



Frequently Asked Questions

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WindowExpress FAQs

This document outlines questions typically asked by WindowExpress users

Why can't I log in?

There are a few reasons you may not be able to log in. Check the following things:

- Verify that your username and password are correct.
- Run the AutoloaderUpdater.
This can be found in **Start > All Programs > WindowExpress**. If you have a Windows 7 machine, right click on **AutoloaderUpdater** and select **Run as Administrator**.

How do I change the customer price of my quote?

Along the top of the Line Item tab is the Pricing Calculator. Enter the markup amount or percentage you want to apply to your customer's price. Select the Apply all checkbox if you want the change to apply to the whole quote and Click **Update Lines**. Click the **Show Pricing Totals** button at the bottom of the screen to get a better view of the pricing change.

After I use Global Changes why are some of the lines red?

The changes you made have opened up new required questions that you need to answer. Double-click the line to see what these new required questions are.

What are the different levels of Preferences?

There are three levels of Preferences: quote preferences, customer preferences, and user preferences. Quote preferences override customer and user preferences. Customer preferences override user preferences.

How can I change the series of my units?

There are two ways you can do this:

- Edit each line and manually change the series.
- Click the arrow next to Global Changes to bring up more options, and select **Series Changes**.

When you change the series, you will most likely open up new required questions. Be prepared to go back into each line to answer those questions, or use Global Changes to answer them for all the lines that they apply to.

What's the difference between Alternate Quote and Copy Quote?

Create an Alternate quote when you want to provide your customer with different options on their quote, and you want to retain the original for comparison.

Copy a quote when a customer needs the same quote for another job.

How can I email my customer their quote paperwork?

With the quote open, click the **Print Quote** button. Click **View** (not **Print**). Open the **File** menu at the top, select **Export**, and send it to a PDF format. Now you can attach that PDF to an email.

I have a new computer - how can I load all of my old quotes?

Click the **Find Quote** button. Scroll down to the bottom of the list of search criteria, and enter your login name in the **User Name** field. Below that, enter the date range you want to search. Now click the **Find Now** button. When the results have loaded click on the first quote. Scroll to the bottom of the results, hold down the Shift key, and click on the bottom quote. All the quotes should now be highlighted. Click **Open**, and all of your quotes will start populating in your Project list.

How can I audit my quote?

To make sure there are no inconsistencies in your quote before you order it, click the **Attribute Display** button. This shows all of your line items in an easy-to-view spreadsheet format. Select the **Show Inconsistencies** check box to show only the columns that have inconsistent options. The Attribute Display will open automatically during Save or Order if there are inconsistencies.

How can I add a unit to an existing line?

Open the Configurator for the line you want to add a unit to. Underneath the Drawing is the **Mull Unit** button. Click this button to open the location selection screen. Select where you want to mull the additional unit, and click **Next**. Now answer the questions in the configurator just like you would for any other unit. When you click **Finish**, you will be brought back to the original line item, with the new unit added.

How do I hide my price line from my customer?

When you are creating lines with your customer looking at the screen, you may want to hide your price line. Click the **Pricing Options** button at the bottom of the Line Items tab, and select **Hide Dealer Price**. You can also do this for the List Price.

If you want those price lines to always be hidden, you can do that in your User Options. Go to the Tools menu, and select Options. On the Line Items tab, check the **Hide Dealer** and **List Price** checkboxes.

How do I remove a quote from my project list?

If you want to remove old quotes from your project list, right-clicking on the quote and select **Remove from Tree**. This will only remove the quote from your project list and will not delete it from the manufacturer's server.

Where do I see the prices for add-ons?

When you are selecting options in the Configurator, the price is being adjusted. When you select a new option, you can review how it affected the price in the Pricing pane of the configurator. This can be seen under the Answer pane, where you select from the available options.

What does the red dot mean in the Configurator?

When you see a red dot next to a question in the Configurator, it means you must answer that question before you can finish the unit.

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