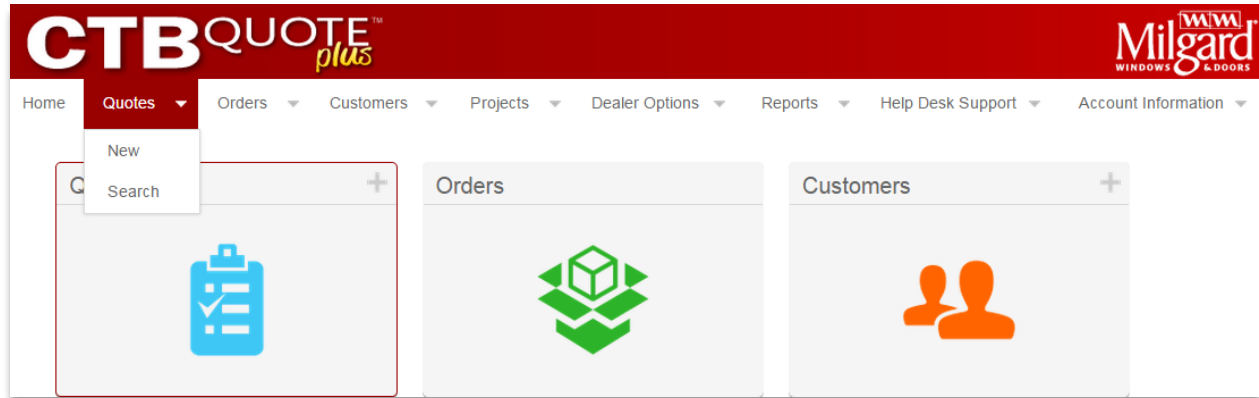


Quotes

CTB Quote™ Plus offers all the tools to quickly build professional **Quotes** with graphical representations and pricing details, as required. This chapter covers the required steps for **Quote** creation, along with all of the key functionality sections available from the **Quote** page. New **Quotes** can be opened from the **Navigation Ribbon>Quotes > New** selection or from the Home page Quotes tile **Add** icon+.



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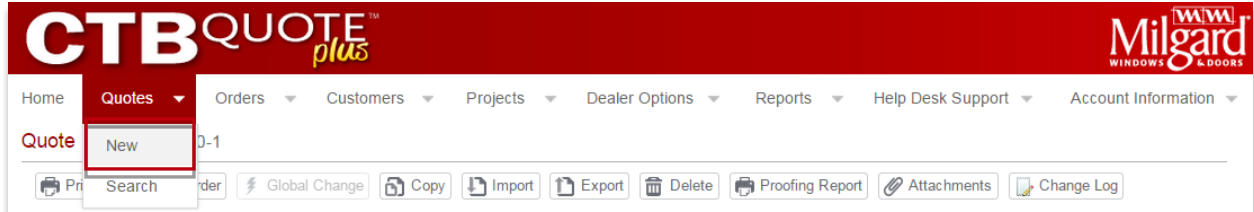
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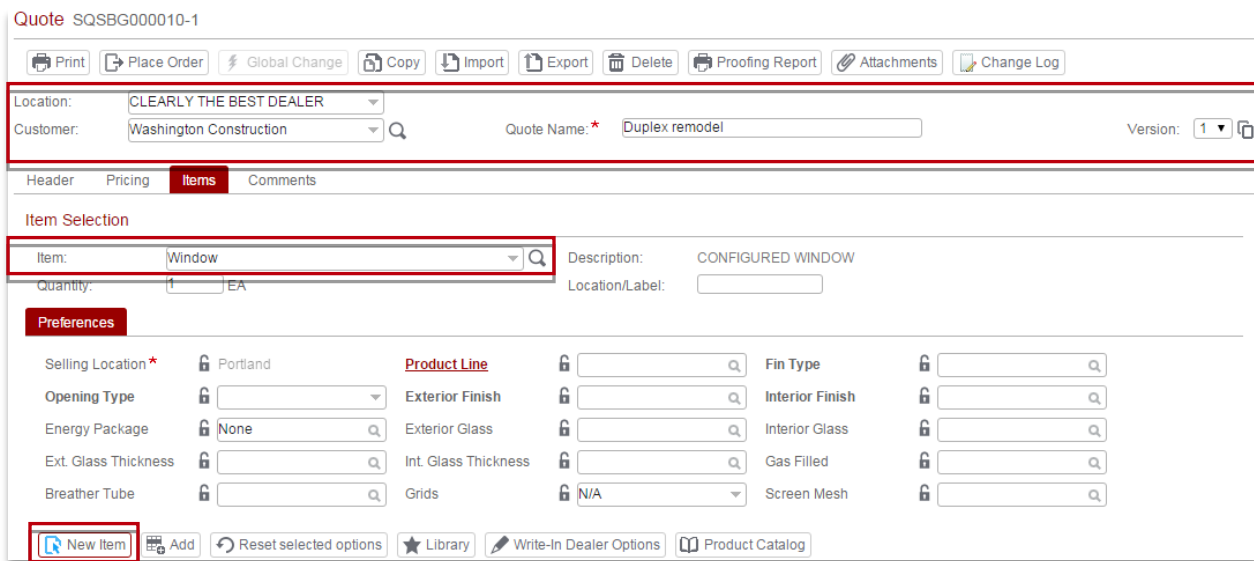
Quick Steps to Create Quote Items

This section offers 10 basic steps to build a **Window**. The same steps apply for **Doors**. //See [Detailed Quote Steps](#) section for more detailed instructions.//

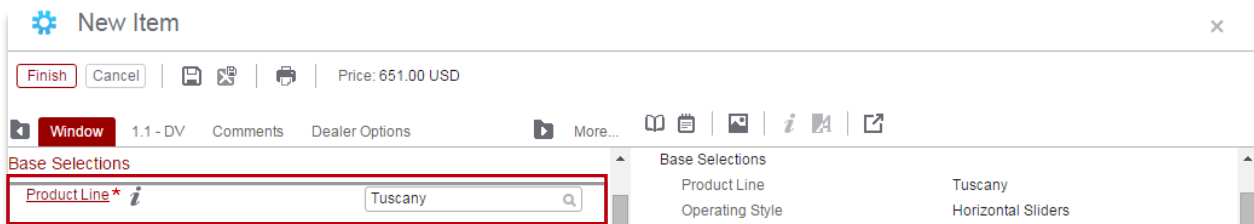
1. Select **New** from the **Navigation Ribbon>Quotes** drop-down menu.



2. In the **Quote header** fields, select a **Location** (if applicable) and **Customer** from the drop-down list(s) and add a **Quote Name** (required) for easy identification.



3. Ensure the **Items** tab is active and select **Window** from the **Item** drop-down list
4. Select the **New Item** button to open the **Item Configurator** (tool to build **Items**).
5. In the **Item Configurator ~ Left Panel**, complete all prompts, updating default fields, as applicable.



6. Use **Tool Tips** for build tips and view **Info Links** for additional product or field information.
7. Use the **Item Configurator ~ Right Panel** to view **Item** summary, details, images, and **Info** link pages.
8. Click the **Continue** button to progress through build options (e.g., glass settings).
9. Enter **Line Item Comments** or **Dealer Options** on the applicable tabs, as needed.
10. Click the **Finish** button to finalize the **Window** build.

Quote Page Navigation

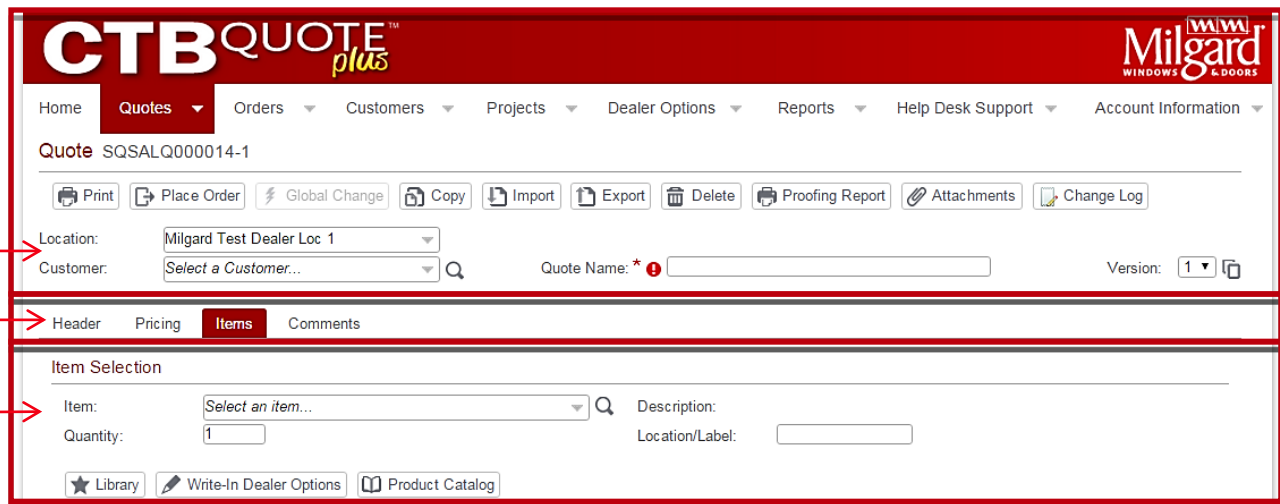
The **Quote** page is the primary workspace within **CTB Quote™ Plus**. Many auto-fill defaults are available to speed the creation process. This section identifies primary **Quote** views to assist with navigation.



Quotes touch upon most areas in **CTB Quote™ Plus**, to include: **Customers** and **Default Terms** (e.g., taxes and upcharges). Best practice for **Quote** workflow is to have **Account Information** and **Customer** defaults established prior to building **Quotes**.

Initial Quote View

The illustration below depicts a new **Quote** with the default workflow displayed. The **Header** area is always visible with one active tab: the default tab is the **Items** tab which shows the **Item Selection** area.



- ❖ Header area - The Quote Header area consists of the following:
 - ◇ **Quote ID – Quote** number with -1 identifying the Quote as Version 1.
 - ◇ **Header buttons:** Print, Place Order, Global Change, Copy, Import, Export, Delete, Proofing Report, Attachments, and Change Log
 - ◇ Header Fields:
 - Location field - if more than one Location exists, a drop-down list is visible
 - **Customer** field – a drop-down list of all your existing **Customers** in **CTB Quote™ Plus**
 - **Quote Name** (required) – best to use a name that clearly distinguishes between **Quotes**
 - **Version** – create duplicates to offer different build options //see [Versioning](#) for details//.
- ❖ Tabs – the **Items** tab is the default active tab. Administrators can change the default, according to business practices, to one of the following tabs:
 - ◇ **Header tab** – **Customer Quote** detail information (e.g., Ship-To and Contact information)
 - ◇ **Pricing tab** – displays **Quote** pricing information (e.g., taxes, discounts, and markups)
 - ◇ **Items tab** – provides the options to select **Items** for the **Shopping Cart**
 - ◇ **Comments tab** – provides text fields to add comments
- ❖ **Item Selection** area - under the **Items** tab, offers a list of **Items** (to build or add to the *Shopping Cart*), an **Item Quantity** field and an **Item Location/Label** field.

Active Quote ~ Header Tab View

The illustration below depicts a **Quote** with the **Header** tab active and a **Customer** selected on the **Quote** page.

The screenshot displays the CTBQUOTE plus software interface. At the top, there is a navigation menu with options: Home, Quotes (selected), Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. Below the menu is a toolbar with icons for Print, Place Order, Global Change, Copy, Import, Export, Delete, Proofing Report, Attachments, and Change Log. The main content area is divided into several sections:

- Quote Information:** Includes fields for P.O. Number, Quote Status (set to 'Open'), Project, Created by (Rep, Rita 10/2/2015), and Last Modified by (Rep, Rita 10/13/2015).
- Address Information:** Divided into 'Bill-to' and 'Ship-to' sections. Both sections are auto-filled with the same information: Washington Construction, 123 Street NE, Suite 101, Fife, Washington, 98424, United States.
- Additional Information:** Includes Construction Type, Contact Source (set to 'Cold Call'), Dealer Currency (USD), Exchange Rate (1 USD/USD), Requested Ship Date, Payment Terms (set to 'Net 30'), and Reporting Currency (USD).
- Contact Information:** Includes Contact (Washington, George (CNBG000002)), Email (gwwashington@def.com), Phone (111-222-4444), Mobile, and Fax.

- ❖ **Quote Information** is auto-filled with the **Quote Status** default of 'Open'.
- ❖ **Address Information** is auto-filled from the selected **Customer** from the **Quote Header** area. This section remains empty until a **Customer** is selected.
- ❖ **Additional Information** is auto-filled from **Account Information>My Company Profile page>Default Terms** tab or from the **Customer Information page>Default Terms** tab, if available. If no default terms are completed in Account Information or the Customer pages, no fields are auto-filled.
- ❖ **Contact Information** is auto-filled from the **Default Contact** selected on the **Customer Information** page, if available.

Active Quote ~ Pricing Tab View

The illustration below depicts a **Quote** with the **Pricing** tab active when the **Quote** has **Items** in the *Shopping Cart*.

Quote SQSBG000007-1

Location: CLEARLY THE BEST DEALER
 Customer: Washington Construction
 Quote Name: Welcome Center
 Version: 1

Header: **Pricing** | Items | Comments

Pricing Summary

Upcharge Mode: Markup % | Pricing Display Options: Bottom Line Only | Reset To Defaults | Adjust Header Level Pricing | Adjust Line Level Pricing

Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Dealer Options Subtotal:				700.00	
Write-In Dealer Options SubTotal:				0.00	5,609.49
Quote Subtotal:				5,609.49	
Additional Discount (% off Subtotal):		0.891289 %	0.891 %	(50.00)	5,559.49
Adjusted Subtotal (Discounted):				5,559.49	
Material Tax:	4,865.73	6 %		291.94	5,851.44
Labor Tax:	693.76	7 %		48.56	5,900.00
Shipping and Handling:		0.00 USD		0.00	5,900.00
Other Charges (Specify):		0.00 USD		0.00	5,900.00
Total Amount - Final Customer Price in USD:					5,900.00

- ❖ **Pricing Terms** (e.g., Taxes, Upcharge, etc.) are auto-filled from Account Information>My Company Profile>Default Terms tab if no Customer is selected.
- ❖ If a Customer is selected from the Quote *Header* area, and has terms completed on the Customer page >Default Terms, Customer Default Terms will override Account Information Default Terms.
- ❖ **Pricing** tab calculations (e.g., **Subtotals** and **Total Amount – Final Customer Price in USD**) are only calculated when **Items** exist in the *Shopping Cart*.

Active Quote ~ Items Tab View

The illustration below depicts a **Quote** with the **Items** tab active and **Items** in the *Shopping Cart*. With **Window** selected in the *Item Selection* area, the **Preferences** section is opened for quick-build option(s).

The screenshot displays the CTBQUOTE plus software interface. At the top, there is a navigation menu with options like Home, Quotes, Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. The current quote is identified as 'Quote SQSBG000007-1'. Below this, there are several action buttons: Print, Place Order, Global Change, Copy, Import, Export, Delete, Proofing Report, Attachments, and Change Log. The 'Location' is set to 'CLEARLY THE BEST DEALER' and the 'Customer' is 'Washington Construction'. The 'Quote Name' is 'Welcome Center' and the 'Version' is '1'. The 'Items' tab is active, showing the 'Item Selection' area with 'Window' selected and a quantity of '4 EA'. The 'Description' is 'CONFIGURED WINDOW' and the 'Location/Label' is 'Side Windows'. The 'Preferences' section is expanded, showing various options for the window, such as 'Selling Location' (Portland), 'Opening Type' (Call Out), 'Exterior Finish' (White), 'Interior Finish' (White), 'Energy Package' (None), 'Exterior Glass' (None), 'Interior Glass' (None), 'Ext. Glass Thickness' (1/8"), 'Int. Glass Thickness' (1/8"), 'Gas Filled' (None), 'Breather Tube' (None), 'Grids' (No), and 'Grid Type' (None). Below the preferences, there are buttons for 'New Item', 'Add', 'Reset selected options', 'Library', 'Write-In Dealer Options', and 'Product Catalog'. The 'Quote Lines' section is also visible, showing a table with columns for Line, Location/Label, Item, Qty, UOM, Price, and Total. The first line item is 'Window' with a quantity of 4, a unit of measure of EA, a price of 702.21, and a total of 2,803.48. The 'Item' column for this line is expanded, showing detailed specifications for the window, including 'CONFIGURED WINDOW', 'Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42', and a list of options like 'Size = Net Frame 107 1/2" X 47 1/2"', 'Dimensions = Sash Width One Quarter', 'Model = Double Vent', 'Handing = Double Vent XOX', 'Glass = 3/32" SunCoat (Low-E) over 3/32" Clear', 'Other Glass = Gray EdgeGuard Spacer with BreatherTube', 'Grid 1:1-DV Left Vent 1:1-DV Right Vent = Sculptured Ext White/Int White 0" Colonial 2W3H', 'Grid 1:1-DV Fixed = None', 'Hardware = SmartTouch Lock', 'Screen = Standard with Fiberglass Mesh', 'Ratings = STC: No Rating, OITC: No Rating, Certified LC25', 'Clear Opening = W 24 1/8" x H 44 1/2" Sq. Ft. 7.46 Egress: Yes', 'Calculations = Unit Area (Sq. Ft.) 35, Unit Perimeter (nominal in lineal ft) 27', 'Other Ratings = CPD: MIL-A-224-02287-00003', and 'Dealer Write in Option = Special Install'. A small diagram of the window is also shown, with dimensions and a 'View Image' link.

- ❖ **Preferences section** – the **Items** tab offers the **Preferences** section to help build **Items** more quickly
 - ◇ Common build selections
 - ◇ Visual and drop-down list options
 - ◇ Preference selections are retained for the same **Quote** to rebuild previous **Items**
 - ◇ **Reset Selected Options** button [Reset selected options](#) resets **Preferences** section to defaults
- ❖ **Quote Lines (i.e., Shopping Cart)** section - visible when **Items** are in the *Shopping Cart* //see the [Line Items](#) section for details on functionality and options//.
- ❖ **Shopping Cart** primary options :
 - ◇ **Item Total(s)** - Total Quantity of Windows and Doors, Total Price (before taxes or other charges)
 - ◇ **Item Descriptions** and **Images** in expanded view.
 - ◇ Options to edit, reorder, copy, adjust price, add attachments, etc.
 - ◇ **Collapse All /Expand All** button – toggles the option to hide or show line item details

Active Quote ~ Comments Tab View

The illustration below depicts a **Quote** with the **Comments** tab active. No auto-filled defaults apply to fields on the **Comments** tab.

The screenshot shows the CTBQUOTE plus software interface. At the top, there is a navigation menu with options: Home, Quotes (selected), Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. Below the menu, the quote ID is displayed as "Quote SQSBG000007-1". A toolbar contains icons for Print, Place Order, Global Change, Copy, Import, Export, Delete, Proofing Report, Attachments, and Change Log. The main form area includes fields for Location (CLEARLY THE BEST DEALER), Customer (Washington Construction), Quote Name (Welcome Center), and Version (1). The "Comments" tab is active, showing three sections: "Dealer to End Customer (Print on Bid Document)", "Dealer to Milgard", and "Dealer Internal (Do not print or pass to Milgard)". Each section has a "Comments:" label and a text input field.

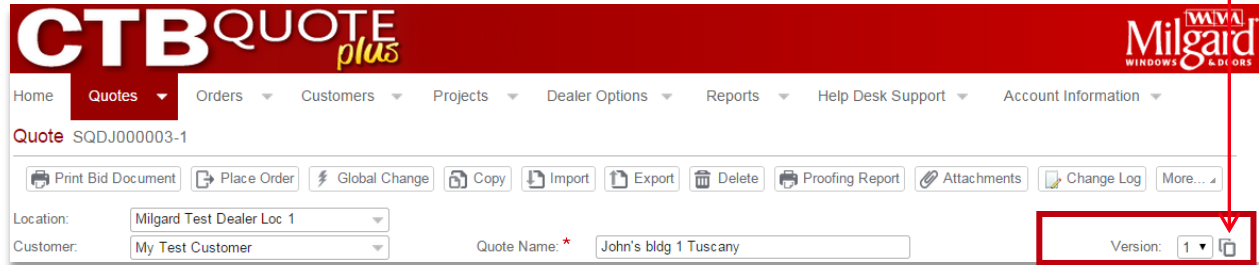
- ❖ **Dealer to End Customer** Comments will appear on report types that are specific to **Customer** views (e.g., 'Detailed Quote (Portrait)').
- ❖ **Dealer to Milgard** Comments will be read by Milgard when a **Quote** is converted to an **Order**
- ❖ **Dealer Internal** Comments are not visible to Customers. Only visible to associates with access to the **Quote**.

Versioning

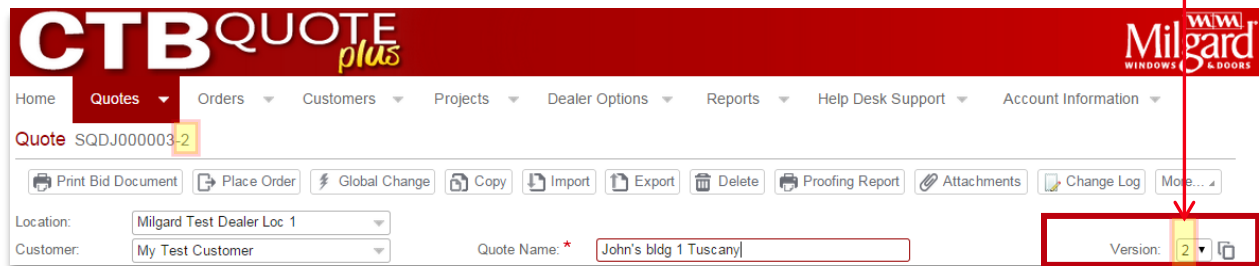
A **Quote** can have multiple **Versions** created for a **Customer**. **Versions** save time when a **Customer** requests different options or configurations, e.g., one **Quote Version** for windows with grids, one **Version** without grids, or **Versions** for product series price comparisons.

Steps to Versioning

1. From the **Quotes** page, just to the right of the **Quote Name** field, find **Version: 1** and the **Version copy icon**

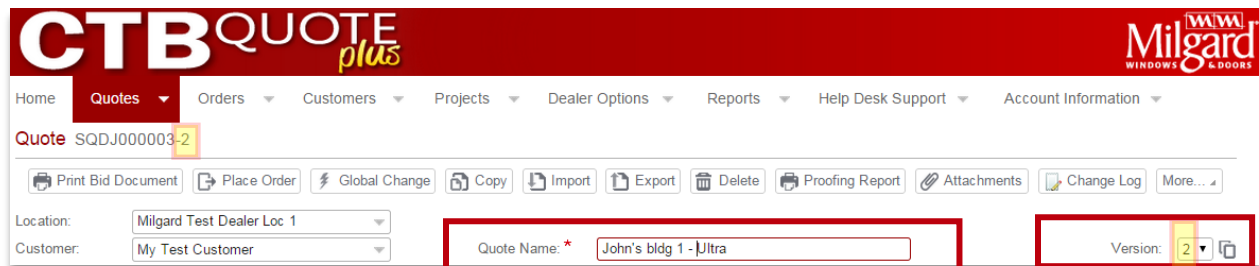


2. Select the **Version copy icon**. A duplicate of the **Quote** opens to **Version: 2**.




Changes made after the copy icon is clicked will only apply to **Version 2**, or, to the **Version** number that is displayed (active) in the **Version** number field.

3. Update the new **Version** with a distinctive **Quote Name**, to avoid confusion.



4. Make changes to the new **Version** (e.g., add grids, change styles, etc.).
5. Toggle between **Quote Versions** with the **Version** drop-down **Version: 2** list.

Characteristics of Quote Versions

- ❖ Each Quote Version is initially duplicated from the original Quote, however, any Version can be used to create a duplicate Version.
- ❖ All Versions can be reviewed and updated from the same Quote page. Use the Version drop-down list  to quickly toggle between Versions.
 - ❖ Versions with the same Quote ID Number are easy to identify and maintain. Versioning keeps the original Quote Number and only increments the appended number (i.e., -1, -2, -3, etc.). All Quote Numbers have a default of -1.
- ❖ Converting any Quote Version to an Order will change the status of remaining Quote Versions to *Inactive* for easy Quote management.
- ❖ If a Version is deleted, newly created Versions will not reuse a deleted Version number.
- ❖ Any number of Quote Versions can be created.
- ❖ Each Quote Version retains its own settings, meaning, changes made to a particular Version will remain unique to that Version:
 - ◇ Changes to **Quote Version 2** will not update or affect **Version 3**, and vice versa
 - ◇ A deleted **Quote Version**, even the original, does not delete any other **Versions**

How is Quote Versioning Different from Copying a Quote?

