FAQ's

This section provides answers to frequently asked questions in **CTB Quote™ Plus**. When answers require detailed explanation, the chapter or section within the User Guide is referenced.

Contents

General Usage Questions

Q **How do I save changes?**

A All information on **CTB Quote™ Plus** *pages* (e.g., **Quotes Page**, **Customers Page**, etc.) is auto-saved. In contrast, popup windows (e.g., **Attachments**, **Change Password**, **Price Adjustments**, etc.) that *do not* auto-save offer 'OK' or 'Save' buttons. Select the **OK** or **Save** button in order to save changes made on popup windows.

Q **Can I send a copy of this quote to someone?**

A **Customers** or other non-**CTB Quote™ Plus** users can receive a PDF copy of a **Quote** by email. **Quotes** can be saved in a PDF format with the **Print** functionality.

A See the **Print** section for more details on creating a PDF **Quote**.

A See the **Import and Export** section for steps to share **Quotes** with other **CTB Quote™ Plus** users.

Q **What is the Validate All button?**

A The **Validate All** button performs a confirmation check on all **Items** in the *Shopping Cart*. The confirmation includes build verification against rule requirements, in addition to price checking. It is a best practice to use the **Validate All** button prior to converting a **Quote** to an **Order** (i.e. **Place Order** function) to eliminate errors.

A Copied **Quotes** and **Library Items** require validation to ensure that location settings have been verified. Click the **Validate All** button to clear the requirement message from the *Shopping Cart*.

Q **What do all of the icons mean?**

A Hover the mouse over icons and buttons to view a popup identification offered from within **CTB Quote™ Plus**.

A For detailed functionality, see the **Visual Glossary** section.

Q **How do I copy an order?**

A **Orders** are converted **Quotes**. Once an **Order** is placed, the **Order** can only be printed or exported. The fastest method to get a copy of an **Order** is to **Copy** the original **Quote** from the **Quote Search** page. **CTB Quote™ Plus** retains the original **Quote** with the status of '*Ordered*' which can be copied in its entirety.

A To copy a converted **Quote**, use the **Quote Search** page to find the '*Ordered*' **Quote**. Select **Copy** from the **Action** icon. A **New Quote** opens as an exact copy of the original, to include **Customer, Attachments**, and **Comments**. Update the *Header* information (especially the **New Quote Name**) and other **Quote** information, as applicable.

A See **Orders** and/or **Search Pages** for more details.

Q   What is the Library?

A   The **Library** provides the functionality to save time by reusing preconfigured builds. **Library Items** can be shared among users to quickly add preconfigured builds to the *Shopping Cart*.

A   Refer to the <u>Library</u> section for instructions on adding and using Library builds.

Q   How do I search for a Quote or Order?

A   **Search** page can be accessed directly from the **Home** page tiles and from the *Navigation Ribbon* for **Quotes** and **Orders**.

A   **Search** pages offer smart search fields to quickly find **Quotes** or **Orders**. Best practice is to use descriptive **Quote Names** to more easily identify **Quotes** or **Orders** on **Search** pages.

A   See <u>Search Page Options</u> for option details or <u>Search Functionality</u> how to use search features.

Q   How does my customer check their order details?

A   Report options from the **Print** functionality offer images, in addition to details and pricing information. Save Reports in PDF format to Email to **Customers**.

A   See the <u>Print</u> section for more details.

Q   How do I enter labor charges or miscellaneous charges?

A   **Dealer Options** offer the ability to create customized **Items** to add to the *Shopping Cart*.

A   Labor charges can be indicated on **Dealer Options** to adjust for specific tax situations.

A   **Dealer Options** can be created for discounts (i.e., negative amounts), in addition to miscellaneous charges.

A   See <u>Dealer Options</u> for details.

Q   How do I create a new Customer?

A   New **Customers** can be created from the *Navigation Ribbon* drop-down menu **Customers > New** selection or by selecting the **Home** page > **Customers** tile > **Add** icon.

