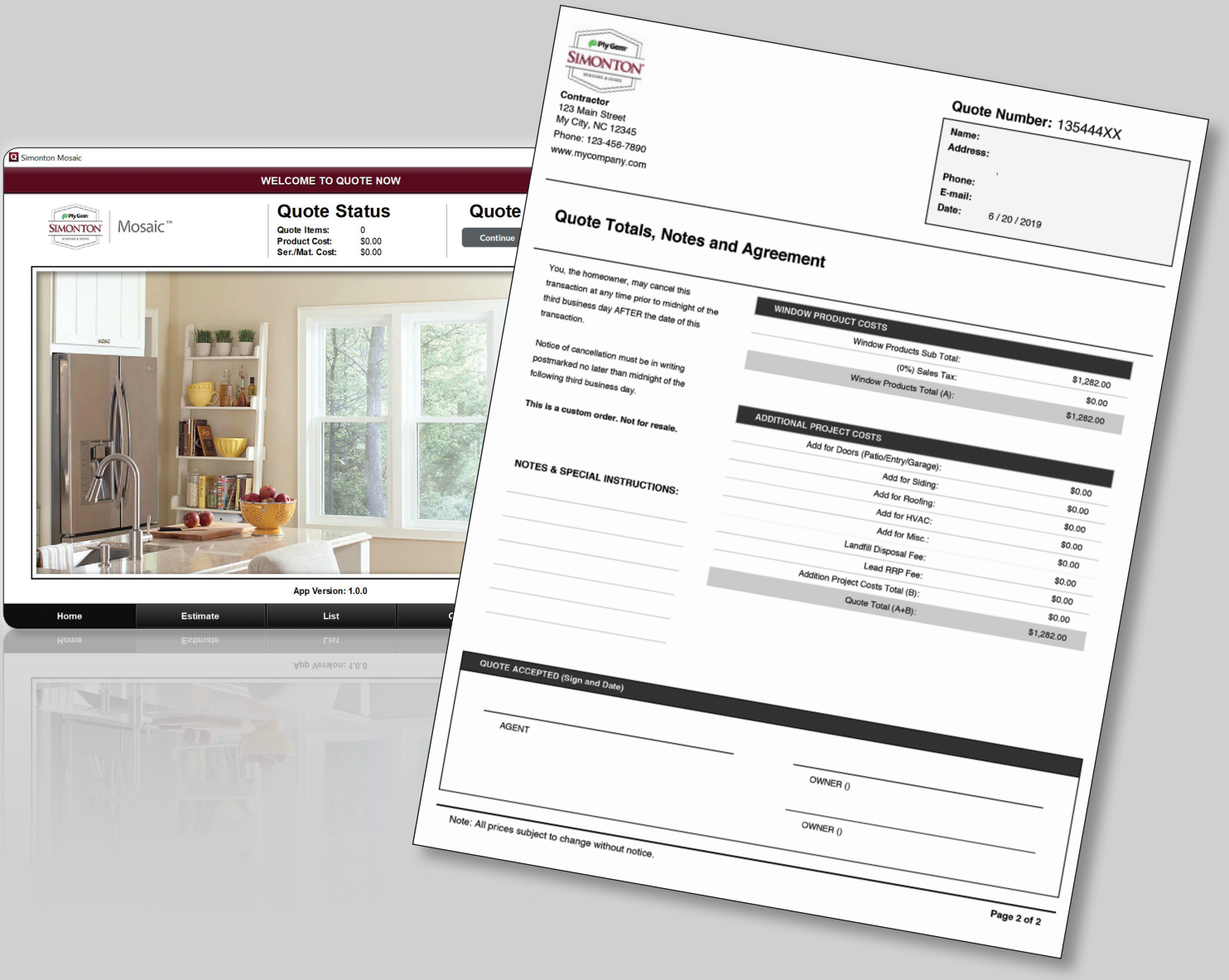
GENERATE PROFESSIONAL, ACCURATE QUOTES IN RECORD TIME!