- ❖ Quote Version
 - ◇ **Versioning** retains the original **Quote ID Number** with each **Version** incrementing the appended number (i.e., -1, -2).
 - ◇ **Versioning** is most often used to offer different build options for the *same Customer*.
 - ◇ When a **Quote Version** is converted to an **Order**, the status of all remaining **Versions** automatically changes to *Inactive* //saves time with **Quote** management//.
 - ◇ **Versions** can all be viewed from the **Quote** page by toggling the **Version** number.
- ❖ Quote Copy
 - ◇ The **Copy** function creates an entirely *new Quote* with a unique **Quote** number
 - ◇ A **Quote Copy** is most often used to offer the same build options for a *different Customer* or to duplicate an **Order**.
 - ◇ When a **Quote** is converted to an **Order**, any copies remain active and unchanged.
 - ◇ Copies cannot be toggled from the **Quote** page.
 - ◇ There is no obvious method to identify that a **Quote** is a **Copy**. Once **Copy** is selected, the copied **Quote** opens to the **Quote** page for editing. If no changes are made to the copy (e.g., the **Quote Name** and **Customer** remain the same), the **Quote Search** page will display duplicate listings.



Any number other than -1 appended to the **Quote Number** is a **Version** of the **Quote** (e.g., **Version two** is SQDJ00003-2, **Version three** is SQDJ00003-3, and so on).

Steps to Duplicate an Original Version

To create a duplicate of the original **Quote** (-1) perform the following steps:

1. From the Quotes page, ensure that the Version drop-down list reads “1”.



2. Click the **Version copy icon** . The next **Version** number will open automatically.
3. Update the **Quote Name** for the new **Version**. All edits will occur to the opened **Version**.



Changes made after the **Version** copy icon is clicked will only apply to the new **Version**, or, the **Version** that is active on the **Quotes** page.

Steps to Duplicate a Specific Quote Version

New **Quote Versions** can be based on any **Version**.

4. From the **Quotes** page, open the **Version** to duplicate by selecting the **Version** number from the drop-down list (or open the **Version** from the **Quotes Search** page).
5. With the **Version** open on the **Quotes** page, click the **Version** copy icon . The next **Version** number will open automatically.
6. Rename the new **Version**. The new **Version** is a duplicate of the **Version** from which the copy icon was clicked.



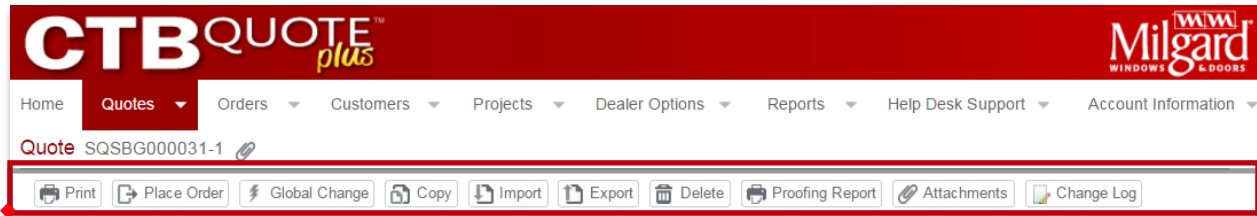
Quote Versions can be found and opened from the **Quote Search** page. Best Practice is to use descriptive **Quote Names** for clarity. The screenshot below shows **Versions** -3 & -4 with the same **Quote Name**, which can cause confusion.



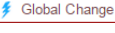

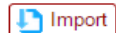



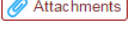
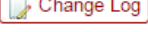
 A screenshot of the CTBQUOTE plus software interface. The top navigation bar includes 'Home', 'Quotes', 'Orders', 'Customers', 'Projects', 'Dealer Options', 'Reports', 'Help Desk Support', and 'Account Information'. Below the navigation is a 'Quote Search' section with a 'New Quote' button. A table displays search results with columns for Customer, Name, PO#, ID#, Last Modified by, Modified on, and Status. Two rows are highlighted with red boxes, showing identical 'Name' and 'PO#' values for different 'ID#' values.

Customer	Name	PO#	ID#	Last Modified by	Modified on	Status
My Test Customer	John's Bldg 1 - Montecito	PO1234	SQDJ000003-4	Dealer, Test	4/6/2015	Open
My Test Customer	John's Bldg 1 - Montecito	PO1234	SQDJ000003-3	Dealer, Test	4/6/2015	Open
My Test Customer	John's Bldg 1 - Ultra	PO1234	SQDJ000003-2	Dealer, Test	4/6/2015	Open
My Test Customer	John's Bldg 1 - Tuscany	PO1234	SQDJ000003-1	Dealer, Test	4/6/2015	Open

Header Buttons

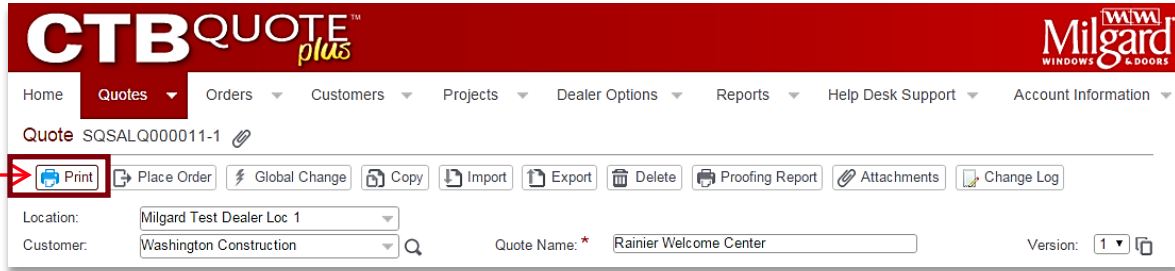
Header buttons in **CTB Quote™ Plus** are always available on the **Quote** page to provide additional actions. This section identifies the header buttons and a brief description of the functionality that each provides.



- ◇ **Print button** -  Click on the **Print** button to print **Quote** reports. //See [Print Options](#) chapter for details.//
- ◇ **Place Order button**  - Click on the **Place Order** button to convert a **Quote** into an **Order**. //See [Orders](#) section for details.//
- ◇ **Global Change button** -  //future enhancement option// Global Change require at least one build **Item** in the *Shopping Cart* to become active. **Global Change** will provide rapid change options to **Quote** Items.
- ◇ **Copy button** -  Click on the **Copy** button to make a complete duplicate of all details, Items, etc., into a new **Quote**.
- ◇ **Import button**  - Click on the **Import** button to import **Build Items** into the open **Quote**. //See [Export Option](#) for details.//
- ◇ **Export button**  - Click on the **Export** button to export **Quote** all **Build Items**. //See [Export Option](#) for details.//
- ◇ **Delete button**  - Click on the **Delete** button to delete the entire **Quote**.
- ◇ **Proofing Report button**  - Click on the **Proofing Report** button to review all **Line Items**, in detail, for the **Quote**. //See [Proofing Report](#) for details.//
- ◇ **Attachments button** -  Click on the **Attachments** button to attach one or more files to the **Quote**. //See [Attachments](#) section for details.//
- ◇ **Change Log button**  - Click on the **Change Log** button to review an audit trail of activities on the **Quote**. //See [Change Log](#) section for details.//

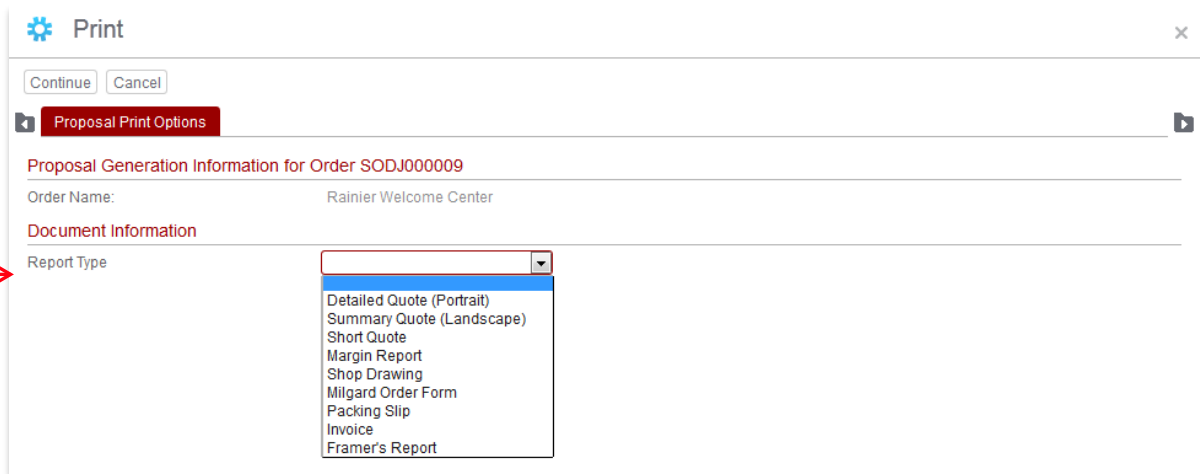
Print Button

The **Print** button provides the functionality to preview, print, save, and email **Quotes**. **Dealer** logos and formatting are applied in various report templates. //See the **Print Options** chapter for detailed instructions and report examples. //

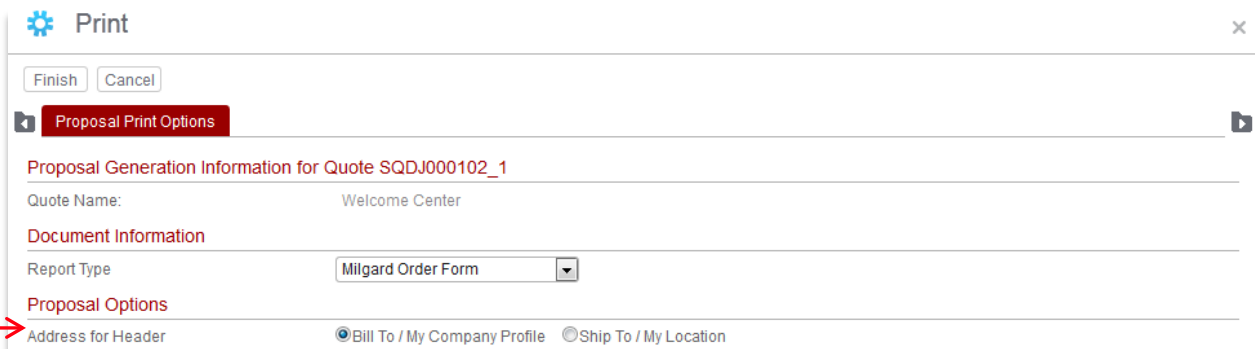


Steps to Print

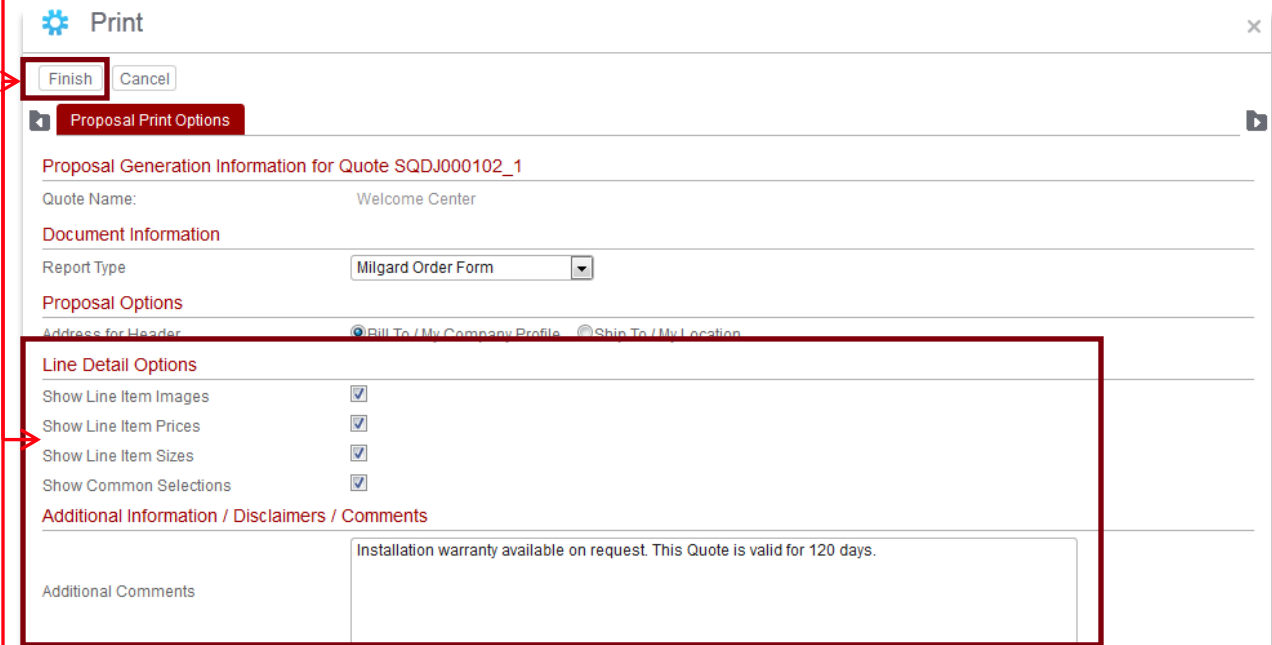
1. Open the **Print** window from the **Print** button on the **Quote** page.
2. Select a **Report Type** from the drop-down list under *Document Information*. // The example illustrates a *Milgard Order Form* for selection.//



3. Update the **Proposal Options** fields (address/location information), if applicable.



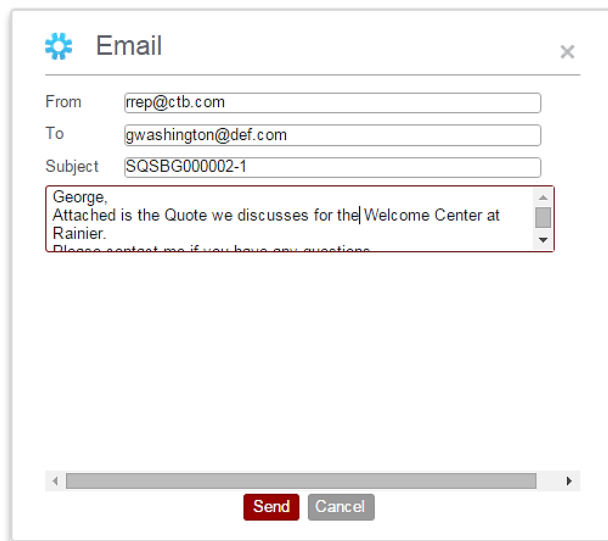
4. Deselect **Line Detail Options** to *omit* information from the **Report**.



5. Add or update **Additional Comments**, if applicable.
6. Select the **Finish** button, on the **Print** screen, to build the **Report** and open the **Print** output popup window (below) for the **Report**.




7. Select **Preview** or **Print** from the Print output popup window to view the **Report** with options to **Print** or **Save**.
8. Select the **Email** button to send the **Quote** as an attached PDF. Update Email fields, as applicable, and then select the **Send** button. //Email templates are set in Account Information>My Company Profile by Administrators.//

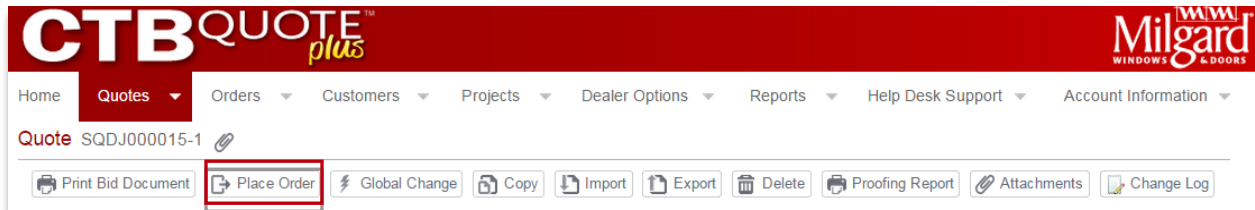


Place Order Button

The **Place Order** button converts a **Quote** to an **Order**. //See the [Order](#) chapter for details about **Orders**./

Steps to Place Order

1. When a **Quote** is confirmed as ready to submit, click on the **Place Order** button  located in the **Quotes Header** area.



2. The **Place Order** screen opens when the **Place Order** button is selected. Verify information and ensure required fields * are completed (e.g., **Construction Type** and **PO Number** to Milgard).

The 'Place Order' form is divided into three main sections:

- Address Information:** This section is split into 'Bill-to' and 'Milgard Ship To'. Both sections have identical fields: Bill-to/Ship-to (Milgard Test Dealer), Name (Milgard Test Dealer Loc 1), Address 1, 2, and Cross Street (all MTD Add1, 2, 3), City (Temecula), State (California), Zip Code (92590), and Country (United States). ERPID is MTD Acct for Bill-to and MTDL1 ERPID for Ship To.
- Additional Information:** This section contains:
 - Construction Type: * Single-Family Replacement (dropdown)
 - Requested Ship Date: (calendar icon)
 - Contact Source: Cold Call (dropdown)
 - Payment Terms: (dropdown)
 - P.O. Number: * (text input)
 - Shipping Instructions: (text input)
- Contact Information:** This section contains:
 - Contact: Dealer, Test (CNJ000001) (dropdown)
 - Phone: (text input)
 - E-mail: (text input)
 - Mobile: (text input)
 - Fax: (text input)

3. Update fields and add a **Requested Ship Date** or **Shipping Instructions** , as applicable.

4. When **Place Order** fields are completed, click on **Place Order** button  **Place Order** to submit.

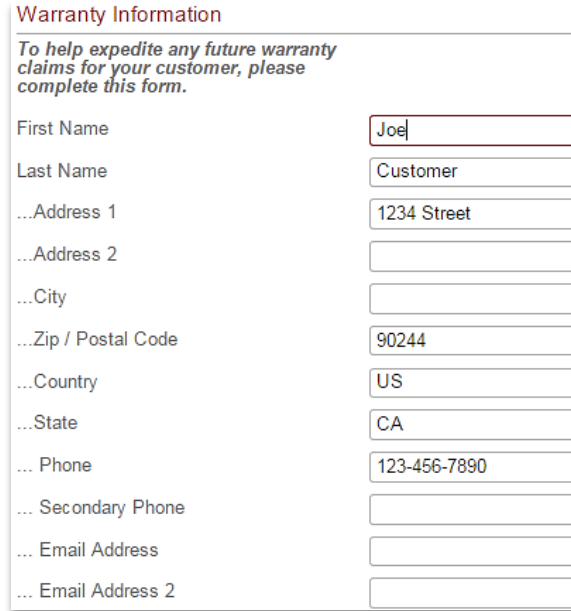


Place Order

 Place Order  Cancel

Address Information

5. The **Warranty information** page appears. Provide **Customer** warranty details, as applicable.



Warranty Information

To help expedite any future warranty claims for your customer, please complete this form.

First Name

Last Name

...Address 1

...Address 2

...City

...Zip / Postal Code

...Country

...State

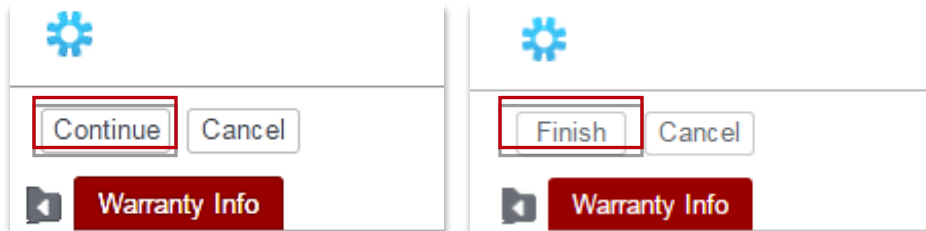
... Phone

... Secondary Phone

... Email Address

... Email Address 2

6. Click the **Continue** and **Finish** buttons on the **Warranty** page to finalize the **Order**.



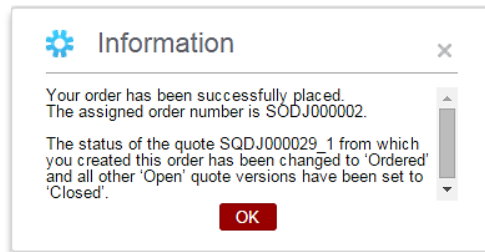
Warranty Info

Continue Cancel

Warranty Info

Finish Cancel

7. The **Quote** is converted to an **Order**. A confirmation popup appears, identifying the **Order Number**.



Information

Your order has been successfully placed.
The assigned order number is SODJ000002.

The status of the quote SQDJ000029_1 from which you created this order has been changed to 'Ordered' and all other 'Open' quote versions have been set to 'Closed'.

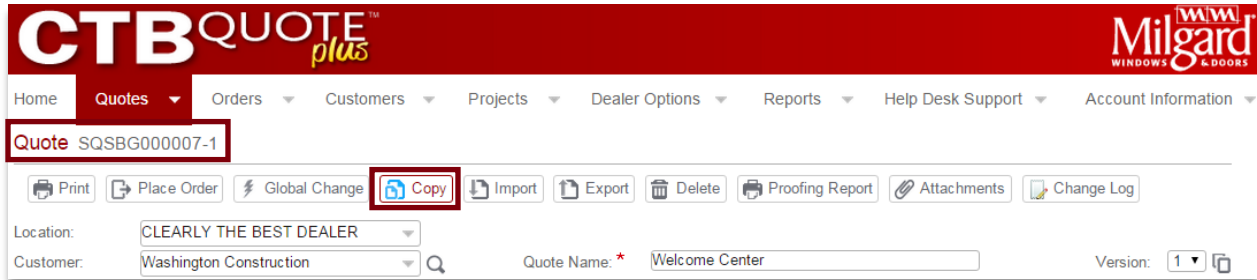
OK

Copy Button

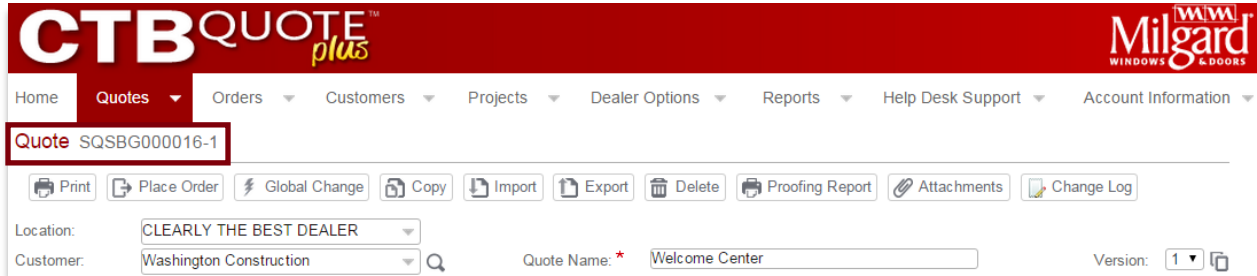
This section identifies the **Copy** function. The **Copy** option is generally used for reorders to create an exact duplicate of the entire **Quote** (e.g., all **Header** information, **Items**, tab data, etc.). //See [Versioning](#) for options to provide the same **Customer** with different *build options* (e.g., **Grids**, etc.//

Steps to Copy

1. From the *Header* buttons, at the top of the **Quote** page, select the **Copy** button  **Copy** .



2. A copy of the **Quote** opens immediately into a **New Quote** page, with a new **Quote** number.



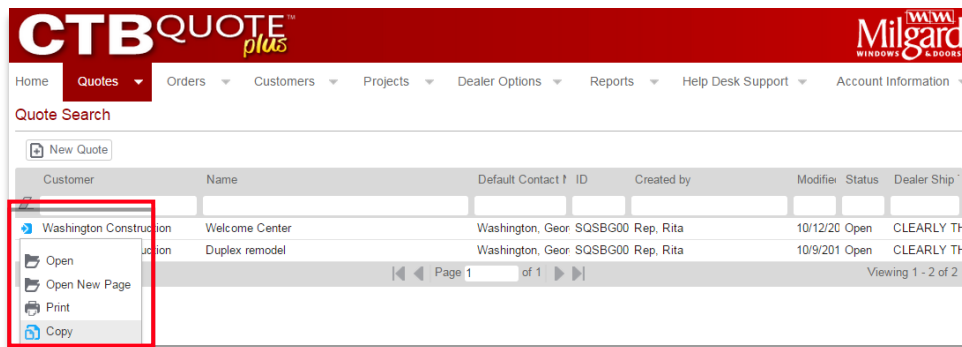
3. Update the copied **Quote** with a new **Quote Name** for clarity.
4. Verify that all copied **Quote** data applies to the **New Quote**.



