

User Reference Guide

Welcome to the Associated Materials network of dealers!

This user guide will get you started with Associated Materials' new order entry system, **WindowExpress**. It covers basic information you need to login, organize your customer files, create custom quotes and place orders.

It also introduces you to some of the special features of the system, including quote certification, preferences, global changes and alternate quotes. This guide is not an exhaustive manual of all the system's features and functions. It is merely an introduction to a few of the time saving features you will find in **Associated Materials WindowExpress**.

Again, Welcome!

Definitions

Client: You are a **client** of Associated Materials. Your organization's information is populated in to the list of **clients**.

Contacts: Customers who order windows from you. You are the Associated Materials **client**, and your customers are referred to as **contacts** in the system. By saving your customer's information as a **contact**, you can easily populate quotes with shipping, billing and order preferences associated with that **contact**.

Global Changes: Changes made to multiple lines in a quote simultaneously. Global changes can be applied to line configuration options or pricing.

Preferences: Predefined answers to common configuration questions, such as glass strength or grill style set prior to beginning the quote, and customer pricing changes that are applied at the start of a quote

User Options: This is a group of setting that allows you to select defaults for repetitive actions that will save you time. Access these User Options from the Tools menu, and set your defaults.

Window & Door Configurator: The configurator in WindowExpress is used to define a unit and add it as a line item to a quote.

Login

Username: Enter your username.

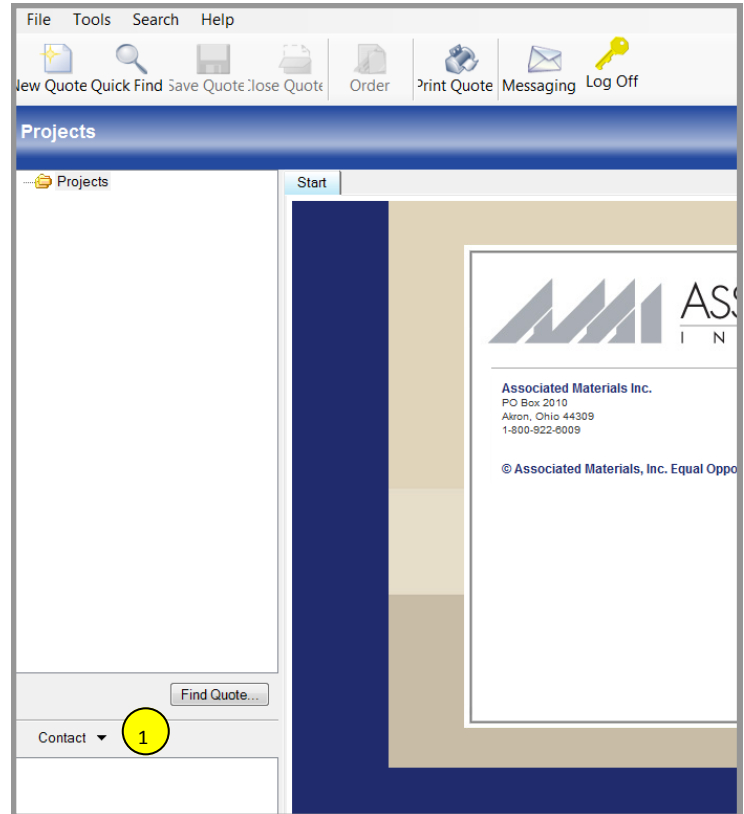
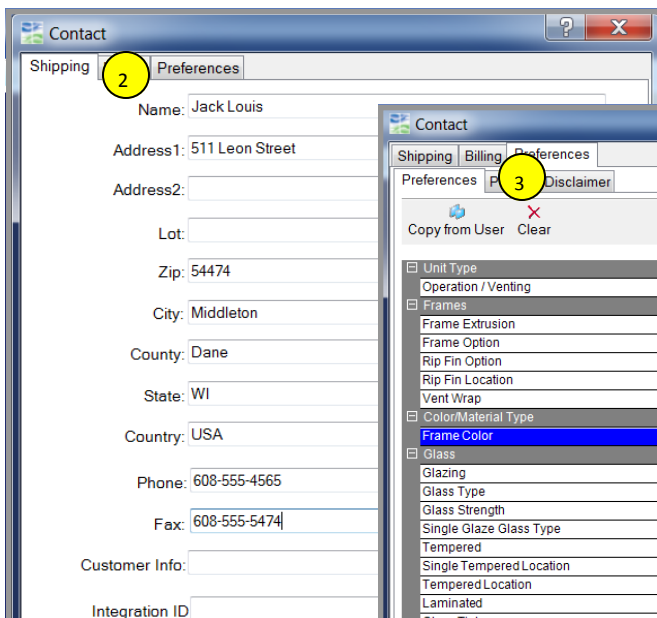
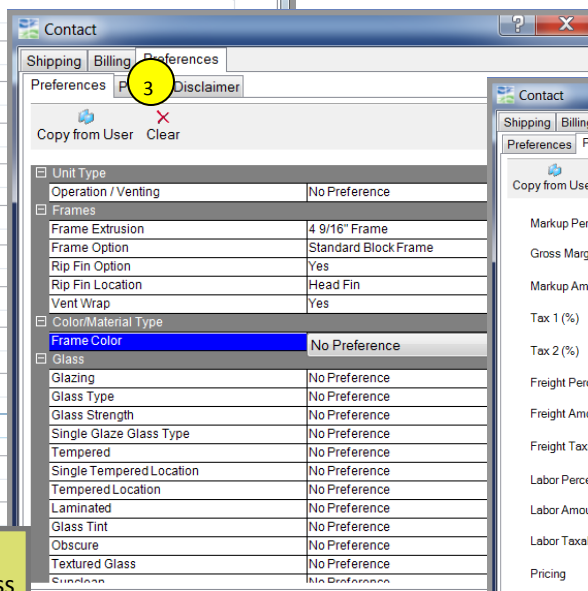
Password: Enter your password.

