



Waudena Configurator User Reference Guide

(Version 4.0)

August 2021



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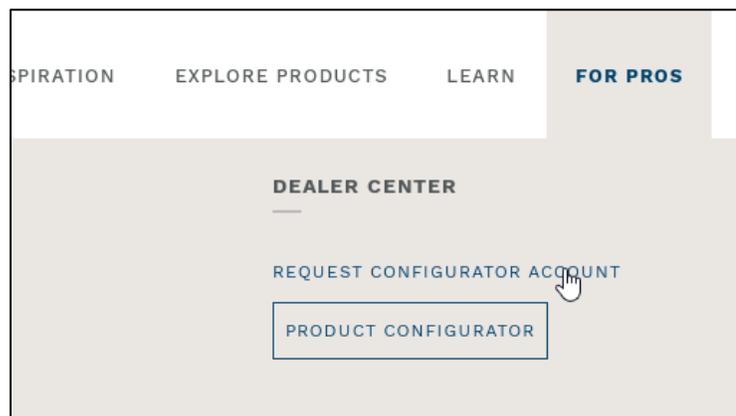


Requesting a Configurator Log In

Objective: Requesting a dealer or contractor log in for the Configurator.

Dealer Access (Refer to page 3 for contractor access)

1. Navigate to www.waudena.com.
2. Hover over "For Pros" in the upper right-hand corner and select "Request Configurator Account."



3. Complete all required fields (marked with an asterisk), check the boxes for each item you require access to and select "Submit".
4. The request will be sent to Waudena for the user account to be created.
5. A Waudena representative may reach out to the dealer or Waudena/Wausau Supply Company Territory Manager to confirm that the requester is a current employee and whether they have security for quote/view only or to be able to place orders on behalf of the dealer.
6. User accounts are typically activated within 24 hours of being submitted.



Requesting a Configurator Log In

Objective: Requesting a dealer or contractor log in for the Configurator.

Contractor Access

Note: Contractor access allows the customer of a Waudena dealer to enter their own quotes and view in list price. All orders must be placed with Waudena by the dealer. A contractor cannot place orders directly with Waudena.

1. Dealer fills out the **Contractor or Builder Access Request Form** (see following pages for form).
2. Send completed form to ***CPQWebRequests@wausausupply.com*** or to your Waudena/Wausau Supply Company Representative to be placed on our Help Desk.
3. Contractor/Builder Access will typically be activated within 24 hours of submittal.



Contractor or Builder Access Request Form

Requesting Dealer Information

Company Name	
Customer Number	
Who at Requesting Dealer will need access to see the contractor/builder quote?	

Contractor or Builder Information

Company Name	
Address	
City	
State	
Zip Code	
Phone	
Mobile Phone	
Fax	

User Information

User 1	
Last Name, First Name	
Email Address (This will be used as a Username)	
Password	
Phone	
Mobile Phone	
Fax	
User 2	
Last Name, First Name	
Email Address (This will be used as a Username)	
Password	
Phone	
Mobile Phone	
Fax	



User 3	
Last Name, First Name	
Email Address (This will be used as a Username)	
Password	
Phone	
Mobile Phone	
Fax	
User 4	
Last Name, First Name	
Email Address (This will be used as a Username)	
Password	
Phone	
Mobile Phone	
Fax	
User 5	
Last Name, First Name	
Email Address (This will be used as a Username)	
Password	
Phone	
Mobile Phone	
Fax	



Creating Desktop Shortcut for Configurator

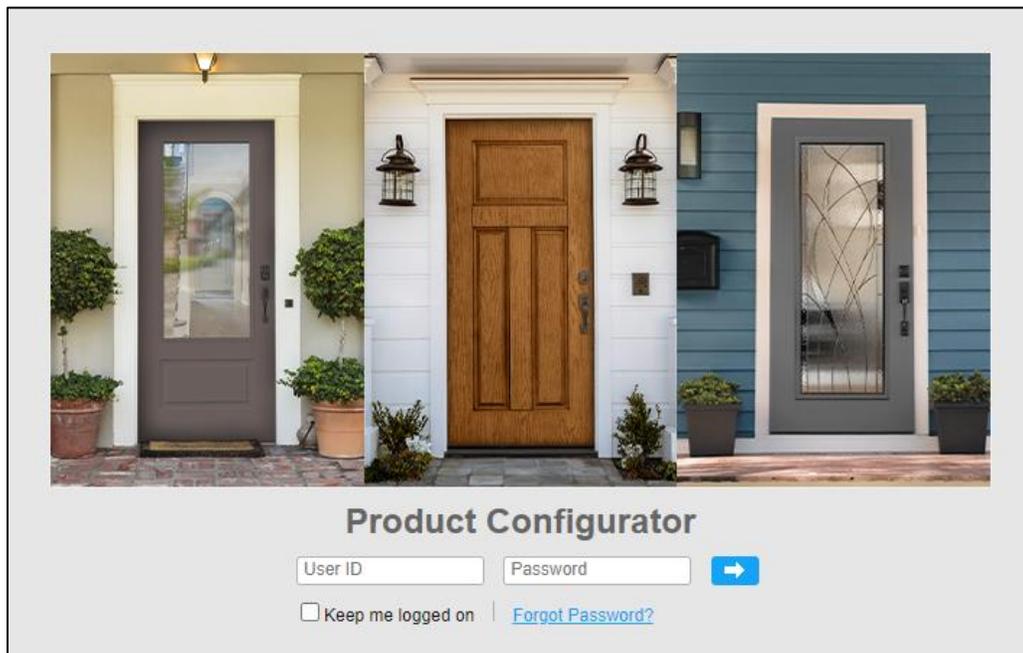
Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

Google Chrome (see Windows starting on page 13, iPad on page 18)

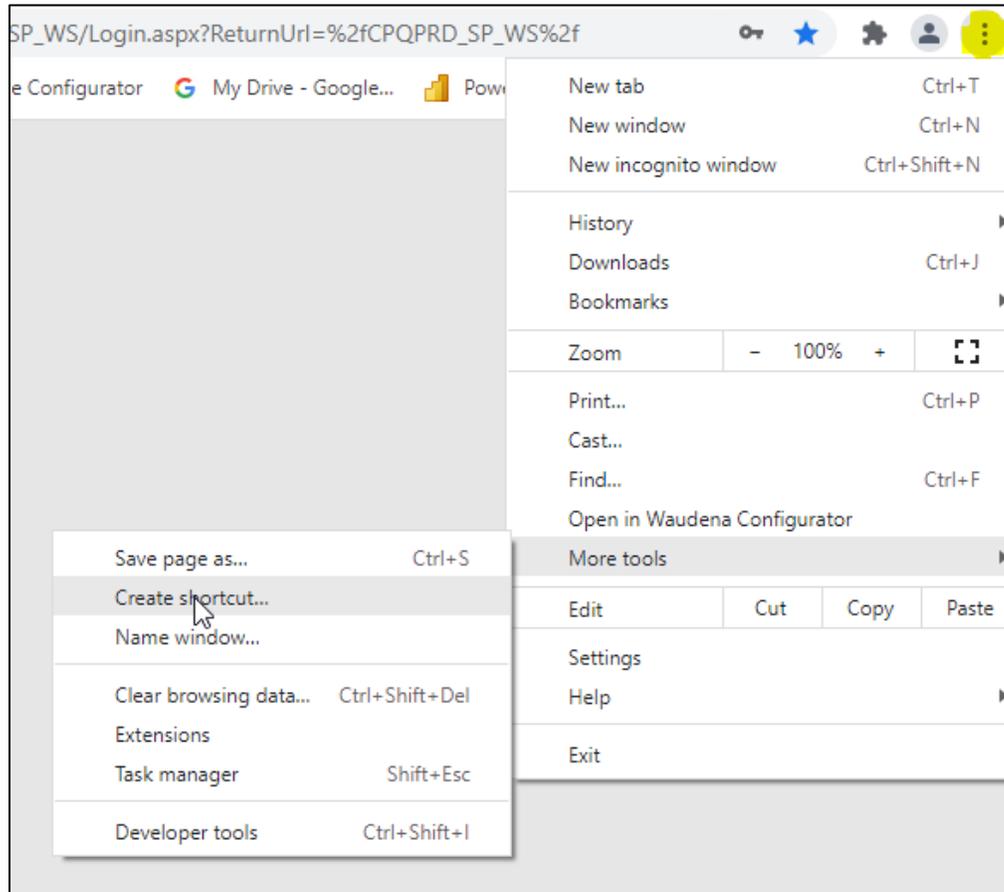
1. Create a folder on the user's desktop and label it "Icons".
2. Copy the attached Waudena Configurator icon file to the Icon folder.



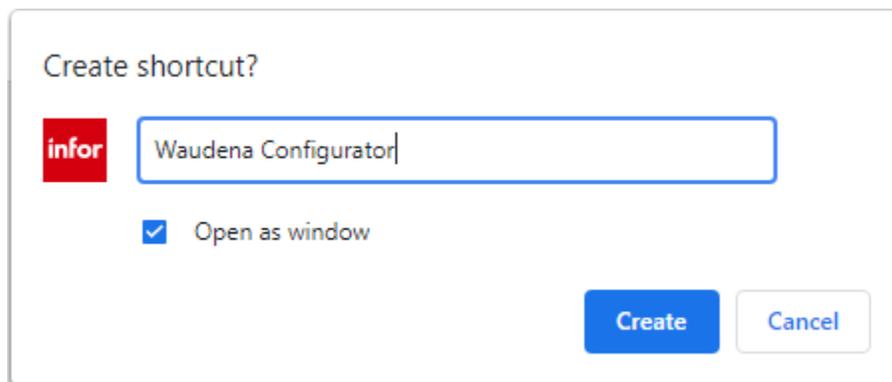
3. Open Google Chrome and enter ***configurator.wausausupply.com*** into the address bar to go to the sign in page.



4. In the upper right-hand corner of Chrome, click on the vertical ellipsis, select "More tools" and "Create shortcut...".



5. The "Create shortcut" window will open. Change the name from the default to Waudena Configurator, check "Open as window" and select "Create".

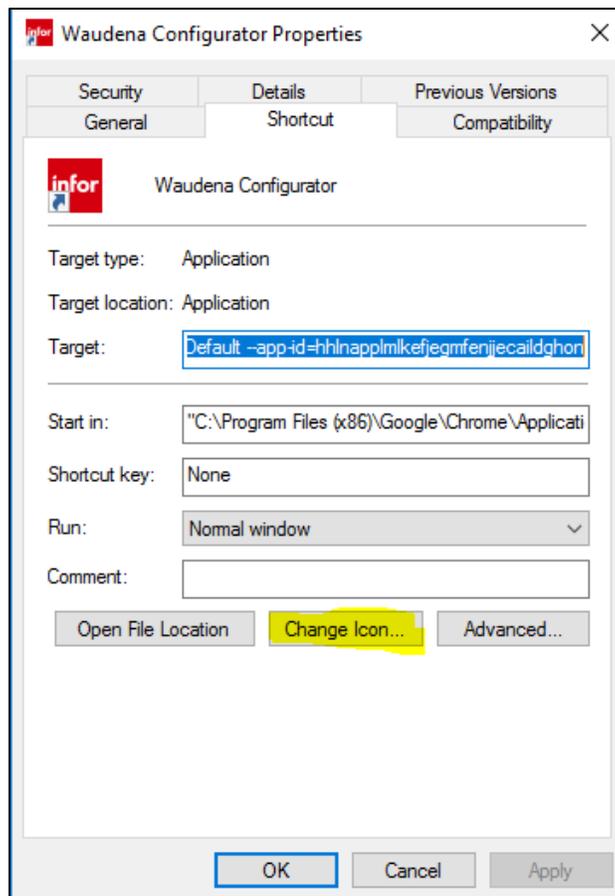




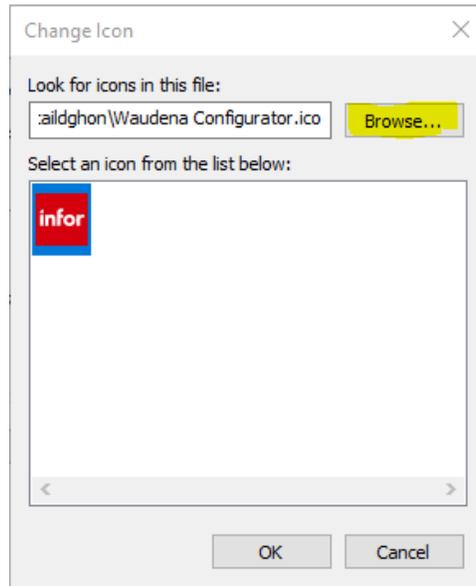
6. Close Chrome and you will now have an icon on the desktop that will look like this:



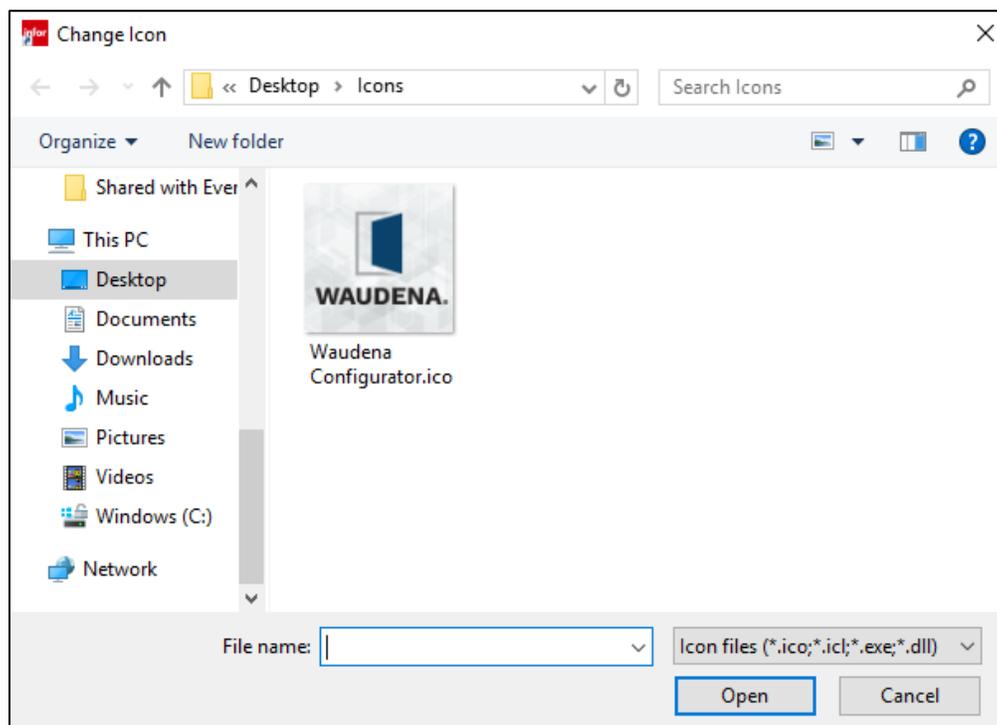
7. Right click on the icon and select "Properties".
8. The window below will pop up. Select "Change Icon...".



9. Select "Browse" in the window that pops up.



10. Locate the folder you labelled "Icons" and select the Waudena icon. Double click on it or highlight it and select "Open" to choose the icon.





11. Click "OK" in the icon window and again click "OK" in the Properties window.
12. You're done. Your desktop shortcut should now appear as below. The user can now double click that icon to launch directly into the login screen.



Creating Desktop Shortcut for Configurator

Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

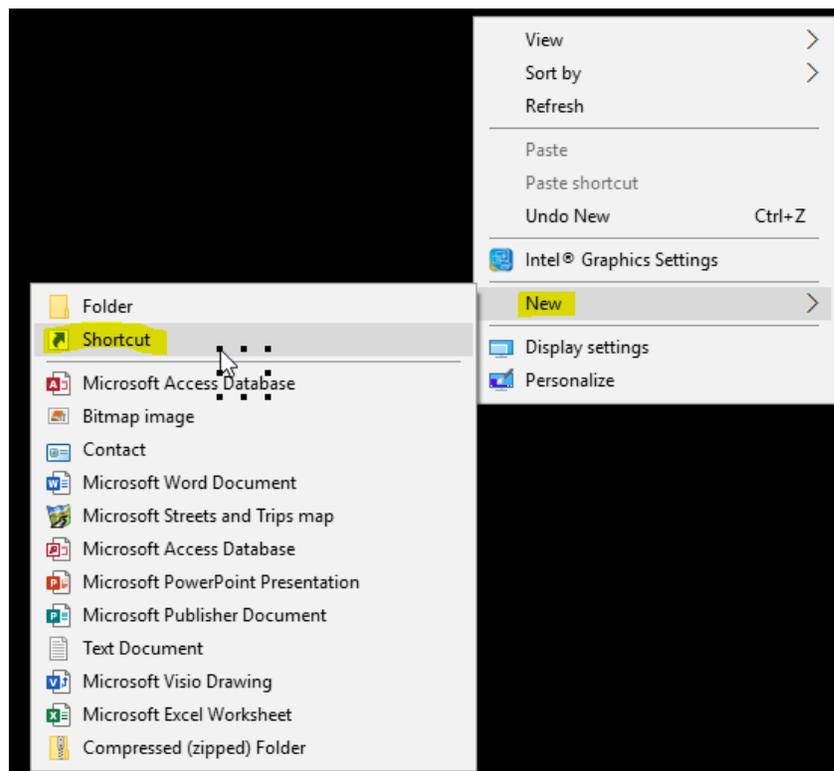
Windows

Note: Google Chrome is the preferred browser and will provide the best user experience.

