Introducing CTB Quote™ Plus

CTB Quote™ Plus is a user-friendly, web-based application with all the tools to build professional **Quotes** for your Customers. This section of the User's Guide provides basic setup information and tips to navigate through the application.

Contents

System Requirements

CTB Quote™ Plus is a web application. The following are recommended browsers and minimum computer requirements for best results. An internet connection is required to use the online version.

Computer Settings

❖ Compatible Browsers
 ◊ Google Chrome (Preferred)
 ◊ Internet Explorer 9, 10, 11
 ◊ Mozilla Firefox
 ◊ Safari 5.1.2

❖ Computer Requirements
 ◊ Windows 7 Operating System or Later
 ◊ 4 GB or greater RAM (Recommended)
 ◊ Minimum 10 GB free disk space

❖ Screen Resolution
 ◊ Screen resolution is designed for 1366x768 or higher
 ◊ Viewable on various mobile devices, monitors, and screens

NOTE

CTB Quote™ Plus is compatible with IE 9 and newer when Compatibility Mode is turned *off*. In IE 9, go to **Tools> Compatibility View Settings** and ensure all checkboxes are **unchecked**.
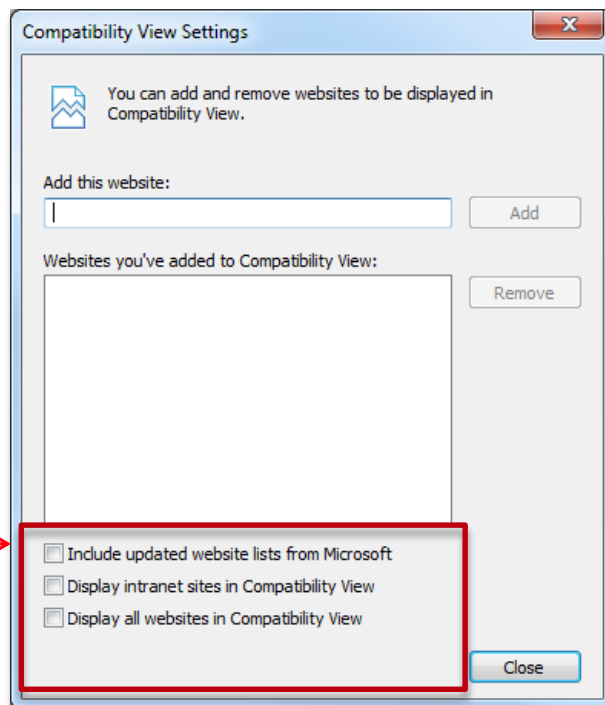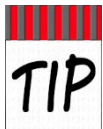
CTB Quote™ Plus Login

1. Access the **CTB Quote™ Plus** portal at ctbquoteplus.com

2. **CTB Quote™ Plus** login screen appears. Log in to the website with a *UserID* and *Password*.


Login Screen Options

❖ Login Credentials
  ◊ User ID – a User ID should have been assigned by the administrator
  ◊ Password – a temporary password should have been provided by the administrator

❖ **Enter button** – click to submit credentials for access to **CTB Quote™ Plus**.
❖ **Keep me Logged on** – check to retain login details
❖ **Forgot Password** – provides a link to have a new password sent to your email address
❖ **Site Requirements** – provides a link to system requirement information
❖ **Terms & Conditions** – provides a link Milgard's Terms and Conditions
❖ **Contact Us** – opens your default email service to send an email to the Help Desk Support team

TIP

Use the **Contact Us** link to reach out to the Milgard Support Team if you can't access **CTB Quote™ Plus.** //See **Help Desk Support** for other support options.//