The **Copy** function retains all data from the original **Quote** (e.g., **Quote Name**, **Customer**, **Location**, **Comments**, **Attachments**, and **Line Item** details). Ensure that all details apply.



The **Copy** function works the same on the **Quote Search** page. Select **Copy** from the action icon popup list to open the duplicated **Quote** into a **New Quote** page.



Import Button

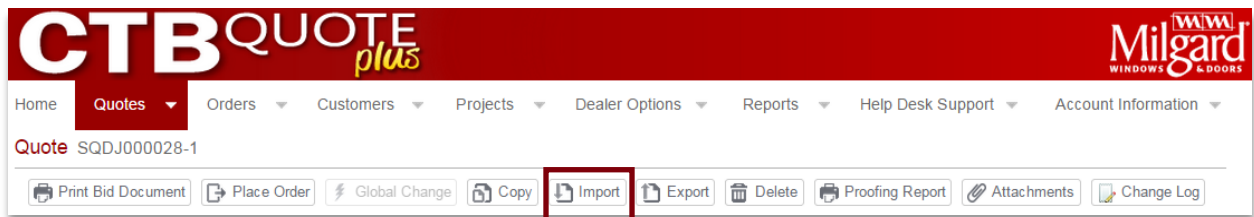
This section identifies how to import configured **Line Items** into a **Quote**. The import process is most commonly used to add previously built **Items** into *new* **Quotes**. The same steps apply to import **Line Items** into *existing* **Quotes**. The file to import must be in the XML file format, as exported from **CTB Quote™ Plus** //see [Export-Import](#) for details//.



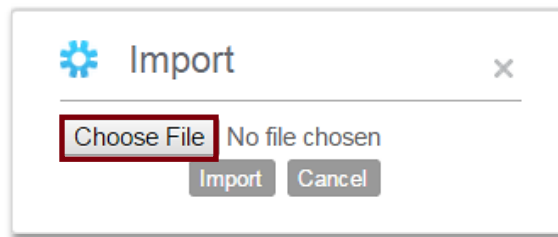
The import process adds previously built **Line Items** into **Quotes**. For *existing* **Quotes**, the XML **Line Items** will append to any **Items** that already exist in the *Shopping Cart*.

Steps to Import

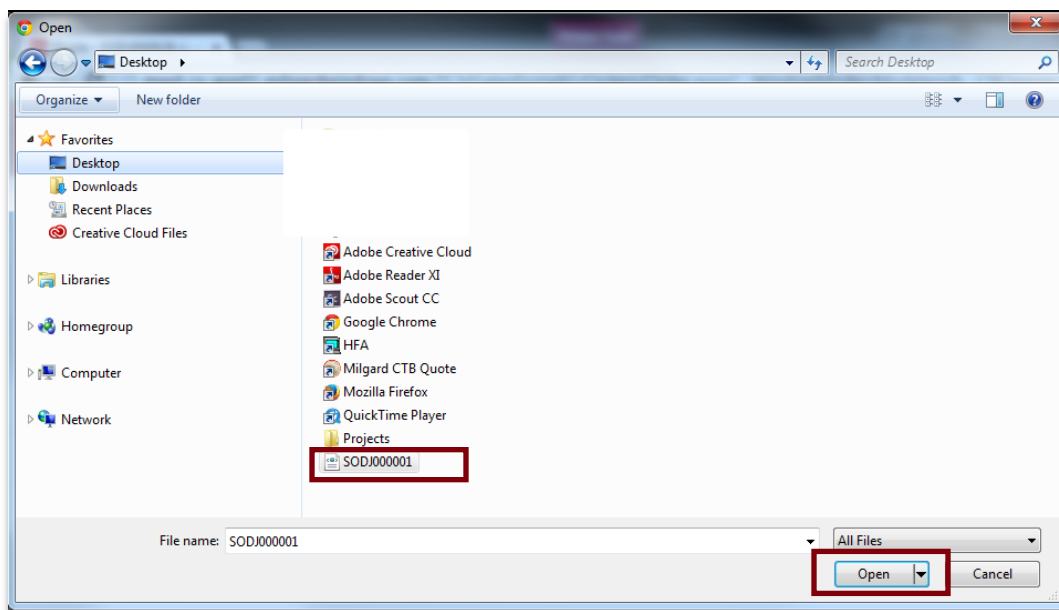
1. From the *Header* buttons, at the top of the **Quote** page, select the **Import** button .



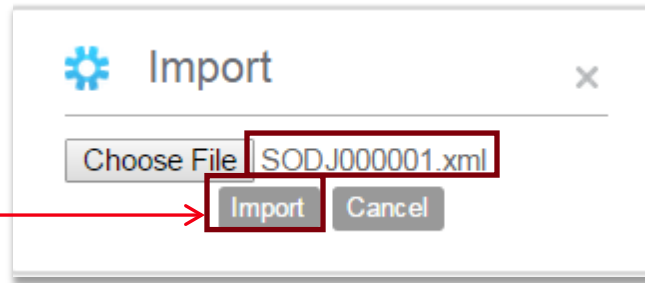
2. The **Import** popup appears. Click on the **Choose File** button to open the search wizard.



3. Find the location where the XML file is located. Select the file and click **Open**.



- Once the file is selected, the **Import** popup displays the selected file name to the right of the **Choose File** button. Click the **Import** button to confirm the import.



The XML file *name* can be changed to something more user-friendly – just ensure that the .xml format (i.e., the .xml extension and embedded data) is retained. Do not edit XML file content or it may become unreadable to **CTB Quote™ Plus** and the import function will fail.

- CTB Quote™ Plus** processes the XML file when the **Import** button is selected. The **Line Item** data appears in the *Shopping Cart* (i.e. **Quote Lines** section) of the **Quote**.

Quote Lines

Validate All Expand All Total Quantity: 1 Windows, 0 Doors Total Price: 315.36

Line	Location/Label	Item	Qty	UOM	Price	Total
1		Window	1	EA	315.36	315.36
Edit Item Adjust Price		Configured Window Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White, Call Out 4020, U-Factor: .34, SHGC: .28, VT: .53, <i>Dealer to End Customer Comments</i>	Line Details		Remove	



The **Import** functionality checks **Location** and **Customer** defaults to validate pricing and Min-Max verification. If the **Shopping Cart** displays a *'Requires Validation'* warning, verify that **Location** and **Customer** are completed and then select the **Validate All** button to update.

- Update **Quote** information (e.g., **Header** tab and **Pricing** tab data) and/or add more **Items** to the **Shopping Cart**, as applicable.



Imported **Line Items** retain customizations and data that was exported from **CTB Quote™ Plus** (e.g., sizes, **Comments**, **Attachments**, and **Line Item Write-In Options**). Ensure all **Line Item** details apply to the new or existing **Quote**, or update, as applicable.

Export Button

The **Export** button provides the ability to share or reuse *Shopping Cart Items* with other **CTB Quote™ Plus** users. This section identifies the **Export** functionality.

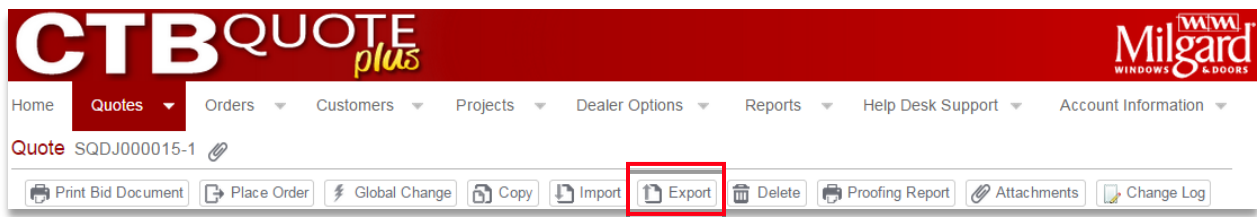


Only configured **Line Items** are exported, not a complete copy of the Quote. **Dealer Options**, **Header** data, and other **Quote** information are not exported. This is by design to provide *Shopping Cart* sharing or reuse without exposing **Customer** data.

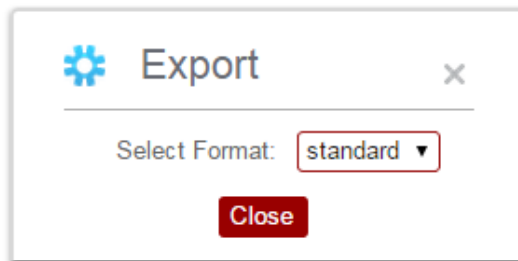
Export Steps

The following steps describe exporting all *Shopping Cart Items* from the **Quote** page. //Individual **Line Items** can be exported from **Quote Lines**> [More...](#) //

1. From the *Header* buttons on the **Quote** page, select the **Export** button 



2. The **Export** pop-up appears. Select “**Standard**” or “**XML**” from the **Select Format** drop-down list.



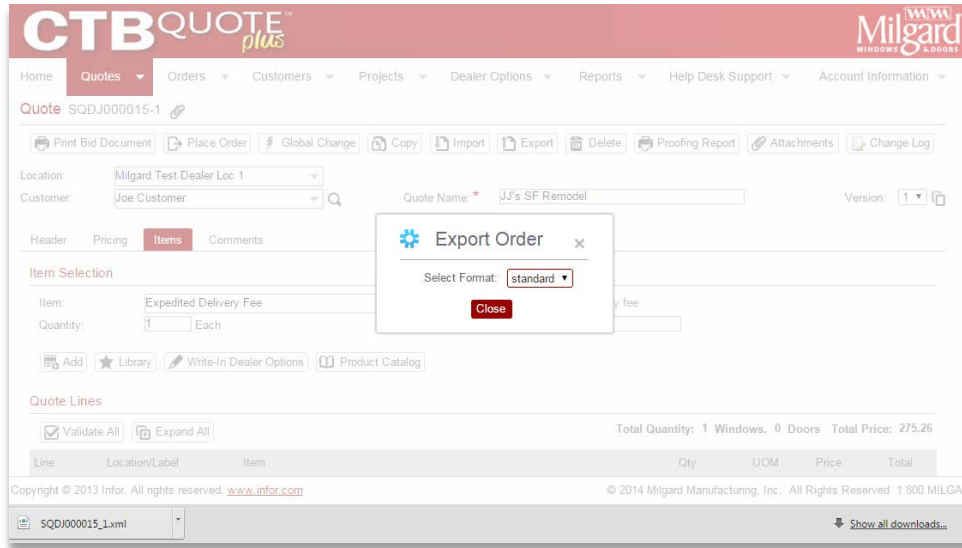
Both ‘XML’ and ‘Standard’ selections result in the **XML** format required for import into **CTB Quote™ Plus**. XML is also a standard format for many other applications. ‘Flat’, as the export format, results in a spreadsheet-style file.

3. After format selection, the export file is automatically downloaded.



In the **Chrome** browser, the downloaded file appears at the bottom of the browser window (screenshot above). Browser settings can affect how downloads are handled. Each Browser has a *Downloads* folder on your local PC //a common download location is “**My Computer**>**Downloads** folder”//.

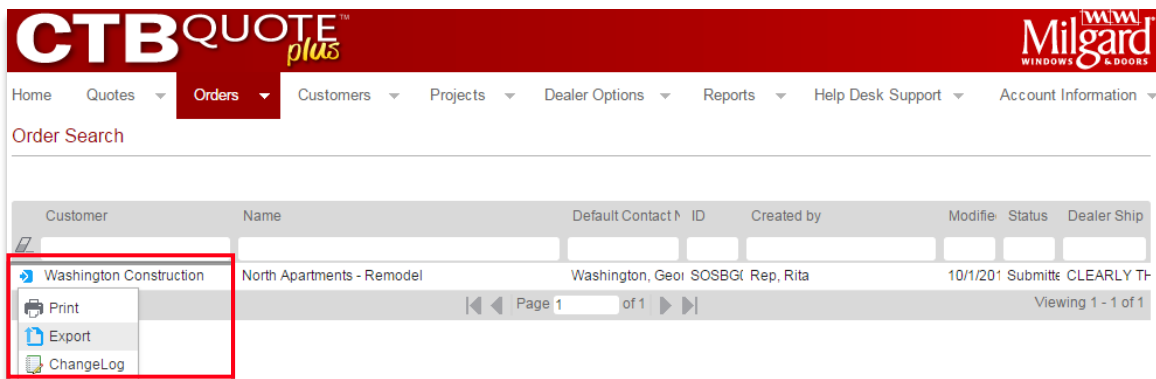
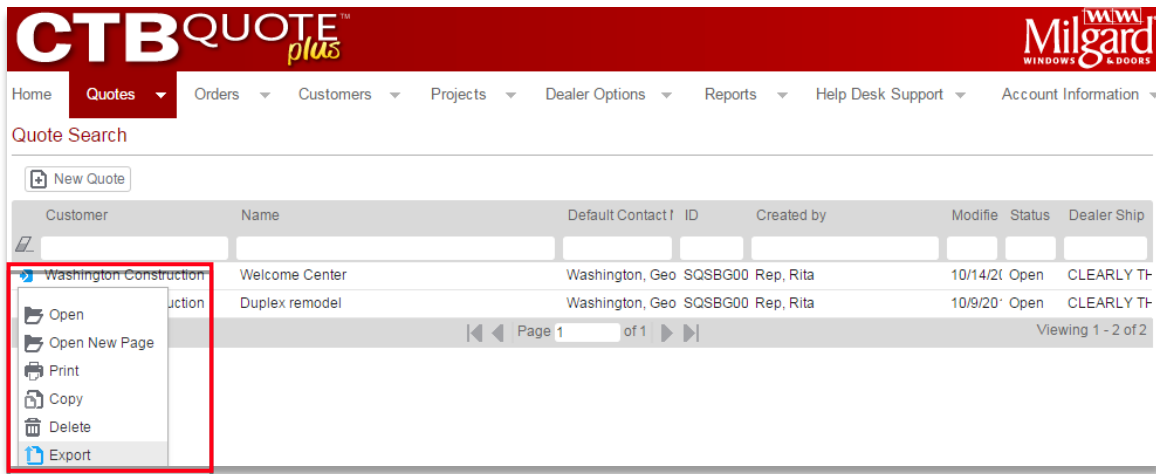
4. Select the **Close** button on the **Export** popup to return to **Quotes** page.



5. Email the XML file to another **CTB Quote™ Plus** user, or, save the file to a local or network location for later import/reuse.



The **Export** function works the same on the **Quote Search** page and the **Order Search** page. **Export** is a selection from the action icon popup list. When **Export** is selected, the same **Export** pop-up appears.



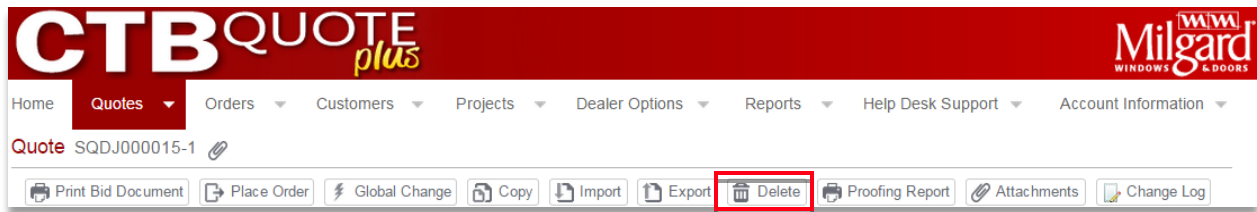
Delete Button

The **Delete** button provides the ability to remove the **Quote** from **CTB Quote™ Plus**. This section identifies the **Delete** functionality.

Delete Steps

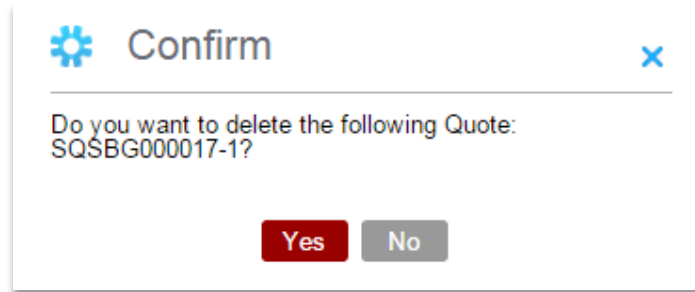
The following steps describe removing a **Quote** from the **Quote** page with the **Delete** button.

1. From the *Header* buttons on the **Quote** page, select the **Delete** button 



The **Delete** option provides a confirmation popup window. If confirmed, the open, active, **Quote** is permanently removed and the **Quote Search** page is opened.

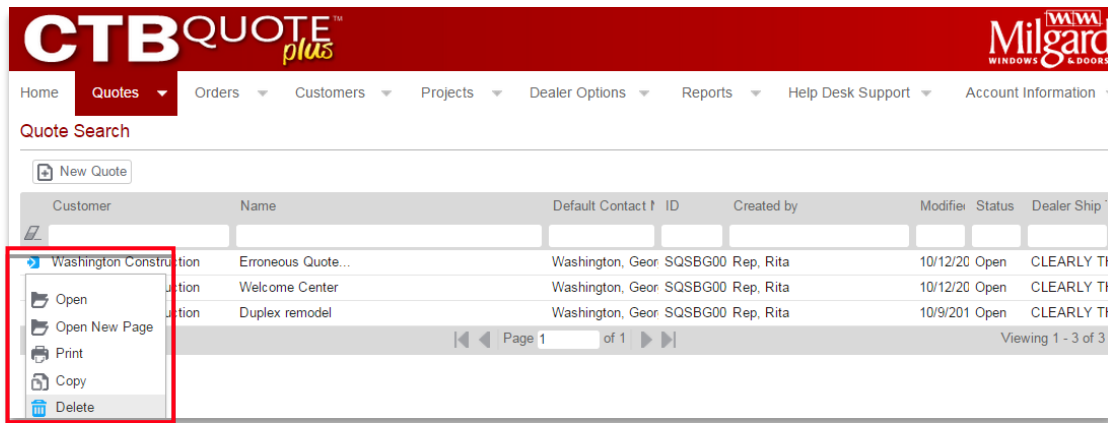
2. The **Delete** Confirmation pop-up appears. Select **Yes** to confirm removal.



3. Select **No** to cancel the **Delete** option and close the *Confirm* popup.



The **Delete** function works the same on the **Quote Search** page. **Delete** is a selection from the action icon popup list. When **Delete** is selected from the **Quote Search** page, the confirmation popup appears. Select **Yes** to confirm or **No** to close the popup.




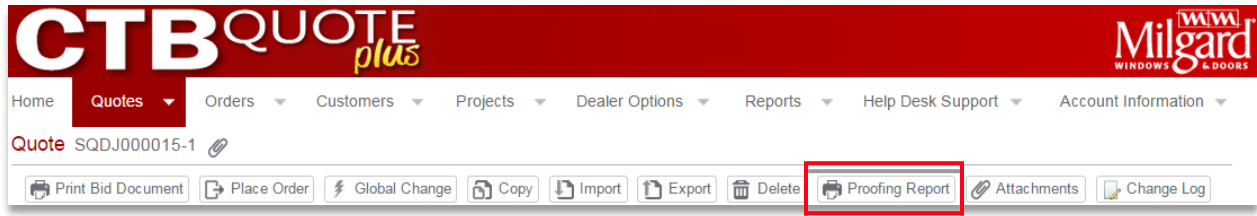
Proofing Report Button

The **Proofing Report** button provides **Line Item** details for configured **Items** in the *Shopping Cart*. Details include ratings and specifications in a format that makes it easy to identify accuracy. This section identifies the Proofing Report option.

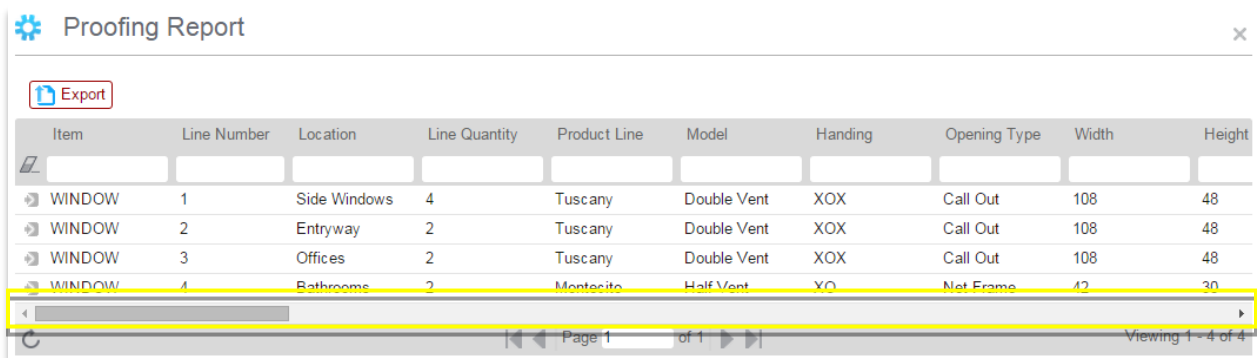
Proofing Report Steps

The following steps identify options for the **Proofing Report**.

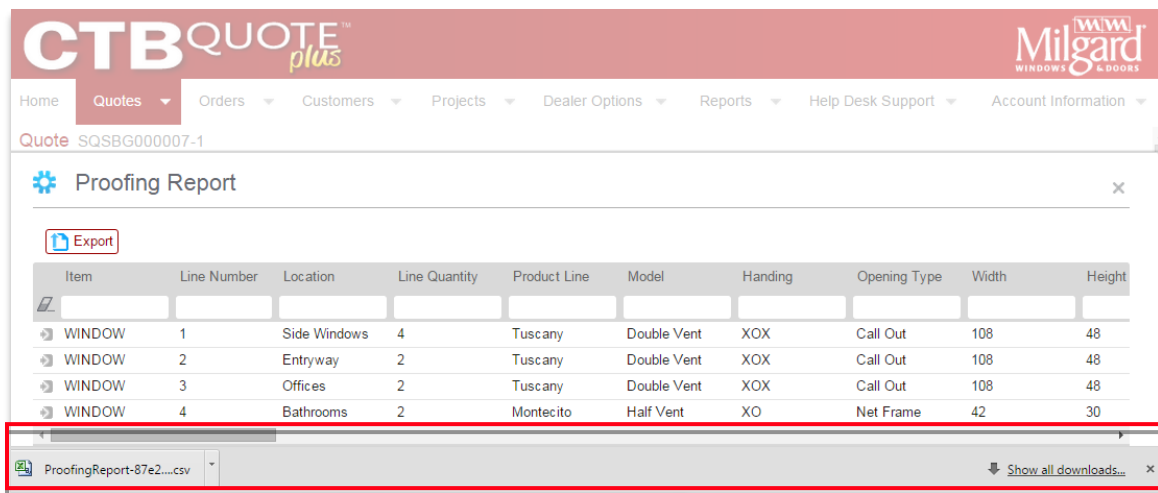
1. From the *Header* buttons on the **Quote** page, select the **Proofing Report** button 



2. The **Proofing Report** window opens. //Typical search grid features apply.// Use the horizontal scrollbar (scroll left and right) to view additional columns/column data.