Forgot your password will e mail you a new temporary password.

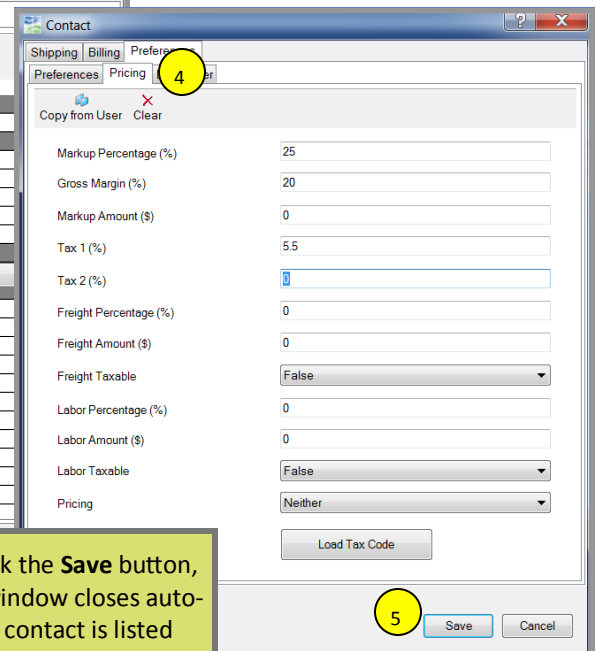


Contacts

- 1 Create a contact by clicking on the word **Contact** on the left of your screen., below the gray **Find Quote** button.
- 2 Enter the contact's **Shipping** information in the Contact form. Then navigate to the **Billing** information using the tabs across the top of the pop-up window.
- 3 If necessary, navigate to **Preferences** using the navigation tab. If your contact has specific ordering preferences you can enter them. Each time you create a quote for this contact, these predefined preferences are auto-populated. You can set unique preferences for each brand.
- 4 Click the **Pricing Preferences** sub-tab to enter your mark-up as well as any taxes, freight or labor charges used with the contact.
- 5 Click **Save**.

Unit Type	Preference
Operation / Venting	No Preference
Frames	
Frame Extrusion	4 9/16" Frame
Frame Option	Standard Block Frame
Rip Fin Option	Yes
Rip Fin Location	Head Fin
Vent Wrap	Yes
Color/Material Type	
Frame Color	No Preference
Glass	
Glazing	No Preference
Glass Type	No Preference
Glass Strength	No Preference
Single Glaze Glass Type	No Preference
Tempered	No Preference
Single Tempered Location	No Preference
Tempered Location	No Preference
Laminated	No Preference
Glass Tint	No Preference
Obscure	No Preference
Textured Glass	No Preference
European	No Preference



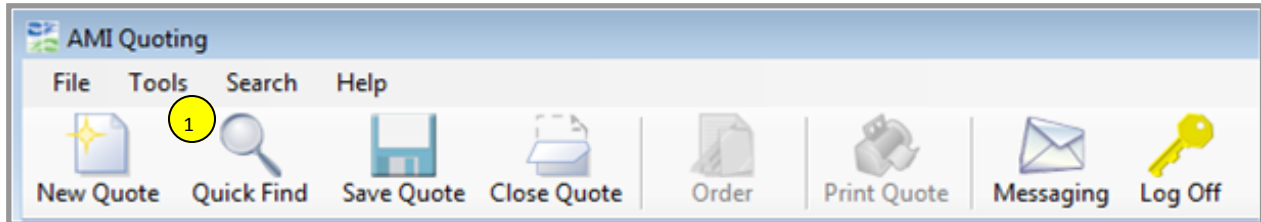
Markup Percentage (%)	25
Gross Margin (%)	20
Markup Amount (\$)	0
Tax 1 (%)	5.5
Tax 2 (%)	0
Freight Percentage (%)	0
Freight Amount (\$)	0
Freight Taxable	False
Labor Percentage (%)	0
Labor Amount (\$)	0
Labor Taxable	False
Pricing	Neither

NOTE: During the quoting process you can override the contact preferences if needed.

When you click the **Save** button, the **Contact** window closes automatically. The contact is listed under **Contacts** list on the left side of the screen.