Navigating CTB Quote™ Plus

❖ **CTB Quote™ Plus** offers two main options for navigating the site:
  ◊ **Navigation Ribbon** – Horizontal ribbon along the top of the application with drop-down options
  ◊ **Home page** – a page of image tiles offering one-click access to key areas
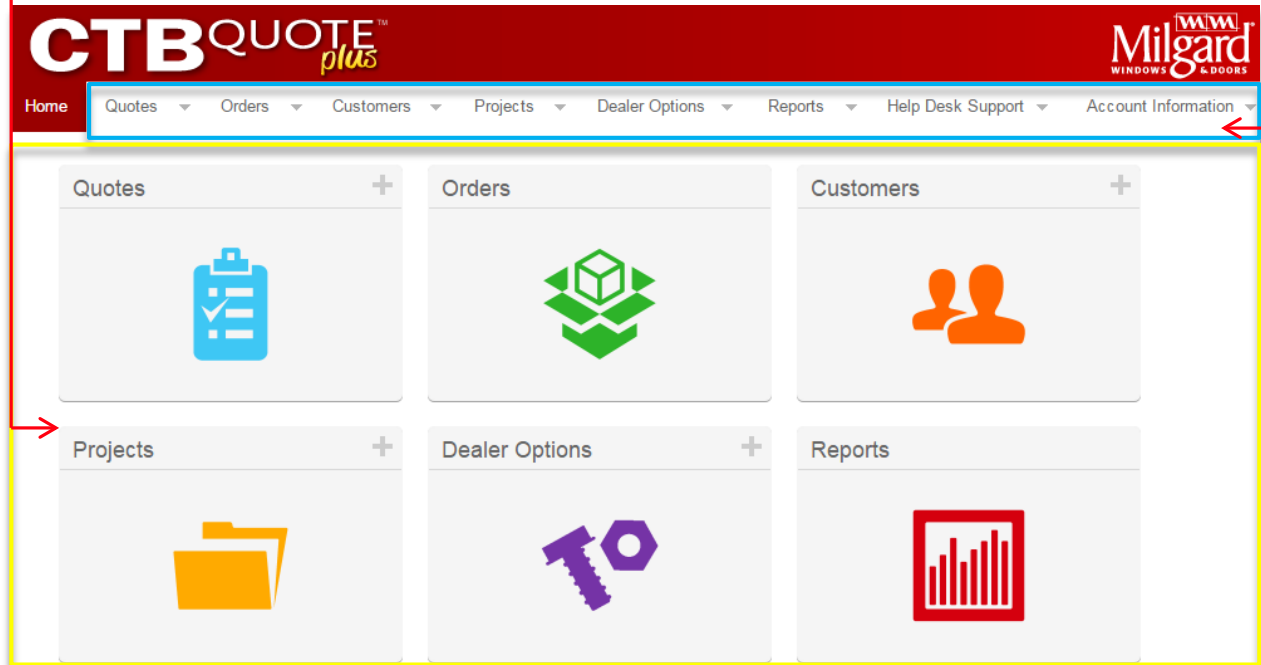

Navigation Ribbon

The **Navigation Ribbon** provides a drop-down menu for quick access to the main options for **CTB Quote™ Plus** areas. The ribbon is located horizontally along the top of the application and is persistent (i.e., always available) for navigation to key pages.
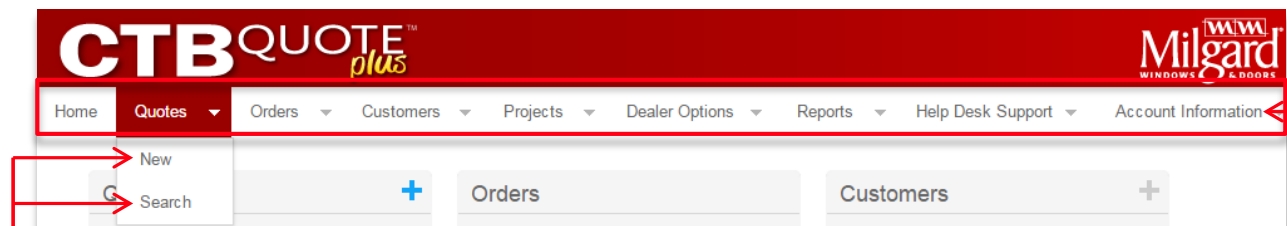
❖ **New option** – opens an Information page to create a new entry for that object
❖ **Search option** – opens a Search Page listing entries for the following pages:
  ◊ Quotes   ◊ Projects
  ◊ Orders   ◊ Dealer Options
  ◊ Customers   ◊ Reports
❖ Help Desk Support link – one-click access to the Help Desk Support Portal
❖ **Account Information** – offers application settings, password changes, defaults //see **Account Information** for details.
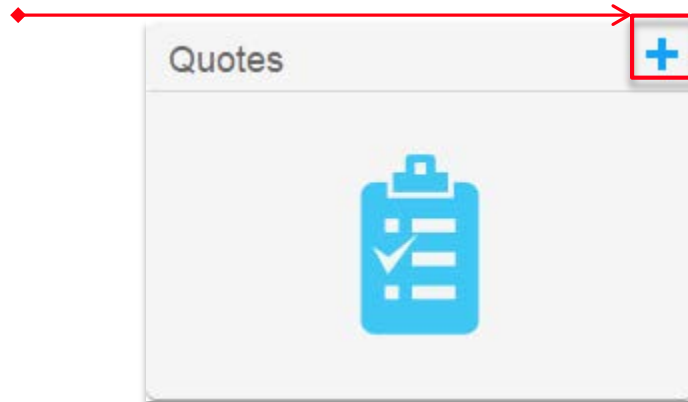
Home Page Tiles