1. Create a folder on the user's desktop and label it "Icons".
2. Copy the attached Waudena Configurator icon file to the Icon folder.

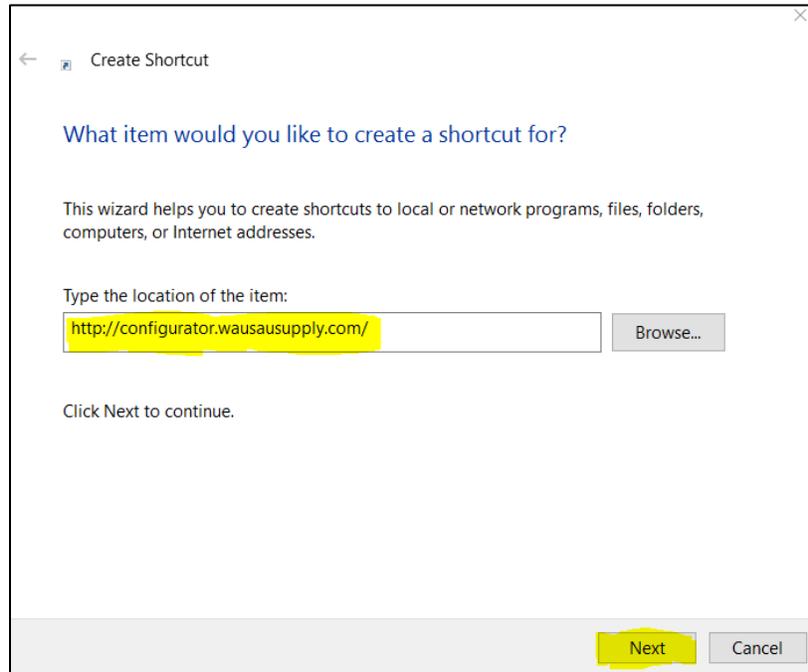


3. Right click anywhere on the desktop and select "New" and "Shortcut".

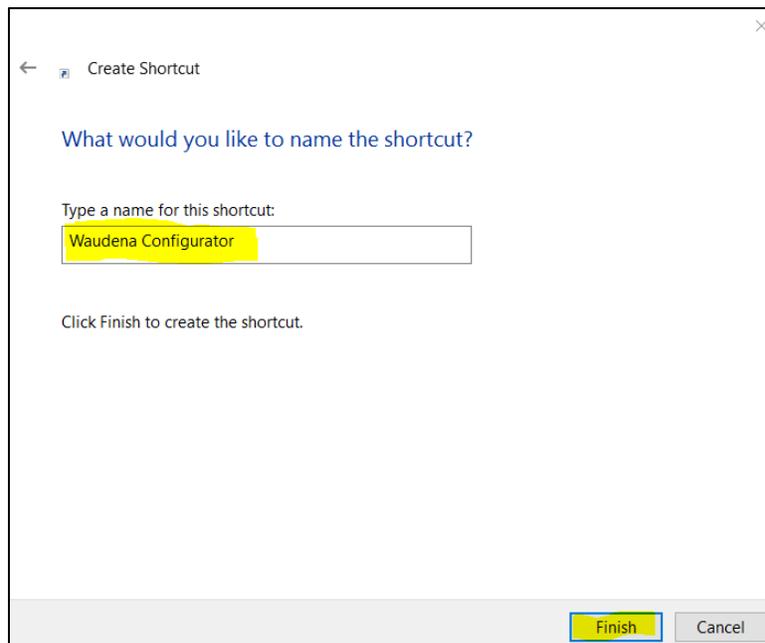




4. The shortcut window will open so you can type the destination of the shortcut. Enter ***configurator.wausausupply.com*** as the destination and select "Next".



5. In the next window, enter "Waudena Configurator" as the name for the shortcut and select "Finish".



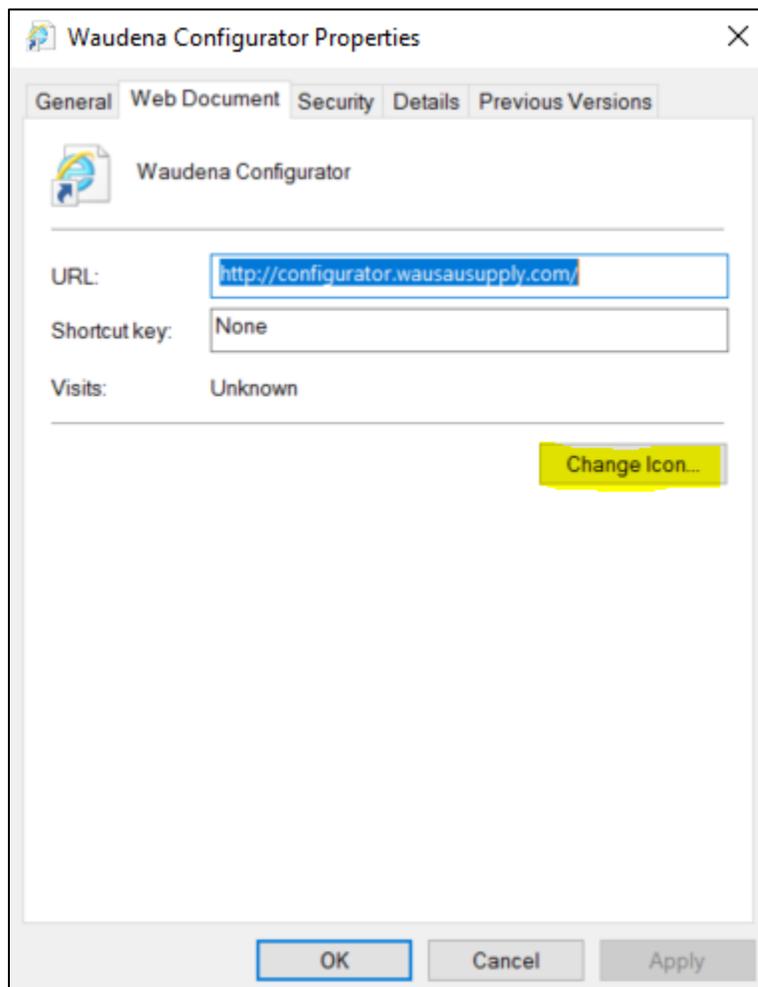


6. You will now have an icon on your desktop that will look like this:

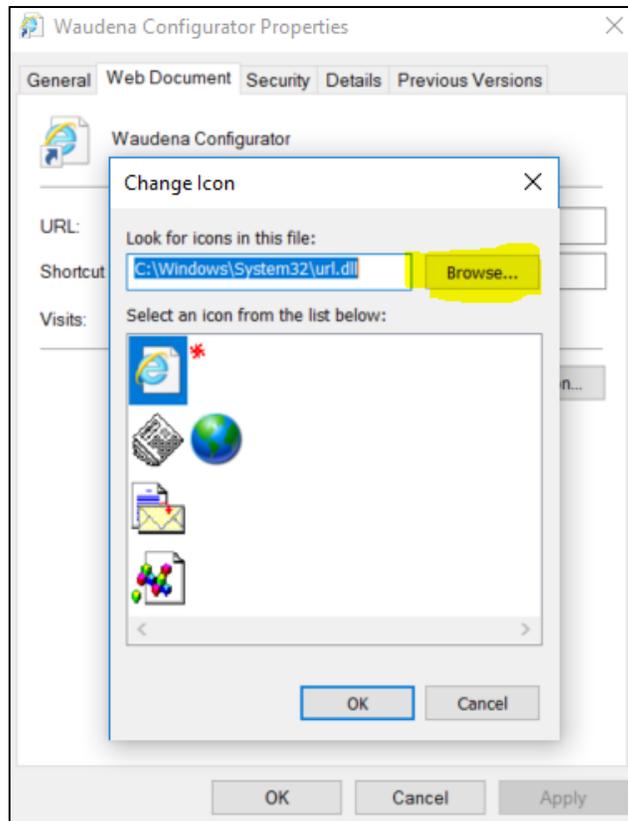


7. Right click on the icon and select "Properties".

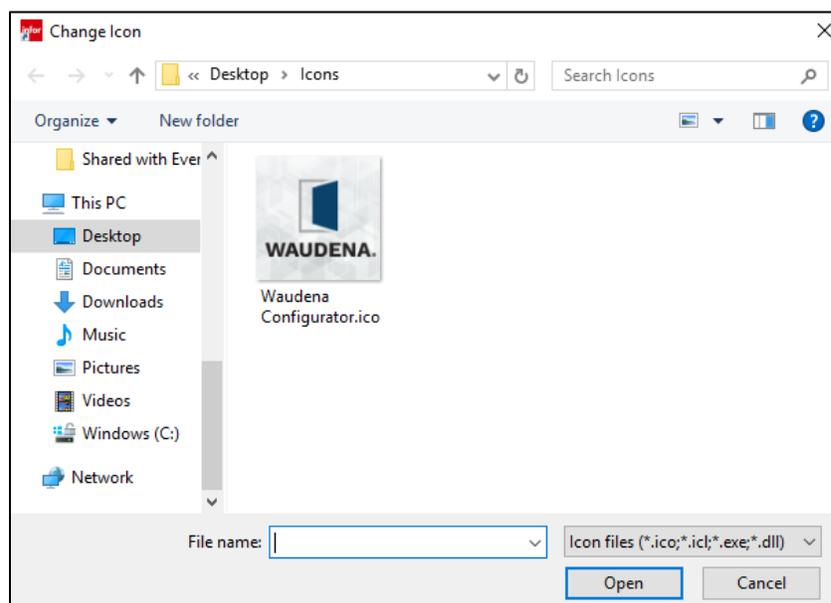
8. The window below will pop up. Select "Change Icon...".



9. Select "Browse" in the window that pops up.



10. Locate the folder you labelled "Icons" and select the Waudena icon. Double click on it or highlight it and select "Open" to choose the icon.





11. Click "OK" in the icon window and again click "OK" in the Properties window.

12. You're done. Your desktop shortcut should now appear as below. The user can now double click that icon to launch directly into the login screen.



Creating Desktop Shortcut for Configurator

Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

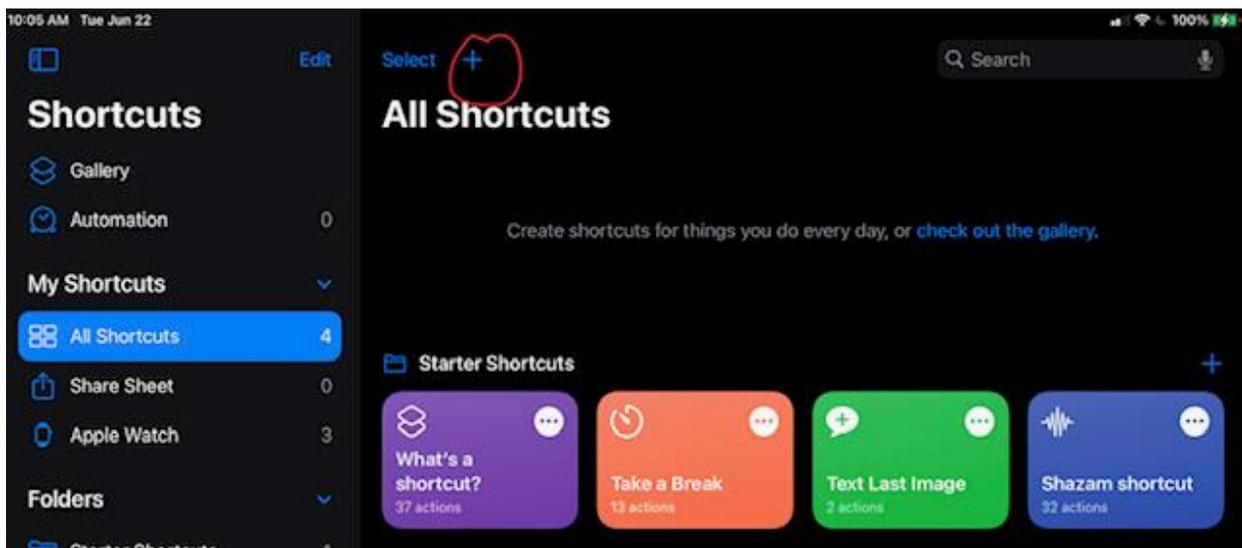
iPad

Notes: Google Chrome should be added to the iPad before creating the shortcut. Instructions provided using iOS 14.6, other iPad versions may work differently. Update is recommended before adding the shortcut.

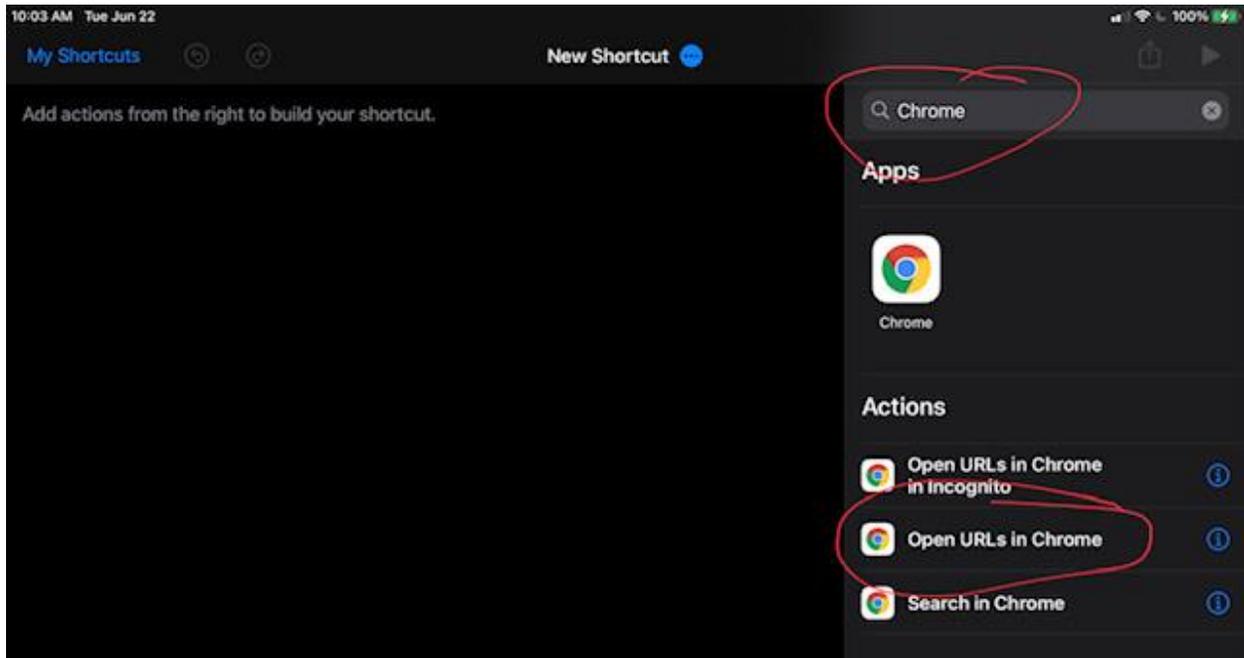
1. Send the Waudena icon file, in .jpg format, to the user's iPad via e-mail or Airdrop and save it to the photo album.
2. Open the "Shortcuts" app on the iPad.