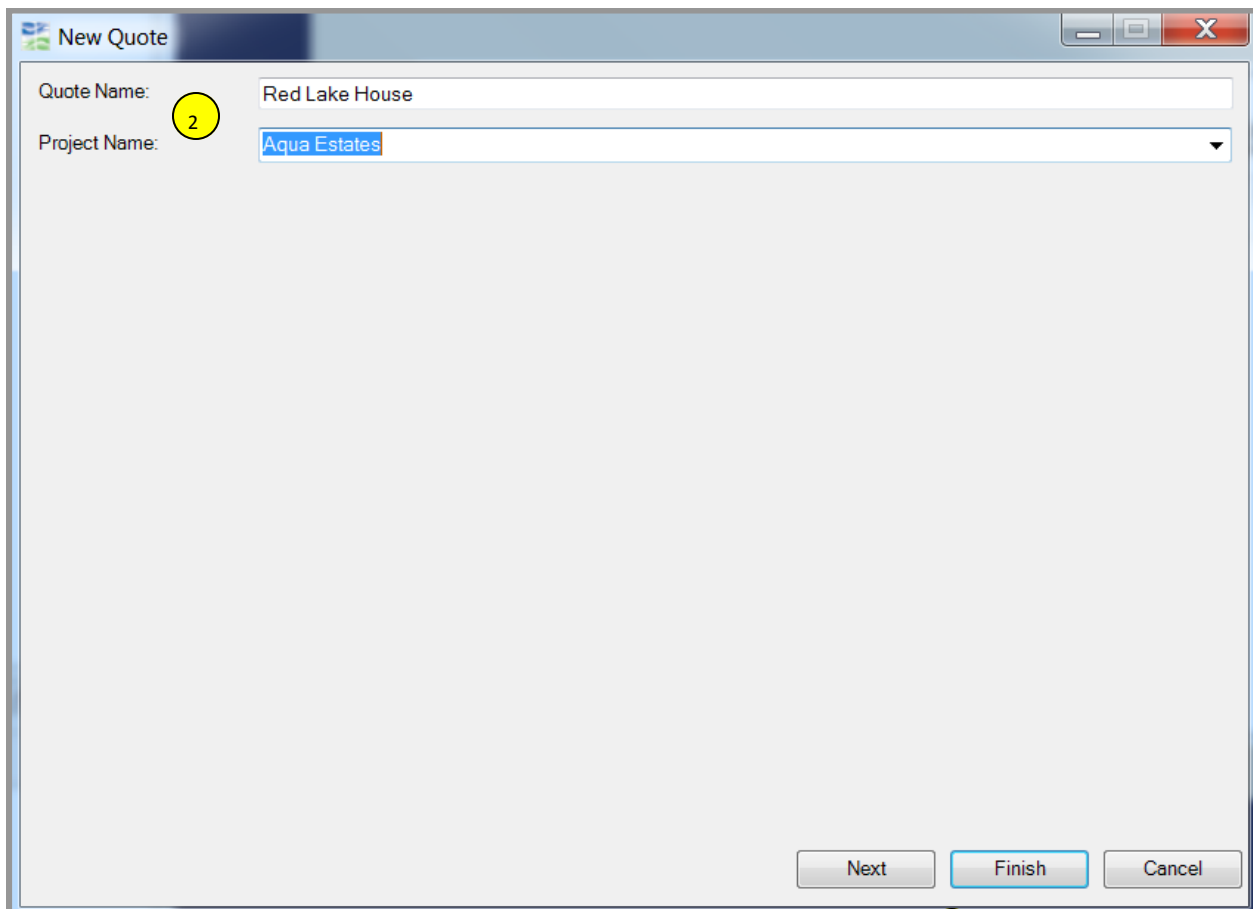
Creating Quotes

- 1 Click on the **New Quote** icon. The **New Quote** form appears (image below).



- 2 In the New Quote form, enter a **Quote Name**. You will use this name to find the quote later. Enter the **Project Name**. The **Project Name** is the name of the file in which your quote will be stored.

- 3 Click the **Finish** button.



New Quote: Required Data Tab

Use the **Required Data** Tab to record information required by Associated Materials to complete your order.

- 1 The Purchase Order references your P.O. with Associated Materials.
- 2 Next, select the **Sold** tab.

Start	Aqua Estates - Red Lake House				
Required Data	Sold To	LI ² Items	Quote Status	Related Items	Notes
Required Data	Shipping	Billing			
Purchase Order	1	45-545			
Rush		false			
SalesPerson					
Order Comment					

New Quote: Sold To Tab

The **Quote Date**, **Quote Name** and **Project Name** are auto-populated from the information entered in the **New Quote** window.

- 1 Choose a **Contact** from the drop down list. The **Shipping** tab information is auto-populated based on the **Contact** information.
- 2 The **Billing** tab information is auto-populated based on the **Contact** information.