The CTB Quote™ Plus Home page offers navigation options with *Image Tiles*. *Image Tiles* link to other pages when clicked. This section identifies the actions on the **Home Page** tiles.
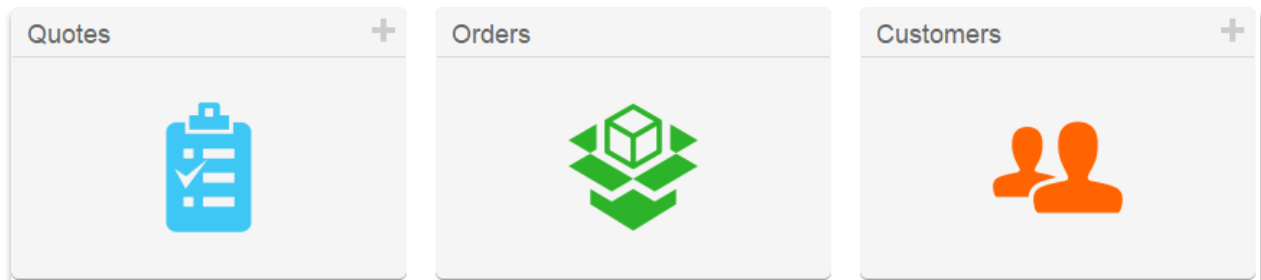
Tile Add icon

❖ The *Add icon* ➕ opens an **Information** entry page to create a new entry for that object.

❖ Click on the *Add icon* ➕ of the individual tile in which to create a new entry //clicking the *Add icon* ➕ of the **Quotes Tile**, illustrated above, opens the entry page for a **New Quote** //.

❖ The following **Tiles** create **New** entries:
  ◊ Quotes
  ◊ Customers
  ◊ Projects
  ◊ Dealer Options

One-click Search

❖ Most **Tiles** open a **Search Page** listing of entries for that object
  ◊ Quotes
  ◊ Orders
  ◊ Customers
  ◊ Projects
  ◊ Dealer Options
  ◊ Reports
  ◊ CTB Quote™ Plus Resources
 ◊ Dealer Resources
  ◊ Marketing Resources

One-click links

❖ The following **Tiles** open an external resource when clicked:
  ◊ **Help Desk Support –** opens the Milgard Help Desk Support Portal
  ◊ **CTB+ Offline Download –** opens the Install Wizard for CTB Quote™ Plus Disconnected

Field Navigation in CTB Quote™ Plus

Many fields in **CTB Quote™ Plus** offer drop-down lists from which to make quick selections. Visual selections are another option found throughout the application. This section details the functionality and shortcuts to navigate field selection options.

Field Drop-down Lists

❖ A down arrow (**ᵛ)** in a field box indicates a drop-down list.