3. Select the **Export** button to download the **Proofing Report** for review in a spreadsheet program.
4. The **Export** button will download a CSV-formatted file. //Browser settings may handle downloads differently, however the default location is the **Downloads** folder on your computer.//



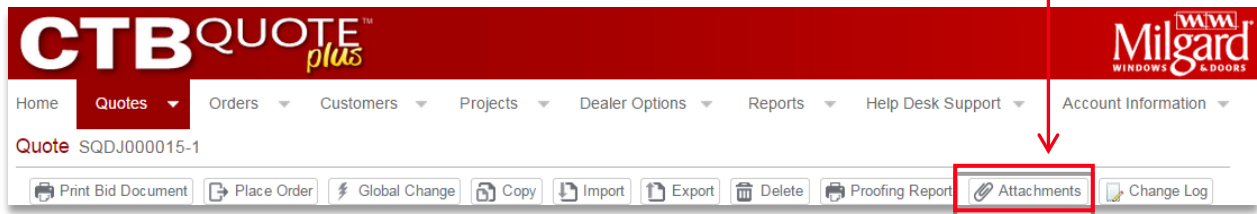
Attachments Button

One or more files can be attached to **Quotes**. File attachments can be added at the *Header* level or at the individual *Line Item* level. //See [Line Item Attachments](#) for steps to add a **Line Item** attachment.//

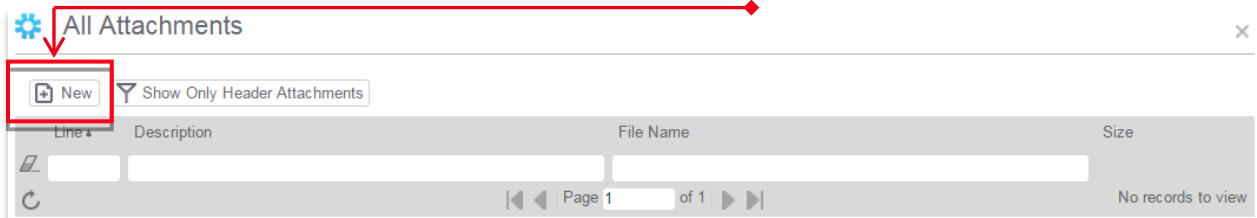
Steps for Header Attachments

This section lists the steps to add attachments at the *Header* level to apply to the overall **Quote**.

1. From the **Quote** page, click on the **Attachments** button.



2. The **All Attachments** window opens. Click on the **New** button.

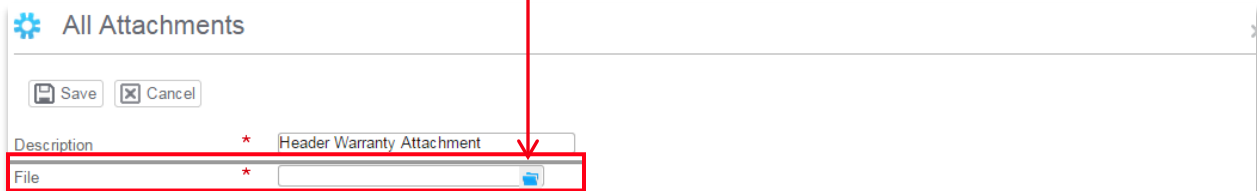


The **All Attachments** window lists all attachments linked to the **Quote**. If **Line Item Attachments** have been added, they will also be listed on the **All Attachments** window.

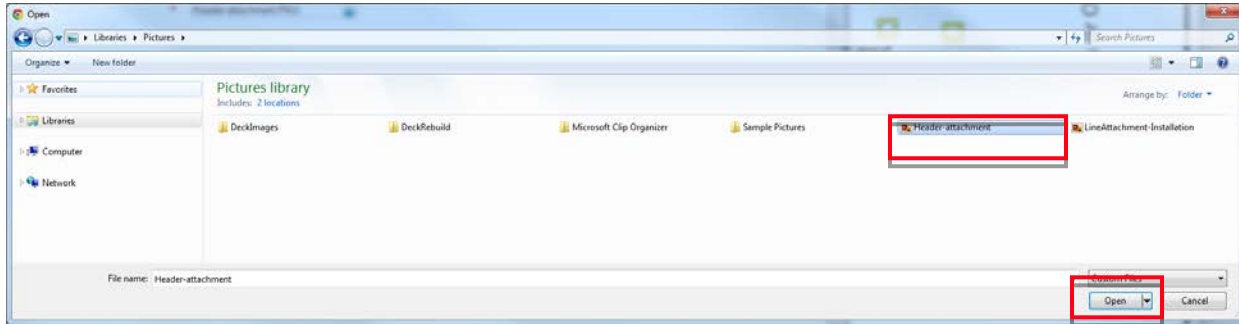
3. The **All Attachments** wizard opens. Add a description in the required *** Description** field.



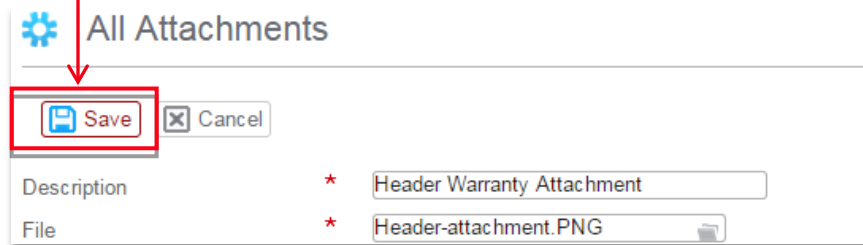
4. Click the **Folder** icon in the **File** field to 'Open' the file on your computer (e.g. generally opens a *Windows Explorer* default location).



5. Select the file to attach and click the **Open** button to return to the **All Attachments** wizard.



6. With the file name displayed in the **File** field, click the **Save** button, in the upper left part of the screen.

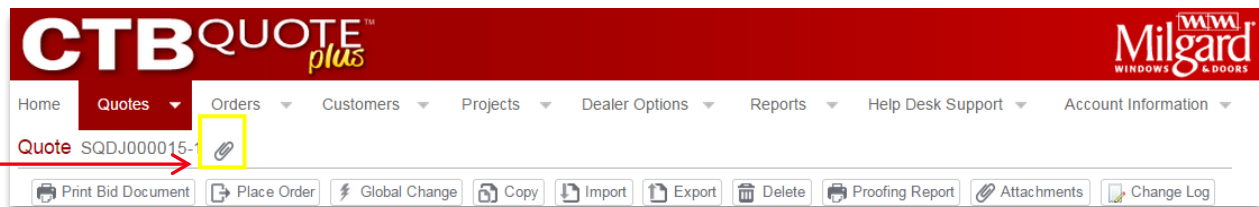



The **Close** button **will not save** the file to the **Quote**! Click the **Save** button prior to closing the **All Attachments** wizard in order to save the file as an attachment.

7. The attached file is now listed in the **All Attachments Search grid**.



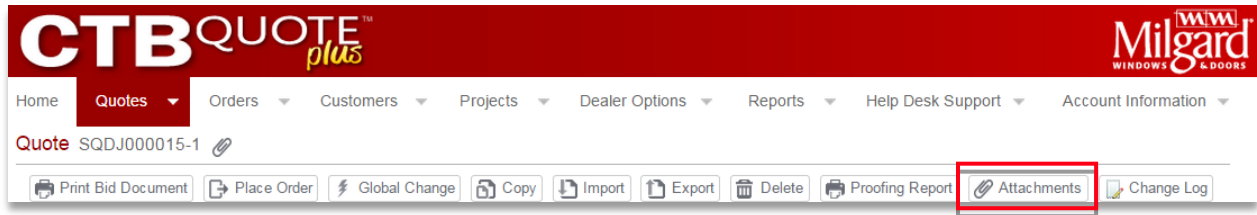
8. Close the **All Attachments** screen to return to the **Quote** page.



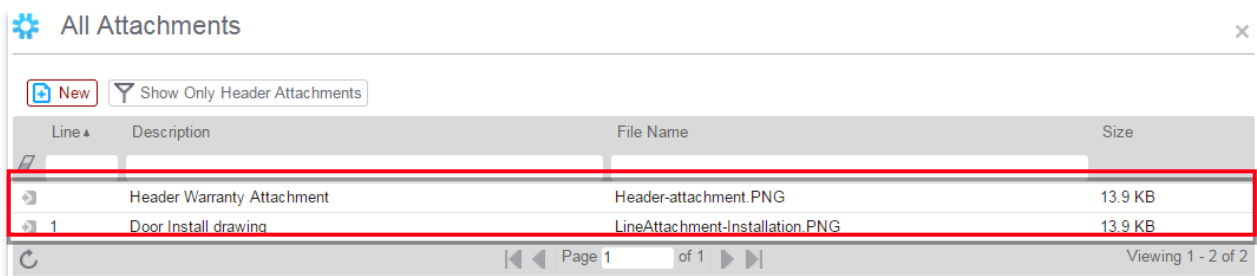
The *Paperclip* icon  displays to the right of the **Quote ID** number. The *Paperclip* icon in this location indicates that a file is attached at the *Header* level.



Manage Attachments

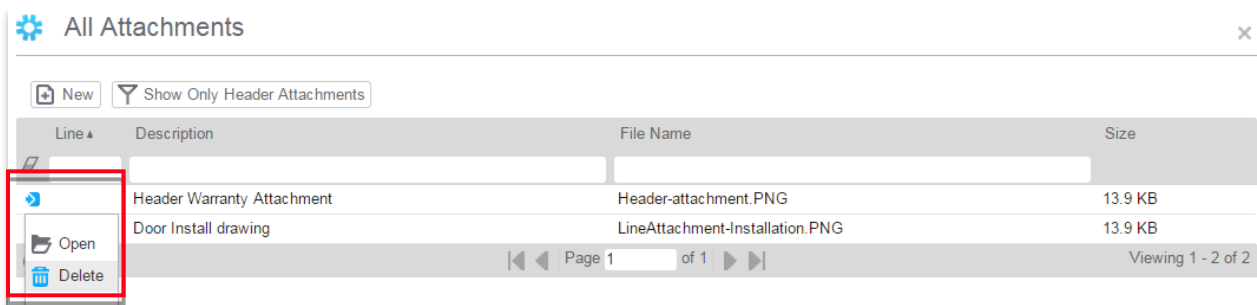
All **Quote Header** and **Line Item** attachments can be searched, viewed, and deleted from the **All Attachments** window. From the **Quotes** page, click on the **Attachments** button. This section identifies options to manage all attachments from the **Attachments** button.



- ❖ The **All Attachments Search** grid lists any attachment(s) linked to the **Quote**. Typical **Search** functionality is available (e.g., sort and search).

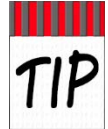


- ❖ **New** button – Click to attach a file at the *Header* level. //The **More..** link in the *Shopping Cart* is the only method to attach a file to an individual **Line Item**//.
- ❖ **Show Only Header Attachments** button – Toggle on/off to hide or display the view of **Line Item** files from the *Search* Grid.
- ❖ **Eraser icon**  – Click to clear any text in *Search* fields.
- ❖ **Search grid fields** – use smart search to filter the displayed files.
- ❖ **Line** column – Displays the **Line** number for files that are attached at the **Line Item** level.
- ❖ **Description** column – Displays the file description, as entered, for any attached files.
- ❖ **File Name** column – Displays the file attachment name.
- ❖ **Size** column – Displays the file size.
- ❖ **Action icon**  – Displays the options available for **Attachment** list items. For **Attachments**, the *Action* icon offers the options to **Open** or **Delete** an **Attachment**.



Change Log Button

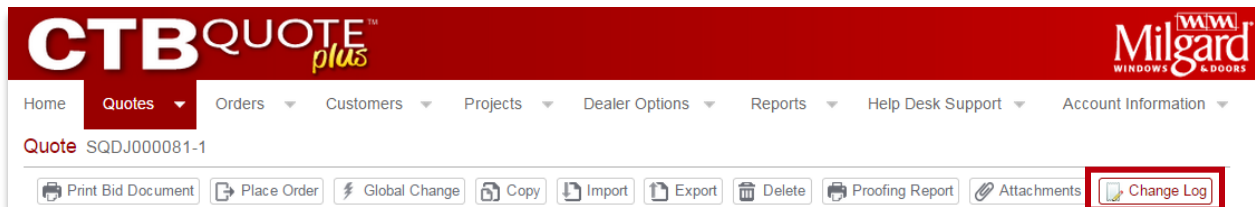
CTB Quote™ Plus offers the **Change Log** as an audit trail for **Quote** activities. Logged entries types include Adds, Copy, Edits, and Deletes to **Shopping Cart Line Items**. Additional **Change Log** entries are price adjustments, project linking, and comments.



The **Change Log** audit trail not only lists *what* activities occur on a **Quote**, but also the user and the date that changes are made. Use the **Change Log** for **Quote** tracking purposes.

Steps for Change Log

1. From the **Quote** page, click on the **Change Log** button.



2. The **Change Log** screen opens for review.

The screenshot shows the 'Change Log' window with a search icon and an 'Export' button. Below is a table with the following columns: Modified on, Modified Time, Last Modified by, Change T, Line N, Option Name, Description, Quantity, List Price, and On Factor.

Modified on	Modified Time	Last Modified by	Change T	Line N	Option Name	Description	Quantity	List Price	On Factor
7/20/2015	08:11:43	jdealerrep	Add	0.00		Project: Washington Welcome Centers (PRJ000007)	0.00	0.00	0.00
7/20/2015	08:46:28	CT000010	Comment	0.00		Dealer to Milgard: Please ensure shipping location	0.00	0.00	0.00
7/20/2015	08:17:52	OBOErica	Add	1.00		Attachment: LineAttachment-brochure.PNG	0.00	0.00	0.00
7/20/2015	08:12:47	jdealerrep	Change	1.00	Window	Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White Half Vent Half Vent XO 3/32" SunCoat (Low-E) over 3/32" Clear Gray EdgeGard Spacer with BreatherTube 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 ft) : CPD: MIL-A-224-02287-00001	1.00	499.00	0.33

3. Use typical *Search* functionality (sorting, smart search, etc) to change or filter grid entries. //The default list displays the most recent change made on the **Quote**://
4. Click on the **Export** button to download the **Change Log**.
5. Open the downloaded file for review, or save, as applicable.



Browsers generally display downloaded files in the bottom of the task area. If you don't see the downloaded **Change Log**, check the *Downloads* folder on your computer. The **Change Log** is exported in a spreadsheet format (e.g., .xls), with the **Quote Number** at the beginning of the file name.

Header Tab

Header Tab Options

CTB Quote™ Plus provides the **Header** tab to track **Quote**-specific **Customer** data. The following section describes setting up the **Quotes>Header** tab.

- ❖ The **Header** tab is located on the **Quotes** page *Header* tabs.

The screenshot shows the CTBQUOTE plus interface. At the top, there is a navigation bar with the following items: Home, Quotes (selected), Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. Below the navigation bar, the quote ID is displayed as "Quote SQDJ000015-1". A toolbar contains several action buttons: Print Bid Document, Place Order, Global Change, Copy, Import, Export, Delete, Proofing Report, Attachments, and Change Log. Below the toolbar, there are input fields for Location (Milgard Test Dealer Loc 1), Customer (Joe Customer), Quote Name (JJ's SF Remodel), and Version (1). At the bottom, a tabbed interface is visible with "Header" selected, and other tabs include Pricing, Items, and Comments.

- ❖ Quote, Address, Additional Information, and Contact Information sections are available.

The screenshot shows the CTBQUOTE plus interface with the "Header" tab selected. The interface is divided into several sections:

- Quote Information:** Contains fields for P.O. Number (PO1234), Project (Project for John Smith (PRJ000001)), Quote Status (Open), Created by (Dealer, Test 3/31/2015), and Last Modified by (Dealerrep, John 6/12/2015).
- Address Information:** Divided into "Bill-to" and "Ship-to" sections. Both sections have fields for Name, Address 1, Address 2, Cross Street, City, State, Zip Code, and Country. The "Ship-to" section has a dropdown menu set to "Same as Bill-to".
- Additional Information:** Contains fields for Construction Type (10: Single Family Replacement), Requested Ship Date, Contact Source (Direct Mailer), Payment Terms (Net 30), Customer Currency (USD), Reporting Currency (USD), and Exchange Rate (1 USD/USD).
- Contact Information:** Contains fields for Contact (Smith, John (CNJ000002)), Phone (123.456.7890), Email (jsmith@abc.def.com), Mobile, and Fax.

Header Tab: Quote Information

CTBQUOTE^{plus} Milgard WINDOWS & DOORS

Home Quotes Orders Customers Projects Dealer Options Reports Help Desk Support Account Information

Header Pricing Items Comments

Quote Information

P.O. Number: PO0424-1 Project: Project for John Smith (PRJ000001)

Quote Status: Open

Created by: Dealer, Test 4/17/2015 Last Modified by: Dealerrep, John 5/8/2015

- ❖ **P.O. Number** – enter a **Customer Purchase Order Number**, if applicable. //This PO can be different than the PO to Milgard. Commonly used for **Customer-unique PO Numbers**. This **PO Number** will appear on **Print Bid Documents**.//
- ❖ **Quote Status** – Default setting is “Open”. **Quote Status** is displayed on the **Quote Search Page** for easy identification. Update **Status** to one of the following options:
 - ◇ Abandoned
 - ◇ Bidding
 - ◇ Held Screen
 - ◇ Lost
 - ◇ Open
 - ◇ Pending
 - ◇ Quoting
 - ◇ Sold
- ❖ **Projects - Quotes** for the same **Customer** can be linked by assigning them to the same **Project**. //See **Projects** for details to organize multiple **Quotes** under a **Project** for the same **Customer**.//

Header Tab: Address Information

Address Information

Bill-to	Ship-to
Bill-to: Joe Customer	Ship-to: Same as Bill-to
Address 1: 123 Any Street	Name: Same as Bill-to
Address 2:	Address 1: 123 Any Street
Cross Street:	Address 2:
City: Temecula	Cross Street:
State: California	City: Temecula
Zip Code: 90210	State: California
Country: United States	Zip Code: 90210
	Country: United States

- ❖ **Bill-To Address** – Defaulted from the **Customer Information** page. Update the **Customer Address** on the **Customers** page, as needed //see **Customers** for details//.
- ❖ **Ship-To Address** – auto-filled from the Customer Information page> *Default Ship-To Address* field
 - ◇ Ship-To drop-down options:
 - Customer Ship-To Addresses – all Ship-To address created for that Customer
 - Same as Bill-To – replaces address fields to match the Bill-To address
 - One-Time Ship-To – clears all Ship-To fields in order to define unique Ship-To information

Header Tab: Additional Information



Most fields on the **Header** tab are auto-filled from the **Customer Information** page. Best practice is to complete **Customer Information** fields prior to creating a **Quote**.

Additional Information			
Construction Type:	10: Single Family Replacement	Requested Ship Date:	<input type="text"/>
Contact Source:	Direct Mailer	Payment Terms:	Net 30
Dealer Currency:	USD	Reporting Currency:	USD
Exchange Rate:	1		USD/USD

- ❖ **Construction Type** – describes the installation structural state. Select the option that best applies.
 - ◇ Commercial Property
 - ◇ Multi-Family New Home Construction
 - ◇ Multi-Family Replacement
 - ◇ Service Only
 - ◇ Single Family New Home Tract
 - ◇ Single Family New Home Custom
 - ◇ Single Family Replacement
- ❖ **Contact Source** – marketing field to identify how/where the **Customer** was acquired
- ❖ **Customer Currency** – defaulted from the Customer Information page
- ❖ **Exchange Rate** – defaulted from the Customer Information page
- ❖ **Requested Ship Date** – date field that a **Customer** has requested for a specific delivery /installation date. //Note that the **Requested Ship Date from Milgard** is on the **Place Order** screen.//
- ❖ **Payment Terms** – optional field to identify the payment terms from the **Customer** to **Dealer**
- ❖ **Reporting Currency** – defaults to *USD*

Header Tab: Contact Information

Contact Information			
Contact:	Smith, John (CNJ000002)	Phone:	123.456.7890
E-mail:	jsmith@abc.def.com	Mobile:	<input type="text"/>
		Fax:	<input type="text"/>

- ❖ **Contact** – defaulted from Customer Information page. Update on the Customer Information page
- ❖ **Email** – defaulted from **Customer Information** page. Add or update as applicable.
- ❖ **Phone** – defaulted from **Customer Information** page. Add or update as applicable.
- ❖ **Mobile** – defaulted from **Customer Information** page. Add or update as applicable.
- ❖ **Fax** – defaulted from **Customer Information** page. Add or update as applicable.



Existing Quote Customer data does *not* synch with **Customer changes!** To update a **Quote**, reselect Location (if applicable) and **Customer** from the **Quote Header** section.

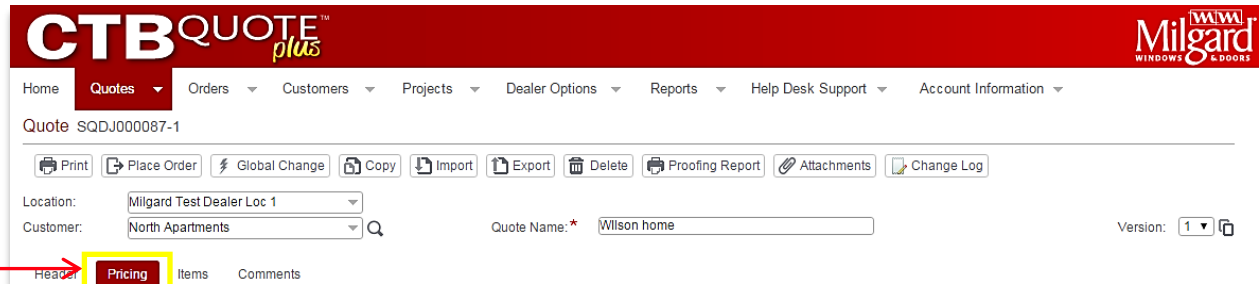
Quote SQDJ000015-1	
<input type="button" value="Print Bid Document"/> <input type="button" value="Place Order"/> <input type="button" value="Global Change"/>	
Location:	Milgard Test Dealer Loc 1
Customer:	Joe Customer

Pricing Tab

The **Pricing** tab provides the functionality to view and modify pricing information on **Quotes**. This section identifies the various pricing views and options on the **Pricing** tab.

Pricing Tab Overview

- ❖ The **Pricing** tab is located along the **Header** tabs in the upper section of the **Quote** page.



❖ Pricing Tab Header Options

- ◇ Upcharge Mode – identifies the default method of upcharge. //Does not change Quote totals.//
- ◇ Pricing Display Options – identifies the active pricing view //”Bottom Line Only” is illustrated.//
- ◇ Reset to Defaults Button - reverts changes to Manufacturer Discount to the default.



When **Pricing Display Options** is set to “*Bottom Line Only*”, it is a best practice to refrain from selecting the **Reset to Defaults** button. Unexpected results may occur, as there is no visibility to detailed pricing defaults. Contact your administrator for assistance.

- ◇ **Adjust Header Level Pricing Button** - provides the option to adjust overall pricing (if permissions allow) to all configured items, or to limit the adjustment to a specific product line
- ◇ **Adjust Line Level Pricing Button** – adjust prices (if permitted) for each *Shopping Cart* item

Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Pricing Summary					
Upcharge Mode: <input type="text" value="Markup %"/> Pricing Display Options: <input type="text" value="Bottom Line Only"/> <input type="button" value="Reset To Defaults"/> <input type="button" value="Adjust Header Level Pricing"/> <input type="button" value="Adjust Line Level Pricing"/>					
Dealer Options Subtotal:				100.00	
Write-In Dealer Options SubTotal:				0.00	4,953.45
Quote Subtotal:				4,953.45	
Additional Discount (% off Subtotal):		<input type="text" value="0 %"/>	<input type="text" value="0 %"/>	0.00	4,953.45
Adjusted Subtotal (Discounted):				4,953.45	
Material Tax:	4,853.45	<input type="text" value="6.5 %"/>		315.47	5,268.93
Labor Tax:	100.00	<input type="text" value="8 %"/>		8.00	5,276.93
Shipping and Handling:		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Other Charges (Specify): <input type="text"/>		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Total Amount - Final Customer Price in USD:		<input type="text" value="USD"/>			5,276.93

❖ **Column Headings** –heading identifiers (e.g., *Description*) for the data in the column

- ◇ **Description Subtotals** – Subtotals for the *Shopping Cart* and upcharges applied (may be hidden)
- ◇ **Additional Discount % off Subtotal** – editable percentage field for applied discount
- ◇ **Taxes and Other Charges** – provides tax fields and other charge entries
- ◇ **Total Amount** – editable field allows for a Forced Price entry to override the Quoted total.