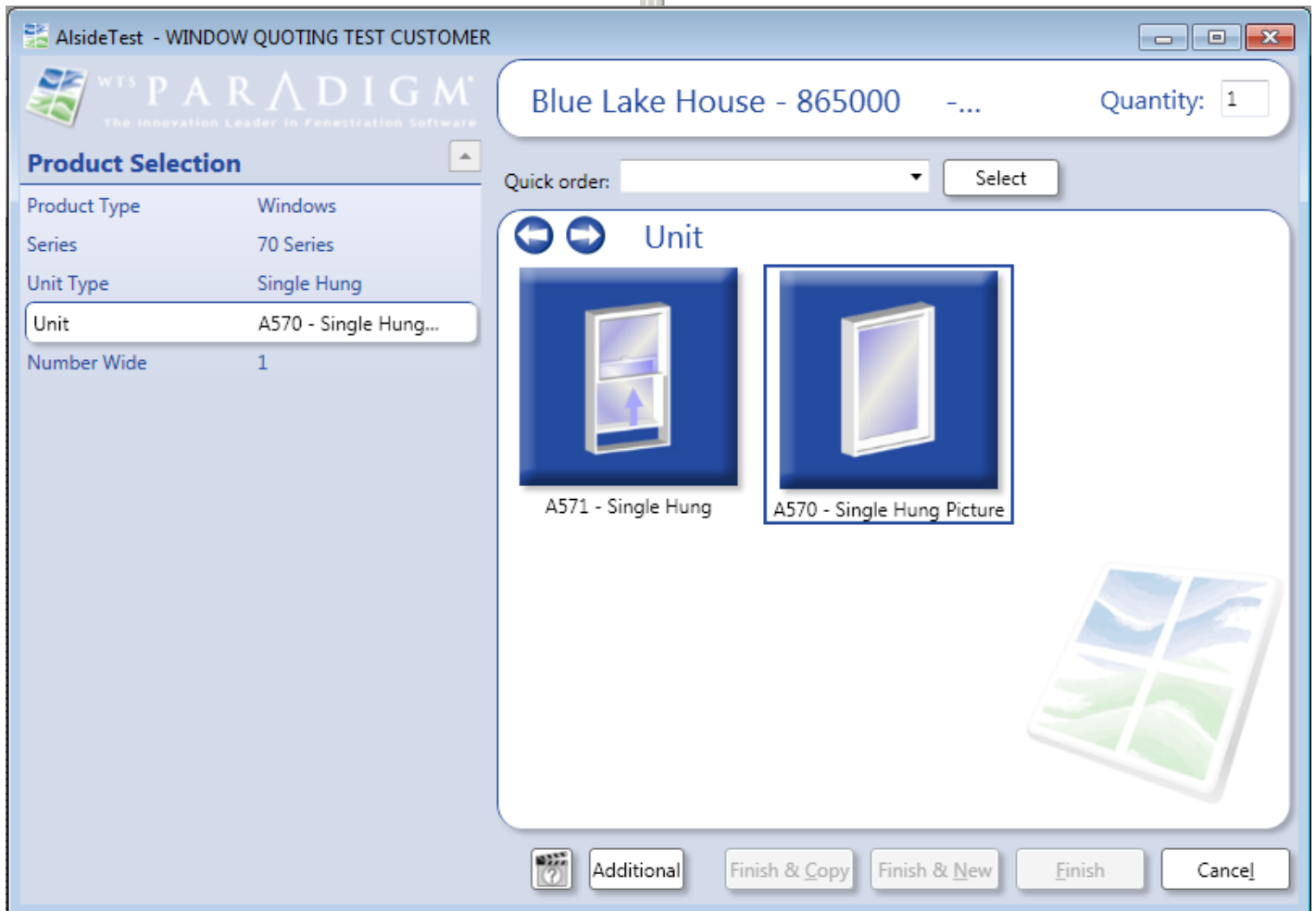
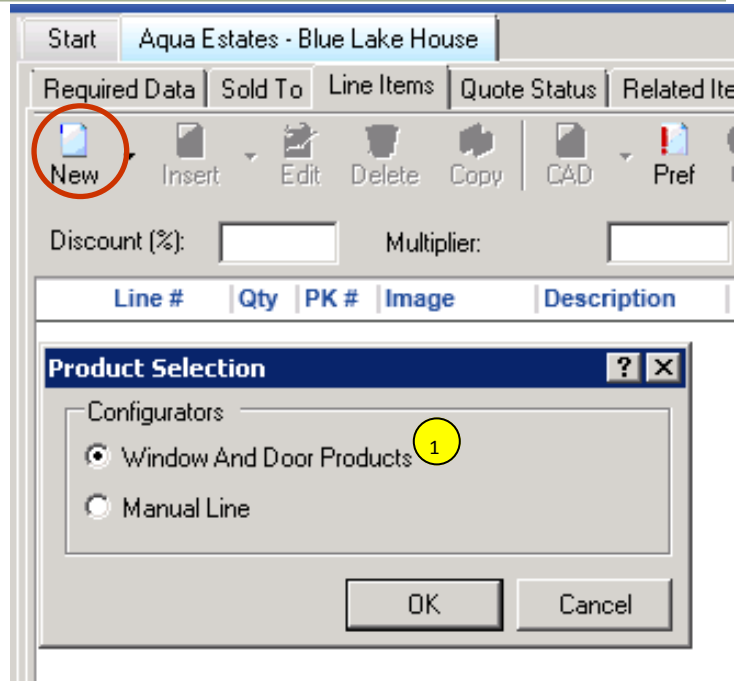
Next, select the **Line Items** tab.

The screenshot shows the 'Sold To' tab of the software interface. The 'Quote Date' is 'Tuesday, April 13, 2010', 'Quote Name' is 'Red Lake House', and 'Project Name' is 'Aqua Estates'. The 'Clients' field is 'WINDOW QUOTING TEST CUSTOMER'. The 'Contact' dropdown menu is open, showing 'Jack Louis' selected, with a yellow circle '1' next to it. Below the 'Sold To' tab, the 'Shipping' tab is active, with a yellow circle '2' next to the 'Info' sub-tab. A checkbox 'Use Contact's address' is checked. The shipping address fields are populated with: Name: Jack Louis, Address1: 511 Leon Street, Address2: (empty), Lot: (empty), Zip: 54474, City: Middleton, County: Dane, State: WI, Country: USA, Phone: 608-555-4565, Fax: 608-555-5474, and Customer Info: (empty).

New Quotes: Configuration

- 1 Click on the **New** icon on the Line **Items** tab. In the Product Selection form select **Window and Door Products** and click **OK**.

In the next form, select a product, series, unit type, and number wide from the Product Tree. Select the images that match your requests. These answers can be changed at any time .

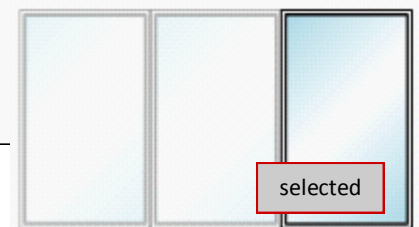


New Quotes: Configuration

NOTE: Each of the five sections is sizable, by clicking in the border between the sections and dragging it to the appropriate size.