❖ Activate drop-down lists by clicking in the field. The illustration below depicts the **Item** drop-down list, activated on the **Quotes** page.
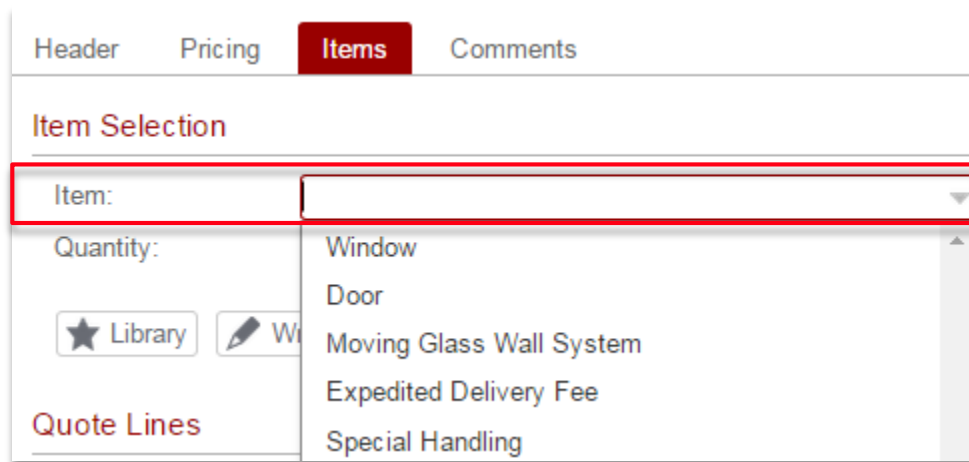
❖ Use keyboard arrows **(i.e., < ∧ ∨ >)** to scroll to a list selection.

❖ Type a letter in the field box to limit list results to those that contain that letter (e.g., type **'w'** and only *Window* and *Moving Glass **W**all System* will be displayed, as shown below).
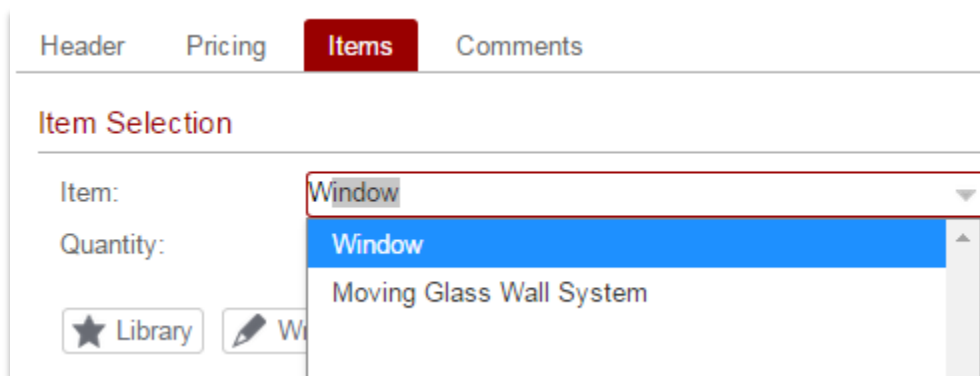

❖ Use the mouse and left click to make a drop-down list selection.

❖ A highlighted option is selected with a left mouse click, or use the *Tab* or *Enter* key.

TIP

For those who prefer the keyboard over mouse usage, most field navigation can be conducted with just the *Tab* key and the keyboard arrows (e.g., **> <∨∧**). //See **Hints and Shortcuts** for more details.//

Visual Field Selection with the Search Icon

❖ The visual **Search** icon 🔍 is used throughout **CTB Quote™ Plus** to offer helpful visual popup options, as with images, to make a selection.