Pricing Summary Screen Options

Editable entry fields are available on the **Pricing Summary** screen and indicated with boxed borders surrounding the fields. If default entries are displayed (e.g. auto-filled **Material** or **Labor Taxes**), they are derived from other **CTB Quote™ Plus** areas but can be modified.

The screenshot shows the 'Pricing Summary' screen with the following fields and values:

Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Dealer Options Subtotal:				100.00	
Write-In Dealer Options SubTotal:				0.00	4,953.45
Quote Subtotal:				4,953.45	
Additional Discount (% off Subtotal):		<input type="text" value="0 %"/>	0 %	0.00	4,953.45
Adjusted Subtotal (Discounted):				4,953.45	
Material Tax:	4,853.45	<input type="text" value="6.5 %"/>		315.47	5,268.93
Labor Tax:	100.00	<input type="text" value="8 %"/>		8.00	5,276.93
Shipping and Handling:		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Other Charges (Specify): <input type="text"/>		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Total Amount - Final Customer Price in USD:		<input type="text"/>	USD		5,276.93

- ❖ **Reset to Defaults Button** - reverts **Quote** pricing back to defaults, if applicable.



The **Reset to Defaults** button will revert any changes made to **On Factor** adjustments. If **On Factor** or other pricing detail fields are not visible, it is a best practice to refrain from using the **Reset to Defaults** button. Unexpected results may occur. Contact your administrator for assistance.

- ❖ **Dealer** representatives can, at a minimum, enter or modify the following fields on the **Pricing** tab:
 - ◇ **Additional Discount** - manually enter a specific percentage to be discounted from the Quote (pretax). //See the [Forced Price](#) section where the Additional Discount field is calculated.//
 - ◇ **Material Tax** - enter a product tax percentage (6.5% is the auto-filled tax in the illustration). Defaults can be changed, or removed, according to applicable taxes.
 - ◇ **Labor Tax** - enter a labor tax percentage (8% is the auto-filled tax in the illustration). Defaults can be changed, or removed, according to applicable taxes. Labor Tax may be the same as Material Tax, however, is available as a separate field to account for various business practices.
 - ◇ **Shipping and Handling** – enter any courier charges here. //Note that taxes will not be added to this field. Use a Dealer Option for shipping when taxes should be applied.//
 - ◇ **Other Charges** – Enter any miscellaneous charges with a description, as applicable. //Note that taxes will not be added to this field. Use a Dealer Option for charges when taxes should be applied.//
 - ◇ **Total Amount – Final Customer Price in USD** (i.e., the ‘Forced Price’) – the Total Amount field offers the functionality to enter a set price. Examples include matching a competitor’s price or to provide the Customer with a rounded dollar amount for easier quote management. The next section describes the *Forced Price* process.



If taxes and/or terms are always the same, defaults can be set in **Account Information** (**Default Terms** tab). Likewise, a **Customer** can have default terms set on the **Customer** page (**Default Terms** tab) to auto-fill for all new **Quotes** for that **Customer**.

Force a Quote Price

CTB Quote™ Plus offers the functionality to provide your **Customers** with a specific **Quote** total. Common scenarios to force a specific price include: price matching, and rounding the total to the nearest dollar amount. The following steps identify how to force a specific price on the **Pricing** tab.

1. Open an existing **Quote** to which a set price should be applied and select the **Pricing** tab.
2. At the bottom of the *Pricing Summary* screen, find the **Total Amount – Final Customer Price in USD**. The current **Quote** total is listed in the far right column //the illustration depicts the current **Quote** total at **\$5,276.93**//.

Header Pricing Items Comments						
Pricing Summary						
Upcharge Mode:	Markup %	Pricing Display Options:	Bottom Line Only	Reset To Defaults	Adjust Header Level Pricing	Adjust Line Level Pricing
Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals	
Dealer Options Subtotal:				100.00		
Write-In Dealer Options SubTotal:				0.00	4,953.45	
Quote Subtotal:				4,953.45		
Additional Discount (% off Subtotal):		<input type="text" value="0"/>	0 %	0.00	4,953.45	
Adjusted Subtotal (Discounted):				4,953.45		
Material Tax:	4,853.45	<input type="text" value="6.5"/>	6.5 %	315.47	5,268.93	
Labor Tax:	100.00	<input type="text" value="8"/>	8 %	8.00	5,276.93	
Shipping and Handling:		<input type="text" value="0.00"/>	0.00 USD	0.00	5,276.93	
Other Charges (Specify):		<input type="text" value="0.00"/>	0.00 USD	0.00	5,276.93	
Total Amount - Final Customer Price in USD:		<input type="text" value=""/>	USD		5,276.93	



A forced price must be **lower** than the existing **Quote** total or unexpected results could occur. This is by design as the forced price is meant to *reduce* the amount of calculated subtotals. Only use numbers for the manually entered price. Do not enter dollar signs (\$), commas(,) or other text characters.

3. In the entry box, enter a price that is lower than the current **Quote** total. //Decimal points are added automatically, if not entered. For example, 5000 is automatically displayed as 5,000.00.//
4. Tab off the entry box or use the *Enter* key to enforce the price.

Header Pricing Items Comments						
Pricing Summary						
Upcharge Mode:	Markup %	Pricing Display Options:	Bottom Line Only	Reset To Defaults	Adjust Header Level Pricing	Adjust Line Level Pricing
Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals	
Dealer Options Subtotal:				100.00		
Write-In Dealer Options SubTotal:				0.00	4,953.45	
Quote Subtotal:				4,953.45		
Additional Discount (% off Subtotal):		<input type="text" value="5.247888"/>	5.248 %	(259.95)	4,693.50	
Adjusted Subtotal (Discounted):				4,693.50		
Material Tax:	4,598.75	<input type="text" value="6.5"/>	6.5 %	298.92	4,992.42	
Labor Tax:	94.75	<input type="text" value="8"/>	8 %	7.58	5,000.00	
Shipping and Handling:		<input type="text" value="0.00"/>	0.00 USD	0.00	5,000.00	
Other Charges (Specify):		<input type="text" value="0.00"/>	0.00 USD	0.00	5,000.00	
Total Amount - Final Customer Price in USD:		<input type="text" value=""/>	USD		5,000.00	


Force a Quote Price Result

Pricing Summary					
Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Dealer Options Subtotal:				100.00	
Write-In Dealer Options SubTotal:				0.00	4,953.45
Quote Subtotal:				4,953.45	
Additional Discount (% off Subtotal):		5,247888 %	5,248 %	(259.95)	4,693.50
Adjusted Subtotal (Discounted):				4,693.50	
Material Tax:	4,598.75	6.5 %		298.92	4,992.42
Labor Tax:	94.75	8 %		7.58	5,000.00
Shipping and Handling:		0.00 USD		0.00	5,000.00
Other Charges (Specify):		0.00 USD		0.00	5,000.00
Total Amount - Final Customer Price in USD:					5,000.00



Additional Discount (% off Subtotal) is automatically updated with the calculated percentage due to the forced price entry //the illustration shows the discount calculated at **5.247888%**/. The **Additional Discount** field remains editable and will override the *Forced Price*, if modified.

Pricing Tab Characteristics

- ❖ **Forced Price** will revert to the **Quote**-calculated total if the **Reset to Defaults** button is selected.
- ❖ The **Reset to Defaults** button on the Pricing Tab reverts the Pricing Tab defaults according to defaults set in Customer>Default Terms. If no Customer Default Terms exist, Account Information>My Company Profile>Default Terms will apply. Contact your administrator if the **Reset to Defaults** functionality produces unexpected results.
- ❖ The **Reset to Defaults**  buttons located on the **Adjust Line Level Pricing** popup will revert defaults according to where the button is selected. There are **Reset to Defaults** buttons for each **Line Item**, as well as the **Reset to Defaults** button for the overall **Quote**.
- ❖ The **Reset to Defaults** button does *not* reset **Upcharges**. **Upcharges** are auto-filled with **Default Terms** or modified manually.

Price Summary Screen Adjustment Options

Pricing adjustments may be limited by permissions. The ability to view or edit pricing can only be set by your administrator. This following adjustment sections identify options for those with full permissions:

Adjust Header Level Pricing Button

- ❖ The **Adjust Header Level Pricing** button provides the ability to adjust **Pricing Terms** for the overall **Quote** or to specific product lines.

Adjust Line Level Pricing Button

- ❖ The **Adjust Line Level Pricing** button provides the ability to adjust **Pricing Terms** for individual **Quote Line Items**.

Adjust Header Level Pricing

Header level (i.e., overall **Quote**) price adjustments are made by selecting the **Adjust Header Level Pricing** button. The button is found on the **Pricing** tab **Pricing Summary** screen and also on the **Adjust Line Level Pricing** popup.



There must be configured **Line Items** in the *Shopping Cart* for the **Pricing Summary** screen to display pricing details. If any *Shopping Cart Line Items* displays “Validation Required”, select **Validate All** to update **Pricing** information.

1. On an existing **Quote**, with configured **Line Items**, select the **Pricing** tab to view the **Pricing Summary** screen.

Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Milgard List:				12,432.00	
Manufacturer's Discount (On Factor):			0.320	(8,453.76)	3,978.24
Dealer Cost from Milgard:				3,978.24	
My Upcharge (Markup %):			22.000000 %	875.21	4,853.45
Dealer Options Subtotal:				100.00	
Write-In Dealer Options SubTotal:				0.00	4,953.45
Quote Subtotal:				4,953.45	
Additional Discount (% off Subtotal):		<input type="text" value="0 %"/>	0 %	0.00	4,953.45
Adjusted Subtotal (Discounted):				4,953.45	
Material Tax:	4,853.45	<input type="text" value="6.5 %"/>		315.47	5,268.93
Labor Tax:	100.00	<input type="text" value="8 %"/>		8.00	5,276.93
Shipping and Handling:		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Other Charges (Specify): <input type="text"/>		<input type="text" value="0.00 USD"/>		0.00	5,276.93
Total Amount - Final Customer Price in USD:		<input type="text" value="USD"/>			5,276.93
Total Amount - Final Dealer Cost in USD:					3,978.24

2. Click on the Adjust Header Level Pricing button.
3. The *Adjust Header Level Pricing* popup window opens. Locate the **Product Line to Override** field.

Adjust Header Level Pricing ✕

Product Line to Override

Milgard Discount (On Factor) 0.330

My Upcharge (Markup %) 20.000 % %

Additional Discount 0.000 %

4. The **Product Line to Override** defaults to “All”. Open the drop-down list for additional options.

The screenshot shows a dialog box titled "Adjust Header Level Pricing". It contains the following fields and values:

Product Line to Override		All
Milgard Discount (On Factor)	0.330	
My Upcharge (Markup %)	20.000 %	
Additional Discount	0.000 %	

The dropdown menu for "Product Line to Override" is open, showing the following options: All (highlighted), Montecito, and Tuscany. The dialog box has "OK" and "Close" buttons at the bottom.

5. If all product lines should be adjusted, retain “All” as the selection. Select a specific **Product Line to Override**, if applicable.
6. The **Milgard Discount (On Factor)** field is a manufacturer defined *Price As* value. Adjust the **On Factor**, if applicable. //Note that **On Factor** adjustments must be approved by the manufacturer.//

The screenshot shows the same dialog box as above, but the dropdown menu is closed. The "Product Line to Override" field now shows "All". The other fields and values remain the same. The dialog box has "OK" and "Close" buttons at the bottom.

7. **Additional Discount** is an information-only field on this popup view. //Edits can be made to **Additional Discount** on the **Pricing Summary** screen, if applicable.//
8. Click **OK** to save changes. //Note that the popup window requires “OK” to be selected to save changes. Entries are not auto-saved as on primary screens.//
9. Click **Close** to return to the **Pricing Summary** screen.



Adjustments made on the **Adjust Header Level Pricing** popup will be reflected on the **Pricing Tab>Pricing Summary** screen. If “All” is not selected for the field **Product Line to Override**, reflected adjustments will display the *average*. For example, if the **Upcharge** is changed to 25% for the *Montecito* product line only, the **Upcharge** is still 20% for *Tuscany*, therefore, the **Upcharge** percentage on the **Pricing Summary** screen will be the averaged **Upcharge** for both product lines.

Adjust Line Level Pricing

The **Pricing Summary** screen displays the **Adjust Line Level Pricing** button. This button provides the ability to adjust **Pricing Terms** for individual **Line Item** prices. The following steps identify the process:

Description	Material & Labor Subtotals	Header Level	Effective	Values of Interest	Totals
Milgard List:				12,432.00	
Manufacturer's Discount (On Factor):			0.320	(8,453.76)	3,978.24
Dealer Cost from Milgard:				3,978.24	
My Upcharge (Markup %):			22.000000 %	875.21	4,853.45
Dealer Options Subtotal:				100.00	
Write-In Dealer Options SubTotal:				0.00	4,953.45
Quote Subtotal:				4,953.45	

1. Click on the Adjust Line Level Pricing button. The *Adjust Line Level Pricing* window opens.

Adjust Line Level Pricing

OK Cancel

Header Values

Effective Pricing Display Options: On Factor, Cost & Upcharge

Manufacturer's Discount (On Factor) 0.320

My Upcharge (Markup %) 22.000 %

Additional Discount (% off Subtotal) 0 %

Quote Lines

Expand All

Line	Item	Qty	UOM	Manufacturer's Discount	My Upcharge	Additional Discount %	Selling Price	Extended Selling Price
1	Window	2	EA	0.320	22.000 %	0 %	255.71	511.42
Configured Window Montecito, 8120M, HV, 1 3/8" Setback, Ext Espresso/Int White, Net Frame 42" x 30", U-Factor: .34, SHGC: .28, VT: .53								
<input type="button" value="Reset to Defaults"/>								
Line Details								
2	Window	2	EA	0.320	22.000 %	0 %	611.76	1,223.52
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .52								
<input type="button" value="Reset to Defaults"/>								
Line Details								
3	Window	2	EA	0.320	22.000 %	0 %	460.67	921.34
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .53								
<input type="button" value="Reset to Defaults"/>								
Line Details								
4	Window	4	EA	0.320	22.000 %	0 %	549.29	2,197.16
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42								
<input type="button" value="Reset to Defaults"/>								
Line Details								

2. The **Header Values** section displays the current values from Header Level settings. To change Header Level Settings, select the **Adjust Header Level Pricing** button.



The **Adjust Header Level Pricing** button displayed on the *Adjust Line Level Pricing* popup window provides the same functionality as the button located on the **Pricing Summary** screen. See [Adjust Header Level Pricing](#) for details.//

- Note that all configured **Quote Lines** (*Shopping Cart Items*) are listed individually. Each line offers fields to edit the **Manufacturer's Discount** and/or **My Upcharge** amounts.

⚙ Adjust Line Level Pricing

OK Cancel

Header Values

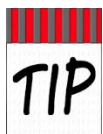
	Effective	Pricing Display Options:	On Factor, Cost & Upcharge
Manufacturer's Discount (On Factor)	0.320		
My Upcharge (Markup %)	22.000 %		
Additional Discount (% off Subtotal)	0 %		

Quote Lines

Expand All

Line	Item	Qty	UOM	Manufacturer's Discount	My Upcharge	Additional Discount %	Selling Price	Extended Selling Price
1	Window	2	EA	0.320	22.000 %	0 %	255.71	511.42
Configured Window Montecito, 8120M, HV, 1 3/8" Setback, Ext Espresso/Int White, Net Frame 42" x 30", U-Factor: .34, SHGC: .28, VT: .53								
<input type="button" value="↺ Reset to Defaults"/>								
Line Details								
2	Window	2	EA	0.320	22.000 %	0 %	611.76	1,223.52
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .52								
<input type="button" value="↺ Reset to Defaults"/>								
Line Details								
3	Window	2	EA	0.320	22.000 %	0 %	460.67	921.34
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .53								
<input type="button" value="↺ Reset to Defaults"/>								
Line Details								
4	Window	4	EA	0.320	22.000 %	0 %	549.29	2,197.16
Configured Window Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42								
<input type="button" value="↺ Reset to Defaults"/>								
Line Details								

- Adjust the **Manufacturer's Discount** and/or **Dealer Upcharge** field on each line item, as applicable.



Each **Line Item** displays an individual **Reset to Defaults** button to reset the defaults for just that line. Alternatively, use the **Reset to Defaults** button above the **Quote Lines** to restore all lines to the defaults.

- Click **OK** to save changes, or click **Cancel** to cancel, and return to the **Pricing Summary** screen.



Adjustments made to **Line Level Pricing** will be reflected on the **Pricing Summary** screen. Reflected adjustments will display the *average adjustment*, as compared to the overall total. For example, if the **Upcharge** for a few lines is lowered to 20%, the **Upcharge** on the **Pricing Summary** screen will reflect the average percent against the whole Quote.

Adjust Line Level Pricing Options

This section identifies additional views and options available on the **Adjust Line Level Pricing** window.



Adjust Line Level Pricing window offers functionality similar to **Adjust Price** offered in the **Shopping Cart** on the **Items** tab. The benefit of the **Adjust Line Level Pricing** window is that it provides access to all **Quote Line Item** price adjustments on one screen, and it offers a snapshot of **Header Level** settings to immediately identify the results of adjustments.

❖ **Pricing Display Options** – if a drop-down list is available, the **Pricing Display Option** can be changed to provide one of the following levels of visibility //for example, to *reduce* pricing detail information, select the “*Bottom Line Only*” view, in order to hide fields from the **Customer**//:

- ◇ Bottom Line Only – minimal pricing details only
- ◇ Cost and Upcharge – displays cost and upcharge information
- ◇ On Factor, Cost, and Upcharge – displays all totals used for calculations

❖ **Expand All /Collapse All** buttons toggle the view of the **Quote Lines** section (e.g., opened or closed). No images are displayed in either view on the **Adjust Line Level Pricing** window.

❖ The **Line Details** link functions as it does on the **Items** tab to open or close a *single Line Item*.

Detailed Pricing Information

❖ **Expand All** view offers **Line Item** detailed pricing information to include the following:


- ◇ **Milgard List Price** - per Unit and Extended (i.e., *Unit * Quantity*)
- ◇ **Dealer Cost from Milgard** - per Unit and Extended (i.e., *Unit * Quantity*)
- ◇ **Subtotal** - per Unit and Extended (i.e., *Unit * Quantity*)
- ◇ **Dealer Options** total when linked at the line level – (Unit(s) and Extended)

Items Tab

Item Selection Area

The **Item Selection** area provides **Item** selection, quantity, description, and actions to add or build **Items** for the *Shopping Cart*.

❖ Item Selection fields:

- ◇ **Item field** - the generic term for any type of *Shopping Cart* entry, including **Dealer Option Items**. **Items** can include both Milgard products and defined **Dealer Options**.
 - **Item drop-down list** – Click *in* the **Item** field to a drop-down list of available **Items**.
 - **Item search icon** – Click the **Item** search icon  to open a pop-up screen that provides more **Item** details and the option to filter Category by *type* (e.g., just **Dealer Options**).

Name	Item Number	Description
Window	WINDOW	CONFIGURED WINDOW
Door	DOOR	CONFIGURED DOOR
Moving Glass Wall System	MGWS	CONFIGURED MOVING GLASS WALLS
Milgard Charge	MilgardCharge	Milgard Charge
Expedited Service	PDBG000001	Extra installer

- ◇ **Quantity field** - optional field to preset the number of **Items** to be built (prior to building it). The default is 1. // Quantity can be added or updated on the **Line Item** in the *Shopping Cart*.//
- ◇ **Location/Label field** - optional field to help define location. //The Location can be added or updated on the **Line Item** in the *Shopping Cart*.//
- ❖ **Preferences area** –//not always visible// provides quick build options. Visibility for **Preferences** is determined by the type of **Item** selected (e.g., Windows or Doors). //See [Preferences](#) for details.//
- ❖ **Item buttons** –provide options for adding **Items** to the *Shopping Cart* and additional functions, described in more detail.

Preferences Overview

The **Preferences** section provides the ability to quickly build **Quote Items** with frequently used options. Selected **Preferences** reduce the number of build questions that are asked in the **Item Configurator**. **Preferences** are optional; all build questions can be completed in the **Item Configurator**. //See [Build a Window with Preferences](#) for details.//



It is helpful to have familiarity with interrelated fields when using **Preferences** for specialized builds (e.g., preselecting *Glass Thickness* with *Energy Packages*).

Preferences Tips

The **Preferences** section lists the most commonly used quick-build fields. The following characteristics assist with using **Preferences**:

- ❖ An **Item** type (e.g., **Window** or **Door**) must be selected to display the **Preferences** section.
- ❖ **Dealer Options**, as an **Item** type, will not have a **Preferences** section.
- ❖ In order to view applicable build options, select the **Product Line** prior to other fields. An example would be that all *Finish* colors will display if no **Product Line** is selected. Once the **Product Line** is selected, the *Finish* colors are filtered to colors available for that **Product**.
- ❖ **Bold Preference** fields (e.g., *Fin Type*, *Opening Type*, and *Finish*) represent standard quick-build selections for common installations (e.g. new construction vs. remodels).
- ❖ **Preference** selections that conflict with build requirements are resolved in the **Item Configurator**.
- ❖ Limited **Rules** //see [Rules](#) for details// are triggered within the **Preferences** section, in order to allow for specialized build selections. **Rules** are reevaluated, however, when the **New Item** button is selected. **Preference** field selections that conflict with **Rules** will be cleared in the **Item Configurator** and the field will prompt for an allowable option. A common rule conflict is glass thickness. Best practice is to limit **Preference** selections to known build options.
- ❖ The most recently selected **Preferences** remain active whenever the **Quotes** page is revisited. Select the **Reset Selected Options** button to clear selected **Preferences**.
- ❖ To clear individual **Preferences (except Product Line)**, open the drop-down list with a click and then select the blank line. *Breather tube* can only be checked or unchecked.
- ❖ Quick build selections made in the **Preferences** section can always be changed in the **Item Configurator**.

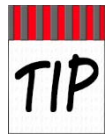
Preference Characteristics

- ❖ **Preferences** provide a shortcut to quickly build **Items** by reducing the number of build questions. A common practice is to use **Preferences** to build multiple windows with the same style (e.g., *Tuscany, White, 1 3/8" Setback, no Grids*).
- ❖ **Preference** selections remain in memory, for the same **Quote**, unless you use the **Reset selected options** button to clear all selections.


The screenshot shows the 'Preferences' window with the following settings:

Product Line (locked)	Tuscany	Fin Type (locked)	1 3/8" Setback	Opening Type (locked)	Net Frame
Exterior Finish (locked)	White	Interior Finish (locked)	White	Energy Package (locked)	Energy Star Northern
Exterior Glass (locked)	SunCoat (Low-E)	Interior Glass (locked)	Clear	Ext. Glass Thickness (locked)	
Int. Glass Thickness (locked)		Gas Filled (locked)	Argon	Breather Tube* (locked)	<input type="checkbox"/>
Grids* (locked)	No	Screen Mesh (locked)			


Buttons at the bottom: New Item, Add, Reset selected options, Library, Write-In Dealer Options, Product Catalog.



When changing the **Product Line**, it is a best practice to clear preselected options. If you don't reset selected options, a popup may appear to notify you that **Preferences** have changed. Click the **Reset selected options** button to clear previous selections and the popup.

- ❖ The *lock*  icon is a visual indicator to identify which fields have been manually set in the **Preferences** section (i.e. *Product Line* = 'Tuscany').

The screenshot is identical to the previous one, but a red box highlights the **Product Line** field, which is currently set to 'Tuscany' and has a lock icon next to it.

- ❖ The *unlock*  icon identifies unanswered and auto-filled fields.
- ❖ Items built with Preference selections can save time by completing commonly selected fields in the Item Configurator. //See [Build a Window with Preferences](#) for details.//

Understanding Rules for Item Builds



CTB Quote™ Plus applies **Rules** behind the scenes in the application when building an Item. It is only important to note that **Rules** are active and can affect application behavior (awaiting a response) or limit a selection option (e.g., 'White') based on a previous answer.