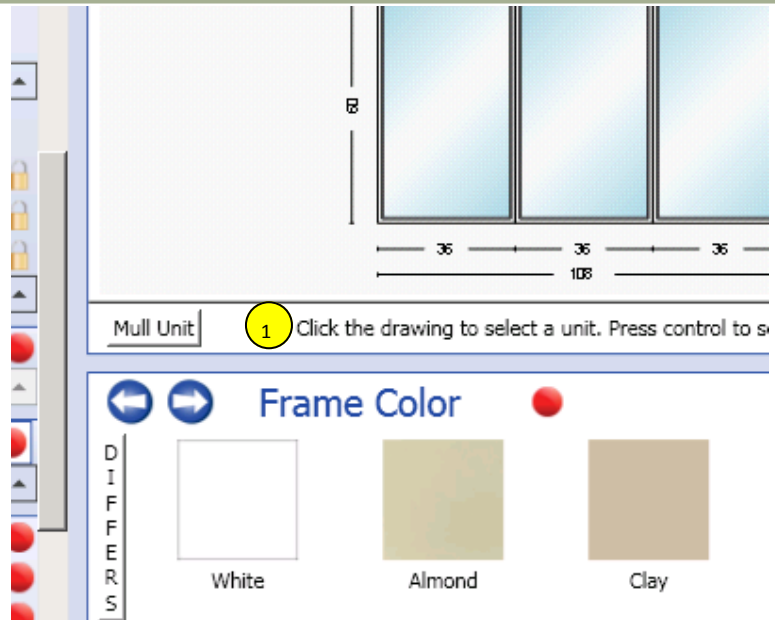
- 1 The **Configuration** form appears. This form contains five sections:
- 2 Image of the configured window
- 3 The Question Groups will step you through a series of optional features, including size and color. The question highlighted in white is selected or “active”.
- 4 Active Question / Answers display the options to the active question from the question group list.
- 5 Pricing Displays the price break down for each unit in the window.
- 6 Messages inform of any configuration limits.

Note: The unit/s you are modifying appear in red in the Images section. If you need to modify only one unit, you can click on the image to select it. The system automatically clears section from the other unit/s which will appear in blue.)

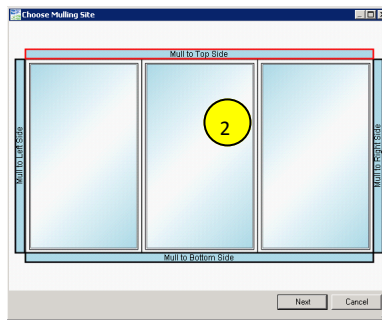


New Quotes: Configuration

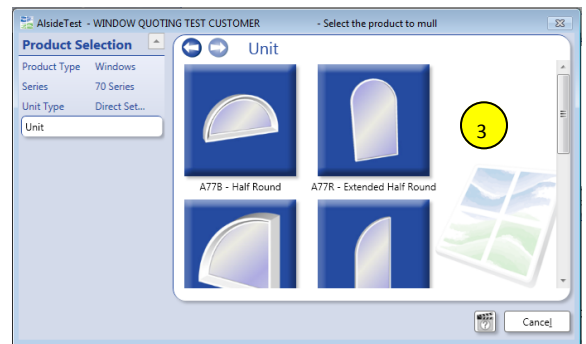
1 On the **Drawing pane**, click **Mull Unit** to add a unit to the window and to add additional units to the line. Be sure your base units are configured to the correct dimensions prior to adding a unit.



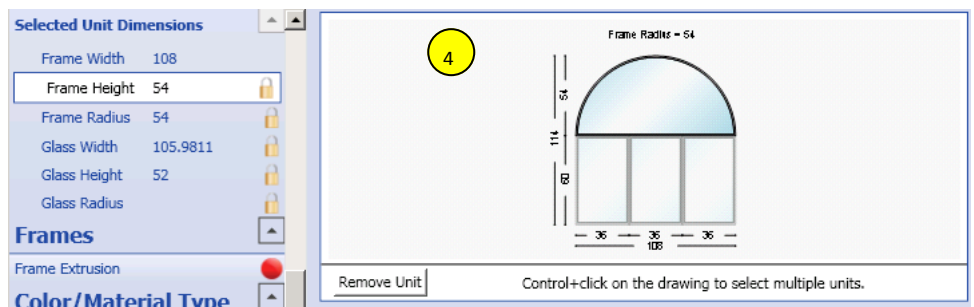
2 The **Choose Mulling Site** form appears. Select the mull site and click **Next**.



3 Select the window to add to the line from the **Configurator**. The **Stacking Rules** form appears. Confirm or edit fields and click **Next**.



4 Enter the dimensions for the new unit. (NOTE: muller unit measurements can only be entered as exact sizes.) The muller unit appears in the main Configuration form. When you are finished creating your window, click **Accept** on the lower right of the form.