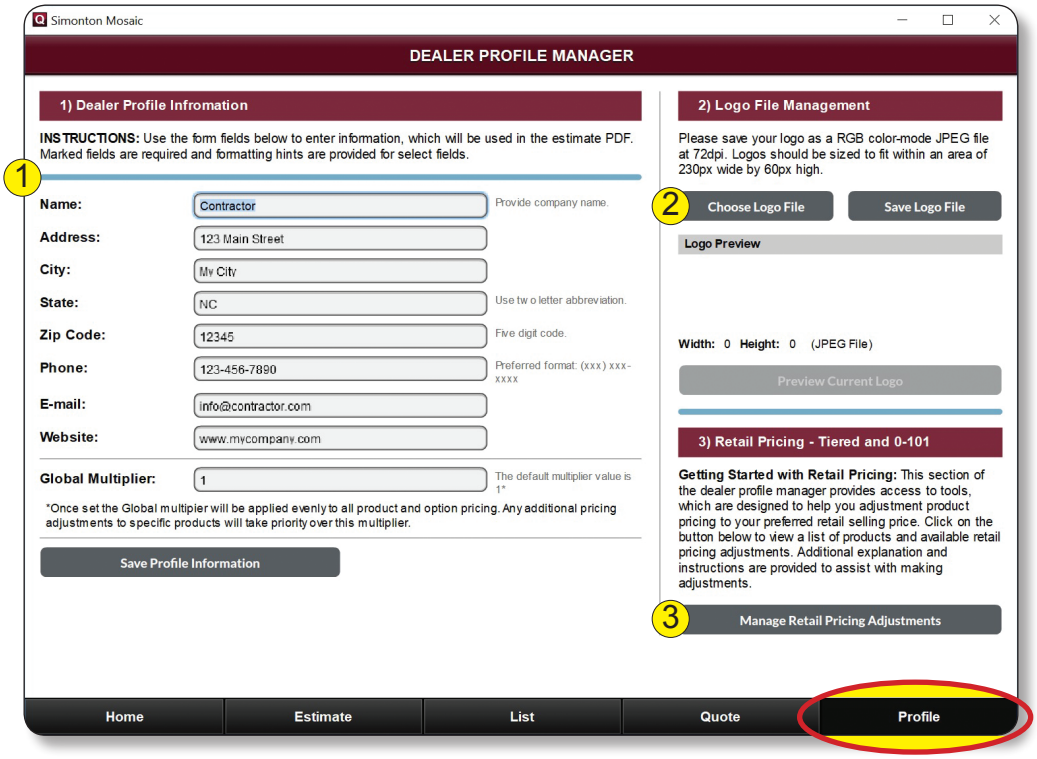
Easy Tips for the Mosaic Quote Tool

VERSION 1



1 Easy as 1-2-3!

PERSONALIZE PROFILE WITH YOUR COMPANY INFORMATION!



1. Populate your company information and click **Save Profile Information**.

2. Choose your company logo file and click **Save Logo File** (for printed quotes).

3. To make retail pricing adjustments click on the **Manage Retail Pricing Adjustments** button. This will take you to a new screen where you will be able to make pricing adjustments and view additional explanation for tiered and 0-104 pricing schemes.
   Please take time to test the pricing scheme for each window and options to ensure you are satisfied with the retail pricing that will print on the homeowner's quote!

Note: Once the Profile Manager page is complete and the information is saved, it is not necessary to go to this page again (except to update pricing or company information).

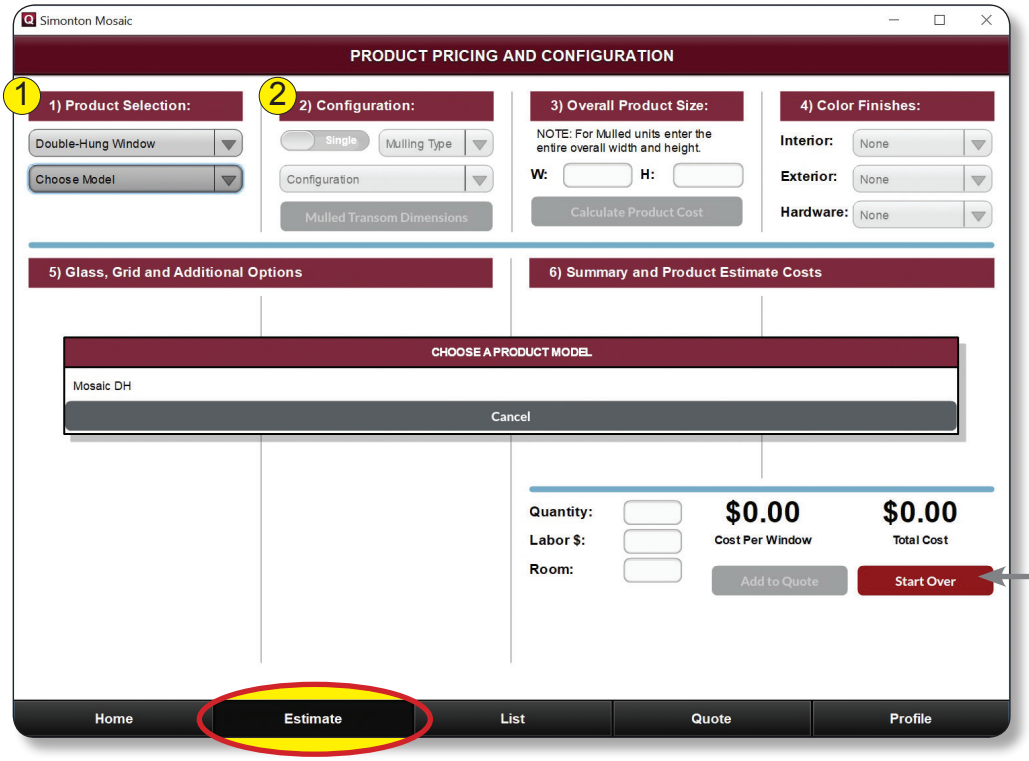
When Entering Text:

- After entering text values in fields hit the **Enter/Return** key on your keyboard.
- On touch-screen software keyboards Enter key may be labeled differently.
- Hitting the Enter key allows for tabbing on forms.



2 Quick Tips for Pricing

START QUOTING!



If you run into an issue during the estimate process click/tap on the **Start Over** button to completely reset the Estimate screen.

The quote tool Estimate screen is very intuitive and allows all options to be selected individually.

1 PRICING A SINGLE UNIT

1. To start click/tap on **Choose a Style** and a pop-up menu will appear. You must choose one of the available menu options. Repeat the same process for **Choose a Model**. After choosing a model the tool will automatically tab over to Width input field.

2. Enter the overall product Width and Height:
   a. Enter a width then hit the **Enter/Return** key on your keyboard to commit the value and tab over to height.
   b. Enter a height then hit the **Enter/Return** key on your keyboard to commit the value and retrieve pricing.
   c. If hitting Enter/Return does not update displayed pricing, hit the **Calculate Product Cost** to update manually.

2 PRICING A MULLED UNIT

1. Choose a product Style and Model like you would for a single unit.

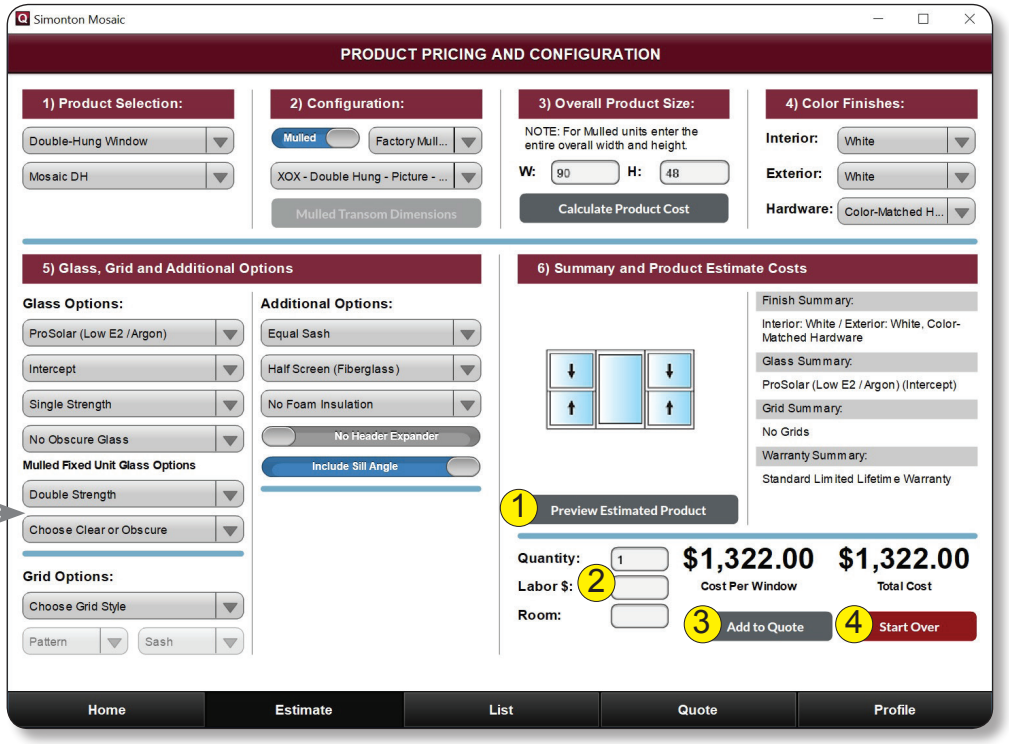
2. Choosing a product configuration for mulled units:
   a. Slide the toggle from Single to Mulled.
   b. You must select the type of mulling option desired (i.e. factory mulled, field mulled, etc.).
   c. You must select a configuration for the mulled unit.
   d. When pricing a mulled unit it is best to make configuration option selections before you enter the overall product size.
   e. When pricing a unit with a transom click on the **Mulled Transom Dimensions** button to enter the desired transom unit height.