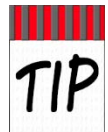
- ❖ **CTB Quote™ Plus** is an interactive tool to assist in building **Quote Items**. The interactive aspect is based, in large part, upon **Rules** in the application that check for requirements to field selections.
- ❖ **Rules** prevent build errors that might otherwise occur if all fields were open to random selections. An example of a rule: an *exterior finish* of 'Espresso' is selected, **CTB Quote™ Plus** checks all primary and secondary **Rules**. A **Rule** gets applied where the only option for *Interior Finish* is 'White', based on the selection *Exterior Finish* is 'Espresso'. The **Rules** will auto-set *Interior Finish* to 'White' to prevent an order from generating an error.
- ❖ **Rules** apply in a top-down manner to assist in filtering options based on previous selections.
- ❖ **Rules** can add supplementary fields, set secondary fields, and provide pop-up notifications when manual changes affect a previous selection or limit available options in secondary fields.
- ❖ **Rule** sets are based on *Location, Product Line, Operating Style, etc.*
- ❖ **Rules** check for unanswered questions that are required for build items.
- ❖ **Rules** will interactively return to required unanswered questions (i.e. remain active on a required field) until the selection meets Rule requirements. Select a valid option to complete the build.



If a selection is made in **Preferences**, but is invalid for the build as configured in the **Item Configurator**, the **Configurator** won't allow the build to continue until corrected. The invalid field will remain active, prompting for a valid selection.

Examples of Applied Rules:

- ❖ **Rules** for *Exterior Finish* can limit the options for *Interior Finish*
- ❖ **Energy Package Rules** limit the options for *Glazing, Outer Glass Type Lite, Spacer, etc.*
- ❖ **Location Rules** limit *Min-Max* options available
- ❖ **Rules** for **Grid** selection can limit the *Min-Max* settings

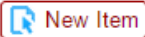

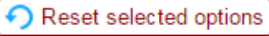


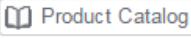


Use **Tool Tips** and **Information Links** to help identify when **Rules** might apply to selection options. See the [Tool Tips and Info Link](#) section for more details

Item Buttons Overview

Item buttons, in general, provide the ability to add **Items** to the *Shopping Cart*. Buttons with detailed options are described in the following sections.

The screenshot displays the CTBQUOTE plus software interface. At the top, there is a navigation menu with options: Home, Quotes, Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. Below this is a sub-menu with Header, Pricing, Items (highlighted), and Comments. The main content area is titled 'Item Selection' and includes a search bar for 'Item' (set to 'Window') and 'Description' (set to 'Configured Window'). There is also a 'Quantity' field (set to '1 EA') and a 'Location/Label' field. Below the search bar is a 'Preferences' section with a grid of fields for configuring the item, including Product Line, Exterior Finish, Exterior Glass, Int. Glass Thickness, Grids, Fin Type, Interior Finish, Interior Glass, Gas Filled, Screen Mesh, Opening Type, Energy Package, Ext. Glass Thickness, and Breather Tube. At the bottom of the interface, there is a toolbar with buttons for 'New Item', 'Add', 'Reset selected options', 'Library', 'Write-In Dealer Options', and 'Product Catalog'.

- ❖ **New Item** button  -Click to open the **Item Configurator** to build an **Item**.
- ❖ **Add Option** button  – Click the **Add** button to insert a **Dealer Option**, from the **Item** field selection, as a **Line Item**, to the *Shopping Cart*. //See [Dealer Options](#) for details.//
- ❖ **Reset Preferences** button  –Click to remove any selected options from the **Preferences** area and reset to defaults.
- ❖ **Library** button  –provides the option to select saved build **Items** from the Library folder to add to the *Shopping Cart*. //See [Library Options](#) section for details.//
- ❖ **Write-In Dealer Options** button  – Click to open the **Write-In Dealer Option** popup to create a one-time option to add, as a **Line Item**, to the *Shopping Cart*. //See [Dealer Options](#) chapter for details.//
- ❖ **Product Catalog** button  – //future enhancement// The **Product Catalog** button will provide the option to add specific Milgard **Items** to the *Shopping Cart*.

Comments Tab

The **Comments** tab on the **Quotes** page is available to add information, notes, or instructions relevant to the entire **Quote**. **Comments** can have different visibility rights according to where they are entered.

Steps for Header Comments

1. Click on the **Comments** tab to make it active.
2. Determine the intended visibility (i.e. Customer, Milgard, or Internal).

The screenshot shows a web interface with a navigation bar at the top containing 'Header', 'Pricing', 'Items', and 'Comments' (which is highlighted in red). Below the navigation bar, there are three distinct sections for adding comments:

- Dealer to End Customer (Print on Bid Documents)**: This section has a 'Comments:' label followed by a large text input box.
- Dealer to Milgard**: This section has a 'Comments:' label followed by a large text input box.
- Internal (Do not print or pass to Milgard)**: This section has a 'Comments:' label followed by a large text input box.

3. Enter the **Comment(s)** in the space(s) provided or edit existing **Comments**. **Comments** are saved automatically. //Clear the text in the in the **Comment** box to remove it.//

Comment Visibility

- ❖ **Dealer to End Customer** (Print on Bid Documents)
 - ◇ **Customer Comments** are intended to appear on **Print Reports** which have **Customer** visibility.
 - ◇ **Customer Comments** do not get distributed with Milgard **Orders**.
- ❖ **Dealer to Milgard** (limited to 240 characters)
 - ◇ Comments to Milgard transfer over when **Quotes** are converted to **Orders**.
 - ◇ **Dealer Comments** are intended for Milgard associates are *not* be visible on **Customer-specific Print Reports**.
- ❖ **Internal** (Do not print or pass to Milgard)
 - ◇ **Internal Comments** are for your Company/associates only and *are not visible* on **Print Reports**.
 - ◇ **Internal Comments** do not get distributed with Milgard **Orders**.

Characteristics of Comments

- ❖ Comments are saved automatically in CTB Quote™ Plus.
- ❖ There is no 'Delete' button for Comments. Clear the text in the in the Comment box to remove it.
- ❖ Comments to Milgard transfer over when Quotes are converted to Orders.

- ❖ Each Comment area has a limited display height. If more lines of text are used than is visible, a scrollbar will automatically appear to allow for additional line visibility.

- ❖ Dealer to Milgard Comments have a maximum allowance of 240 characters.
- ❖ Comments can be copied and pasted from other sources, however, formatting and styles will not be maintained.
 - ◇ Use only standard text and punctuation (letters, numbers, and punctuation).
 - ◇ Email and web addresses can be pasted into a **Comment** box but the formatting and hyperlinks will be removed.
 - ◇ Special formatting characters (e.g., picture bullets) may be removed or defaulted to a default bullet style
 - ◇ Characters used in coding (e.g., | and <> used in CSS, HTML, JavaScript, etc.) may invoke errors and should be avoided or removed to prevent or fix any error popups.



Dealer to Milgard Comments at the *Header* level have a 240-character limitation. The **CTB Quote™ Plus** text box will continue to accept additional text, but only the first 240 characters will be received on Milgard’s end when **Place Order** is submitted.


Library Items

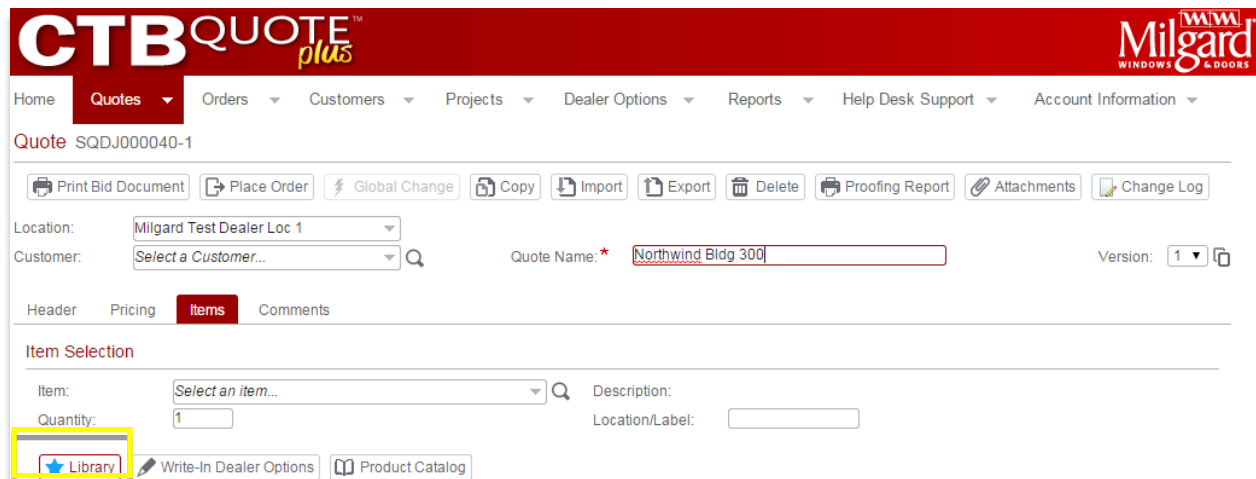
Quote Library Items can save time by having preconfigured *Shopping Cart Items* available for reuse on **Quotes**. A common-use scenario is that certain **Window** or **Door** options are sold more frequently; add these popular **Line Items** to the **Library** to have the **Item** easily available to add to new or existing **Quotes**. This section of the guide covers how to add and reuse **Library Items** within **Quotes**.



Share **Library Items** with coworkers! Customized builds or Special Composite Designs can take time to build. Save customized **Items** to the shared **Library** folder for coworker access.

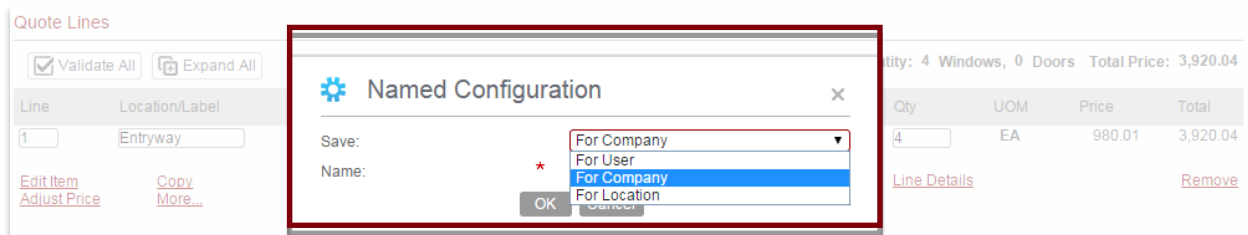
Library Characteristics

- ❖ To have preconfigured **Items** added to the **Library**, they must be built within **CTB Quote™ Plus**. **Library Items** can be saved for all configured build types (e.g., **Windows**, **Wall Systems**, or **Doors**) from the **Shopping Cart** area.
- ❖ **Items** can only be saved to the **Library** from the *Shopping Cart*.
- ❖ The **Library** button  is used to access **Library Items** that have been added to the **Library**. It's located on the **Quotes** page, in the **Item Selection** area.



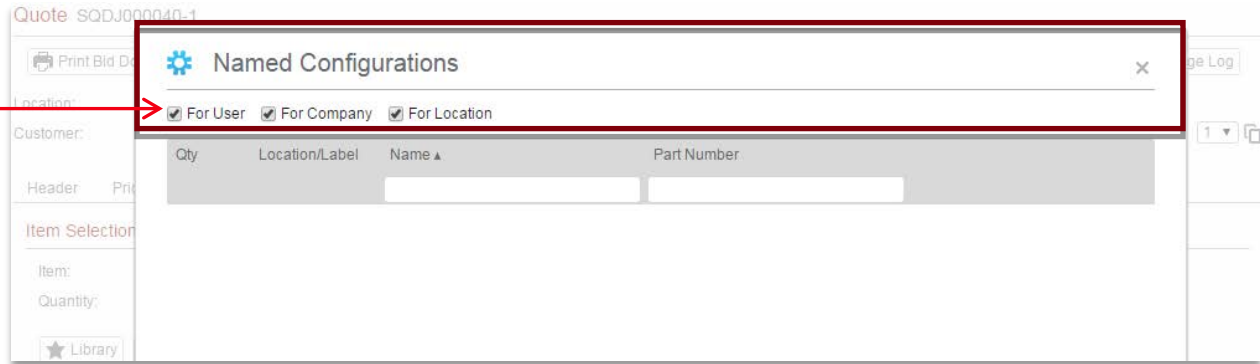
The screenshot shows the CTBQUOTE Plus software interface. The top navigation bar includes 'Home', 'Quotes', 'Orders', 'Customers', 'Projects', 'Dealer Options', 'Reports', 'Help Desk Support', and 'Account Information'. The main content area is titled 'Quote SQDJ000040-1' and includes a toolbar with buttons for 'Print Bid Document', 'Place Order', 'Global Change', 'Copy', 'Import', 'Export', 'Delete', 'Proofing Report', 'Attachments', and 'Change Log'. Below the toolbar, there are fields for 'Location' (Milgard Test Dealer Loc 1), 'Customer' (Select a Customer...), 'Quote Name' (Northwind Bldg 300), and 'Version' (1). The 'Item Selection' section is active, showing a search bar for 'Item' and 'Description', and a 'Quantity' field set to 1. The 'Library' button is highlighted with a yellow box.

- ❖ **Library Items** can be shared or saved to the '*For User*' folder (i.e., only available to your profile).
- ❖ In order for **Items** to be shared, ensure that the **Save** field is set to '*For Company* or *For Location*'.
//The screenshot below depicts a **Library Item** saved in the '*For Company*' folder.//

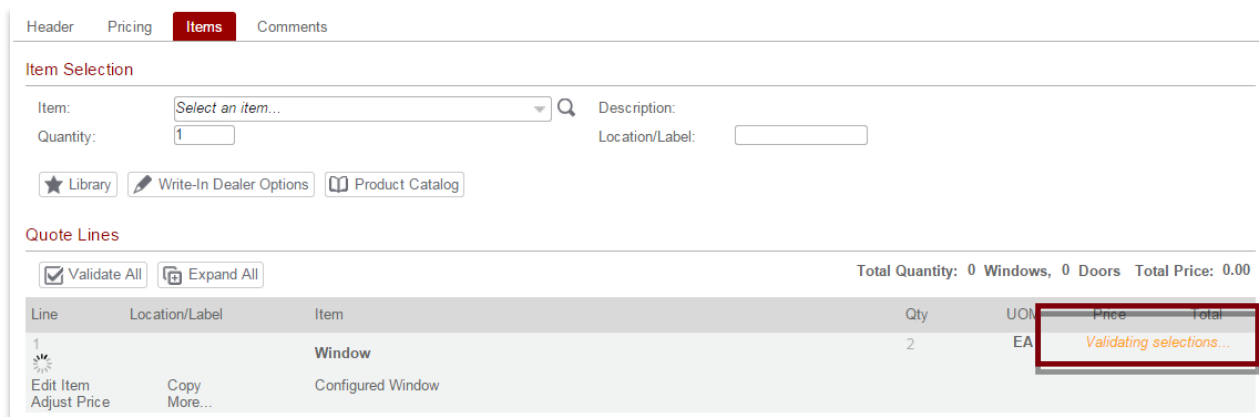


The screenshot shows the 'Named Configuration' dialog box. The 'Save' field is set to 'For Company'. The 'Name' field is empty. The dialog box has 'OK' and 'Cancel' buttons. In the background, a table shows 'Quote Lines' with columns for 'Line', 'Location/Label', 'Qty', 'UOM', 'Price', and 'Total'. The table contains one row with 'Entryway' as the location/label, a quantity of 4, and a total price of 3,920.04.

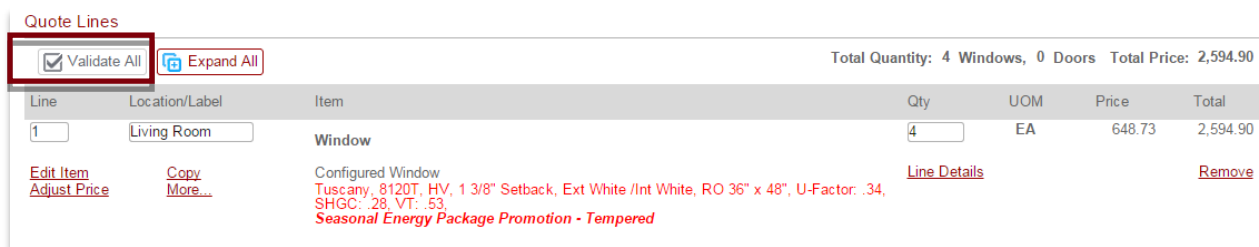
- ❖ If the **Library** is empty, the *Named Configurations* screen appears with no **Items** listed. //To prevent filtering, verify that all access options are checked (e.g., *For User*, *For Company*, and *For Location*).//



- ❖ **Items** saved to a **Library** can have different user-access settings:
 - ◇ **For User** – **Items** saved in the *User Library* folder are only available to the user who created it.
 - ◇ **For Company** – **Items** saved in the *Company Library* are available for all *Company* users.
 - ◇ **For Location** – **Items** in the *Location Library* folder are limited to **Quotes** in the same **Location**. //If only one **Location** exists, all *Company* users see the same **Location Library** folder.//
- ❖ **Library Items** added to the *Shopping Cart* are not tracked in the **Change Log**. If an audit trail of all **Quote** changes is a required part of your business process, do not use **Library Items**.
- ❖ **Library Items**, if built in a different location, may require validation to verify that build requirements are met. After adding **Library Items** to the **Shopping Cart**, the **Item(s)** will be validated.




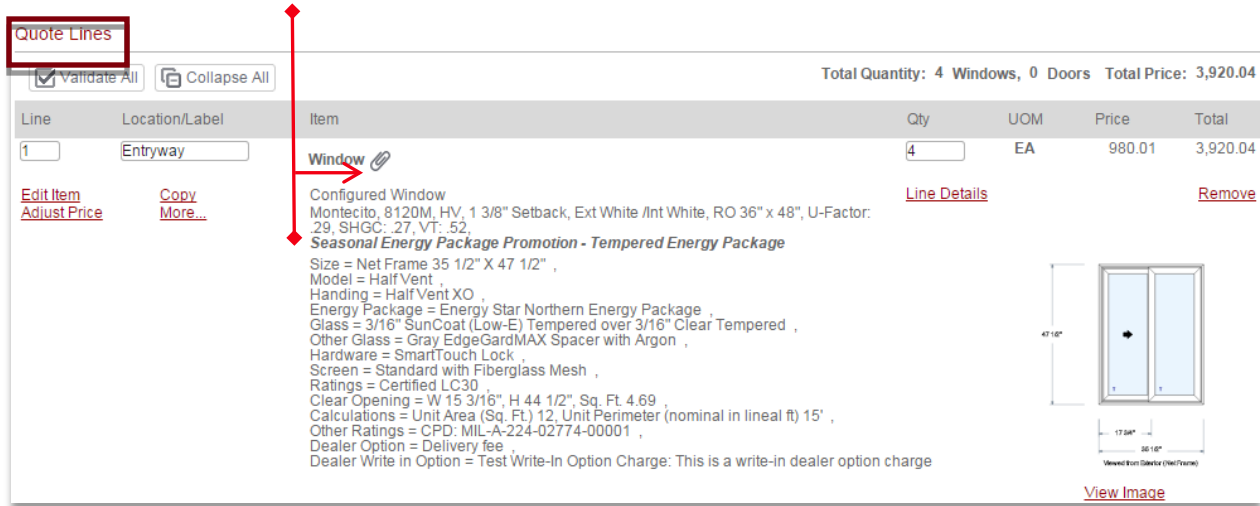
- ❖ Use the **Validate All** button to update reports/pricing/requirements with **Library Items** added to the **Shopping Cart**.



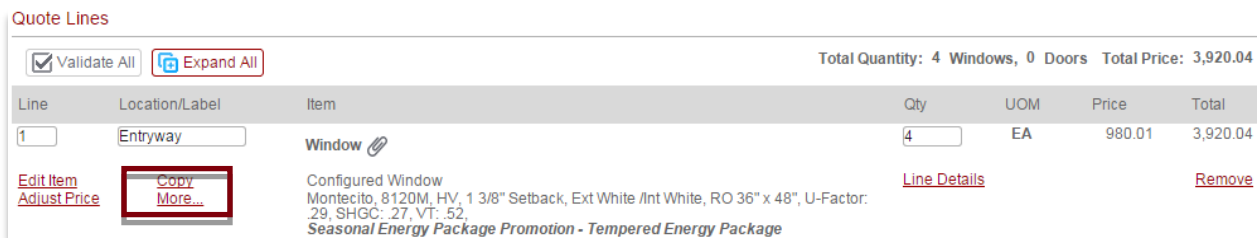
Steps to Add Items to a Library

The **Quote Lines** area (i.e., *Shopping Cart*) displays in the bottom half of the **Quotes** page once an **Item** has been added to a **Quote**. The following steps will illustrate adding a configured *Shopping Cart Item* to the **Library**.

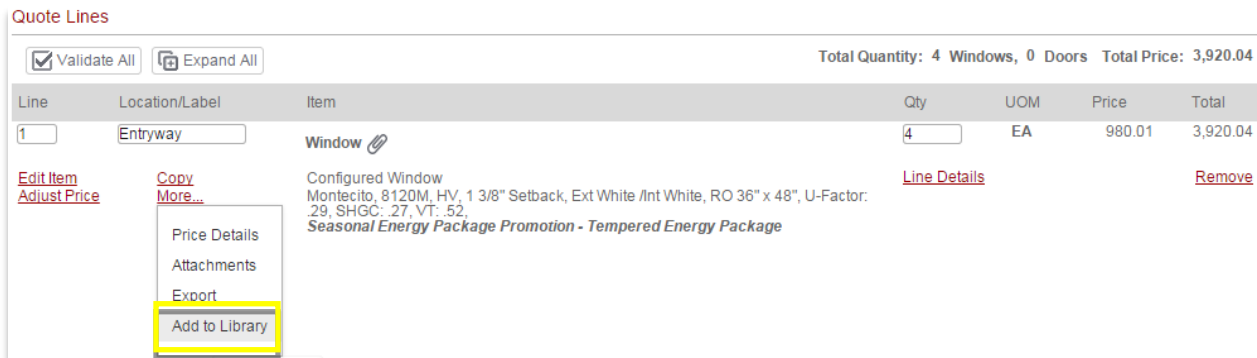
1. Identify the *Shopping Cart Item* to add to the **Library**. //The example displays a preconfigured **Window**. Note that the **Item** has an attachment  and **comments**: “*Seasonal Energy Package Promotion...*” The **Comment** will be retained. The attachment is not saved in the **Library**.//



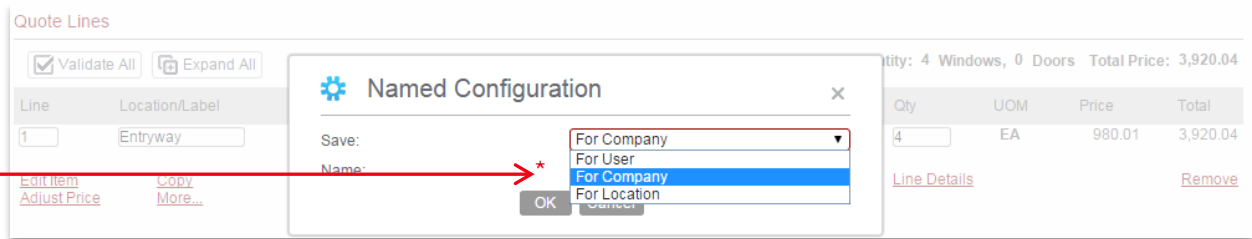
2. Click on the **More...** link next to the **Line Item**.



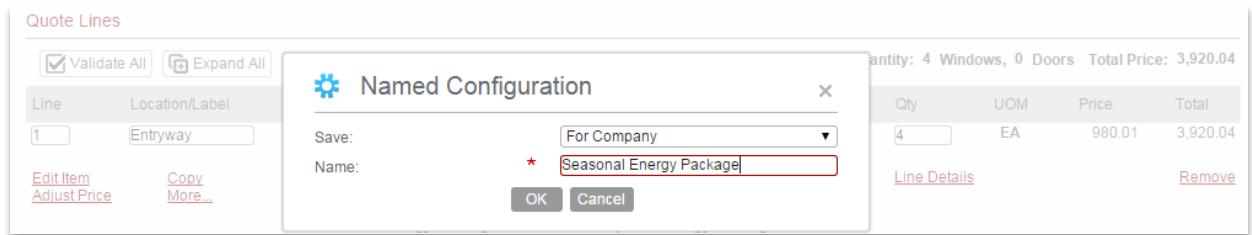
3. Select **Add to Library** from the **More...** drop-down list.