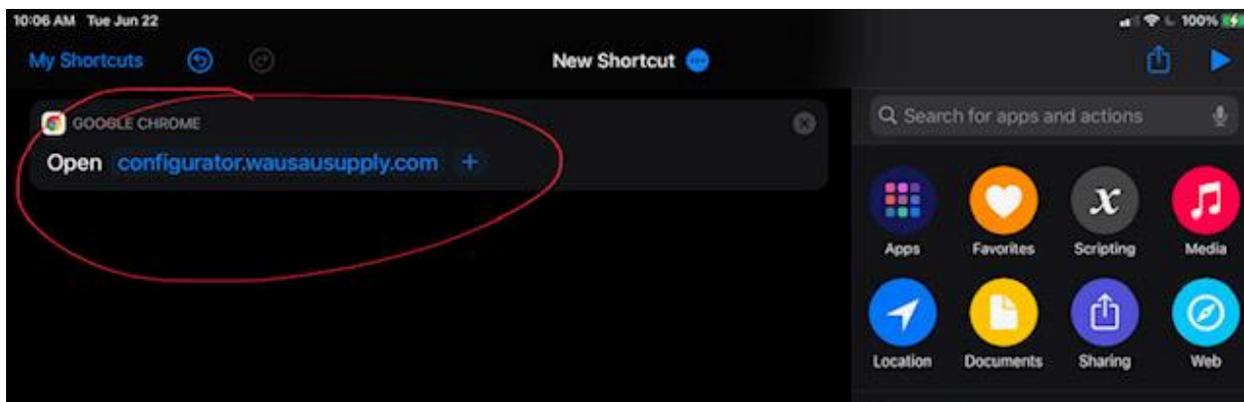
3. Select the "+" to create a new shortcut.



4. In the next window, type **Chrome** into the search field and select "Open URLs in Chrome".

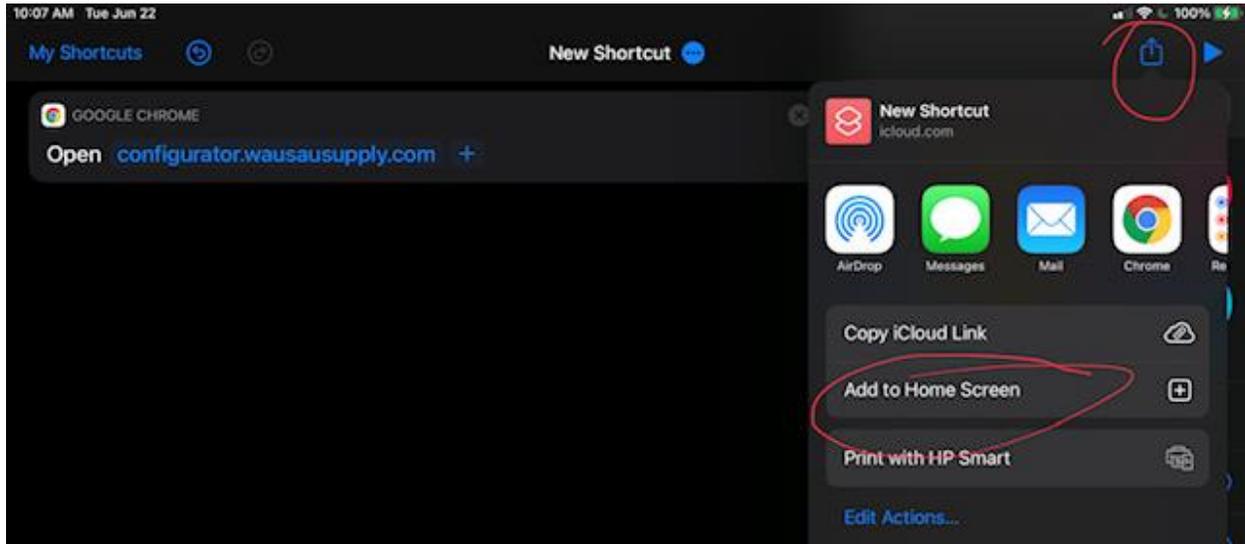


5. When prompted, type **configurator.wausausupply.com** into the URL field and hit "Done".

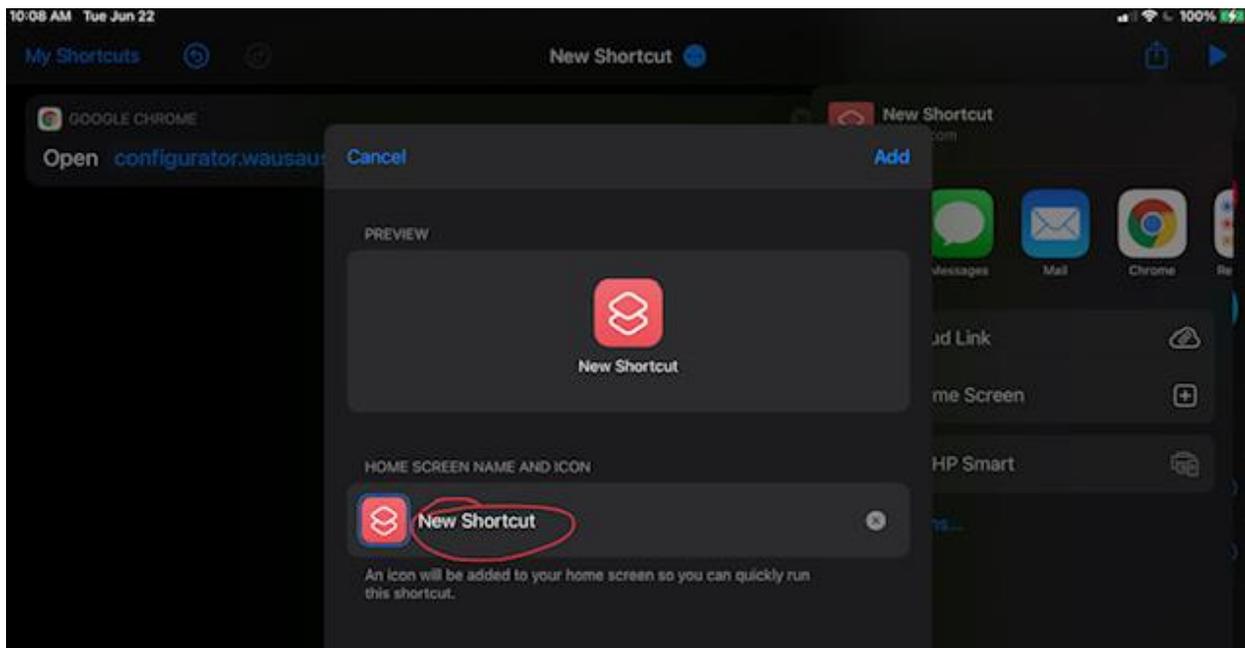




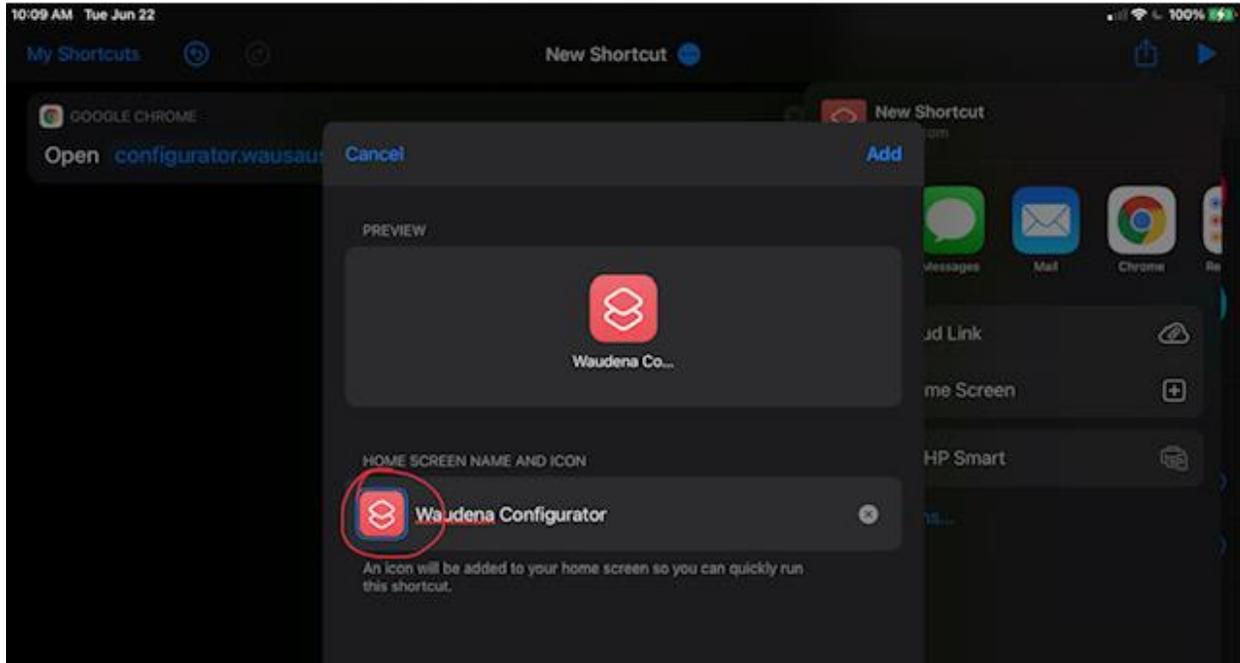
6. Select the "share/upload" button in the upper right-hand corner and select "Add to Home Screen".



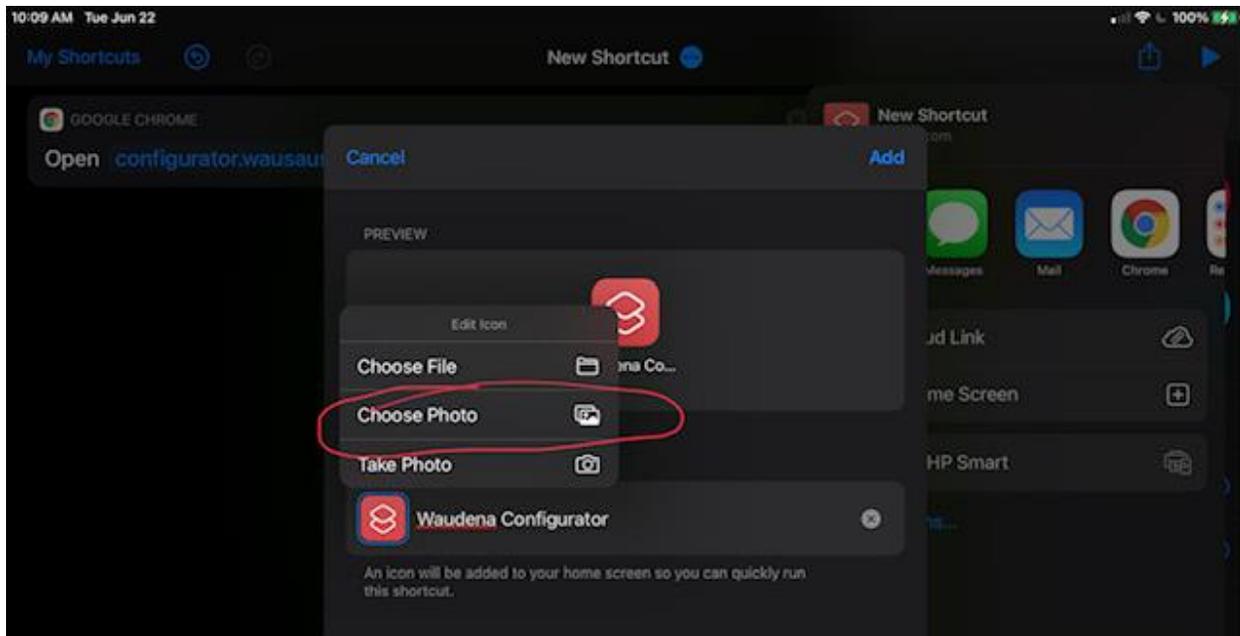
7. When prompted, select the area that says, "New Shortcut" and change it to **Waudena Configurator** or **Configurator** and select "Return".



8. Select the icon symbol next to the name.

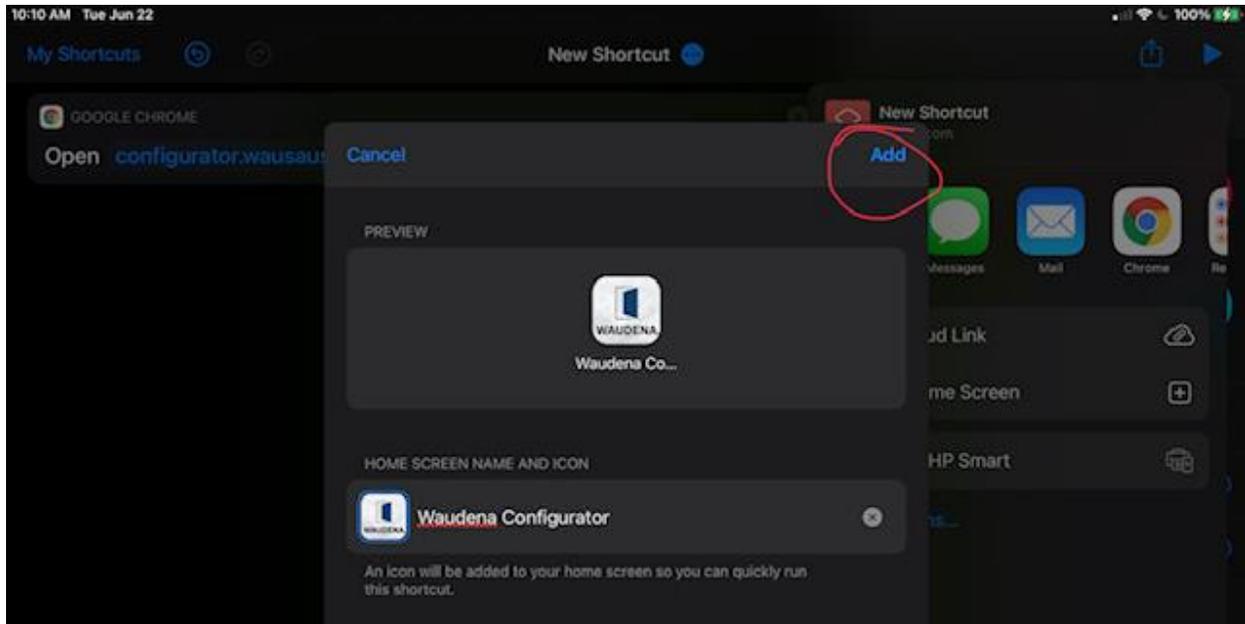


9. Click "Choose Photo" and select the Waudena image, that was placed on the device in step 1, from your photo gallery.





10. After confirming the name and image, select "Add" to place the shortcut on your desktop.



11. You should now have a Waudena Configurator shortcut on your desktop. Click on the icon for one-step access directly to the Configurator log in page.



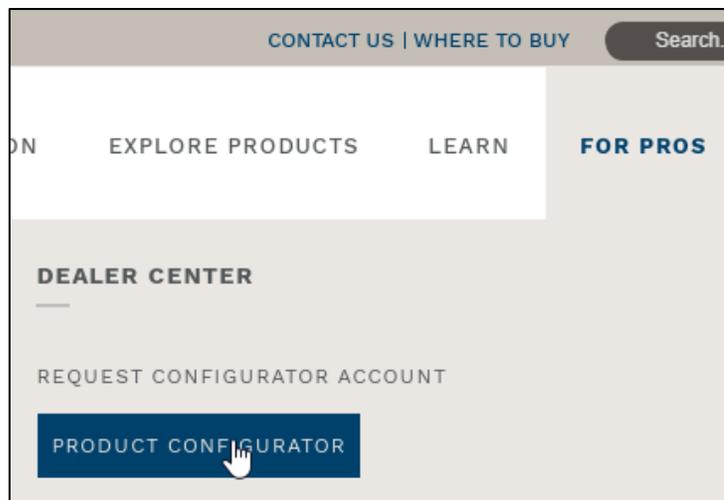


Logging in to Configurator

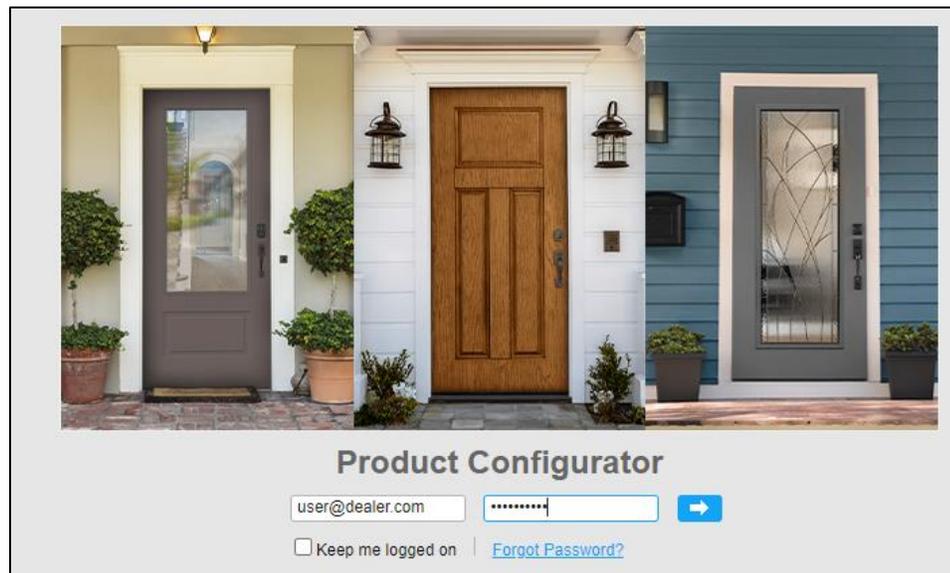
Via www.waudena.com

Note: For best performance, Google Chrome is the recommended web browser.