3. Enter an overall Width and Height, include all units, using the same process described under the single unit scenario.

2 Quick Tips for Pricing Continued

After you have established a product configuration and entered sizes information the Estimate screen will be updated to display fields for glass, grids, additional options, warranties and more.

If you are pricing a mulled unit with a fixed picture window, use these menu controls to set the glass strength as well as clear or obscure glass options for the picture window unit (designated: O) only.



1. To see a complete summary of the product click/tap on the **Preview Estimated Product** button. To return to the main quote page, simply click the **Back to Estimate** button.

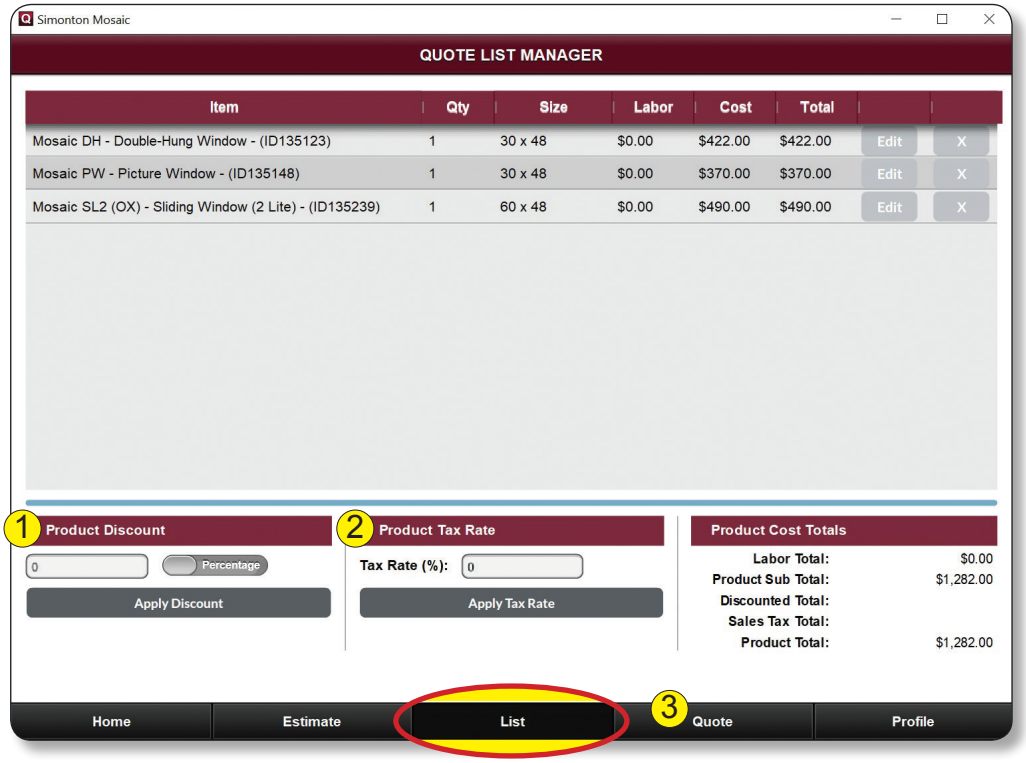
2. You may select a separate labor charge for each window/patio door to be installed. This price will NOT print separately on the printed quote; the total cost will include labor and product for each line item.