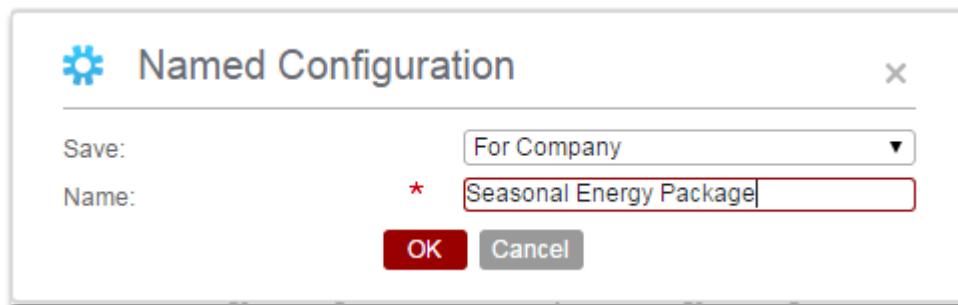
- The **Named Configuration** popup appears for entry. From the **Save** drop-down list, select the folder access-level to save the **Library Item** //In the example, *For Company* is selected.//



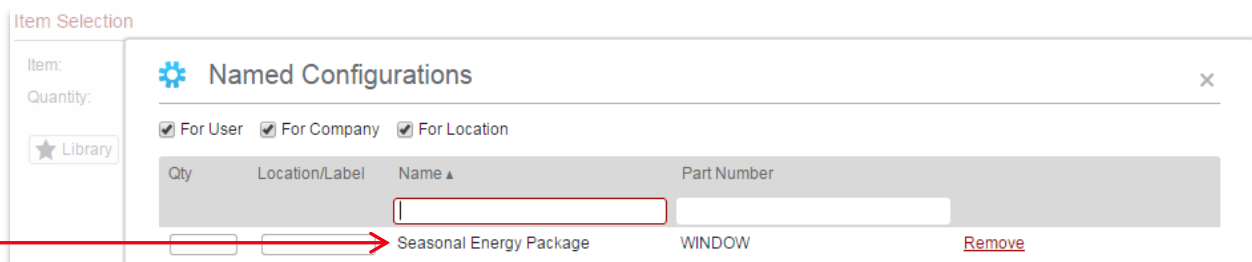
- Enter a **Name** for the **Library Item** //if shared with associates, use a **Name** they will recognize//.



- Click **OK** to save the **Library Item**. //The example illustrates a preconfigured item named “**Seasonal Energy Package**” in the *Company Library* folder ~ available to all Company users.//



- The **Library Item** is now saved and available to all users at the company.



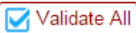


If your company offers promotional packages, build the **Window** according to promotional specifications. Add the **Window Item** to the *Company Library* to be easily added to all **Quotes** with **Customers** requesting the promotional **Item**. Size changes are a quick **Edit**.

Edit Line Items

The **Quote Lines** area (i.e., *Shopping Cart*) is where all **Line Items** are managed for **Quotes**. Available actions are briefly described below with more details in the next sections.



The screenshot shows the CTBQUOTE plus web application interface. At the top, there is a navigation menu with 'Quotes' selected. Below the menu, the 'Quote Lines' section is displayed. It includes a 'Validate All' button (checked) and a 'Collapse All' button. The total quantity is 1 Windows, 0 Doors, and the total price is 138.95. A table lists the line items, with the first item being a 'Window' with a quantity of 1, a unit of measure of 'EA', a price of 138.95, and a total of 138.95. Below the table, there are links for 'Edit Item', 'Adjust Price', 'Copy', 'More...', 'Line Details', and 'Remove'. A detailed description of the window is provided, including specifications like 'Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White, Call Out 4020, U-Factor .34, SHGC: .28, VT: .53'. There is also a 'View Image' link and a small diagram of the window.

- ❖ **Validate All** button  – click to verify all **Line Items** in the *Shopping Cart*.
- ❖ **Expand All/Collapse All** button   –toggles each button caption with the function to maximize or minimize **Line Item** details in the *Shopping Cart*.
- ❖ **Line number identifier** – the Line number is an editable field which allows resorting Line Items.
- ❖ **Location/Label** –as in the Item selection area. Provides an editable field for **Line Item** location
- ❖ **Qty** – Quantity identifies the number of **Items**
- ❖ **UOM, Price, and Total** – read-only fields from **CTB Quote™ Plus** to identify **Line Item** prices.
- ❖ **Edit Item** link - opens the **Item Configurator** to make changes to the build options (e.g., add Grids, change sizes, etc.) for configured **Line Items**. //See the [Item Configurator](#) section for details.// For Write-In Dealer Options, the **Edit Item** link opens the Edit popup window.
- ❖ **Adjust Price** link - Click on the **Adjust Price** link in the *Shopping Cart* to make *individual Line Item* price adjustments (Use the **Pricing** tab for overall **Quote** pricing adjustments).
- ❖ **Copy** link - Click on the **Copy** link in the *Shopping Cart* to copy a **Line Item**.
- ❖ **More...** link - Click on the **More...** link in the *Shopping Cart* to view additional **Line Item** options (e.g., **Line Item Attachments, Add to Library** and **Price Details**).
- ❖ **Line Details** link - Click on the **Line Details** link to expand individual **Line Item** details.
- ❖ **View Image** link - Click on the **View Image** link in the *Shopping Cart* to view a larger image, if available.
- ❖ **Remove** link - Click on the **Remove** link in the *Shopping Cart* to delete a **Line Item**.

Validate All Button

The **Validate All** button is used to update **Items** in the *Shopping Cart*. Occasionally, location changes or imported **Line Items** may cause **Items** in the *Shopping Cart* to display “*Validation Required*” (screenshot below). Select the **Validate All** button to resolve the popup and update **Price** and **Total**. //The message ‘*Attention Required*’ requires the [Edit Item](#) link to resolve build requirements.//

Quote Lines						
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Expand All		Total Quantity: 0 Windows, 0 Doors Total Price: 0.00		
Line	Location/Label	Item	Qty	UOM	Price	Total
1		Window	1	EA	Validation Required	
Edit Item Adjust Price		Validate More... Configured Window Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White, Call Out 4020, U-Factor: 0.34, SHGC: 0.28, VT: 0.53, Dealer to End Customer Comments				Remove

Expand All/Collapse All Button

The **Expand All** or **Collapse All** button toggles the button caption when clicked. Figure I displays **Line Items** in the *Shopping Cart* with minimum details in collapsed view (the **Expand All** caption is visible). Figure II displays maximum details in expanded view (the **Collapse All** caption is visible).

Quote Lines						
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Expand All		Total Quantity: 10 Windows, 0 Doors Total Price: 5,559.49		
Line	Location/Label	Item	Qty	UOM	Price	Total
1	Side Windows	Window	4	EA	702.21	2,803.48
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42 Line Details				Remove
2	Entryway	Window	2	EA	463.12	926.23
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .53 Line Details				Remove
3	Offices	Window	2	EA	615.00	1,230.00
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .52 Line Details				Remove
4	Bathrooms	Window	2	EA	250.34	500.68
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Montecito, 8120M, HV, 1 3/8" Setback, Ext Espresso/Int White, Net Frame 42" x 30", U-Factor: .34, SHGC: .28, VT: .53 Line Details				Remove
5		Expedited Service	1	EA	99.11	99.11
Copy More...		Adjust Price Extra installer				Remove

FIGURE I. COLLAPSED VIEW

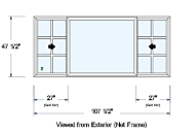
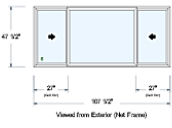
Quote Lines						
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Collapse All		Total Quantity: 10 Windows, 0 Doors Total Price: 5,559.49		
Line	Location/Label	Item	Qty	UOM	Price	Total
1	Side Windows	Window	4	EA	702.21	2,803.48
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42 Line Details Size = Net Frame 107 1/2" X 47 1/2" , Dimensions = Sash Width One Quarter , Model = Double Vent , Handling = Double Vent XOX Glass = 3/32" SunCoat (Low-E) over 3/32" Clear , Other Glass = Gray EdgeGard Spacer with BreatherTube , Grid 1.1-DV Left Vent 1.1-DV Right Vent = Sculptured Ext White/Int White 0" Colonial 2W3H , Hardware = SmartTouch Lock Screen = Standard with Fiberglass Mesh , Ratings = STC: No Rating, OITC: No Rating, Certified LC25 , Clear Opening = W 24 1/8" x H 44 1/2" Sq. Ft. 7.46 Egress: Yes Calculations = Unit Area (Sq. Ft.) 35, Unit Perimeter (nominal in lineal ft) 27' , Other Ratings = CPD: MIL-A-224-02287-00003 , Dealer Write in Option = Special Install				Remove
						View Image
2	Entryway	Window	2	EA	463.12	926.23
Edit Item Adjust Price		Copy More... CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .53 Line Details Size = Net Frame 107 1/2" X 47 1/2" , Dimensions = Sash Width One Quarter , Model = Double Vent , Handling = Double Vent XOX Glass = 3/32" SunCoat (Low-E) over 3/32" Clear , Other Glass = Gray EdgeGard Spacer with BreatherTube , Hardware = SmartTouch Lock Screen = Standard with Fiberglass Mesh , Ratings = STC: No Rating, OITC: No Rating, Certified LC25 , Clear Opening = W 24 1/8" x H 44 1/2" Sq. Ft. 7.46 Egress: Yes Calculations = Unit Area (Sq. Ft.) 35, Unit Perimeter (nominal in lineal ft) 27' , Other Ratings = CPD: MIL-A-224-02287-00001				Remove
						View Image

FIGURE II. EXPANDED VIEW

Line Numbering Field

The **Line** number is an editable field which allows re-sorting **Line Items**. To re-sort or reorder **Line Items**, change the **Line Number** to the desired position in the *Shopping Cart* and use the *Tab* key to implement the change. //The screenshot below shows the **Line Number '4' Item**. To position as the first **Item** in the *Shopping Cart* (i.e., **Line 1**), change the '4' to a '1' and *Tab* off to implement.//

Location/Label Field

The **Location/Label** offers the option to label the **Line Item** in the *Shopping Cart* with a location identifier. Location labels help reference **Items** or identify where the **Items** are to be installed (e.g., assists third party contractors with installation). *Shop Drawings* and other reports display the **Location/Label** for easy identification.

Quantity (QTY) Field

Quantity identifies the requested number of **Items**. The default quantity is '1'. The **QTY** field is updatable with the **Line Item Price** and **Total** updated automatically.

Edit Item Link (Update Line Items)

The **Edit Item** link is, generically, the tool to update **Line Items** in the *Shopping Cart*.

- ❖ For configured **Line Items** (e.g., Windows, Doors, etc.) selecting the **Edit Item** link opens the **Item Configurator** to view or make changes to build options (e.g., add Grids, change sizes, etc.) for. //See the [Item Configurator](#) section for details.//
- ❖ For **Write-In Dealer Options**, selecting the **Edit Item** link opens the popup window to view or edit **Write-In Dealer Option** fields.



There is no visibility of the **Edit Item** link for standard **Dealer Options** in the *Shopping Cart*. See the [Dealer Options](#) chapter for details.

Adjust Price Link

The **Adjust Price** link in the *Shopping Cart* provides the option to make *individual Line Item* price adjustments (Use the **Pricing** tab for overall **Quote** pricing adjustments). //Not all profiles can make price adjustments. If there are no editable fields, (1st screenshot) see your administrator for assistance.//

The screenshot shows a dialog box titled "Adjust Price" with a close button (X) in the top right. Below the title bar, there is a section for "Price Adjustments". Under this section, the text "Additional Discount %" is followed by the value "0.89 %". At the bottom of the dialog, there are two buttons: "OK" (highlighted in red) and "Cancel".

- ❖ Select the **Adjust Price** link to the left of the **Line Item** to adjust. Make price changes, as applicable, and click **OK** to confirm (and save) changes.

This screenshot shows a more detailed "Adjust Price" dialog box. It has the same title and close button. Under "Price Adjustments", there are three rows of input fields:

- "Manufacturer's Discount (On Factor)" with a value of "0.330" in a text box.
- "My Upcharge (Markup %)" with a value of "20" in a text box followed by a "%" sign.
- "Additional Discount %" with a value of "0.89 %".

 At the bottom, there are "OK" and "Cancel" buttons.

Copy Link

The **Copy** link in the *Shopping Cart* makes an exact copy of a **Line Item**. The copied **Line Item** will have the same **Location/Label, Quantity**, and configuration settings (to include customizations, **Line Level Attachments, Line Item Comments & Dealer Options**). Copied **Line Items** appear at the bottom of the *Shopping Cart* (i.e., hold the last **Line Number** position).

- ❖ Click the **Copy** link to the left of the **Line Item** to copy. The copied **Item** is added to the bottom of the *Shopping Cart* //Line Number '4' is copied. The copy is **Line '6'** in the illustration below.//

4	Offices	Window	2	EA	615.00	1,230.00
Edit Item	Copy	CONFIGURED WINDOW	Line Details			Remove
Adjust Price	More...	Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .52				
5		Expedited Service	1	EA	99.11	99.11
Copy	Adjust Price	Extra installer				Remove
More...						
6	Offices	Window	2	EA	615.00	1,230.00
Edit Item	Copy	CONFIGURED WINDOW	Line Details			Remove
Adjust Price	More...	Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .28, VT: .52				



Verify or update copied **Line Items**, for clarity. **Location/Label** duplications can cause installation confusion.

More... Link

The **More...** link opens a popup of additional **Line Item** options, such as the following:

Quote Lines

Validate All Expand All Total Quantity: 10 Windows, 0 Doors Total Price: 5,559.49

Line	Location/Label	Item	Qty	UOM	Price	Total	
1	Side Windows	Window	4	EA	702.21	2,803.48	
		CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42					Line Details Remove
2	Bank	Window	2	EA	250.34	500.68	
		CONFIGURED WINDOW Montecito, 8120M, HV, 1 3/8" Setback, Ext Espresso/Int White, Net Frame 42" x 30", U-Factor: .34, SHGC: .28, VT: .53					Line Details Remove
3	Entryway	Window	2	EA	463.12	926.23	
		CONFIGURED WINDOW					Line Details Remove

❖ **Price Details** – opens a screen with **Item** pricing details (like *Details* view in the **Item Configurator**)

Price Details

Energy Ratings:

U-Factor / SHGC / VT: .34 / .23 / .42
 CPD: MIL-A-224-02287-00003
 Clear Opening 1.1 DV W 24 1/8" x H 44 1/2"
 Sq. Ft. Area 7.46
 Egress: Yes

EGRESS DISCLAIMER
 Egress compliance was calculated according to the IBC (International Building Code) requirements for above-grade applications.
 Please validate against local codes and all applicable installation conditions and requirements.

Performance Ratings:

STC / OITC: No Rating / No Rating
 Performance Grade Certified LC25

Calculations:

Unit Perimeter (nominal in lineal ft) 27"
 Unit Sq. Ft: 35
 Glass Sizes: DV-Left Vent 23 13/16" X 42 5/8"
 Glass Sizes: DV-Fixed 52" X 42 5/8"
 Glass Sizes: DV-Right Vent 23 13/16" X 42 5/8"

Summary Pricing (Pricing Date:10/08/2015)

Tuscany, 8120T, DV, Call Out 9040 1,180.00
 Custom Grid Option 227.00
 Total List Price 1407.00

Dealer Options

Special Install (1.00 EA @ 150.00) 150.00

Rebar 1.1 DV: Yes
 HFA Model DV

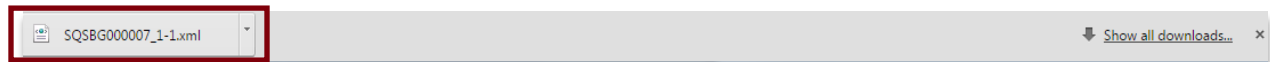
Close

❖ **Attachments** – opens the *Line Attachments* wizard to save an attachment to the **Item**.

Line Attachments

Line	Description	File Name	Size
1	Outside View Side Window Replacement	LineAttachment.PNG	13.9 KB

❖ **Export** – downloads the **Line Item** in the default xml format //see [Import/Export](#) for details//



❖ **Add to Library** – opens the *Named Configurations* wizard to save the **Line Item** to a Library folder.

Named Configuration

Save: For Company
 Name: * Seasonal Energy Package

Quantity: 4 Windows, 0 Doors Total Price: 3,920.04

Qty	UOM	Price	Total
4	EA	980.01	3,920.04

[Line Details](#) [Remove](#)

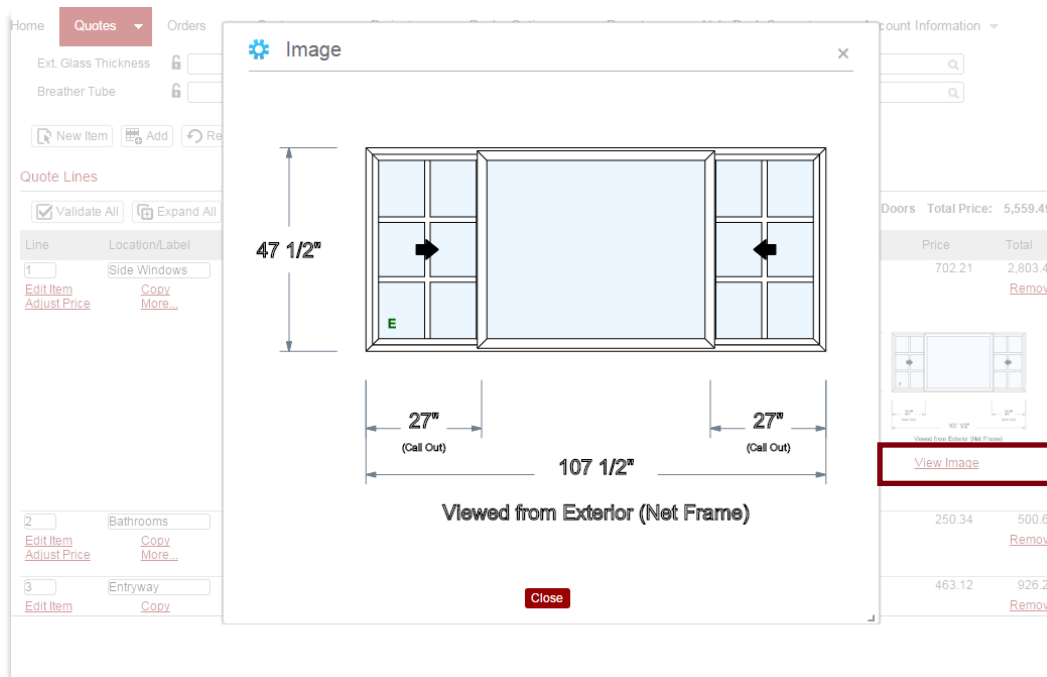
Line Details Link

The **Line Details** link functions similar to the **Expand All/Collapse All** button at the line level. Click on the **Line Details** link in the *Shopping Cart* to expand or collapse the view of the individual **Line Item**.

Quote Lines						
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Expand All		Total Quantity: 10 Windows, 0 Doors Total Price: 5,559.49		
Line	Location/Label	Item	Qty	UOM	Price	Total
1	Side Windows	Window	1	EA	702.21	2,803.48
Edit Item Adjust Price		Copy More...		Line Details		Remove
<small>CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42</small>						

View Image Link

The **View Image** link, only visible for configured Items when the **Line** is expanded, provides a larger popup view of the 2D image for that **Line Item**. Click on the **View Image** link to view a larger image.



Remove Link

Click on the **Remove** link in the *Shopping Cart* to delete the **Line Item**.

Quote Lines						
<input checked="" type="checkbox"/> Validate All		<input type="checkbox"/> Expand All		Total Quantity: 10 Windows, 0 Doors Total Price: 5,559.49		
Line	Location/Label	Item	Qty	UOM	Price	Total
1	Side Windows	Window	4	EA	702.21	2,803.48
Edit Item Adjust Price		Copy More...		Line Details		Remove
<small>CONFIGURED WINDOW Tuscany, 8120T, DV, 1 3/8" Setback, Ext White /Int White, Call Out 9040, U-Factor: .34, SHGC: .23, VT: .42</small>						



The **Remove** link is an immediate action and there is **NO CONFIRMATION POPUP!!!** Ensure that deleting the **Line Item** is the intent as there is no undo option in **CTB Quote™ Plus..**

Item Configurator Views

The **Item Configurator** is where all selections are made available to build a **Line Item** (e.g., Windows, Doors, and Moving Glass Wall Systems). The Item Configurator is separated into the Left (build) Panel and the Right (Visualization) Panel. This section provides **Item Configurator** options in detail.

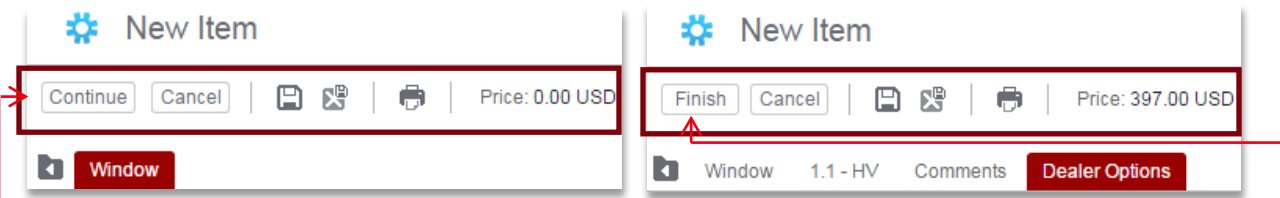
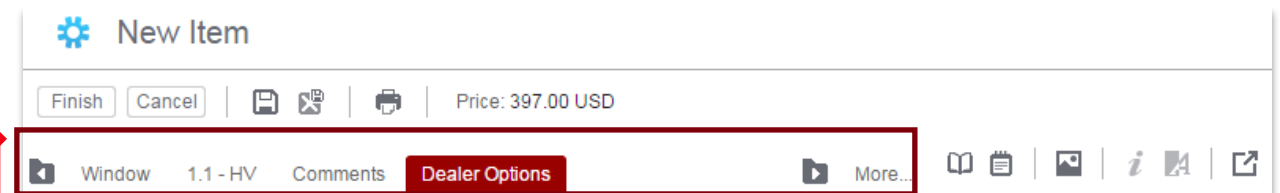


FIG. III

FIG. IV

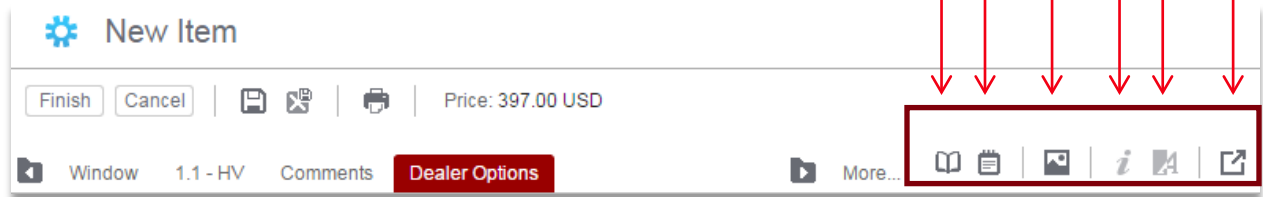
- ❖ The following screen options are available from the **Item Configurator** header area:
 - ◇ Continue button - the Continue button (Fig. 1) is visible until all required fields are answered
 - ◇ Cancel button - Cancels any selections, or changes, and closes the Item Configurator
 - ◇ Save – allows current selections or edits to be saved without finalizing the build
 - ◇ Save and Close – Saves changes and then closes the Item Configurator
 - ◇ Print – offers the option to print or save a detailed view of the Line Item (e.g., combines data from summary, detail, and image views)
 - ◇ Price - Shows the List price of the Line Item, as built. Updates when options affect calculations
 - ◇ Finish button – The Finish button (Fig. 2) is only visible in the final step of Line Item build









- ❖ The **Item Configurator** offers a left and right panel with separate functions (and scrollbars). The **Left Panel** provides build selections, **Comments** and **Dealer Options**. The **Right Panel** displays view options for the **Line Item**.