New Quotes: Wrapping & Mulling

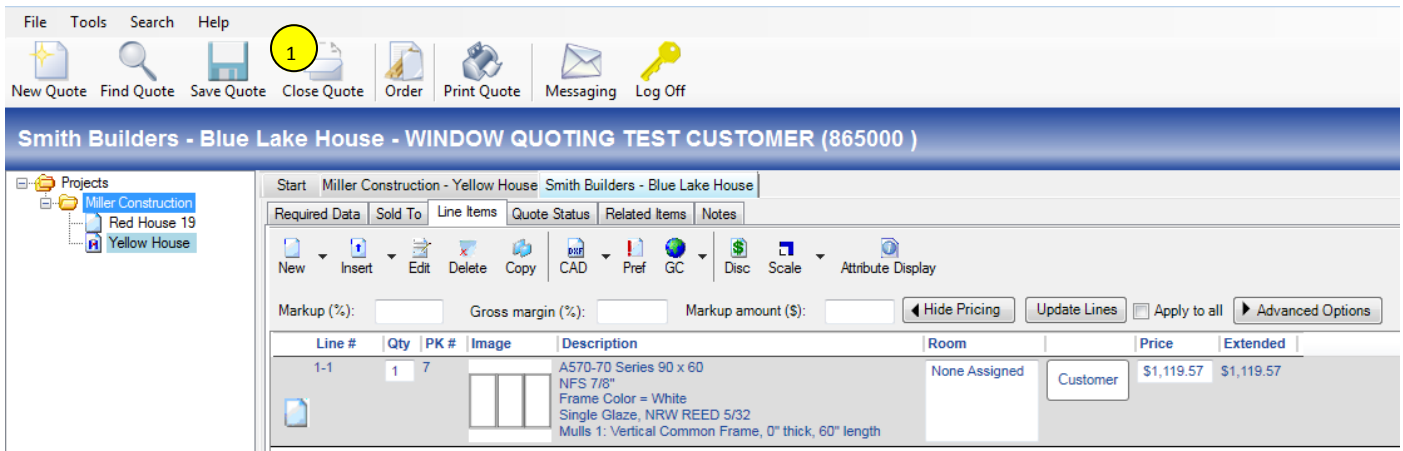
1 Wrapping and Mulling options are located towards the bottom of the question.

New Quotes: Price

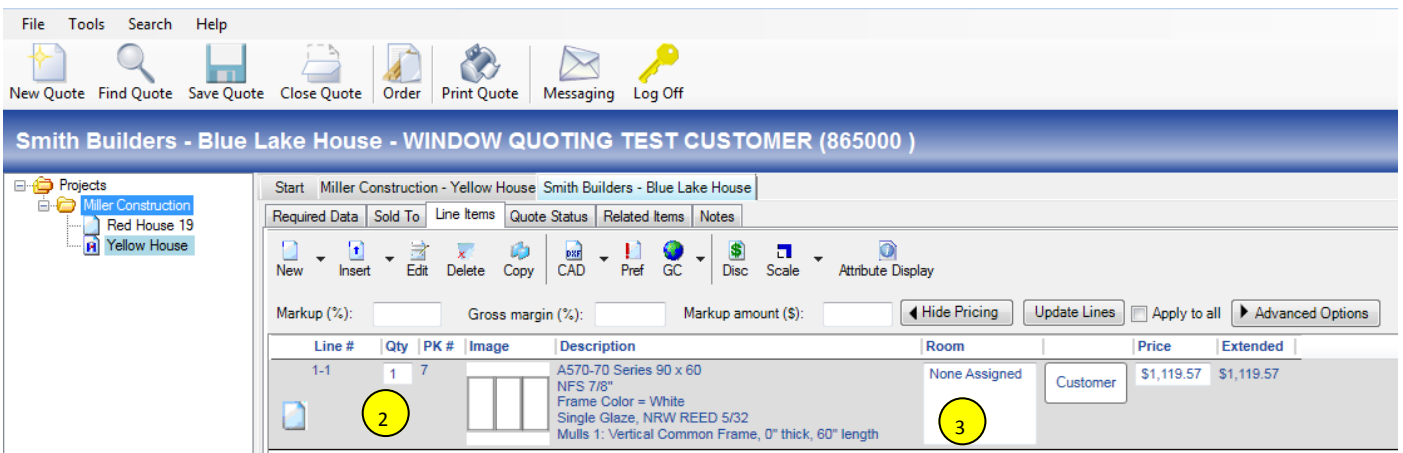
2 You can view list pricing in the Pricing pane.

New Quotes: Saving Quotes

1 In the WindowExpress toolbar, click **Save Quote**.



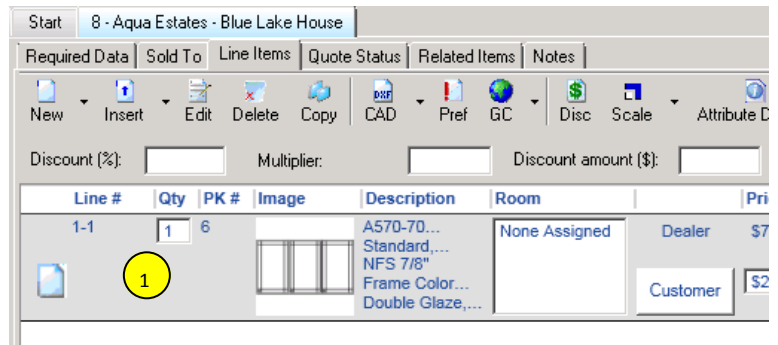
2 To change the quantity of windows in a line item, click in the **Qty** field on the line item to highlight the field in blue. You can now enter a new quantity. To change the room description, click in the **Comment/Room** field on the line item to highlight the field blue. You can now enter a room description.