3. When you finish pricing the current window/patio door click/tap on the **Add to Quote** button. If a cost for labor has not been added, a pop-up window will open asking if you would like to add labor. To proceed without labor, click/tap on the **No, Continue** button and the product will be saved to the quote list and the tool will automatically advance to the **Quote List** screen. To price a new product click/tap on the **Estimate** tab.

4. If you are configuring a product and would like to change the selected product type or style, click/tap on the red **Start Over** button. This allows the Estimate screen to reset itself and will swipeout any previously selected options and text enteries. Be sure to make note of any product dimensions that were entered, so that they may be re-entered while pricing the new product.

3 Manage Your Quote

The Quote List Manager offers a summary of all windows on the quote. See the “Edit” button to make changes to a line item or the “X” button to remove it from the quote completely.



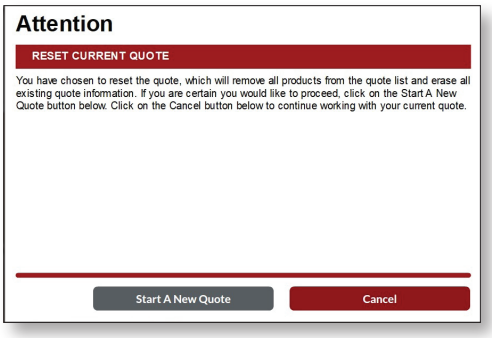
1. If desired, a discount (either cash or percentage) may be applied to the product costs. If no discount is selected, the discount line will NOT appear on the printed quote.

2. If applicable, a tax rate (product only) may be applied. If no taxes are applicable, simply leave blank.

3. Once all information is final on the List Manager screen, please select **Quote** from the navigation bar at the bottom of the screen.

STARTING A NEW QUOTE

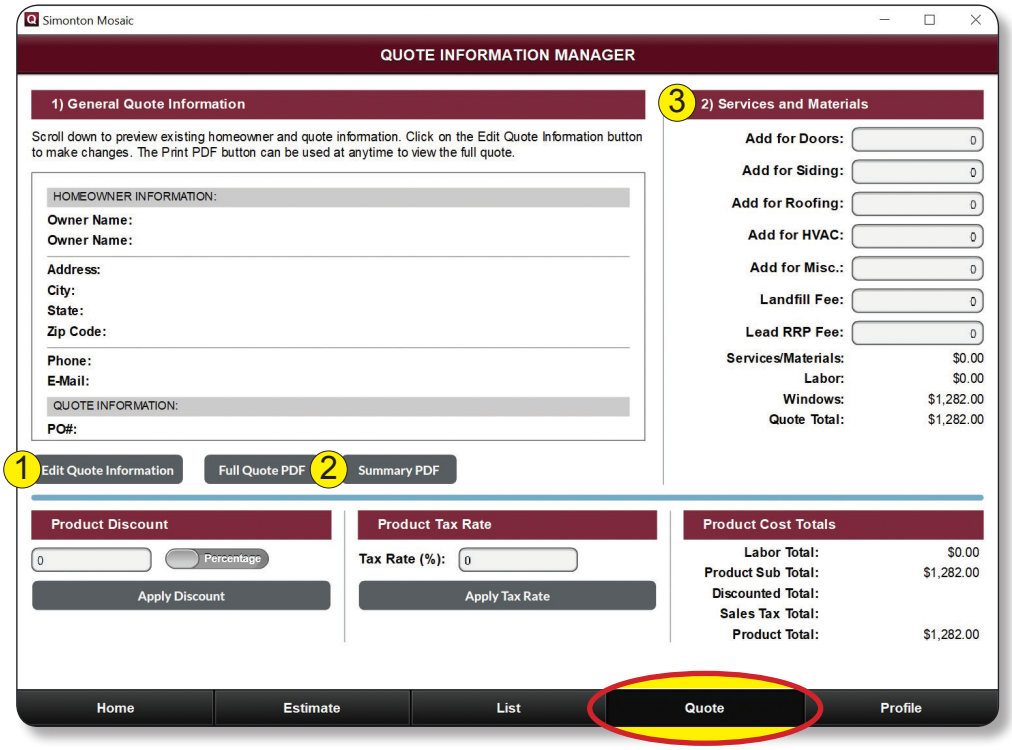
1. When you are finished with the current quote and would like to start a new one for a different customer, start by returning to the Home tab.
2. Under Quote Manager tap on the **Reset Quote** button.
3. A pop-up window will appear, tap on the **Start A New Quote** button to reset the Quote app or tap on the Cancel button to continue with the current quote.