1. Navigate to www.waudena.com.
2. Hover over "For Pros" and select "Product Configurator".



3. Enter *Username* and *Password* and select *blue arrow*.





Logging in to Configurator

Direct Access

Note: For best performance, Google Chrome is the recommended web browser.

1. Select the desktop shortcut for Waudena Configurator or open your browser and navigate to ***configurator.wausausupply.com***.



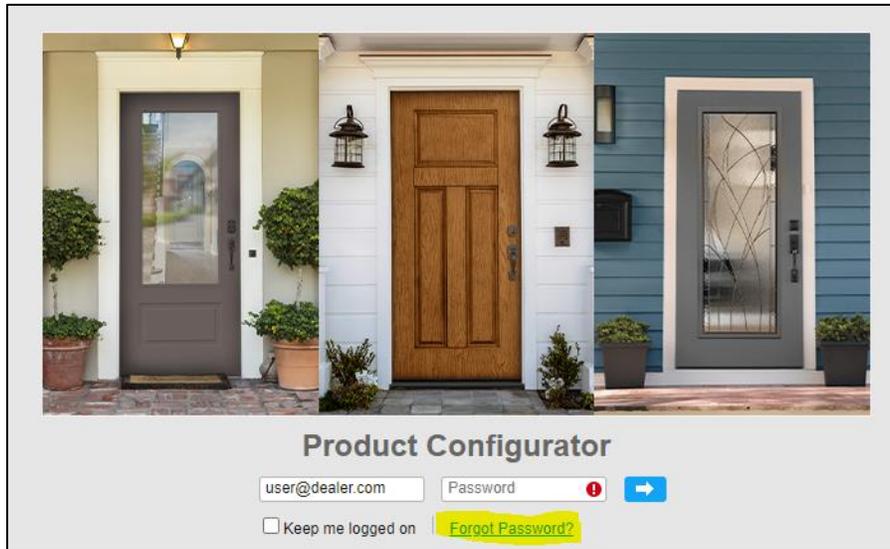
2. Enter *Username* and *Password* and select the *blue arrow*.

A screenshot of the "Product Configurator" login interface. The top half of the image shows three different door styles: a dark grey door with a glass insert, a solid wood door, and a grey door with a decorative glass pattern. Below the images, the text "Product Configurator" is centered. Underneath, there are two input fields: the first contains "user@dealer.com" and the second contains a series of dots representing a password. To the right of the password field is a blue arrow button. Below the input fields, there is a checkbox labeled "Keep me logged on" and a link that says "Forgot Password?".

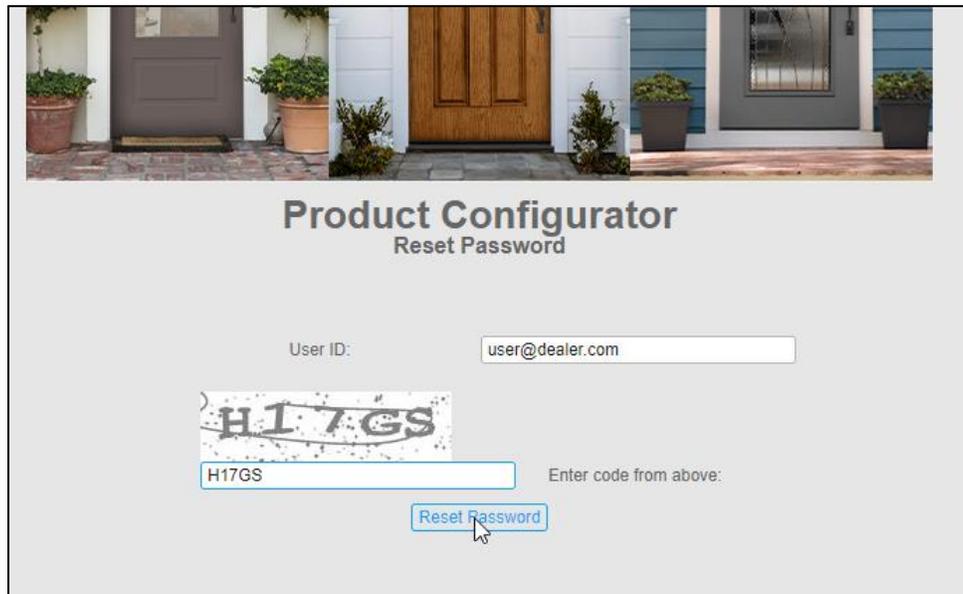
Recovering Forgotten Password

Objective: Replacing a password with a new password if the original is lost or forgotten.

1. On the log in home page, select the link "Forgot Password?"



2. Enter your user ID, enter the code provided and select "Reset Password".



3. You will receive an e-mail shortly. Follow the steps provided in the e-mail to complete the recovery of your account.



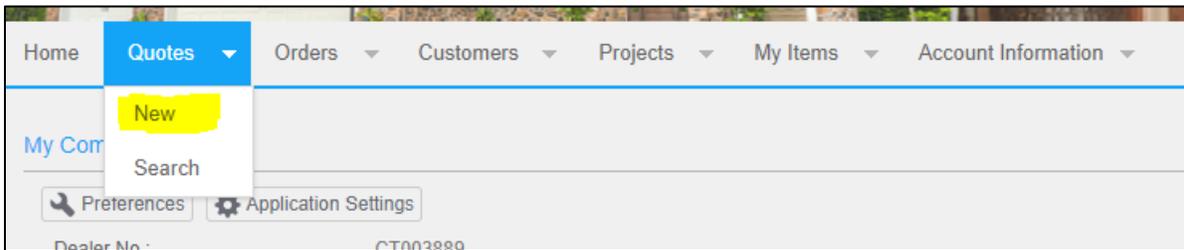
Entering a Quote

Objective: Enter a new quote for a Waudena item.

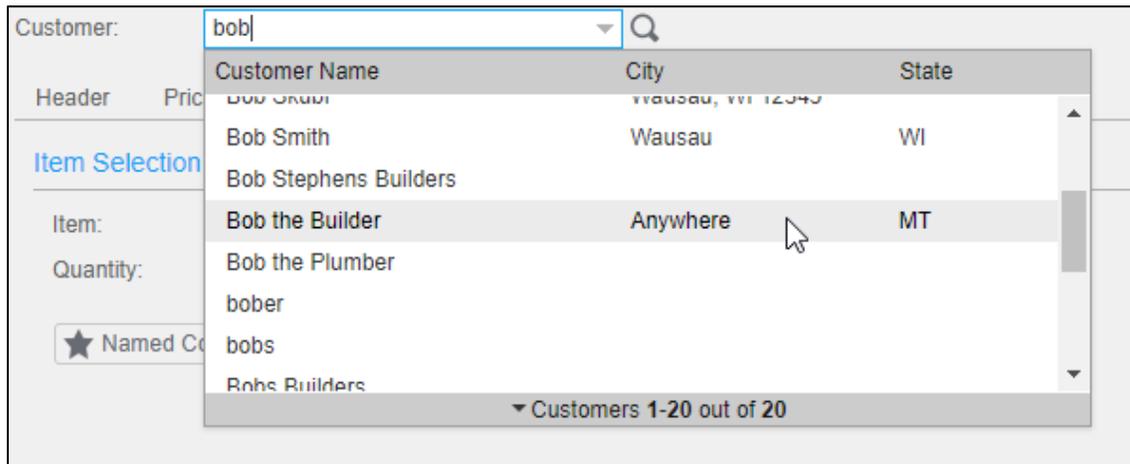
Notes: This example will include steps that, although not required, are recommended for the best experience.

New Quote

1. From any page in the Configurator, hover over Quotes and select "New".



2. Select a Customer (optional). All information for the customer, including pricing records, will be applied to the quote once chosen (see *Creating a Customer Record* for more details).



3. Apply Quote Name (optional). Tip: using a job name will make managing quotes easier.





Building the Quote

1. Select the item to be entered. (Entrance Systems will be used in this example).

A screenshot of the "Item Selection" interface. It shows a search bar with a magnifying glass icon. Below the search bar is a dropdown menu with the following items: "Waudena Entrance Systems", "Waudena Sliding Patio Doors", "Remodeler Unit (RU)", "Innovations Digital Print Doors", "Waudena Trim and Molding", "Waudena Clad Garage Door Frames", and "Waudena Accessories". To the left of the dropdown, there are labels for "Item:" and "Quantity:", and a button labeled "★ Named Configuration".

2. Apply Label for the line item (optional).

NOTE: The label will appear on all paperwork and on the product label when shipped. Using a label can make it easier to identify where a product belongs on the job site.

A screenshot of the "Item Selection" form. The "Item:" dropdown is set to "Waudena Entrance Systems". The "Quantity:" is set to "1 EA". The "Label:" field is highlighted in yellow and contains the text "Front Entry". Other fields include "Description:" and "Price:". At the bottom, there are buttons for "Configure" and "★ Named Configurations".

3. Set quantity required. The system will default to a quantity of 1.

A screenshot of the "Item Selection" form. The "Item:" dropdown is set to "Waudena Entrance Systems". The "Quantity:" is set to "1 EA", with the number "1" highlighted in yellow. At the bottom, there are buttons for "Configure" and "★ Named Configurations".



4. Select "Configure" to begin selecting the details of your product.

Item Selection

Item:

Quantity: EA

5. Each configuration includes a series of questions. The questions and available answers are filtered based on previous answers given, meaning that you should not receive options that are not available for your Configuration. Answer each question by selecting the answer images located immediately below the question.

Door Type
("A" indicates the Door Style features an adjustable hinge plate system.)*

 Cambridge (Smooth Steel)	 Norwood (Textured Steel)	 Timberline (Smooth Fiberglass)	 Textured Fiberglass
---	---	--	--

6. After completing all questions on each tab, you will be prompted to select "Continue" to confirm the answers on the tab and move to the next.

Will the Interior match the Exterior?
?*

Yes No

Please click Continue to proceed

   **Price: 762.00 USD**



7. As you make your selections, an image of your door will be shown on the right with the itemized pricing breakdown. All prices will be shown as list price.



Exterior View

Base Price	762.00
+ Door PreFinish	262.00
+ DeadBolt Bore	38.00
+ Clad Adder	267.00

8. Upon completing all the questions for a complete configuration, you will be prompted to select "finish" to confirm all selections and complete the line.

To complete this line item. Please click "Finish"

Finish

Cancel



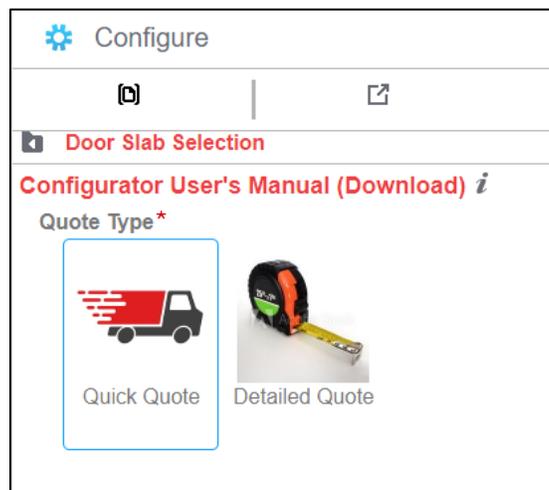
Completing the Quote

Repeat previous steps for additional items needed on the quote.

Once all items have been entered, complete the quote by simply exiting the Configurator or navigating to another page. You do not need to save. See additional sections for pricing, printing, and e-mail options.

Quick Quote vs. Detailed Quote

When you begin a quote for a Waudena Entrance System, you will be offered the option for a Quick Quote or a Detailed Quote. But what are the differences?



Quick Quote

- Ideal for getting a price quickly in the following scenarios:
 - Customer just wants a rough idea of the price of a unit.
 - Working to narrow down many different doors to one or two options.
 - The specifications of the door are very basic.
- Fewer Questions
 - Doesn't ask the questions that will not impact the price.
 - Doesn't include more complex units, keeping it simple and fast.
 - Cannot be placed as an order, does not include enough information.

Detailed Quote

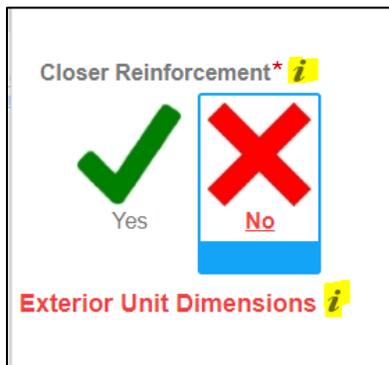
- Includes every detail to ensure complete accuracy within the quote.
- Offers additional items that may otherwise be missed when quoting.
- Includes all types of units, simple to complex.
- Includes all details required to place as an order.

Information References

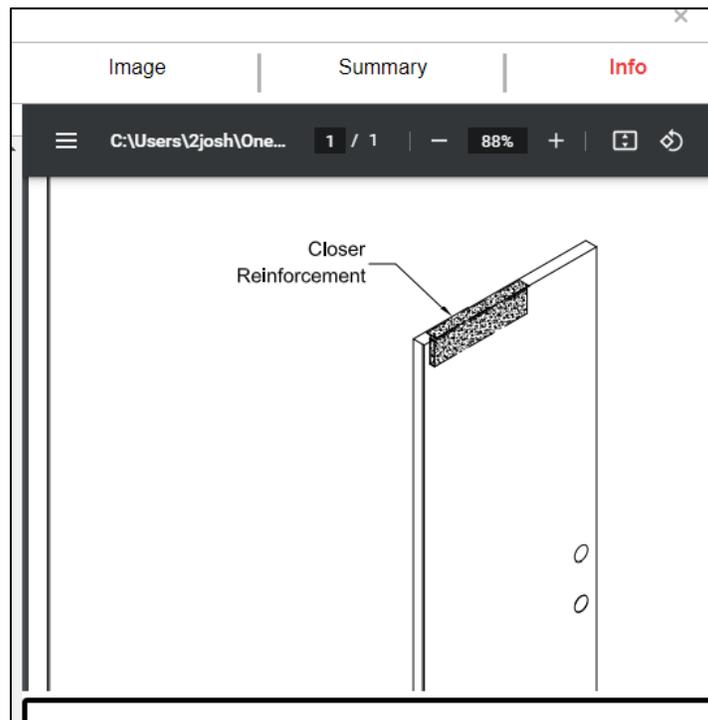
There are several methods employed, within a Configuration, to share information about the options offered or selections that have been made.

Infolink

Infolinks are identified with the italicized "i" next to the selection.

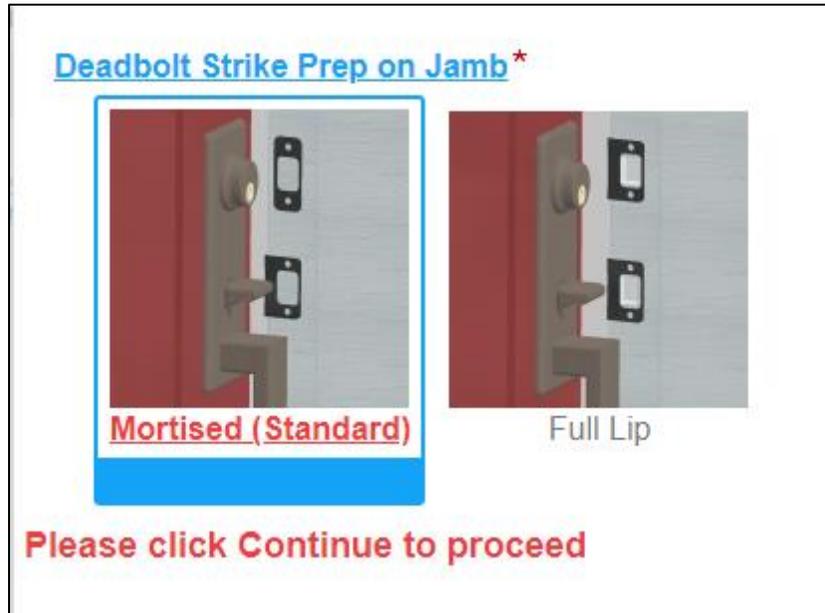


Once you select the Infolink, additional information about the selection will show to the right of your Configuration.