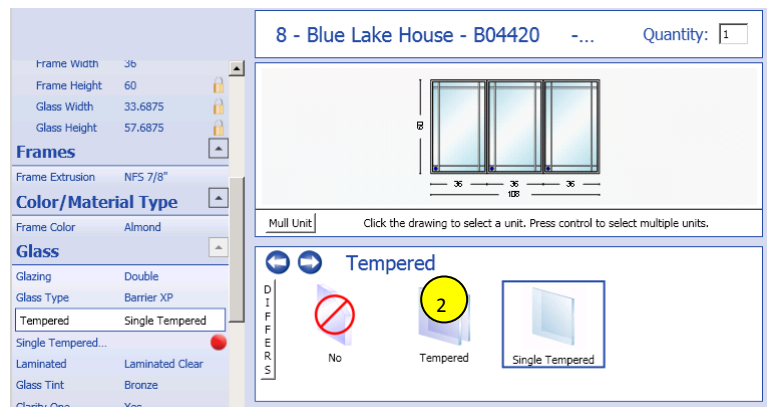
Change a Quote

Open the quote.

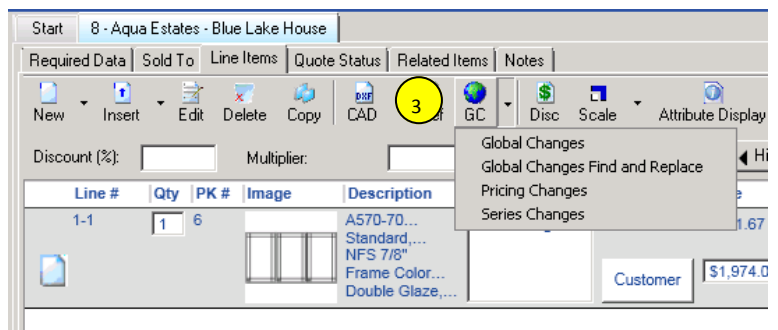
- 1 Navigate to the **Line Items** tab. Double click on the line item to modify.



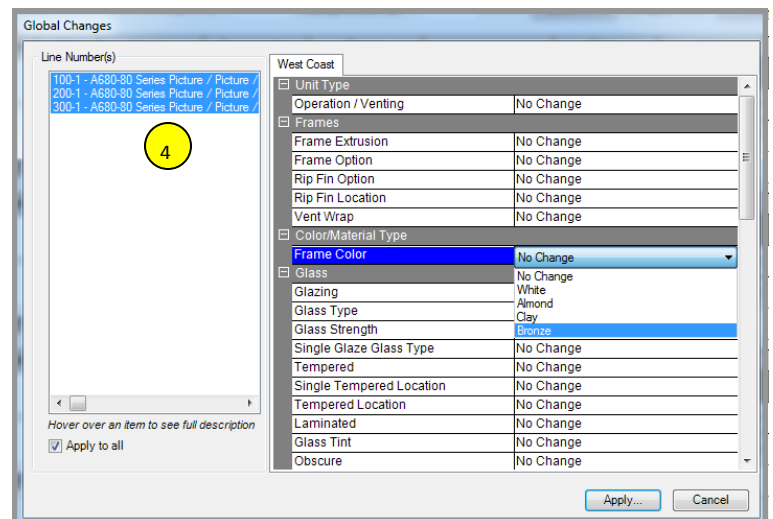
- 2 The **Configuration** form appears. This is the same **Configuration** form you used when creating the quote. Navigate to the question fields in the **Question Groups** and make the changes. Remember to click the Accept button when finished.



- 3 To make changes to more than one line in a quote at once, click the **Global Change** icon on the **Line Items** tab toolbar. The **Global Changes** form appears.



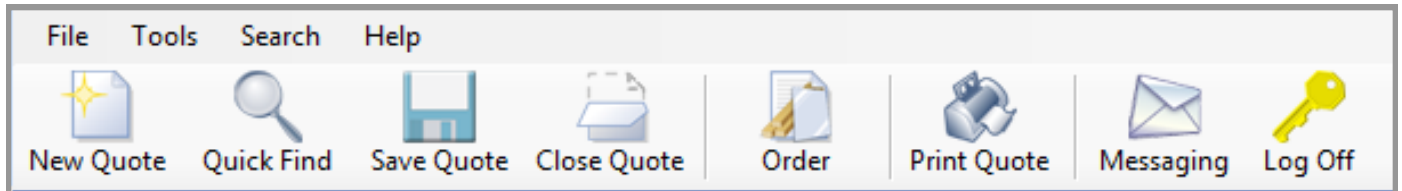
- 4 In the Global Changes form, hold the **SHIFT** key and select the lines you wish to change. Navigate through the configuration options using the slider on the left. Click the **Apply** button to make your changes.



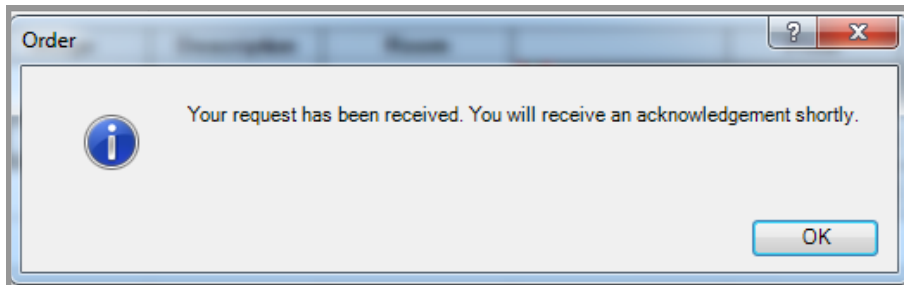
Confirmation of the changes appears in the **Global Change** form. If there was an error in the **Global Change** process, and error message appears with more information.