1. Click on a **Search** icon 🔍 to open a visual selection popup.

2. Click on an image to make a selection.

❖ Examples of visual popup options from the **Quotes>Preferences** section are displayed below:

◊ **Energy Package** visual popup //Note that some **Energy Packages** are only visible for applicable locations//:
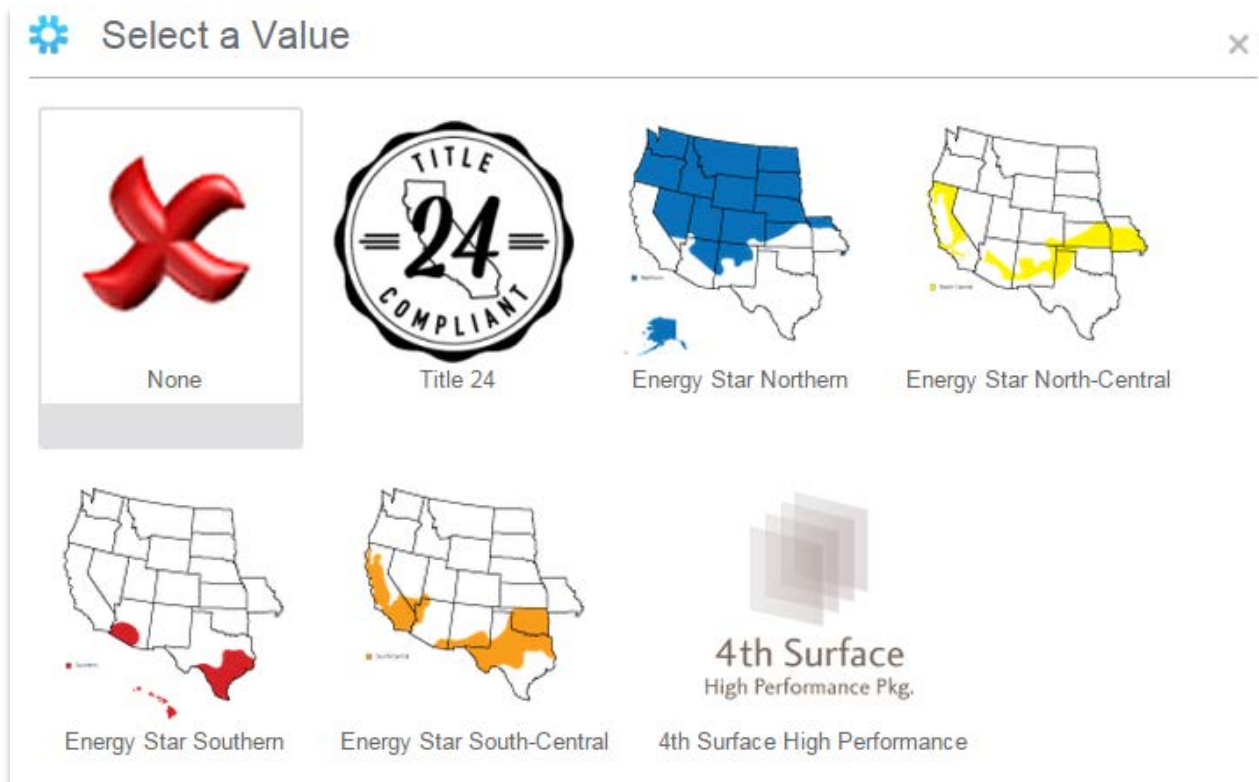
◊ **Fin Type** visual popup //illustrated below//:
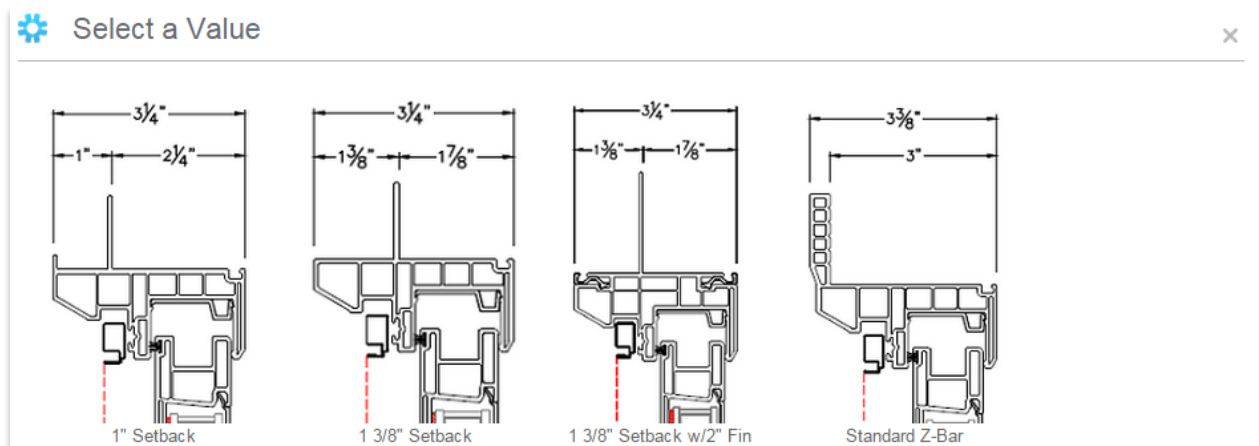
CTB Quote™ Plus Search Page Functionality