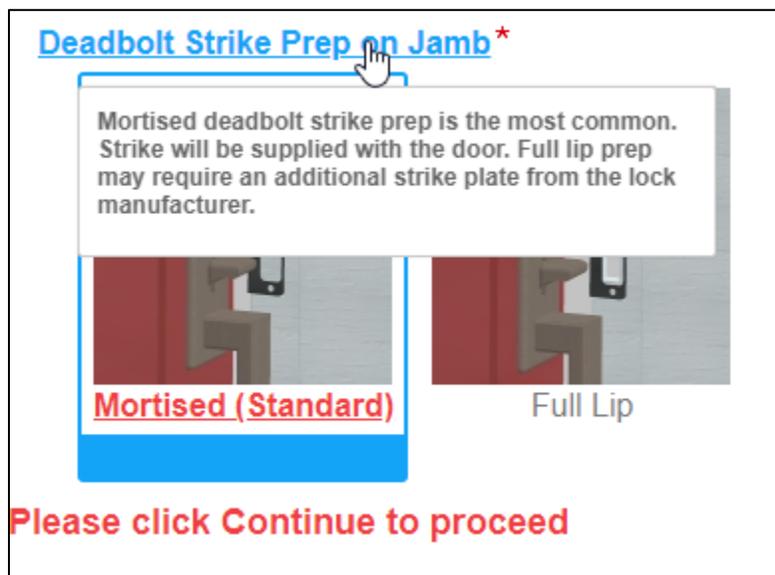


Tooltip

A Tooltip is identified by verbiage that is underscored in or below the selection name.



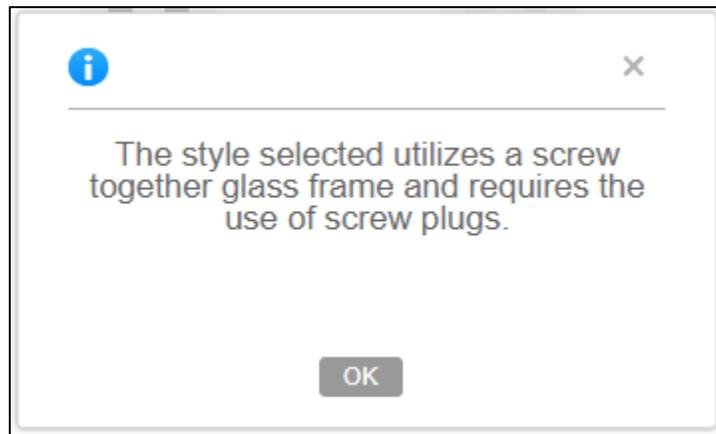
When you see a Tooltip, hover over the underscored words to see additional information about the selection.





Information Message

An information message may be used to convey additional details about a selection that has been made. They will automatically “pop-up” on your screen to share any details that you should be aware of when making that selection.





Copying Lines or Quotes

Objective: Save time in quoting by copying lines, copying quotes, or creating multiple versions of a quote.

Copying Quote/Order Lines

When entering quotes or orders with multiple lines, it is possible to copy a line and make minor changes when the specifications are consistent from line to line.

1. Enter the first line of the quote.
2. To copy the first line to the second, select "Copy" in the line.

The screenshot shows the 'Quote Lines' interface. At the top, there are two buttons: 'Validate All' (checked) and 'Expand All'. Below this is a table with three columns: 'Line', 'Label', and 'Item'. The first row contains the value '1' in the 'Line' column, 'Front Entry' in the 'Label' column, and 'Waudena Entrance Systems' in the 'Item' column. Below the 'Label' cell, there are two links: 'Change Options' and 'Adjust Price'. Below the 'Item' cell, there is a 'Copy' button highlighted in yellow, followed by a 'More...' link. The 'Item' description is partially visible: 'BDEXEEU-3'-0"x6'-8"-11F Single Entr... 2-1/8" DBB, 168 Clad w/Modern Nosir... Fin, Hinge Left/Right Hand Inswing, B... ,Beige Q-Lon W/S and Sweep,'.

3. You will now have identical lines. You can make changes to the new line, including quantity or label. If line 2 requires changes in the details from the previous line, select "Change Options".

The screenshot shows the 'Quote Lines' interface with two lines. The first line is identical to the one in the previous screenshot. The second line also has '1' in the 'Line' column, 'Front Entry' in the 'Label' column, and 'Waudena Entrance Systems' in the 'Item' column. The 'Qty' column for the second line has a value of '1'. The 'UOM' column for both lines is 'EA'. Below the 'Label' cell of the second line, there are two links: 'Change Options' and 'Adjust Price'. Below the 'Item' cell of the second line, there is a 'Copy' button highlighted in yellow, followed by a 'More...' link. The 'Item' description is partially visible: 'BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-... 2-1/8" DBB, 168 Clad w/Modern Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail... Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART. Champagne IS Sill... ,Beige Q-Lon W/S and Sweep,'.



4. Continue to copy as many times as needed or enter new lines if the specifications are not similar, until the quote is complete.

Copying a Quote/Order

You can copy an existing quote or order to a new quote. This may be useful if you want to build another quote with the same or similar details as previous quote or order, or if you want to recreate the quote but with slightly different options.

1. Enter the first quote as desired or locate and open the existing quote/order that you want to copy.
2. Within the quote, select "Copy" from the ribbon.

A screenshot of a software interface for a quote. The title bar reads "Quote SQHPD004060-1". Below the title bar is a ribbon with several buttons: "Print", "Rapid Change", "Copy" (highlighted in yellow), "Import", "Download XML", and "Delete". Below the ribbon are two dropdown menus: "Location: * General Lumber (TestDealer)" and "Customer: Bob the Builder". To the right of the "Customer" dropdown is a search icon and the text "Quote Name:". Below these are four tabs: "Header", "Pricing", "Items" (selected and highlighted in blue), and "Comments". Under the "Items" tab, there is a section titled "Item Selection" with a dropdown menu showing "Waudena Entrance Systems" and a search icon.

3. The Configurator will automatically create an identical quote and assign it a new quote number. The new number will be unique and does not correlate to the original quote.

A screenshot of the same software interface as above, but with the quote number "SQHPD004060-1" highlighted in yellow. The "Copy" button in the ribbon is no longer highlighted. The rest of the interface, including the dropdown menus, tabs, and item selection, remains the same.



4. Make necessary changes to the details of the quote including pricing, customer or quote name as needed.

Quote SQESO008500-1

Customer: Quote Name:

Header

[Item Selection](#)

5. Make necessary changes to each line by selecting "Change Options".

Quote Lines

Validate All

Line	Label	Item	Qty	UOM
<input type="text" value="1"/>	<input type="text" value="Front Entry"/>	Waudena Entrance Systems	<input type="text" value="1"/>	EA
Change Options	Copy	BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-2-1/8" DBB, 168 Clad w/Modern Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART. Champagne IS Sill ,Beige Q-Lon W/S and Sweep,	Line Details	
Adjust Price	More...			
<input type="text" value="2"/>	<input type="text" value="Front Entry"/>	Waudena Entrance Systems	<input type="text" value="1"/>	EA
Change Options	Copy	BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-2-1/8" DBB, 168 Clad w/Modern Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART. Champagne IS Sill ,Beige Q-Lon W/S and Sweep,	Line Details	
Adjust Price	More...			

6. You now have 2 quotes that are similar but with changes as needed.

Creating Multiple Versions of a Quote

Another way to create multiple quotes with similar specifications is to create additional versions. The result is very similar to copying a quote but will result in quote numbers that correlate. This works well for offering multiple options for the same project.

1. Enter the first quote as desired or locate and open the existing quote for which you'd like to create a new version.
2. To the far right of the screen, select the icon to the right of the version number.

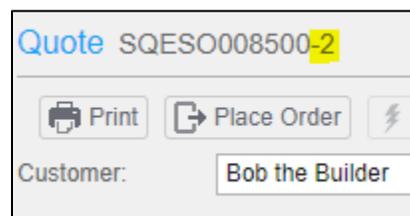
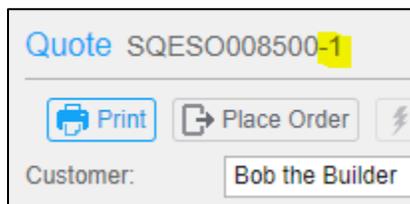


3. The Configurator will take you in to the newly created version of the quote.



4. The second version will retain the same quote number but will have a -2 suffix. You can create as many different versions as needed.

Examples of quote numbers with multiple versions.



5. Make all necessary changes the same as you would when copying a quote (see steps 4 and 5 in the previous section "Copying a Quote/Order").



6. Toggle between versions by selecting the drop down in the version box on the right of the screen.



7. When ready to order, select the version of the quote that you wish to order and follow the "Placing an Order" procedure.



Named Configurations

Objective: To save time in quoting by creating "Named Configurations", which allows you to easily repeat commonly quoted/ordered doors without having to enter from scratch.

How Named Configurations Work

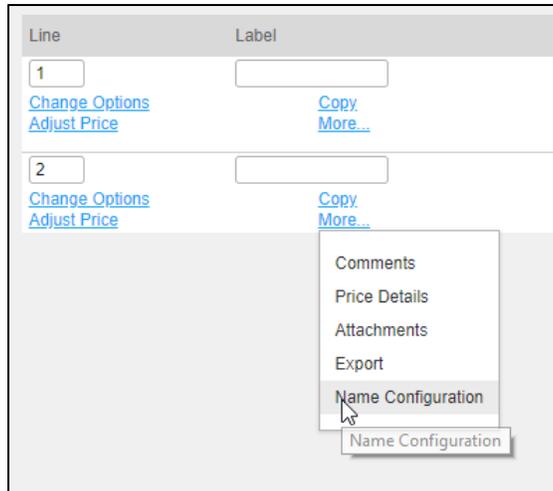
1. A Named Configuration is a way to quickly recreate a common door without having to enter every option from the beginning.
2. Once a Named Configuration exists, it can be added to any quote with a few, simple clicks.
3. Once added, simple changes can be easily accomplished, for example, changing the swing, or adding a paint color.
4. A prime example of a Named Configuration might be a 6 panel steel fire door. The base specs are often repeated in many homes, so having a Named Configuration makes it easy to add a fire door to any quote.
5. Create as many Named Configurations as desired.

Creating a Named Configuration

1. Within a quote, enter a line to the specs desired for the Named Configuration.
2. Once the line is created, select "More..." in the Configurator line that is to be the Named Configuration.

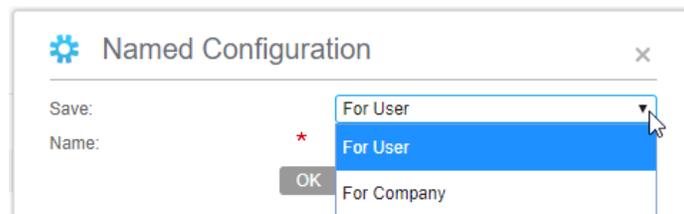


3. Select "Name Configuration".

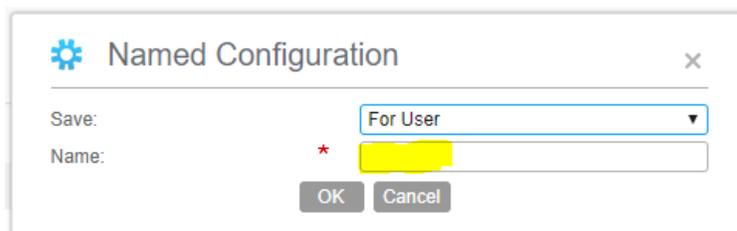


4. When prompted, select whether the Named Configuration will be available to the User or the Company.

Note: This will determine who can view and select the Named Configuration you're creating. If you choose Company, others within your organization can also use the item you've created, however; it is easier to sort the Named Configurations in your view if you make them For User. Either method is acceptable practice and is subject to user preference.



5. Enter the name of the Configuration. This field is free form and format is purely user preference. It is recommended to use a name that is short but clearly identifies the product it represents. i.e. 3/0 6-Panel Fire Door 6-9/16" HRIS





Using a Named Configuration

Now that a Named Configuration has been created, it can quickly and easily be added to any future quote.

1. In a new quote, select "Named Configurations".

Quote SQESO008482-1

Print Place Order Rapid Change Copy

Customer: Bob the Builder

Header Pricing **Items** Comments

Item Selection

Item: Select an item...

Quantity: 1

★ Named Configurations

2. Locate the desired Named Configuration. You may check/uncheck the For User or For Company boxes to narrow the results available to you.

Named Configurations

For User For Company

Qty	Label	Name ▲	Part Number	
<input type="text"/>	<input type="text"/>	3/0 6-Panel Fire Door 6-9/16" HRIS	BDEX	Remove
<input type="text"/>	<input type="text"/>	6TRS-OA	BDWI	Remove
<input type="text"/>	<input type="text"/>	oak 2/14 a profile	BDXJ	Remove



3. Enter the quantity of the item required.

Qty	Label	Name	Part Number	
1		3/0 6-Panel Fire Door 6-9/16" HRIS	BDEX	Remove
		6TRS-OA	BDWI	Remove
		oak 2/14 a profile	BDXJ	Remove

4. If desired, enter a label for the quote line. (will show up on all paperwork and product label).

Qty	Label	Name	Part Number	
	House to Garag	3/0 6-Panel Fire Door 6-9/16" HRIS	BDEX	Remove
		6TRS-OA	BDWI	Remove
		oak 2/14 a profile	BDXJ	Remove

5. Select "Add" to include the Named Configuration in your quote.

Qty	Label	Name	Part Number	
1	House to Garag	3/0 6-Panel Fire Door 6-9/16" HRIS	BDEX	Remove
		6TRS-OA	BDWI	Remove
		oak 2/14 a profile	BDXJ	Remove

Page 1 of 1

[Add](#) [Cancel](#)



6. If there are any specifications that need to change from the "Named Configuration", select "Change Options" on the line and make changes as desired.





Setting Sell Price

Configurator produces a list price and will calculate your cost. There are two methods available to set margins or markups, additional discounts, tax, etc on the quote.

IMPORTANT NOTE: If you have not applied any default pricing or set pricing at the order or line level, when you print the quote at Selling Price, it will show your cost. If you're providing a printed quote to your customer, you should ALWAYS set pricing through one of the methods offered or print the quote at MSRP/List Price.

Pricing at the Order Level

Adjusting price at the order level will affect all lines on the quote equally and allow changes to the bottom line details.

1. In the main screen of the quote select the Pricing tab.

The screenshot shows a software interface for managing a quote. At the top, the quote ID is "SQHPD003987-1". Below this is a toolbar with buttons for "Print", "Rapid Change", "Copy", "Import", "Download XML", "Delete", "Proofing Report", and "Attachments". The "Location" is set to "General Lumber (TestDealer)" and the "Customer" is "Select a Customer...". The "Quote Name" field is empty. A navigation bar shows "Header", "Pricing" (highlighted in yellow), "Items", and "Comments". Under "Item Selection", the "Item" is "Waudena Entrance Systems", "Quantity" is "1 EA", and "Price" is "On Configuration". At the bottom, there are buttons for "Configure", "Named Configurations", and "Add Write-In Item".



- If you've set Default Terms for your account or if you applied a Customer Record with Default Terms, they will automatically populate the pricing summary. If there are no default price records being used, the summary will only calculate cost.