Orders

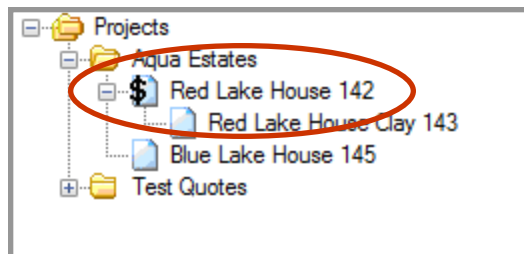
Open the Quote. To place and order, click the **Order** icon in the WindowExpress toolbar.



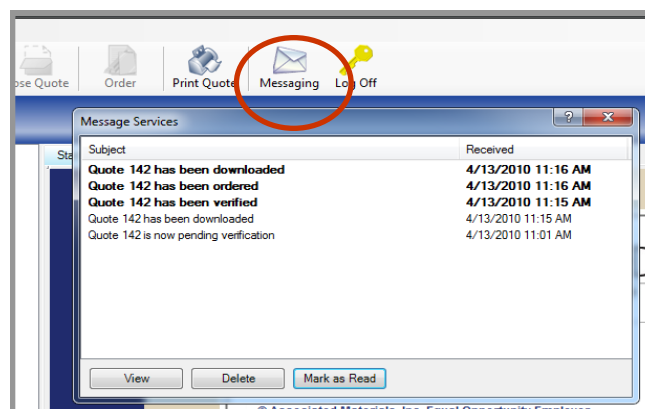
After you click the order icon a verification Order window will pop up.



After the order is confirmed by Associated Materials, the icon on the projects tree will change to the Ordered (\$) icon:



To view the order confirmation in your Messaging queue, click the **Messaging** icon in the WindowExpress toolbar. Select the message and click **View**.



Pricing

Price Changes can be issued to a quote or a line.

Price Change

The pricing modifiers are located below the row of icons on the Line Items tab. Select the line you would like to modify and change the **Markup**, **Freight** or **Labor** percent or fixed dollar amount.

Click the **Update Lines** button. You can also apply the change to all lines by checking the **Apply to All** box.

Start 8 - Aqua Estates - Blue Lake House

Required Data | Sold To | Line Items | Quote Status | Related Items | Notes


New | Insert | Edit | Delete | Copy | CAD | Pref | GC | Disc | Scale | Attribute Display

Discount (%): Multiplier: Discount amount (\$): ◀ Hide Pricing Update Lines Apply to all ▼ Advanced Options

Freight (%): Freight amount (\$): Labor (%): Labor amount (\$):


Freight tax: Tax exempt: Labor tax:

Tax 1 (%): Tax 2 (%):

Line #	Qty	PK #	Image	Description	Room		Price	List	Extended
1-1	1	6		A570-70... Standard,... NFS 7/8" Frame Color... Double Glaze,...	None Assigned	Dealer	\$641.67	\$1,974.00	\$641.67
						Customer	\$1,974.00	\$1,974.00	\$1,974.00

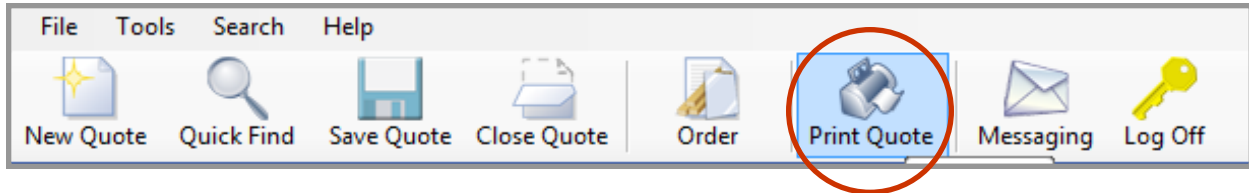
Custom Price Change

Click on the pricing field in the **Customer** line of the **Line Items** tab. The **Customer Custom Price** field will highlight blue and you can adjust the price for that line by manually typing in a price.

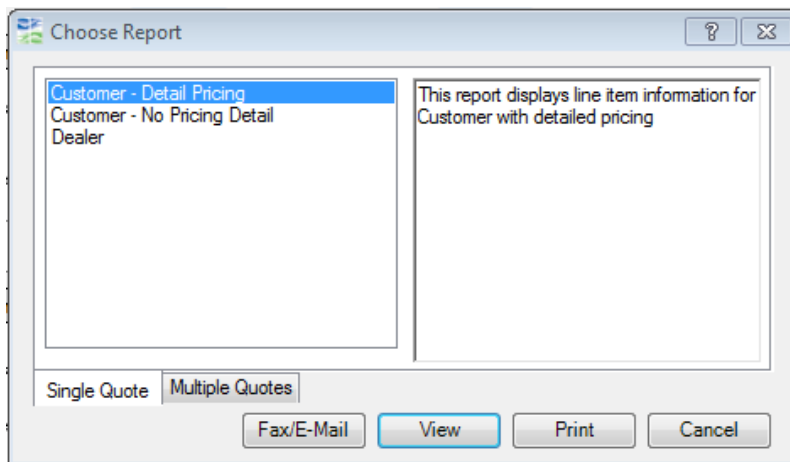
Line #	Qty	PK #	Image	Description	Room		Price	List	Extended
1-1	1	6		A570-70... Standard,... NFS 7/8" Frame Color... Double Glaze,...	None Assigned	Dealer	\$641.67	\$1,974.00	\$641.67
						Customer	\$1,600.00	\$1,974.00	\$1,974.00

Printing Quotes

To Print a Quote, open the quote and click on the **Print Quote** icon.



Select the quote form from the **Choose Report** window that will open. Select **View**, or **Print**.



A pop-up window will open with the quote form.