Search Pages open from many locations within **CTB Quote™ Plus**. The main areas (e.g., **Quotes, Orders, Customers**) have direct search access by clicking the **Home** page tile.

Search Page Features

This section identifies standard **Search Page** functionality. **Search Page** options unique to a specific area will be indicated, when applicable, throughout the User Guide.

- ❖ **Search Page Title** –**Titles** (e.g. '**Project Search'**) identify the search area. The **Search Page** displays all entries by default. If no entries have been created for that area, the **Search Page** will be empty.
- ❖ **Eraser** icon   – Click the *Eraser* icon to remove filters (i.e. text) from **Search** fields.
- ❖ **Search Page**   fields – offers smart search to match search criteria against displayed entries:
  - ◊ Example 1 (screenshot below): The letter '**w',** entered in the **Name Search** field, only displays Project Names with a 'w'. (Click the *Eraser* icon to remove the filter and see all entries.)

  - ◊ Example 2: A date **Search** field is selected. A calendar popup filters results by the date selected

Search Page Features (Continued)

❖ **Sorting** – Click on any column name (i.e., heading) to sort the results ascending ∧or descending∨. Click again to reverse the sort order. Any column can be sorted.

Dealer Option Search

New Dealer Option

Option Name	Description	Price ▲	Status	Last Modified by	Modified on
April fool discount	My discount for option	-10.50	Active	Dealer, Test	4/30/2015
Special Handling	Handling Charge	50.00	Active	Dealerrep, John	5/12/2015
Expedited Delivery Fee	Delivery fee	75.00	Active	Administrator, CT0000·	5/4/2015

|◁ ◁ Page 1 of 1 ▷ ▷| Viewing 1 - 3 of 3

❖ **Action icon** 📲 – Click on the icon to display actions available. Examples of **Action** options for **Project Search** include: *Open, Copy and Delete //*displayed in the illustration below*//*.

Project Search

New Project

Name	Customer	Last Modified by	Modified on ▼
w			
Northwind Remodels	North Apartments	Dealerrep, John	5/12/2015
...wind Bldg 100	North Apartments	Dealerrep, John	5/12/2015
...wind Bldg 200	North Apartments	Dealerrep, John	5/12/2015

Open
Copy
Delete

|◁ ◁ Page 1 of 1 ▷ ▷| Viewing 1 - 3 of 3

TIP

Search Pages offer the option to open files with just a **left mouse click** on an entry row. The row may also appear highlighted (gray) when moused over (depending on browser). // In the above illustration, the top row, **Northwind Remodels,** is highlighted.//

❖ Search Page footer –options include *Refresh, Paging options,* and *Viewing totals*:

Quote Search

New Quote

| Customer	Name	PO#	ID ▼	Last Modified by	Modified on	Status
North Apartments	North 4-Unit Remodel		SQDJ000008-1	Dealer, Test	4/6/2015	Open
Walnut Residence	Janes's Condo - Ultra		SQDJ000005-2	Dealer, Test	4/6/2015	Open
Walnut Residence	Janes's Condo - Tuscany		SQDJ000005-1	Dealer, Test	4/6/2015	Open
Joe Customer	Joe's Apt - Bldg 2- West	PO1235	SQDJ000004-1	Dealer, Test	4/6/2015	Open
Joe Customer	Joe's Apt - Bldg 1 East	PO1234	SQDJ000003-1	Dealer, Test	4/6/2015	Open
Joe Customer	Jones Install		SQDJ000001-1	Administrator, Milgard	4/1/2015	Open

|◁ ◁ Page 1 of 1 ▷ ▷| Viewing 1 - 6 of 6

◊ ***Refresh*** icon ↻ – checks for new entries and reloads the **Search Page**.
◊ ***Paging*** arrows – displays the number of viewable pages and the ability to click forward or back through multiple pages.
◊ ***Viewing*** – identifies the total count of displayed entries. Updates when filters are applied.