Default Pricing In Use:

Header Pricing Items Comments					
Pricing Summary					
Discount by:	<input type="text" value="% Off List"/>	Price by:	<input type="text" value="Margin %"/>	Pricing Display Options: <input type="text" value="Discount & Markup"/>	<input type="button" value="Price Adjustments"/>
Description	Header Level	Effective	Values of Interest	Totals	
Items Subtotal (MSRP):			915.00		
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(430.05)	484.95	
My Cost:			484.95		
My Upcharge (Margin %):	<input type="text" value="35"/> %	35 %	261.13	746.08	
My Items Subtotal:			0.00		
Write-In Items Subtotal:			0.00	746.08	
Quote Subtotal (List Price):			746.08		
Additional Discount (% Off List):	<input type="text" value="0"/> %	0 %	0.00	746.08	
Adjusted Subtotal (Discounted):			746.08		
Tax:	<input type="text" value="8"/> %		59.69	805.76	
Labor Tax:	<input type="text" value="0"/> %		0.00	805.76	
Shipping and Handling:	<input type="text" value="0.00"/> USD		0.00	805.76	
Other Charges (Specify): <input type="text"/>	<input type="text" value="0.00"/> USD		0.00	805.76	
Total Amount - Final Customer Price in USD:				805.76	

No Default Pricing In Use:

Header Pricing Items Comments					
Pricing Summary					
Discount by:	<input type="text" value="% Off List"/>	Price by:	<input type="text" value="Margin %"/>	Pricing Display Options: <input type="text" value="Discount & Markup"/>	<input type="button" value="Price Adjustments"/>
Description	Header Level	Effective	Values of Interest	Totals	
Items Subtotal (MSRP):			915.00		
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(430.05)	484.95	
My Cost:			484.95		
My Upcharge (Margin %):	<input type="text" value="0"/> %	0 %	0.00	484.95	
My Items Subtotal:			0.00		
Write-In Items Subtotal:			0.00	484.95	
Quote Subtotal (List Price):			484.95		
Additional Discount (% Off List):	<input type="text" value="0"/> %	0 %	0.00	484.95	
Adjusted Subtotal (Discounted):			484.95		
Tax:	<input type="text" value="0"/> %		0.00	484.95	
Labor Tax:	<input type="text" value="0"/> %		0.00	484.95	
Shipping and Handling:	<input type="text" value="0.00"/> USD		0.00	484.95	
Other Charges (Specify): <input type="text"/>	<input type="text" value="0.00"/> USD		0.00	484.95	
Total Amount - Final Customer Price in USD:				484.95	



- You can decide how you want to set your pricing, whether it be margin, markup, etc. The method you use is determined by your personal preference.

Pricing Summary

Discount by: Price by: Pricing Display Options:

Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			915.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(430.05)	484.95
My Cost:			484.95	
My Upcharge (Margin %):	<input type="text" value="35"/> %	35 %	261.13	746.08
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	746.08
Quote Subtotal (List Price):				746.08

- After selecting the preferred method, the Pricing Summary will adjust the options to reflect your preference.

My Cost:

My Upcharge (Margin %):

My Items Subtotal:

Write-In Items Subtotal:

- You can now populate all fields that you want to employ in your quote. Most common items are margin/markup and any applicable tax rate.

Pricing Summary

Discount by: Price by: Pricing Display Options:

Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			915.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(430.05)	484.95
My Cost:			484.95	
My Upcharge (Margin %):	<input type="text" value="25"/> %	25 %	161.65	646.60
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	646.60
Quote Subtotal (List Price):			646.60	
Additional Discount (% Off List):	<input type="text" value="0"/> %	0 %	0.00	646.60
Adjusted Subtotal (Discounted):			646.60	
Tax:	<input type="text" value="8"/> %		51.73	698.33
Labor Tax:	<input type="text" value="0"/> %		0.00	698.33
Shipping and Handling:	<input type="text" value="0.00"/> USD		0.00	698.33
Other Charges (Specify): <input type="text"/>	<input type="text" value="0.00"/> USD		0.00	698.33
Total Amount - Final Customer Price in USD:				698.33



6. Additional items that you may wish to use include Shipping and Handling or Other Charges. These items are optional and subject to personal preference.

Adjusted Subtotal (Discounted):			872.03
Tax:	<input type="text" value="6"/>	%	52.32 924.35
Labor Tax:	<input type="text" value="0"/>	%	0.00 924.35
Shipping and Handling:	<input type="text" value="25.00"/>	USD	25.00 949.35
Other Charges (Specify): <input type="text" value="Fuel Surcharge"/>	<input type="text" value="5.00"/>	USD	5.00 954.35
Total Amount - Final Customer Price in USD:			954.35

7. As you make your changes, you will see the complete breakdown calculation on the right side of the screen. In this case, the line will reflect a price of \$872.03. The bottom of the quote will detail the \$52.32 for tax, \$25.00 for Shipping and Handling and the \$5.00 Fuel Surcharge for a bottom line total of \$954.35.

Pricing Summary				
Discount by:	<input type="text" value="% Off List"/>	Price by:	<input type="text" value="Margin %"/>	Pricing Display Options: <input type="text" value="Discount & Markup"/>
				<input type="button" value="Price Adjustments"/>
Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			1,234.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/>	47 %	(579.98)	654.02
My Cost:			654.02	
My Upcharge (Margin %):	<input type="text" value="25"/>	25 %	218.01	872.03
My Items Subtotal:			0.00	
Write-in Items Subtotal:			0.00	872.03
Quote Subtotal (List Price):			872.03	
Additional Discount (% Off List):	<input type="text" value="0"/>	0 %	0.00	872.03
Adjusted Subtotal (Discounted):			872.03	
Tax:	<input type="text" value="6"/>	%	52.32	924.35
Labor Tax:	<input type="text" value="0"/>	%	0.00	924.35
Shipping and Handling:	<input type="text" value="25.00"/>	USD	25.00	949.35
Other Charges (Specify): <input type="text" value="Fuel Surcharge"/>	<input type="text" value="5.00"/>	USD	5.00	954.35
Total Amount - Final Customer Price in USD:				954.35

8. See the section on Printing Quotes for options for how pricing items will appear on the quote.



Pricing at the Line Level

Adjusting price at the line level will affect only the line that you're changing and does not include bottom line details. Line level pricing will override the order level pricing based on the print function selected.

1. After creating a line, select the "Adjust Price" option on that line.

Quote Lines

Validate All Expand All Total Price: 915.00

Line	Label	Item	Qty	UOM	Price	Total
1		Waudena Entrance Systems	1	EA	915.00	915.00

[Change Options](#) [Copy](#) [Line Details](#) [Remove](#)
[Adjust Price](#) [More...](#)

BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-2-1/8" DBB, 6-9/16" Dura Frame Primed Jamb with Primed BM, Hinge Left/Right Hand Inswing, Ball Bearing AB Hinges,ART. Champagne IS Sill ,Beige Q-Lon W/S and Sweep,

2. Your discount from list and any order level pricing that is in place on the quote will be reflected in the Adjust Price window.

Adjust Price

	Header Values	Price Adjustments
Manufacturer's Discount (% Off List)	0 %	<input type="text" value="47"/> %
My Upcharge (Margin %)	25 %	<input type="text" value="25"/> %
Additional Discount	0 %	<input type="text" value="0"/> %

3. Make any additional adjustments that you wish to make only to the line. In this case, we will offer the customer an additional 5% off of this line only.

Adjust Price

	Header Values	Price Adjustments
Manufacturer's Discount (% Off List)	0 %	47 %
My Upcharge (Margin %)	25 %	<input type="text" value="25"/> %
Additional Discount	0 %	<input type="text" value="5"/> %



Creating "My Items"

Introduction

"My Items" allows a user to create chargeable items to include in a Configurator quote that are not items from Wausau Supply or Waudena, to allow you to include everything for a job within a quote.

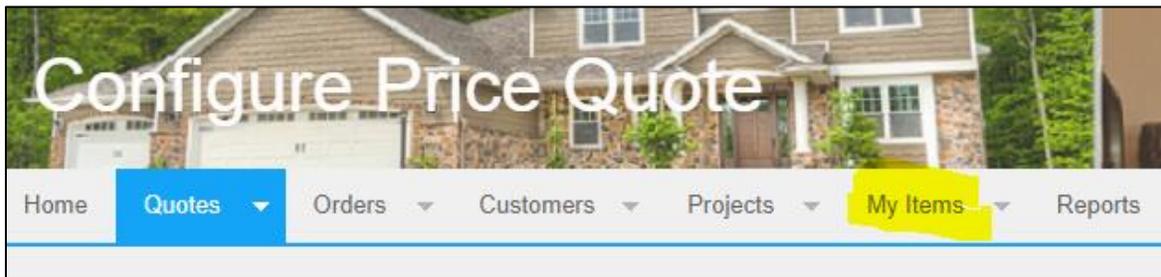
Dealers/Contractors that perform installs or offer additional services are one example of a user that may want to use My Items. You can preset items with a name, description and sell price that suits your business to be selected for use in a quote.

Example: A contractor may want to create items to charge for installation. They can create an item for "Install Single Door" or "Install Double Door" etc.

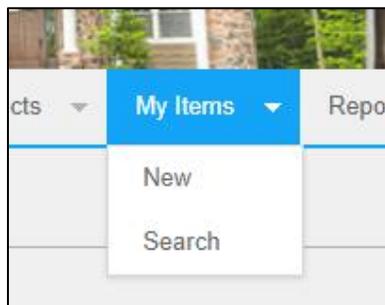
My Items are intended for ease of use to create complete quotes and can be used however the dealer or contractor sees fit. My Items **will not** transfer to Waudena Customer Service when an order is submitted. Prices on "My Items" will appear on the quote as you enter them.

Creating a New Item

1. Click on the tab in the ribbon labelled "My Items".



2. Select "New" to create a new item or "Search" to review or edit existing items.





- 3. Fill out the form with a Part Name, Price, Description and Unit of Measure and set the time frame that the part is available, perhaps in the case of promotional items, as well as a long description as needed.

Tax often does not apply to labor. By checking the box for "Is Labor Item", any tax applied to the quote will not be applied to this item.

Note: If the item will be needed long term, it is recommended to set the date out so long as deemed necessary.

My Item Information

Copy Delete

Item No.: PDES0000012

Part Name:

Price: 0.00

Available from: 2/12/2018

Is Labor Item:

Additional Description:

Description:

Unit of Measure:

Available through: 2/12/2019

Example:

My Item Information

Go to Last Quote Copy Delete

Item No.: PDES0000012

Part Name: Installation - Single Entry Door

Price: 150.00

Available from: 2/12/2018

Is Labor Item:

Additional Description:

Description: Installation Charges

Unit of Measure: EA

Available through: 2/12/2019



Using "My Items" in a Quote

1. To include one of the items you've created, select it in the drop-down box for "Item". The items you've created will appear below the Waudena offering.

The screenshot shows the 'Item Selection' form. The 'Item' dropdown menu is open, displaying a list of items including 'Diamond Kote Supplemental Accessories', 'Decking & Railing', 'Taylor Entrance Systems, Slabs', 'Taylor Entrance Systems, Prehung', 'Pricing Not Ready - Shutters', 'Disposal', 'Door Installation Labor', 'Installation - Double Entry Door', 'Installation - Single Entry Door', and 'Travel'. The 'Quote Lines' section shows a table with one line item, '1', and buttons for 'Change Options' and 'Adjust Price'. A 'Validate All' checkbox is also present.

2. After selecting the item, change the quantity or add a label as desired. Select "Add" to apply the item to the quote.

The screenshot shows the 'Item Selection' form with 'Door Instal' selected in the dropdown. The quantity is set to '1' and the price is '250.00 USD'. The 'Add' button is highlighted, indicating the item is being added to the quote.

Line	Label	Item	Qty	UOM	Price	Total
1	Front Entry	Waudena Entrance Systems	1	EA	1,234.00	1,234.00
		BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-2-1/8" DBB, 168 Clad w/Modern Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART. Champagne IS Sill ,Beige Q-Lon W/S and Sweep,				
2		Door Install	1	EA	250.00	250.00



- The item will then show up on the quote you provide to your customer as a line item and will be calculated into their bottom-line totals. Apply multiple items to the quote as desired.

Quotation		General Lumber (Dealer)		United States		
Quote ID	SQHPD004060-1		P.O. Number 			
Line	Label	Qty	UOM	Family/Part Number	Unit	Extended
1	Front Entry	1.0000	EA	Waudena Entrance Systems	872.03	872.03
<p>BDEXEEU-3'-0"x6'-8"-11F Single Entry,3'-0" X 6'-8" , Smooth Steel 11F, 2-3/4" Backset-2-1/8" DBB, 168 Clad w/Modern Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART. Champagne IS Sill ,Beige Q-Lon W/S and Sweep,</p>						
<p>Exterior View</p>				<p>Door Configuration: Single Entry Unit Type: Assembled Unit Width: 3'-0" Height: 6'-8" Texture: Smooth Steel Glass Type: Style: 11F Hinging: Hinge Left/Right Hand Inswing Hinge Type: Ball Bearing Matte Black (US19) 2-3/4" Backset - 2-1/8" Deadbolt Bore</p> <p>Jamb and Sill Jamb Type: Aluminum Clad Dura Frame Jamb Depth: 6-9/16" Jamb PreFinish: No Jamb Reinforcement Plate Provided as a Standard. Clad Type: Modern Nosing, Clad Color: 168 Noble Nail Fin: Vinyl Nailing Fin Sill Type: Articulating Champagne Beige Q-Lon W/S and Sweep</p> <p>Door Opening Specifications (Width x Height) Frame Size/Unit Dimension: 37 1/2" x 81 3/4" R.O. Size: 38 1/2" x 82" Brickmold/Clad Dimensions: 38 5/8" x 82 9/16"</p>		
Application version		8.1.1.5CF		Printed on		7/30/2021
Content Version		1.0.0.0		Page 2 of 3		



Using Write-In Items

Introduction

“Write-In Items” are another way to include chargeable items in a Configurator quote that are not from Wausau Supply or Waudena. Write-In Items are easier to use quickly for an ad hoc need that is not preset and will not be stored for recurring use. Write-In Items **will not** transfer to Waudena Customer Service when an order is submitted. Prices on “Write-In Items” will appear on the quote as you enter them.

Example: A user may want to use a Write-In Item to include a storm door that is purchased from another manufacturer. Because there are so many options for storm doors, the user can create a one-off item with the specs/price that they need rather than managing these as My Items.

Adding a Write-In Item to a Quote

1. Within the quote in which you want to include the Write-In item, select “Add Write-In Item” in the Item Selection area.

Header Pricing **Items** Comments

Item Selection

Item: Waudena Entrance Systems Description:

Quantity: 1 EA Price:

Configure ★ Named Configurations **Add Write-In Item**

Quote Lines

2. Fill out the Part Number, Description, Unit of Measure, Price and Quantity as desired. Be sure to check the labor item box if it should not have tax applied.

Write-In Item

Part Number: * Storm Door

Description: 3068 LHIS Self Storing Storm Door - White

UOM: EA

Price: * 350

Quantity: 1

Label: Front Entry

Is Labor Item:

OK Close



3. After completing the Write-In Item form, select "OK" to add the item to your quote.

Quote Lines							Total Price: 3,482.00
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Expand All					
Line	Label	Item	Qty	UOM	Price	Total	
1	Front Entry	Waudena Entrance Systems	1	EA	3,132.00	3,132.00	
Change Options Copy Adjust Price More...		BDEXWEU-3'-0"x6'-8"-606-CHA-R Single Entry,3'-0" X 6'-8" , Cherry Timbergrain Grain Textured FG 606-CHA-R, Prefinish Slab Sedona Stain Int Prefinish Slab 124 Ext, 2-3/4" Backset-2-1/8" DBB Only, 176 Clad with BM Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART, Champagne IS Sill ,Beige Q-Lon W/S and Sweep, Touchup 124, Touchup SED,	Line Details		Remove		
2	Front Entry	Storm Door	1	EA	350.00	350.00	
Edit Copy Adjust Price More...		3068 LHIS Self Storing Storm Door - White			Remove		

4. The item will then show up on the quote you provide to your customer as a line item and will be calculated into their bottom-line totals. Apply multiple items to the quote as desired.

Quotation							General Lumber (Dealer)		1212 General Lumber Road Duluth, United States	
Quote ID		SQHPD003847-1		P.O. Number 						
Line	Label	Qty	UOM	Family/Part Number		Unit	Extended			
1	Front Entry	1.0000	EA	Waudena Entrance Systems		3,132.00	3,132.00			
		BDEXWEU-3'-0"x6'-8"-606-CHA-R Single Entry,3'-0" X 6'-8" , Cherry Timbergrain Grain Textured FG 606-CHA-R, Prefinish Slab Sedona Stain Int Prefinish Slab 124 Ext, 2-3/4" Backset-2-1/8" DBB Only, 176 Clad with BM Nosing Applied to 6-9/16" Dura Frame Jamb - Vinyl Nail Fin, Hinge Left/Right Hand Inswing, Ball Bearing FB Hinges,ART, Champagne IS Sill ,Beige Q-Lon W/S and Sweep, Touchup 124, Touchup SED,								
2	Front Entry	1.0000	EA	Storm Door		350.00	350.00			
		3068 LHIS Self Storing Storm Door - White								
Application version		8.1.1.5CF		Printed on		6/29/2021				
Content Version		1.0.0.0				Page 2 of 3				



Expired Quotes

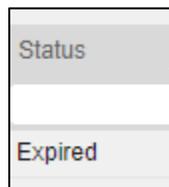
Why is my quote expired?