A   See <u>Customers</u> for more details.

Q   Where do I set up my contact information?

A   **Account Information > My Profile** page provides individual contact information.

A   **Company** contact information is found on **Account Information > My Company Profile** page.

A   See <u>Account Information</u> for details.

Q   How do I set up a standard markup or margin to appear on every Quote?

A   Standard **Default Terms**, to include markup, margin, and taxes are set in **Account Information>My Company Profile> Default Terms** tab.

A   **Default Terms** that exist at the **Company Profile** level are global settings, and therefore, all new **Customers** are auto-filled with **Default Terms** and all New Quotes for those Customers will also be auto-filled.

A   Individual **Customers** and individual **Quotes** can both be customized with markups or margins, on the **Default Terms** tab and **Pricing** tab, respectively.

A   See <u>Account Information</u> for details.

Q   What is the difference between a version and a copy of a Quote?

A   **Quotes** can be copied with the purpose of duplicating all **Quote** information (e.g., window and door builds). Copies are most generally created when *different* **Customers** have the same **Quote** request or when a **Quote** has been converted to an **Order** and a duplicate **Order** is requested. The **Copy** function will create a **New Quote** with a unique **Quote ID Number**. If a duplicate of a **Quote** or **Order** is required, use the **Copy** function.

A   **Quotes** can have multiple *Versions* of the same **Quote**. **Versions** provide the option to offer multiple *views* (most commonly used to compare different styles) of a **Quote** for the *same* **Customer**. **Versions** are easily identified by the appended incremental number (e.g., -2, -3, -4) at the end of the **Quote ID Number**. **Versions** can be quickly rotated from one to another, in front of the **Customer**, to demonstrate the **Version** differences. If a **Customer** requests to see the same **Quote** with a different style, or options with grids, and options without grids, use the **Quotes>Version** copy icon for the optimal solution. All **Quotes** with versions get closed when one **Version** is converted to an **Order** to reduce confusion for **Quote** listings.

A   See **Versioning** for details.

Q   How do I see Details in the Item Configurator? It appears to be empty

A   In the Item Configurator, when building a Door or Window, the Details view in the right panel provides performance ratings, specifications, etc.

A   The Details View icon above the right panel looks like a clipboard.

A   If the information in Details view is incomplete, ensure you are on the final steps of the build to where the Finish button is visible. Details require complete build data to be complete and so is only fully defined when the build is in the final step.

Q   How do I reach support to request help or to report an error with CTB Quote™ Plus?

A   If you can log in to **CTB Quote™ Plus**, the **Help Desk Support** tile on the **Home** page is an immediate link to the **Help Desk Support** portal for **CTB Quote™ Plus**.

A   There is a **Contact Us** link on the **CTB Quote™ Plus** login page to Email the Support Team if you cannot log in to the site.

A   If it just a password problem, the **CTB Quote™ Plus** login page offers a password reset option.

A   The URL for the Help Desk Support portal is http://www.ctbhelp.com/ctbplus.html

A   Email Support directly at CTBHelp@milgard.com

A   Call the Support line: (866) 669-4636

A   See **Help Desk Support** for details.

Q   How do I get my old quote into the new system?

A   Unfortunately, the old CTB application does not offer a functionality to export **Quotes** into **CTB Quote™ Plus**.

Customized Build Questions

Q   **How do I do customize Glass by Lite in CTB Quote™ Plus?**

   A   Glass customization is covered in detail in the <u>Customize Glass By Lite</u> section.

Q   **How do I add top grids only?**

   A   Find the **Grid Type** field, within the **Line Configurator,** and select '*Valence'* from the drop-down list to add **Grids** to the top of the pane only.

   A   See the <u>Customize Grids By Lite</u> section for **Grid** patterns not available in the standard **Grid Pattern** selection list.

Q   **How do I create a custom grid pattern?**

   A   The <u>Customize Grids By Lite</u> section provides instruction for **Grid** patterns not available in the standard **Grid Pattern** selection list.