CTB Quote™ Plus Support Options

CTB Quote™ Plus offers the **Help Desk Support** links to access the **Support** portal //see Help Desk Support Portal for details//. Another option for support from Milgard, detailed below, is direct assistance on a **Quote** with **On-behalf-of (OBO) Mode**.

On-Behalf-Of Mode

On-Behalf-Of (**OBO**) is a UI Mode within **CTB Quote Plus** that allows Milgard to access the Dealer's quoting program to assist with **Quotes** and **Orders**. It is also used to enter **Quotes** and **Orders** for **Dealers** without access to **CTB Quote Plus**. Please contact your Outside Sales Representative to request assistance via an **OBO** session.

TIP
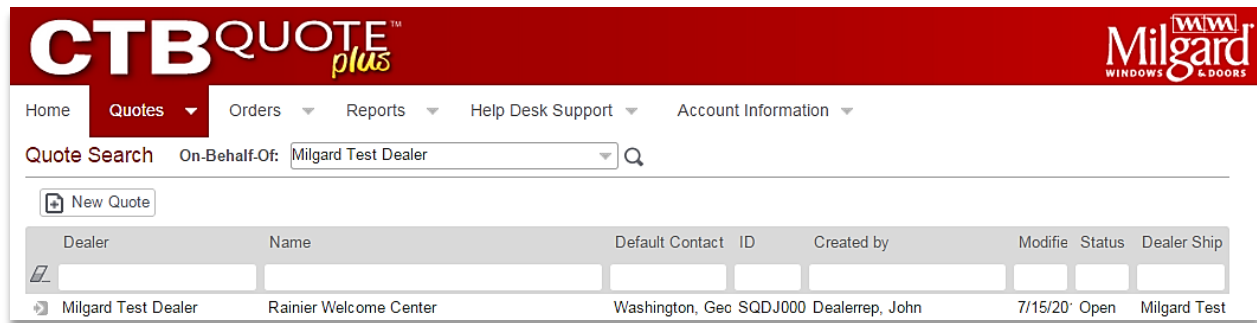
Dealers can still use **CTB Quote™ Plus** while **OBO Mode** is in progress. Best practice, however, is to refrain from making changes to the *same* **Quote** until **OBO** requests are completed.

OBO Purpose

There are three primary reasons for an OBO Mode request: **Min/Max** override, **List Price Adjustments**, and **Quote-to-Order** assists .

NOTE

Only specific areas of **CTB Quote™ Plus** are visible in **OBO Mode** for the Inside Sales Representative**.** //Note the limited **Navigation Ribbon (**screenshot below**)** in **OBO Mode**. **OBO Mode** cannot access **Customers, Dealer Options**, and **Projects** screens.//
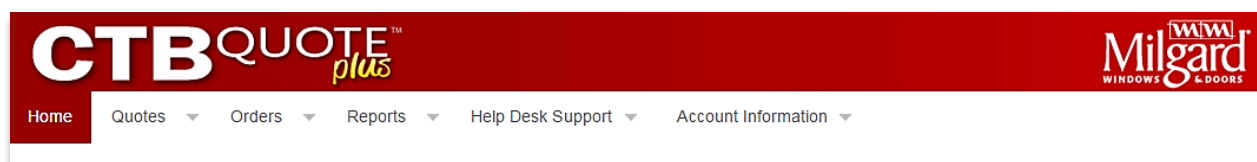
OBO Visibility

❖ **Dealer Option** items, if added to **Quotes**, have visibility to the OBO user from various screens and reports. To prevent **Dealer Option** visibility, do not add **Dealer Option** items to the *Shopping Cart* until OBO-requested assistance has completed.