Important Tip: Once you have decided to start a new quote, all prior product estimate items and quote information will be lost. The only way you will be able to view a previous quote is by referencing any quote PDF files you have stored in your e-mail account or saved to your personal computer. The quote tool does not provide back-ups or archives of previous quotes.

4 Finalize the Quote

EMAIL OR PRINT IMMEDIATELY!



1 EASILY EDIT QUOTE AND CUSTOMER INFORMATION FOR QUOTE PRINTOUT

Click on the **Edit Quote Information** button and you will be taken to a screen where you will be able to enter the necessary homeowner and contact information. When done, click on the **Save Quote Information** button to return to the main Quote Information Manager screen. This will enable the Print PDF button.

2 VIEW A PDF OF THE ENTIRE QUOTE OR JUST THE QUOTE SUMMARY

When all information is final on the Quote Manager screen, you may choose to view a PDF of the quote. Clicking on the **Full Quote PDF** button provides a complete PDF of the quote with product line item breakdowns. Clicking on the **Summary PDF** button provides only the last summary page of the quote with totals, notes, etc. The PDF will be opened in the default PDF viewer installed on your device/computer.

3 EASILY ADD ANY OTHER PRODUCT CATEGORIES FOR SAME QUOTE PRINTOUT

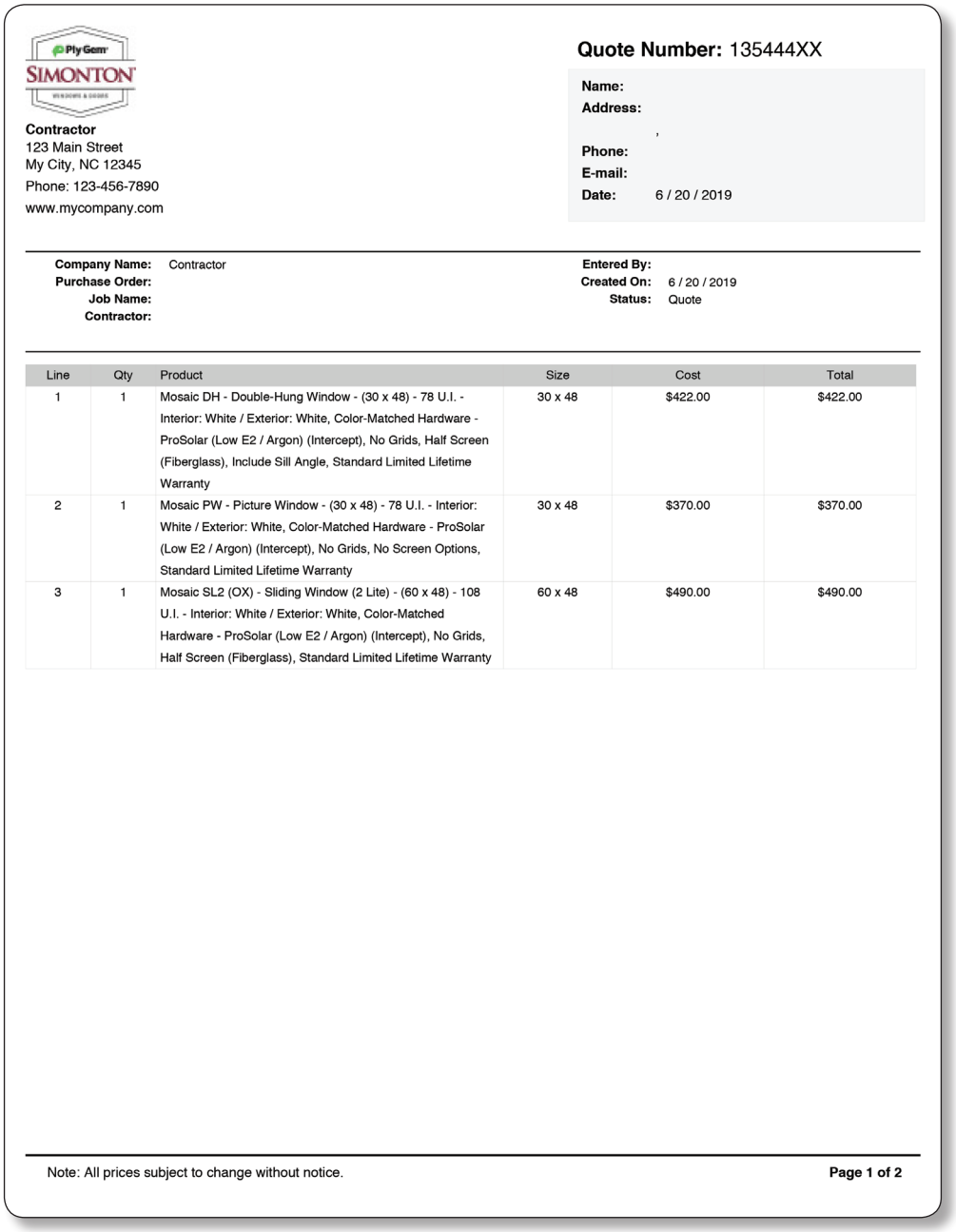
If you are selling additional products, you can simply enter the applicable prices into the appropriate field and they will also print out on the actual quote! Add fencing, decking, HVAC and siding prices and provide to your customers the same, easy, professional printed quote!