1. All quotes in the Configurator expire 30 days from when the quote was entered.
2. Once a quote surpasses 30 days, it expires, however; it can be copied to a new quote and the information is not lost.

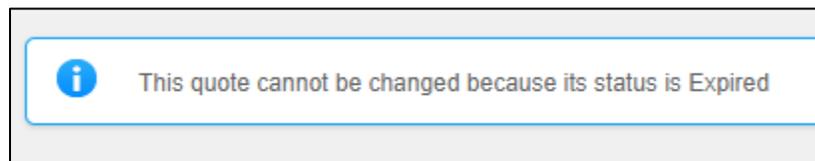
Identifying an Expired Quote

1. When a quote has expired, it will show a status of Expired in the Quote screen.

Customer	Name	PO#	ID	Last Modified by	Modified on v	Status
/			9QESO008343-1	Dealer, Test	5/8/2018	Expired



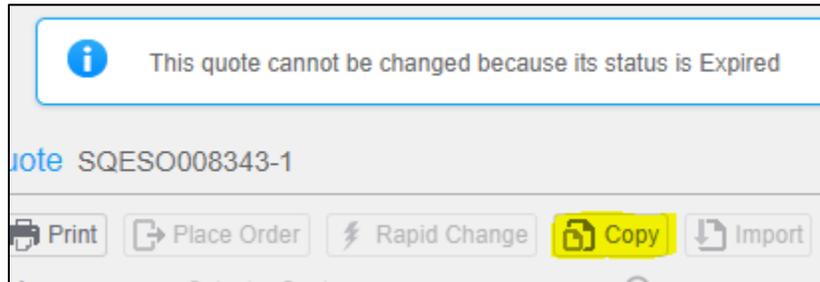
2. Once selected, there will also be a banner within the quote to indicate that the quote has expired.



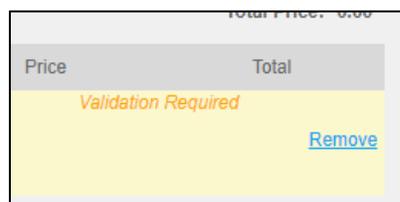
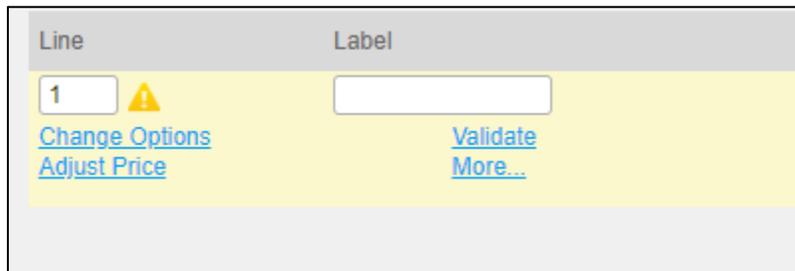
All options to place the order or change the details will be unavailable on an expired quote. You may still print the quote, however; it will indicate that it has expired and the pricing is not guaranteed to be accurate.

Recovering an Expired Quote

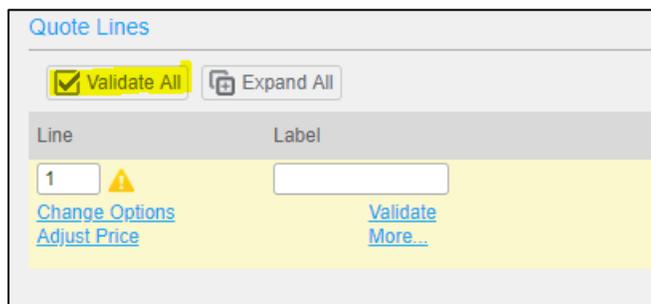
1. While in the expired quote, select "Copy".



2. After selecting Copy, you will notice that the lines will be highlighted and noted with a warning sign. The pricing will indicate "Validation Required".



3. Select "Validate All" to allow the system to rerun the options and calculate current price.



4. The copy will be given a new quote number and will be valid for 30 days from the date it was created.

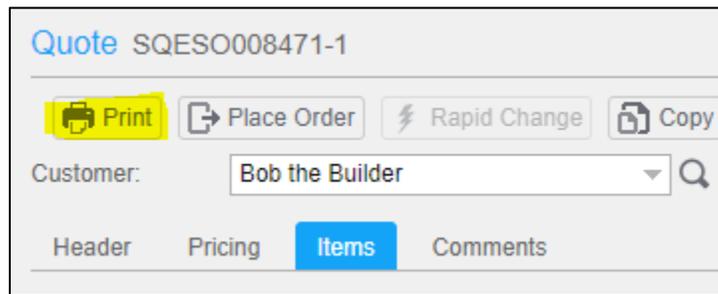


View/Print/Share Quotes

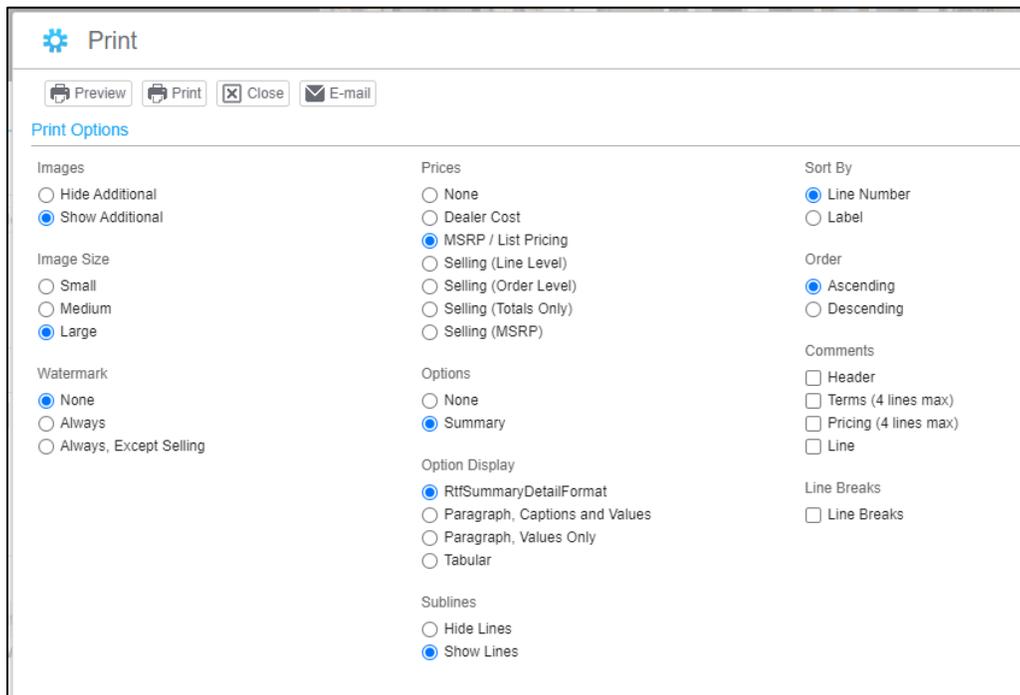
Objective: View, print and/or share a quote with a customer.

View/Print/Share Quotes

1. While in a completed quote, select the "Print" button at the top right of the screen.



2. Make selections for how you want the quote to appear.





3. While the selections are subject to user preference, it is particularly important to select the correct price option to ensure you are sharing the appropriate information.

IMPORTANT – Anytime there are no markup/margins set at any level, the quote will show dealer cost when selling price is selected. Always include a customer, order or line level price set up when providing a quote to a customer.

None – No pricing will appear on the quote.

Dealer Cost – Will show dealer cost.

MSRP – Will show full list price with no mark up or discount applied.

Selling (Line Level) – Will show dealer sell price, including all mark ups or discounts applied to the line. If nothing applied at the line level, it would use order level pricing. If no order level pricing applied, it will show customer record pricing.

Selling (Order Level) – Will show order level pricing. If no order level pricing applied, will show customer record pricing.

Selling (Totals Only) – Uses lowest level pricing and only shows order total (no individual line totals).

Selling (MSRP) – Uses full list price as basis and includes lowest level discount to arrive at a final sell price.

Prices

- None
- Dealer Cost
- MSRP / List Pricing
- Selling (Line Level)
- Selling (Order Level)
- Selling (Totals Only)
- Selling (MSRP)

4. If any Header, Terms, Pricing or Line notes were included on the quote, select the appropriate boxes to allow the notes to appear on the quote as desired.

Comments

- Header
- Terms (4 lines max)
- Pricing (4 lines max)
- Line

View Quote

1. To view only, once the appropriate "Print Options" are selected, click on "Preview" to view the quote on PDF.



2. Once in PDF format, the quote can be saved in PDF for printing or e-mailing. Direct print and e-mail options to follow.

Print Quote

1. To send directly to a printer, once the appropriate "Print Options" are selected, click on "Print" to bring up printer options.



2. Depending on your system, this may take you directly to your printer or may go to PDF format. Check with your system administrator for details.

E-Mail Quote

1. To e-mail directly from Configurator, once the appropriate "Print Options" are selected, click on "E-Mail".





2. Enter the e-mail address of the recipient.

A screenshot of an "E-mail" dialog box. The window title is "E-mail" with a gear icon on the left and a close button (X) on the right. The "From" field contains the email address "testdealer@wausausupply.com". The "To" field is highlighted in yellow and is currently empty. The "Subject" field contains the text "SQESO008471-1". Below the fields is a text area containing the placeholder text "This is a sample template for email.". At the bottom of the dialog are two buttons: "Send" and "Cancel".

3. User's return address will automatically populate the From field.

4. Subject line will default to the quote number, however; user can change this as desired.

5. User can also type a message to accompany the quote.

6. Once all items are ready, select "Send" to release the e-mail. A message will appear confirming that the e-mail was sent successfully.

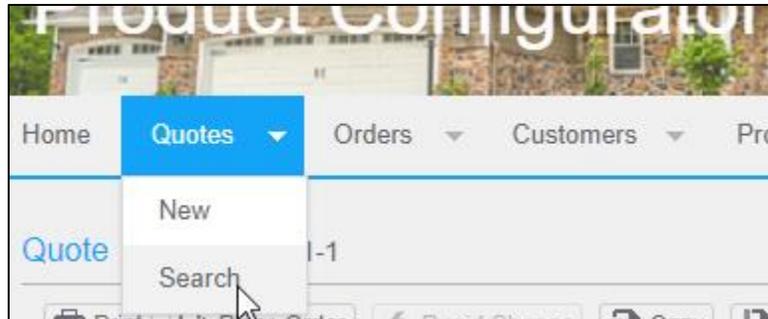
A screenshot of an "Information" dialog box. The window title is "Information" with a gear icon on the left and a close button (X) on the right. The main text area contains the message "E-mail was sent successfully". At the bottom center of the dialog is an "OK" button. At the bottom left corner, there is a small, faint "Show Lines" button.



Placing an Order

Existing Quote

1. From anywhere in the Configurator, hover over Quotes and select "Search".



2. Locate the quote you're looking for.

Quote Search			
<input type="button" value="New Quote"/>			
Customer	Name	PO#	ID
			SQESO008473-1
			SQESO008472-1
Bob the Builder	Smith Residence		SQESO008471-1
Bob the Builder	Smith Residence		SQESO008470-1
			SQESO008469-1

3. You may also use "Customer" or "Name" fields to narrow your search if you entered a customer record and/or quote name on the quote.

Quote Search			
<input type="button" value="New Quote"/>			
Customer	Name	PO#	ID
			SQESO008473-1
			SQESO008472-1
Bob the Builder	Smith Residence		SQESO008471-1
Bob the Builder	Smith Residence		SQESO008470-1
			SQESO008469-1

4. Once you have located the quote that is to be ordered, click on the quote to enter it.



5. Once in the quote to be ordered, begin the process of placing the order by selecting "Place Order" at the top left of the page.

A screenshot of the Waudena software interface. At the top, it says "Quote SQESO008471-1". Below this are several buttons: "Print", "Place Order" (highlighted in yellow), "Rapid Change", "Copy", and "Import". Underneath is a "Customer:" dropdown menu with "Bob the Builder" selected. Below that are tabs for "Header", "Pricing", "Items" (selected), and "Comments". The "Item Selection" section shows "Item:" as "Waudena Millwork Exterior Door" and "Quantity:" as "1 EA". At the bottom of this section are "Configure" and "Named Configurations" buttons.

6. The *Place Order* box will open. At this time, you are required to enter a valid PO number for the order.

A screenshot of a dialog box titled "Place Order". It contains a label "P.O. Number:" followed by a red asterisk and a red exclamation mark icon. To the right of the icon is an empty text input field.

7. You may also enter notes to the right of the PO with any special instructions for the Customer Service Representative to review when confirming your order.

A screenshot of the "Place Order" dialog box. On the left side, there is a label: "Notes (will appear on order when transmitted to manufacturer):". To the right of this label is a large, empty text area for entering notes.

8. When ready, select "Place Order" to transmit your order to Waudena.

A screenshot of the "Place Order" dialog box. At the top, there is a gear icon and the text "Place Order". Below this, there are two buttons: "Place Order" (highlighted in yellow) and "Cancel".



Ordering with No Existing Quote

1. If no quote exists for the items to be ordered, follow the steps on the section labelled "Entering a Quote" to build the items required.
2. After completing the quote, follow steps 5-8 above to place the order with Waudena.

Why do I not have the Place Order Option?

There are 3 scenarios that will cause the "Place Order" button to not be offered.

1. Only dealers can place orders with Waudena. If the user is a contractor, purchasing from a Waudena dealer, the Place Order button is not available.
2. If a dealer is converting a quote to an order and the quote was created by their contractor via Contractor Access, the Location will need to be changed to the dealer's shipping location. If the location is set to the contractor's location, the place order is unavailable.

A screenshot of a web application interface for a quote. The title is "Quote SQHPD003847-1". Below the title is a row of action buttons: Print, Rapid Change, Copy, Import, Export, Delete, and Proofing Report. Below the buttons are two dropdown menus: "Location:" with a red asterisk and "General Lumber (TestDealer)" selected, and "Customer:" with "Select a Customer..." selected. Below the dropdowns are four tabs: "Header", "Pricing", "Items" (which is highlighted in blue), and "Comments". At the bottom of the interface, there is a link labeled "Item Selection".

3. If the quote includes a line that was created as a Quick Quote, the Place Order button will not be available. Quick Quotes do not include enough information to process as an order. To order a line that was entered as a Quick Quote, change the line to a Detailed Quote and answer the additional questions to provide the detail required to process as an order and the Place Order button will appear.



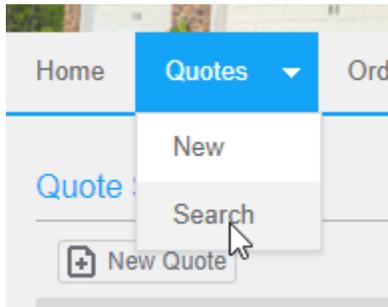
Managing Quotes/Orders

Objective: Manage existing quotes or orders.

Note: Including a customer and quote name makes managing quotes and orders much easier using the search function. While using a customer and/or quote name is not required, it is recommended.

Managing Quotes

1. Upon logging into the Configurator, you will be automatically directed to the Quote Search page. You can also navigate to this page from anywhere in the Configurator by hovering over or clicking on "Quotes" and selecting "Search".



2. You will see all quotes that have been entered for your company. Information includes the quote number, name of who last modified the quote, the date it was last modified and the status of the quote (Open, Ordered or Expired). If you selected a customer or included a Quote Name, this information will also appear.

Customer	Name	PO#	ID	Last Modified by	Modified on	Status
			SQESO008486-1	Dealer, Test	7/16/2018	Open
Bob the Builder	Smith Option 2		SQESO008500-1	Dealer, Test	7/16/2018	Open
Bob the Builder	Smith Option 2		SQESO008500-2	Dealer, Test	7/16/2018	Open
Bob the Builder	Smith		SQESO008499-1	Dealer, Test	7/16/2018	Open
			SQESO008498-1	Dealer, Test	7/13/2018	Open
			SQESO008497-1	Dealer, Test	7/13/2018	Open
			SQESO008496-1	Dealer, Test	7/13/2018	Open
a_1 construction			SQESO008495-1	Dealer, Test	7/12/2018	Open
test			SQESO008494-1	Dealer, Test	7/12/2018	Open
			SQESO008491-1	Dealer, Test	7/12/2018	Open
			SQESO008490-1	Dealer, Test	7/12/2018	Open
			SQESO008489-1	Dealer, Test	7/12/2018	Open
			SQESO008488-1	Dealer, Test	7/11/2018	Open
			SQESO008487-1	Dealer, Test	7/11/2018	Open
			SQESO008485-1	Dealer, Test	7/11/2018	Open



3. To open an existing quote, click on the row containing the quote you wish to open.
4. To simplify the process of locating a specific quote, you can search by the customer, quote name or quote ID.
5. To search by customer, type in the customer name, or first few letters of the customer name and press enter.