❖ If there is ever any confusion between ISS and the **Dealer** as to what changes were made to a **Quote** and by whom, an audit trail of changes is available for reference in the **Change Log**.

Change Log ✕

☐ Export

Modified on	Modified Time	Last Modified I	Change	Line N	Option Name	Description	Quantity	List Price	On Facto
7/16/2015	17:31:44	jdealerrep	Add	1.00	Window	Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int Wh 1.00 Half Vent Half Vent XO Energy Star Northern Energy Package 3/32" SunCoat (Low-E) over 3/32" Clear Gray EdgeGardMAX Spacer with Argon SmartTouch Lock Standard with Fiberglass Mesh STC: No Rating, OITC: No Rating, Certified LC30 W 15 7/16" x H 45" Sq. Ft. 4.82 Unit Area (Sq. Ft.) 12, Unit Perimeter (nominal in lineal f CPD: MIL-A-224-02770-00001	1.00	540.00	0.33
7/17/2015	08:10:03	OBOErica	Change	2.00	WINDOW	Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int Wh 1.00 Half Vent Half Vent XO Energy Star Northern Energy Package 3/32" SunCoat (Low-E) over 3/32" Clear Gray EdgeGardMAX Spacer with Argon SmartTouch Lock Standard with Fiberglass Mesh STC: No Rating, OITC: No Rating, Certified LC30 W 15 7/16" x H 45" Sq. Ft. 4.82 Unit Area (Sq. Ft.) 12, Unit Perimeter (nominal in lineal f CPD: MIL-A-224-02770-00001	1.00	540.00	0.33
7/17/2015	08:10:29	OBOErica	Change	1.00	WINDOW	Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int Wh 1.00 Half Vent Half Vent XO Energy Star Northern Energy Package 3/32" SunCoat (Low-E) over 3/32" Clear Gray EdgeGardMAX Spacer with Argon SmartTouch Lock Standard with Fiberglass Mesh STC: No Rating, OITC: No Rating, Certified LC30	1.00	540.00	0.87

OBO Characteristics

❖ **OBO Mode** enables Milgard Inside Sales Reps to do the following:
  ◊ Provide the **Dealer** with user support
  ◊ Enter/revise **Quotes** for the **Dealer**, when necessary
  ◊ Add special sizes or restricted catalog **Items** to **Dealer Quotes,** per location standards
  ◊ Adjust **Item** pricing on **Dealer's Quotes**

❖ **OBO Mode** *prevents* the Milgard user with any visibility to the following information:
  ◊ Dealer Customers
  ◊ **Dealer** pricing upcharges (e.g., markup or margin)
  ◊ **Header** tab information
  ◊ Access to **Projects** (e.g., **Project Customers** and **Project** details)
  ◊ Dealer Option Information and Search pages are not available in OBO Mode, however Dealer Option Items in the Shopping Cart have visibility in OBO Mode.

OBO Mode ~ Dealer's Perspective

❖ Dealers can remain logged into CTB Quote™ Plus while On-Behalf-Of Mode is used.

❖ **OBO Mode** is not a live screen share - whereby **Dealers** see changes as they occur. The **Dealer's** view of OBO changes are visible *after* a change is made by the Inside Sales Rep. All changes are visible in the **Change Log** or by viewing the modifications to the **Quote**.

❖ **Dealers** can continue to make changes to other Quotes while **OBO Mode** is in use; however, the online database will prevent the **OBO User** and the **Dealer** from changing the same **Quote**.

❖ A popup box will notify when a **OBO Mode** is in use on the same **Quote**. **OBO** changes prevent Dealer changes during use.

❖ Line Item Comments remain visible in OBO Mode to allow for Line Item Comment exchanges.

❖ **Quote** attachments are visible in **OBO Mode**.

❖ The **Change Log** (Audit Trail) will reflect **Line Item** edits and display the final changes made to a field, according to the database timestamp (Pacific Time).

❖ **Pricing** tab and **Line Item** price adjustments only display **Milgard On Factor** in **OBO Mode**.