You can even add special instructions or comments by clicking on **EDIT SPECIAL INSTRUCTIONS**. The quote will print whatever you type in that field. Even the date automatically updates on the printed version.

5 Quote PDF

PRODUCT INFORMATION FOR ORDERING:

The first part of the quote PDF will include all details that have been selected; your logo, homeowner information, business information, applicable purchase order information and a detailed description of each product. The estimated products are listed as line items, which display the quantity, description, size, cost and total. It is important that you retain these pages of the quote as a reference for ordering the quoted product(s) via PlyGem AccuQuote.



Contractor
123 Main Street
My City, NC 12345
Phone: 123-456-7890
www.mycompany.com

Quote Number: 135444XX

Name:
Address:
,
Phone:
E-mail:
Date: 6 / 20 / 2019

Company Name: Contractor
Purchase Order:
Job Name:
Contractor:

Entered By:
Created On: 6 / 20 / 2019
Status: Quote

Line	Qty	Product	Size	Cost	Total
1	1	Mosaic DH - Double-Hung Window - (30 x 48) - 78 U.I. - Interior: White / Exterior: White, Color-Matched Hardware - ProSolar (Low E2 / Argon) (Intercept), No Grids, Half Screen (Fiberglass), Include Sill Angle, Standard Limited Lifetime Warranty	30 x 48	$422.00	$422.00
2	1	Mosaic PW - Picture Window - (30 x 48) - 78 U.I. - Interior: White / Exterior: White, Color-Matched Hardware - ProSolar (Low E2 / Argon) (Intercept), No Grids, No Screen Options, Standard Limited Lifetime Warranty	30 x 48	$370.00	$370.00
3	1	Mosaic SL2 (OX) - Sliding Window (2 Lite) - (60 x 48) - 108 U.I. - Interior: White / Exterior: White, Color-Matched Hardware - ProSolar (Low E2 / Argon) (Intercept), No Grids, Half Screen (Fiberglass), Standard Limited Lifetime Warranty	60 x 48	$490.00	$490.00

Note: All prices subject to change without notice.