Quote Search

Customer	Name	PO#	ID
<input type="text" value="Bob"/>			
Bob the Builder	Smith Option 2		SQESO008500-1
Bob the Builder	Smith Option 2		SQESO008500-2
Bob the Builder	Smith		SQESO008499-1
Bob the Builder			SQESO008482-1
Bob the Builder	Smith Residence		SQESO008471-1
Bob the Builder	Smith Residence		SQESO008470-1
Bob Builder			SQESO008109-1
Bob's Builders	2301 Smith St. - DiamondKote Quote		SQESO006120-1

6. To search by quote name, type in the name or the first few letters of the quote name and press enter.

Customer	Name	PO#	ID
<input type="text"/>	<input type="text" value="smith"/>		
Bob the Builder	Smith Option 2		SQESO008500-1
Bob the Builder	Smith Option 2		SQESO008500-2
Bob the Builder	Smith		SQESO008499-1
Bob the Builder	Smith Residence		SQESO008471-1
Bob the Builder	Smith Residence		SQESO008470-1
	smith		SQESO008387-1
Ryan's Doors	Smith		SQESO008190-1

7. To search by quote ID, type in the alphanumeric quote ID and press enter.

Quote Search

Customer	Name	PO#	ID
<input type="text"/>			<input type="text" value="SQESO008500-1"/>
Bob the Builder	Smith Option 2		SQESO008500-1

Page 1 of 1

- The status of the quote will be Open, Ordered or Expired. Quotes remain in the open period for 60 days after entering. If the quote you wish to access is Expired, see the section on Expired Quotes to copy to a new quote.

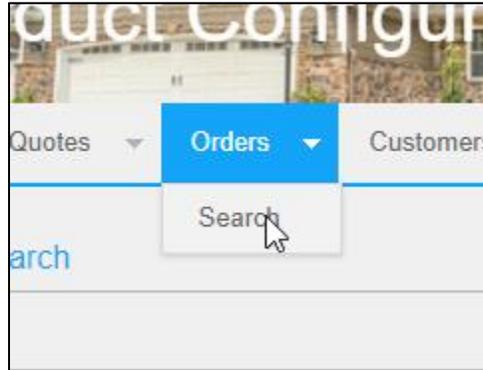
If the quote has been placed as an order, it is still available to view.

- If a quote is no longer needed and you wish to delete it, you can do so by opening the quote and selecting delete in the ribbon.

The screenshot displays the Waudena software interface for a quote. At the top, there is a navigation bar with tabs for Home, Quotes (selected), Orders, Customers, Projects, My Items, and Accounts. Below the navigation bar, the quote title "Quote SQESO008500-1" is shown. A ribbon of action buttons includes Print, Place Order, Rapid Change, Copy, Import, Export, and Delete (highlighted in yellow). Below the ribbon, the "Customer:" field is set to "Bob the Builder". A sub-tabbed interface shows "Header", "Pricing", "Items" (selected), and "Comments". Under the "Items" tab, the "Item Selection" section shows the "Item:" field set to "Waudena Millwork Interior Door" and the "Quantity:" field set to "1 EA".

Managing Orders

1. Navigate to the "Order Search" page by hovering over or clicking on "Orders" in the ribbon and selecting "Search".



2. You will see all orders that have been submitted as an order. Information includes the PO number provided with the order, Configurator order number, name of who submitted the order, and the date it was submitted. If you selected a customer or included a Quote Name, this information will also appear.

Customer	Name	PO#	ID	Last Modified by	Modified on	Status
Jim Powers	Powers home	Jim Powers	SOESO000124	Dealer, Test	6/1/2018	Submitted
		test	SOESO000123	Dealer, Test	4/5/2018	Submitted
		test	SOESO000122	Dealer, Test	4/5/2018	Submitted
		test	SOESO000121	Dealer, Test	4/5/2018	Submitted
	Josh Testing	test order	SOESO000120	Dealer, Test	3/27/2018	Submitted

3. You can select an order by clicking on the row it is in. This will allow you to view, print or e-mail a copy of the order. You will not be allowed to make changes in the Configurator once the order is placed.



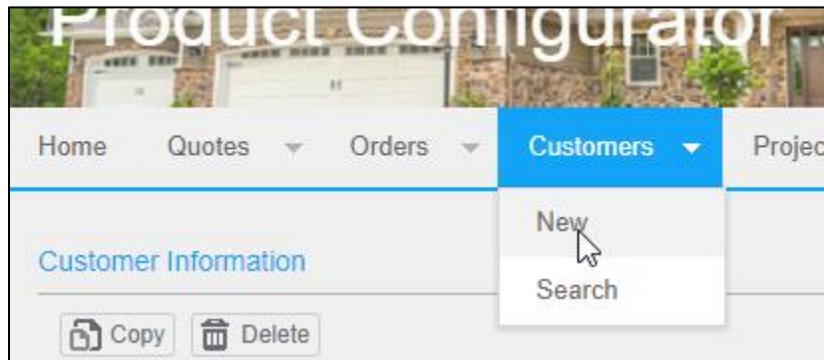
Creating a Customer Record

Objective: Create a customer record to be applied to quotes.

Notes: A customer record can include pricing records for consistent quoting and can be used to manage quotes for that customer. Although use of customer records is not required, they are recommended for ease of use. Using customer record also makes a quote more detailed and personal when provided to the customer.

New Customer

1. Within the Configurator, navigate to the Customer tab and select "New".



2. Fill blanks with information about the customer. Only a name is required, however; the more information entered the more complete a quote will be once entered.

Customer ID:	CTESO000827	Status:	* Active
Name:	* Bob the Builder	Type:	
Address 1:	123 Main Street	Phone 1:	123-456-1234
Address 2:		Phone 2:	
Address 3:		Fax:	
City:	Anywhere	Default Contact:	
State:	Montana	Default Ship-to Address:	
Zip:	12345		
Country:	United States		

IMPORTANT – When creating a new customer, it will be visible to all logins that are enabled. For customers with 'Contractor Access', be sure to uncheck the box so they cannot see customer records you have created. (located at bottom of customer record).

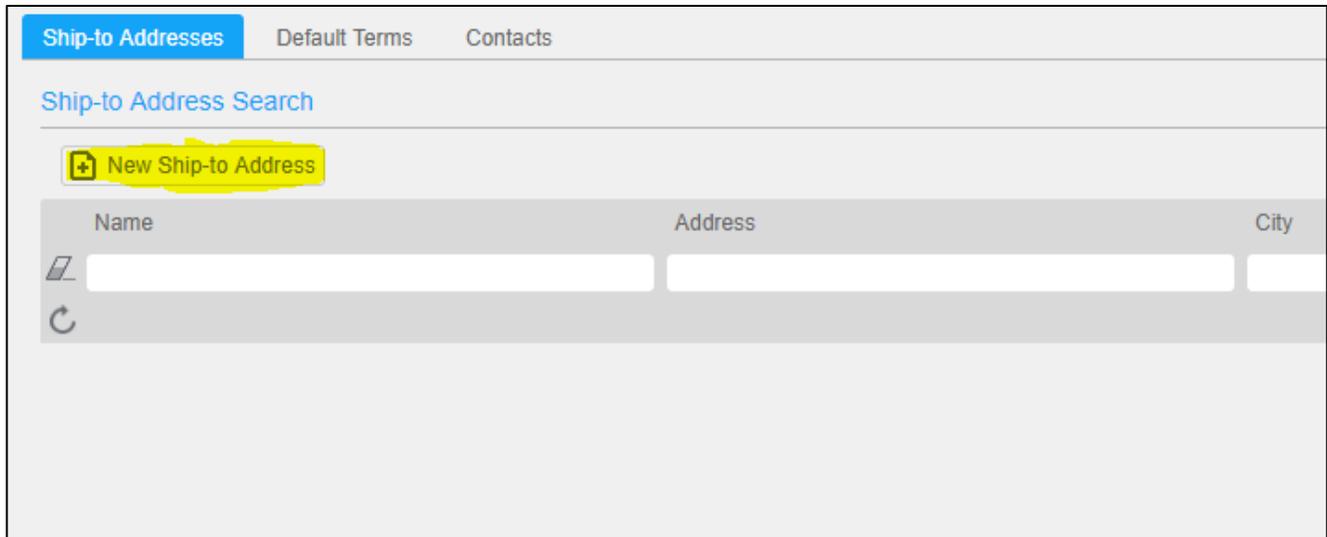
Name	Address	City	State	Postal Code	Country	ID	Ship-to ERPID	Enabled
Lumber								All
General Lumber (TestDealer)	1212 General Lumber Road	Duluth	MN	55802	US	CA064655	002	<input checked="" type="checkbox"/>

Page 1 of 1

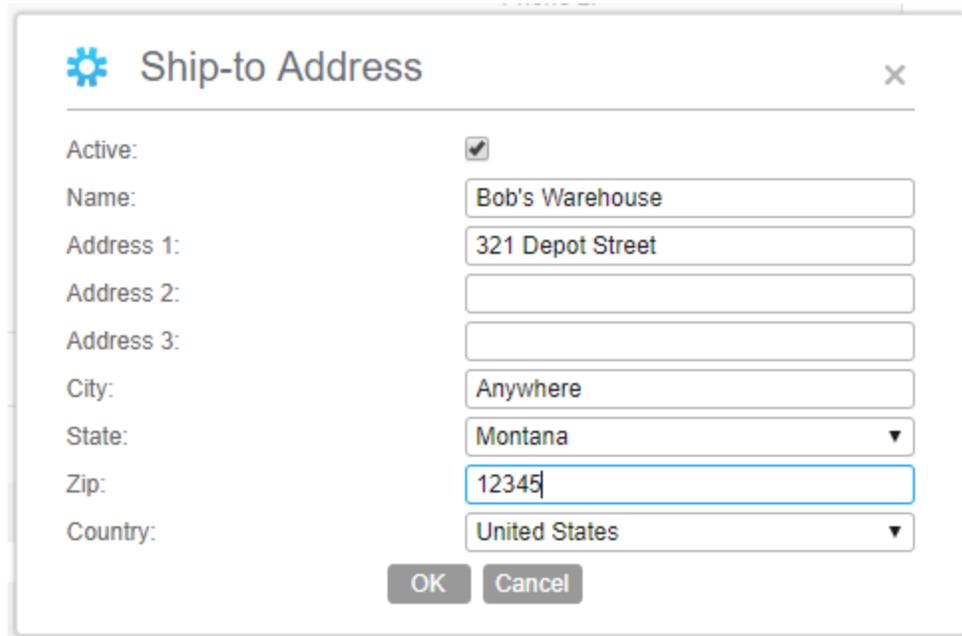
Ship-To Addresses

If the customer has more than one address, create additional ship-to addresses within the customer record.

1. Select the "Ship-to Addresses" tab within the customer record and click on "New Ship-to Address".

A screenshot of a software interface showing the "Ship-to Addresses" tab. The tab is highlighted in blue. Below the tab are three sub-tabs: "Ship-to Addresses", "Default Terms", and "Contacts". Under the "Ship-to Addresses" tab, there is a "Ship-to Address Search" section. Below this is a yellow button with a plus sign and the text "New Ship-to Address". Below the button is a table with three columns: "Name", "Address", and "City". The table has one row with empty input fields. There are also icons for edit and refresh.

2. Complete as much information as desired for the additional ship-to record.

A screenshot of a "Ship-to Address" form. The form has a title bar with a gear icon and the text "Ship-to Address" and a close button. The form contains the following fields:

- Active:
- Name:
- Address 1:
- Address 2:
- Address 3:
- City:
- State:
- Zip:
- Country:

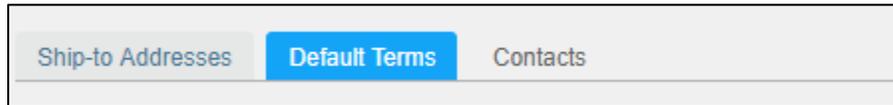
At the bottom of the form are "OK" and "Cancel" buttons.

3. Repeat for as many ship-to addresses as required.



Creating Default Terms for a Customer

1. Select the "Default Terms" tab within the customer record.



2. Determine if you will price by markup, margin, or multiplier to achieve the customer's purchase price. Make the selection prior to setting the percent of markup, margin, or multiplier for best results.

Discount by: % Off List

Price by: Markup %

Business Terms

Additional Discount (% Off List): 0 %

Tax: 5.5 %

Labor Tax: 0 %

Upcharge (Markup %): 49.25 %

Payment Method: On Account

Payment Terms: Net 10

Comments:

3. Apply as much term information as desired. The more that is included, the more complete the quote will be when the customer is used. Pricing will be applied to any quote the customer record is applied to.

Business Terms

Additional Discount (% Off List): 0 %

Tax: 5.5 %

Labor Tax: 0 %

Upcharge (Margin %): 25 %

Payment Method: On Account

Payment Terms: Net 10

Comments:

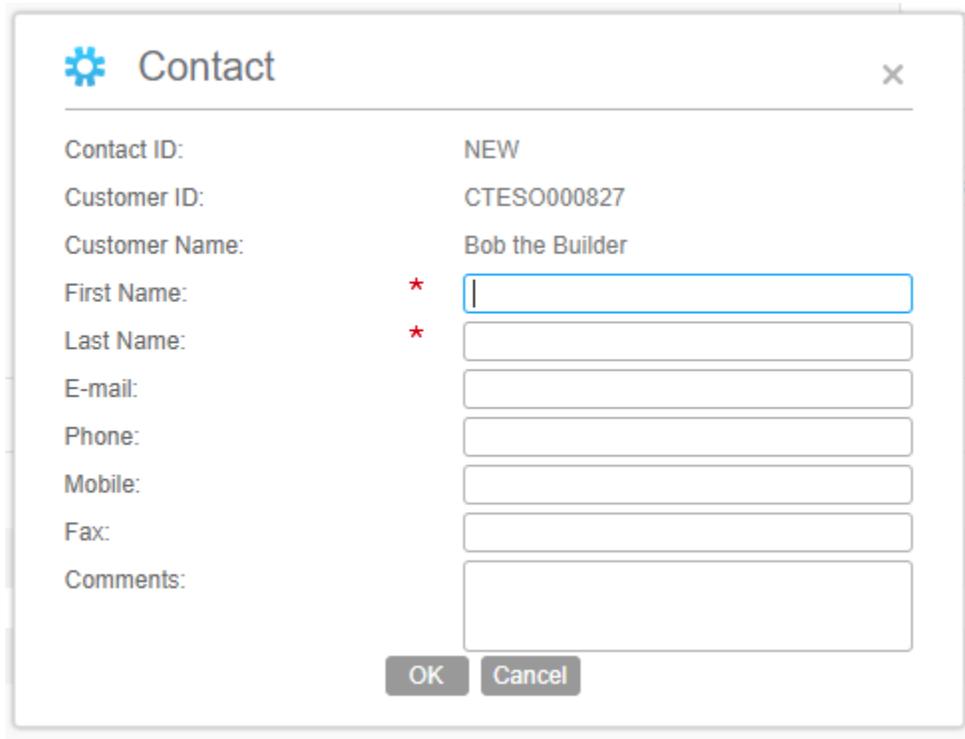
Creating Contacts for a Customer

Additional contacts can be created for each customer record.

4. Select the "Contacts" tab within the customer record and select "New Contact".

A screenshot of a software interface showing the 'Contacts' tab for a customer record. At the top, there are three tabs: 'Ship-to Addresses', 'Default Terms', and 'Contacts', with 'Contacts' being the active tab. Below the tabs is a 'Contact Search' section. A yellow box highlights a '+ New Contact' button. Below this is a table with columns for 'Name', 'E-mail', 'Phone', and 'Mobile'. The table is currently empty. At the bottom right of the table area, there is a pagination control showing 'Page 1 of 1'.

5. Complete as much contact information as desired. Select "OK" when completed.

A screenshot of a 'Contact' form. The form has a title bar with a gear icon and the word 'Contact', and a close button (X) in the top right corner. The form contains the following fields:

- Contact ID: NEW
- Customer ID: CTESO000827
- Customer Name: Bob the Builder
- First Name: * [text input field]
- Last Name: * [text input field]
- E-mail: [text input field]
- Phone: [text input field]
- Mobile: [text input field]
- Fax: [text input field]
- Comments: [text area]

At the bottom of the form are two buttons: 'OK' and 'Cancel'.

6. Repeat for additional contacts as desired/necessary.