Q   **How do I build a special configuration or mulled window?**

   A   Mulled windows (i.e., special configurations) are covered in detail in the **<u>Build a Special Composite Design – Mulled Window</u>** section.

Quote-Specific Questions

Q **Where do I find NFRC information or Energy Package Ratings.**

A **Summary Quote, Short Quote** and **Shop Drawing** from the **Print function (R**eport Type) all offer **Ratings** and other **Line Item** details.

A Quotes> **Proofing Report** button offers **Energy Package Rating**s and other **Line Item** details.

A You can view **Energy Package Ratings** and other **Line Item** details from the **Details** icon view, selected above the right panel, within the **Line Configurator**.

Q **How do I attach a diagram to a Quote?**

A **Attachments** can be added to **Quotes** at the overall *Header* level with the **Attachments** button

A **Line Item** level **Attachments** are added using the **More…** link option in the *Shopping Cart.*

A See **Attachments** for detailed instruction.

Q **What does the E, O, T, and W mean on the window Images?**

A The **E** identifies an Egress pane.

A The **O** identifies Obscure glass.

A The **T** identifies Tempered glass.

A The **W** is specific to California **Customers** for single Tempered panes.

Q **How do I adjust pricing?**

A The **Quotes>Pricing** tab offers the functionality to adjust pricing for the overall **Quote** and for individual **Line Items**.

A The **Quotes>Quote Lines> Adjust Price…** link offers the functionality to adjust pricing for individual **Line Items**.

A For Milgard price adjustments, OBO Mode must be requested.

A See **Pricing Tab** or **OBO Mode** for details, as applicable.

Q **How do I add a Line Comment (i.e., note) to a specific Line Item?**

A Add a **Line Item Comment** from within the **Line Configurator** on the **Comments** tab. The **Comments** tab appears after glass configuration is completed.

A See **Comments** for more details.

Q **How do I adjust the On Factor?**

A **Price As** or **On Factor** discussions should occur between the **Dealer** and the Milgard Sales Rep.

A All **New Quotes** for **Customers** have a default **On Factor** (i.e. **Price As**) from the Manufacturer. Auto-filled **On Factors** can be adjusted on the **Pricing** tab for overall **Quote** or from the **Adjust Price** link in the *Shopping Cart***,** however, only Milgard can approve the adjustment.

A See **Pricing Tab** for details.

Q   How do I view an image of my Window or Door?

A   The **Expand All/Collapse All** button in the *Shopping Cart* toggles to display or hide ALL **Line Item** images of **Windows** and **Doors**. The **View Image** link under an image in the *Shopping Cart* will open a larger view of the **Window/Door**.

A   The **Line Details** link in the *Shopping Cart* toggles to display or hide individual **Line Item** images of **Windows** and **Doors**. The **View Image** link under an image in the **Line Item** will open a larger view of the **Window/Door**.

A   Within the **Line Configurator**, select the **Image** icon, above the right panel, to show a preview of the **Window** or **Door** when enough fields have been answered

A   Several reports with image views are available from the **Print** function**.   Print** also offers the option to save reports in PDF format to send to **Customers**.

Q   How do I see detailed pricing?

A   The **Pricing** tab offers full pricing details from the **Adjust Line Level Pricing** button >**Expand All**.

A   Select **Print** from the **Action** icon on **Quotes** or **Orders Search** pages. For **Report Type,** select **Detailed Quote** and ensure that *Show Line Item Price Details* is checked (selected), to view detailed pricing.

A   Shopping Cart pricing can be viewed from the **More…** link >**Price Details** for a Line Item.

A   Within the **Line Configurator**, the **Details** icon, above the right panel, offers detailed pricing for individual **Items**.   Note that the **Finish** button must be displayed before the **Details** view can offer complete pricing details.

A   See the **Pricing Tab**and **Print** sections for details.