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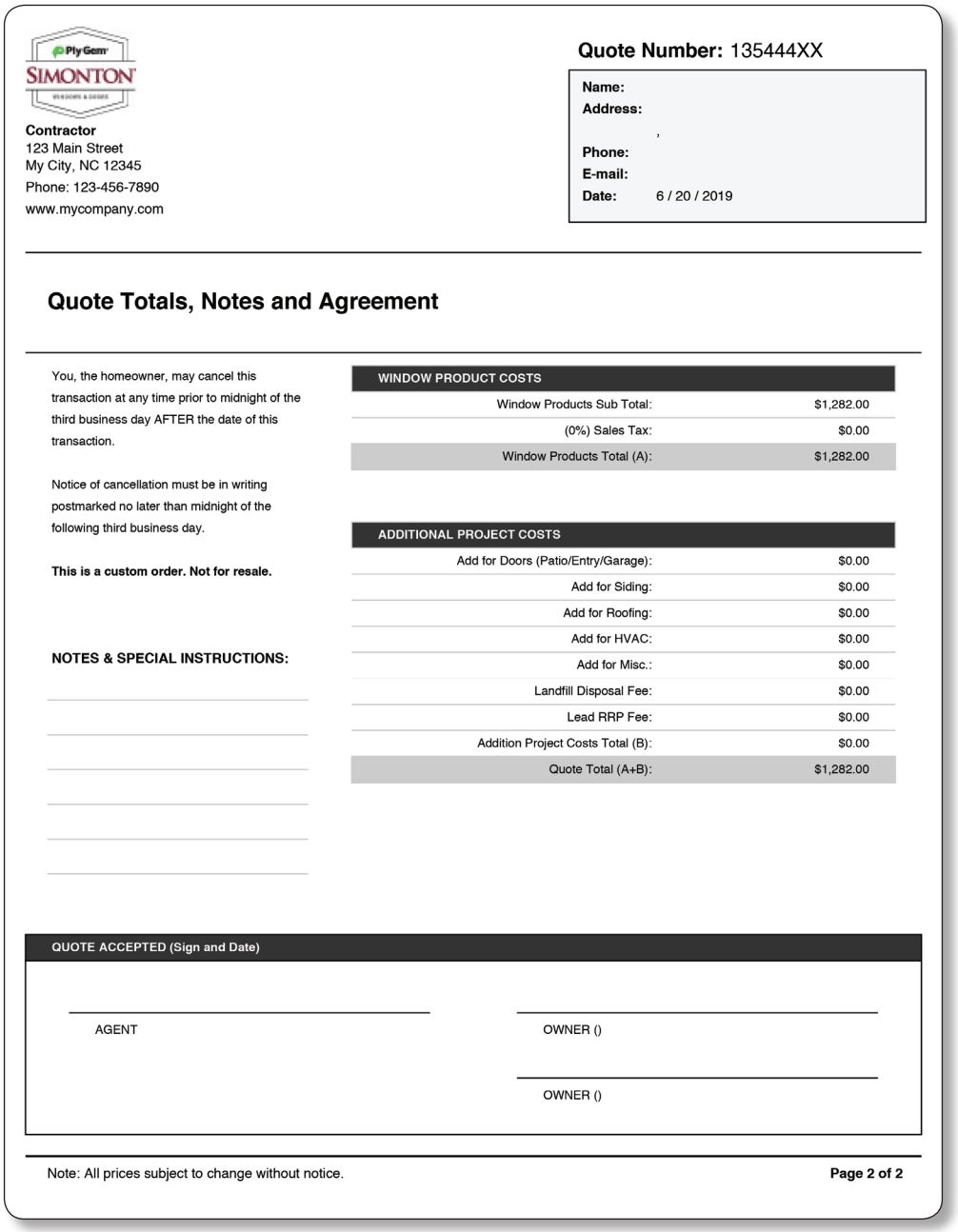
5 Quote PDF

SUMMARY PAGE AND SAVING:

The last page of the quote PDF is a summary page with total product costs, total additional materials and services costs, applicable purchase order information, and an area for homeowner's acceptance and signature. This is the only page we recommend leaving with the customer for their records.



Contractor
123 Main Street
My City, NC 12345
Phone: 123-456-7890
www.mycompany.com

Quote Number: 135444XX

Name:
Address:
,
Phone:
E-mail:
Date: 6 / 20 / 2019

Quote Totals, Notes and Agreement

You, the homeowner, may cancel this transaction at any time prior to midnight of the third business day AFTER the date of this transaction.

Notice of cancellation must be in writing postmarked no later than midnight of the following third business day.

This is a custom order. Not for resale.

NOTES & SPECIAL INSTRUCTIONS:

WINDOW PRODUCT COSTS	
Window Products Sub Total:	$1,282.00
(0%) Sales Tax:	$0.00
Window Products Total (A):	$1,282.00

ADDITIONAL PROJECT COSTS	
Add for Doors (Patio/Entry/Garage):	$0.00
Add for Siding:	$0.00
Add for Roofing:	$0.00
Add for HVAC:	$0.00
Add for Misc.:	$0.00
Landfill Disposal Fee:	$0.00
Lead RRP Fee:	$0.00
Addition Project Costs Total (B):	$0.00
Quote Total (A+B):	$1,282.00

QUOTE ACCEPTED (Sign and Date)

AGENT

OWNER ()

OWNER ()

Note: All prices subject to change without notice.

Page 2 of 2

PRINTING, EMAILING AND SAVING THE QUOTE:

To save the PDF, please select save as PDF and choose a folder on your computer where you would like to keep your quotes. It is recommended to include client name and quote date in the file name (i.e. SMITH quote, 6-12-19). You may now email or print quote.