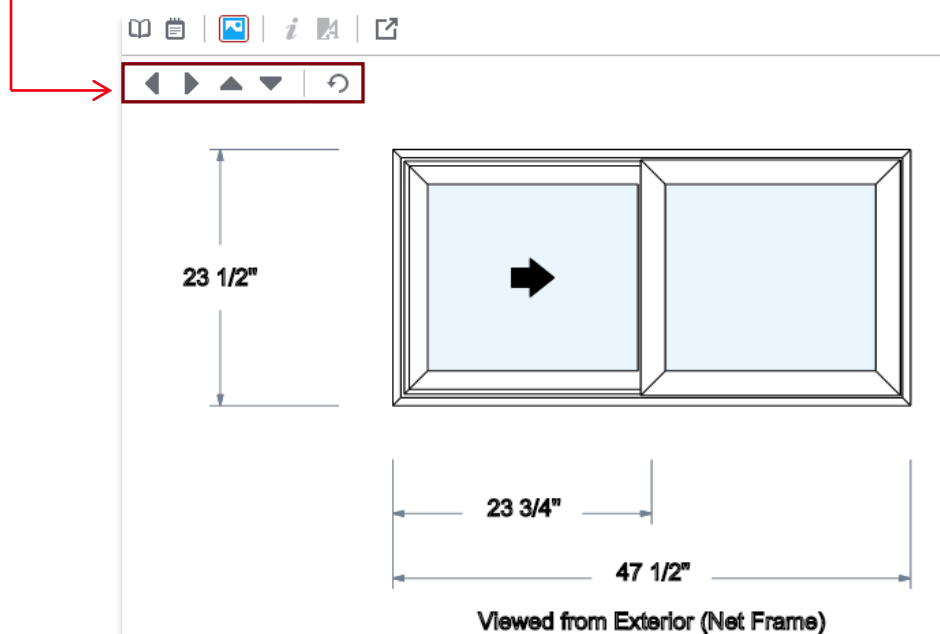





- ❖ Line Item Options (Left Panel):
 - ◇ **Scroll icons** – only active when Line Item tabs extend beyond visibility. Click left or right scroll arrow to view hidden *sub-tabs*.
 - ◇ **Item tab** - displays the primary **Item** type(e.g., Window) and overall build options (e.g., **Product Line, Dimensions, Style**). Use the primary **Item** tab (e.g., Window tab) for overall settings.
 - ◇ **Sub-tabs** –displays secondary Line Items specific settings (e.g., glass and grid customizations). Sub-tabs (e.g., 1.1-DH) vary by Item, therefore, may not always appear.
 - ◇ **Comments tab** –specific **Line Item comments** can be added on the **Comments** tab. Visibility rights apply as it does on the *header Comments* tab //see [Comments Tab](#) for details//.
 - ◇ **Dealer Options tab** – Dealer Options specific to the Line Item can be added //see Dealer Options for Details//.
 - ◇ **More...** link – provides a drop-down quick view of all tabs available.

❖ Visualization Icons (Right Panel)




- ◇ **Summary icon**  Opens a *summary* of all build selections (i.e. answers) for the Line Item. Select the Summary icon for a view of build selections. When the Summary view is active, line answers are interactive. Click a Line item answer to open the corresponding left panel query for quick editing.
- ◇ **Details icon**  Opens a *detailed* view of Line Item information (e.g., Energy and Performance Ratings, price breakdowns). Click the Details icon to view Line Item specific data
- ◇ **Image icon**  Opens Line Item image(s), if available. Click the Image icon to view 2D images. When the Image icon is active, changes that affect the image display (e.g., grids and glass customizations) are immediately visible.
 - Move arrows     - Change the image position within in the visualization pane.
 - Reset icon  - resets the image position in the visualization pane

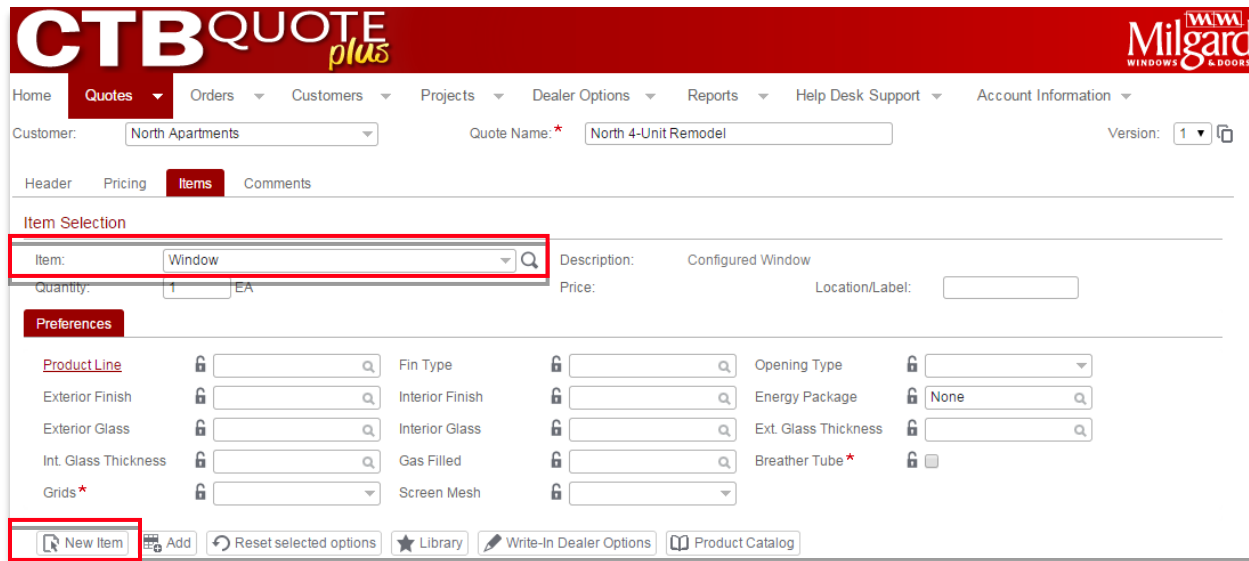


- ◇ **Info icon**  -Displays Info links, when available. Info links are found on the primary build tab (i.e., Window). If the Info icon is greyed out, no Info links are active (see [Info Links and Tool tips](#) for details).
- ◇ **Application Link icon**  greyed out as inactive ~ potential CTB Quote™ Plus usage
- ◇ **Full Screen icon**  -opens the right panel view into a separate screen or tab. Select the Full Screen icon to open the right panel into a separate window.

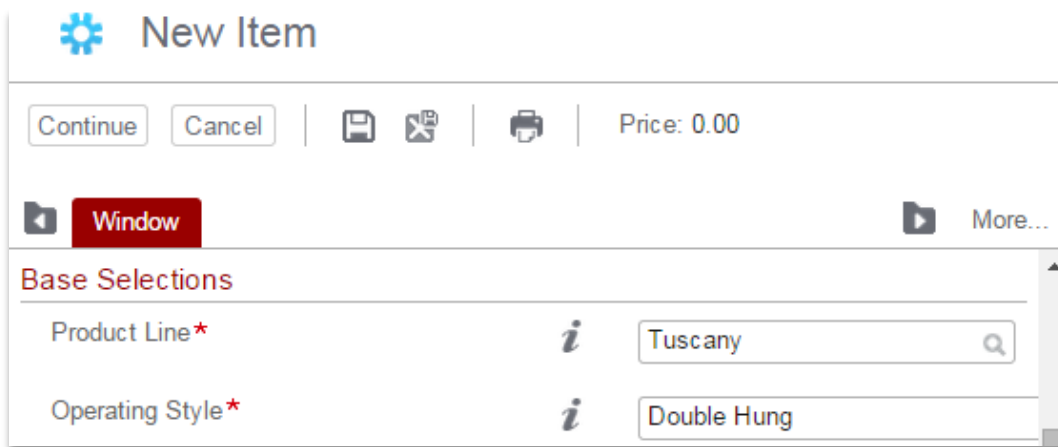
Line Item Comments

Individual **Line Item Comments** can be added in the final step of building a **configured Item (e.g. Window, Door, etc.)**. The **Comments** tab becomes visible after glass is configured. You can add a **Line Item Comment** at the time of build or by editing a completed **Line Item**. The following steps identify adding **Line Item Comments** for a new **Window**. //The same steps apply for adding **Line Item Comments** to a **Door** or **Wall System**. See [Comments Tab](#) for comparison to overall **Quote Comments**://

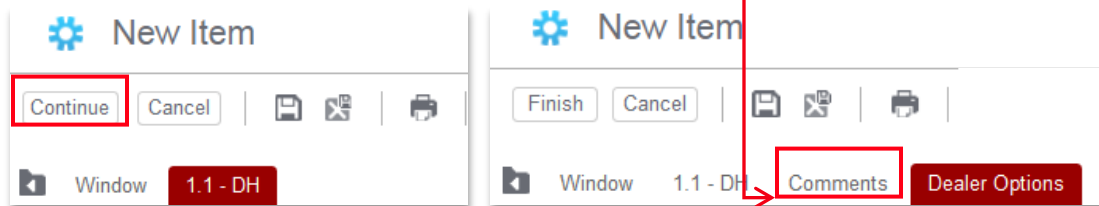
1. From the **Quotes** page, with the **Items** tab active, select the **Item** to build from the **Item** drop-down list //Window is selected in the example//.
2. Click the **New Item** button  **New Item** //See [Detailed Quote Steps](#) for more details.//



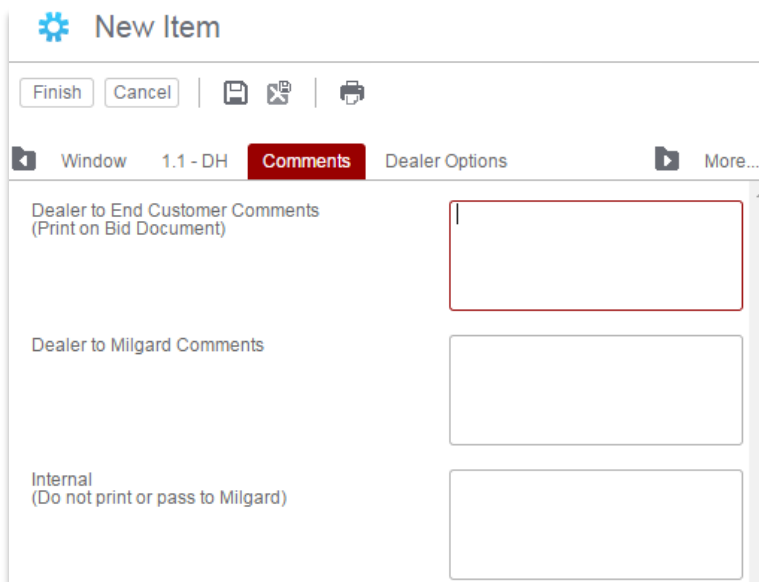
3. The **New Item** button opens the **Item Configurator** to the **Window** tab. Answer the questions to build the **Window**.



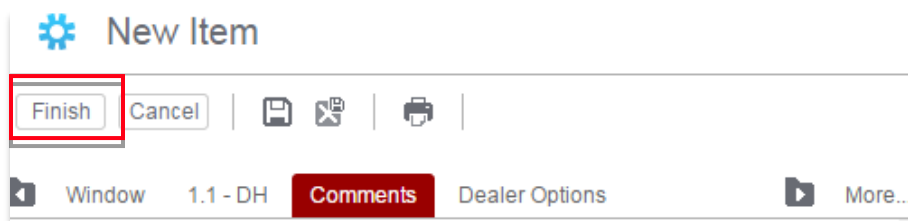
- Once all **Window** or **Door** questions are answered, sub-tabs may appear for **Glass** settings. Finalize the build, as applicable, with the **Continue** button, in the upper left corner of the **Item Configurator**, until the **Finish** button and **Comments** tab appear.



- Click on the **Comments** tab to view. Enter **Comment(s)** in the space provided with visibility relevant to the intended audience (i.e. **Customer, Milgard, or Internal**).



- Click the **Finish** button to save changes and return to the **Quotes** page.



If the **Finish** button is not active, click the **Save** icon  to prompt **CTB Quote™ Plus** to wake up and finalize the build.

Line Item Comment Visibility

Comments can have distinct visibility rights, depending on the text box in which they are added. The following section describes where **Line Item Comments** are visible.

- ❖ All **Line Item Comments** are reviewable from the *Summary* view within the Item Configurator.

The screenshot shows the 'Edit Item' window with a 'Comments' tab selected. On the left, there are three comment categories: 'Dealer to End Customer Comments (Print on Bid Document)', 'Dealer to Milgard Comments', and 'Internal (Do not print or pass to Milgard)'. Each category has a corresponding text box containing sample comments. On the right, there is a list of technical specifications for a window. At the bottom right, a 'Comments' summary table is displayed, listing the comments and their categories.

Comments	
Dealer to End Customer Comments (Print on Bid Document)	Seasonal Energy Package Promotion - Tempered
Dealer to Milgard Comments	This is my comment to Milgard
Internal (Do not print or pass to Milgard)	Referral Customer - special energy package promotion extended

- ❖ Dealer to End Customer (Print on Bid Documents)

- ◇ **Customer Comments** are intended to appear on reports and have **Customer** visibility.
- ◇ **Line Item Customer Comments** will display bold, and in red, in the *Shopping Cart*.

The screenshot shows the 'Quote Lines' table with a single line item. The comment 'Seasonal Energy Package Promotion - Tempered' is highlighted in red and bold in the item description.

Line	Location/Label	Item	Qty	UOM	Price	Total
1		Window	1	EA	648.73	648.73

Configured Window
Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White, RO 36" x 48", U-Factor: .34, SHGC: .28, VT: .53, **Seasonal Energy Package Promotion - Tempered**

- ❖ Dealer to Milgard //50 characters MAX!!!//

- ◇ **Dealer to Milgard Comments** are intended for Milgard associates and *are not* visible on reports.

- ❖ Internal (Do not print or pass to Milgard)

- ◇ **Internal Comments** are for your Company/associates only and *are not* on reports.
- ◇ **Internal Comments** do not get distributed with Milgard **Orders**.
- ◇ **Internal Comments** do not have visibility in **Quote Lines** (i.e., *Shopping Cart*).



Dealer to Milgard Comments at the *line level* have a **50-character limitation**. The **CTB Quote™ Plus** text box will continue to accept additional text, but only the first 50 characters will be received on Milgard's end when Place Order is submitted.

Line Item Attachments

This section lists the steps to add attachments to an individual **Line Item**. //See [Attachments Button](#) for options at the Header Level.//

1. From the **Quotes** page, find the **Line Item** in the *Shopping Cart*, where the file is to be attached. Click on the **More...** hyperlink to open the popup of available options.

Quote Lines

Validate All Expand All Total Quantity: 0 Windows, 1 Doors Total Price: 411.52

Line	Location/Label	Item	Qty	UOM	Price	Total
1	Kitchen	Door	1	EA	411.52	411.52

[Edit Item](#) [Adjust Price](#) [Copy](#) [More...](#) [Line Details](#) [Remove](#)

Configured Door
 Style Line: 6610, SD2: 1 3/8" Setback, Ext White /Int White, RO 72" x 82", U-Factor: .33, SHGC: .31, VT: .58

2. Select **Attachments** from the list of popup options.

Quote Lines

Validate All Expand All Total Quantity: 0 Windows, 1 Doors Total Price: 411.52

Line	Location/Label	Item	Qty	UOM	Price	Total
1	Kitchen	Door	1	EA	411.52	411.52

[Edit Item](#) [Adjust Price](#) [Copy](#) [More...](#) [Price Details](#) [Attachments](#) [Line Details](#) [Remove](#)

Configured Door
 Style Line: 6610, SD2: 1 3/8" Setback, Ext White /Int White, RO 72" x 82", U-Factor: .33, SHGC: .31, VT: .58

3. The **Line Attachments** grid opens with a list of any attached files. Click the **New** button to open the **Line Attachments** wizard to add a new attachment.

Line Attachments

Line	Description	File Name	Size

Page 1 of 1 No records to view

4. Add an easy to identify label or description in the required * **Description** field.

Line Attachments

Description *

File *

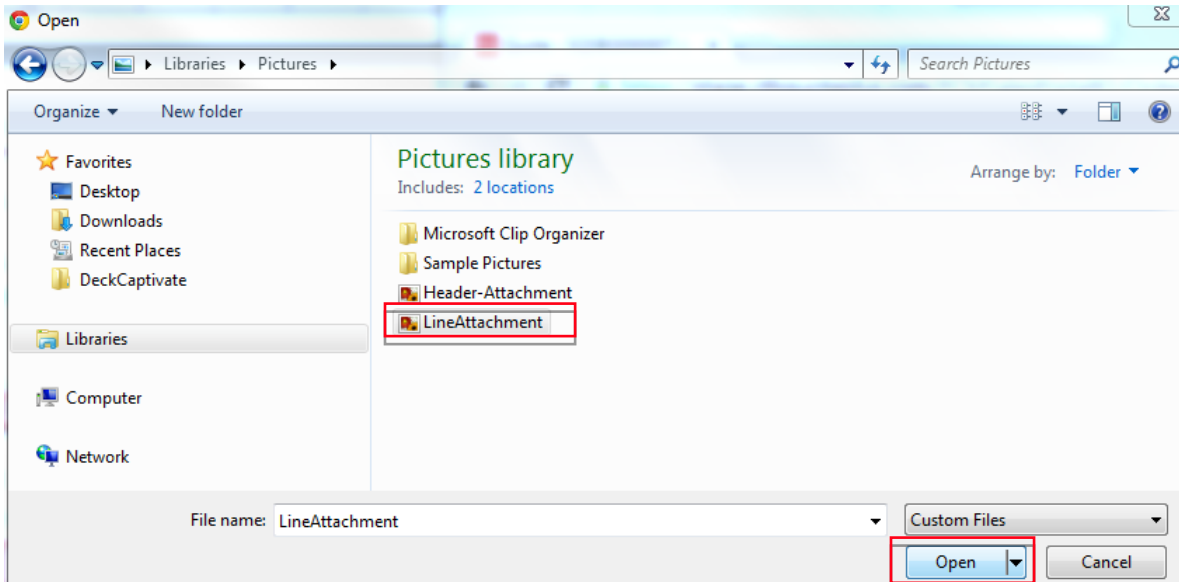
5. Click the **Folder** icon in the **File** field to browse for the file on your computer.

Line Attachments

Description * Door Install drawing

File * 

6. Select the file to attach and then click on the 'Open' button to close Windows Explorer.

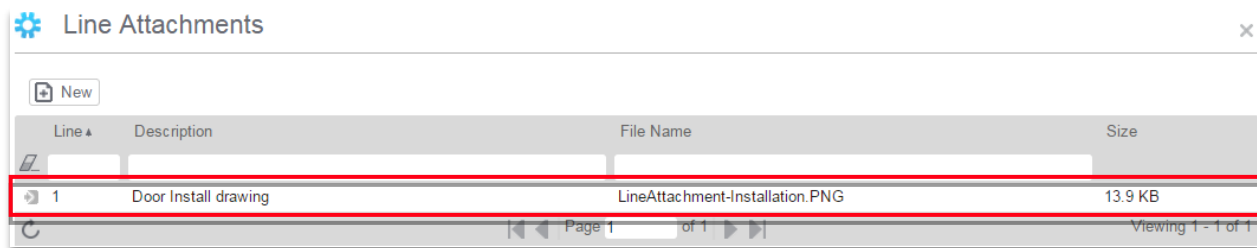


7. With the file displayed in the **File** field, click the **Save** button, in the upper left part of the screen.

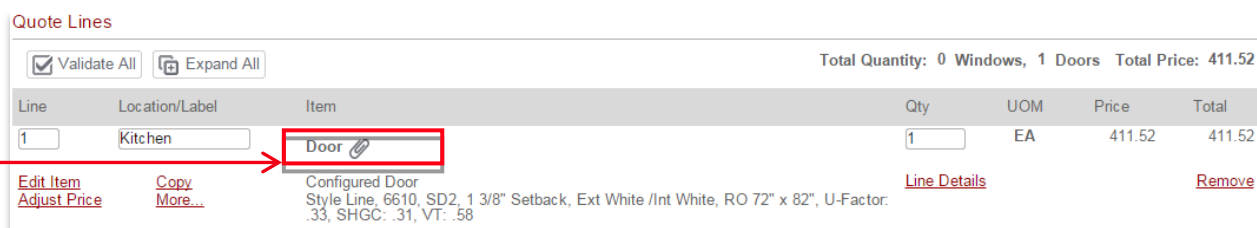



The **Close** button **will not** save the file to the **Quote**! Click the **Save** button, located in the upper left part of the screen, to save the displayed file as an attachment.

8. The saved file now displays in the **Line Attachments Search grid**.



9. Close the **Line Attachments** screen to return to the **Quotes** page.



The *Paperclip* icon  displayed to the right of the **Item Description** ('Door' in the illustration) identifies that a file is attached to the **Line Item**.

Tool Tips and Info Links

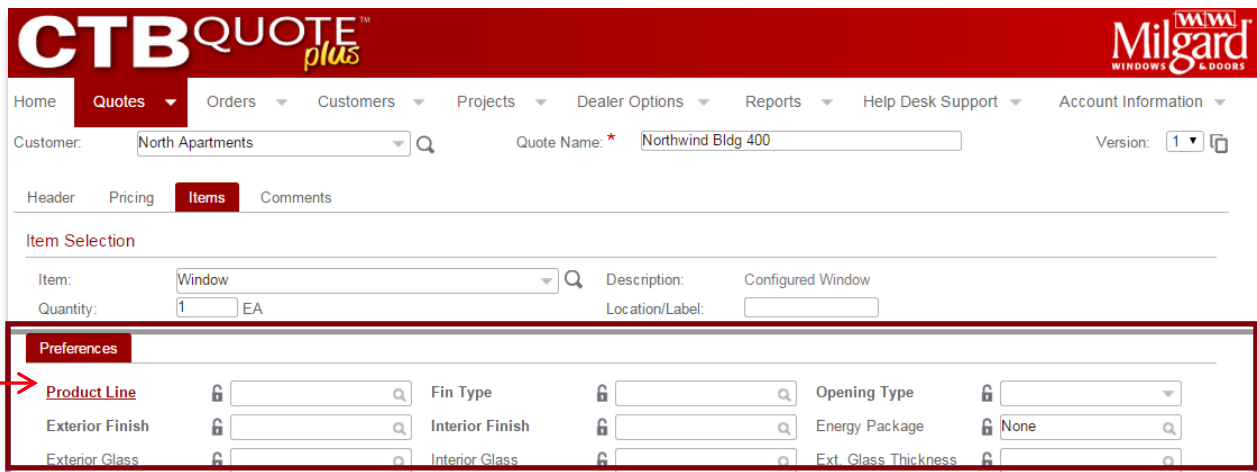
Tool Tips and **Info Links** are available on the **Quotes** pages to provide additional information or supporting links to Milgard product pages.

Tool Tip Characteristics

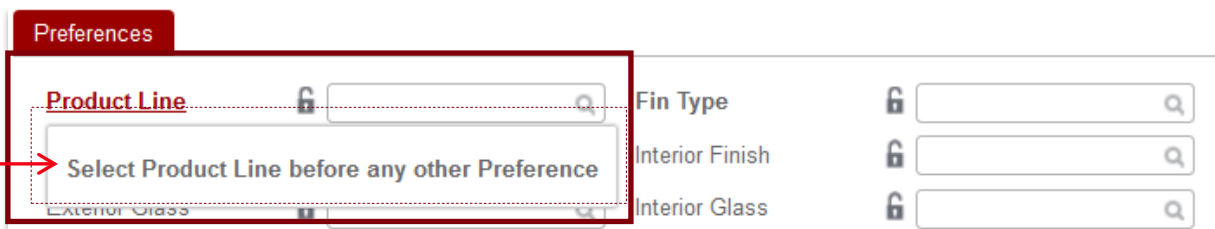
- ❖ **Tool Tips** offer the following benefits:
 - ◇ Assists with answering **Item** build options (e.g., **Min-Max** limitations, etc.)
 - ◇ Defines terms
 - ◇ Provides guidance if answers have constraints or automatic inclusions
 - ◇ Indicates size restraints
- ❖ **Tool Tips** are mostly found in the **Item Configurator**, but are seen elsewhere (e.g. **Preferences**).
- ❖ **Tool Tips** are identified on field names with an underline and styled red.

View a Tool Tip

1. To view **Tool Tips**, open a new or existing **Quote** and ensure the **Items** tab is active.
2. Select a **Window** or **Door** as the **Item** //the example displays a **Window**//.



3. The **Preferences** section is displayed. The **Tool Tip** for Product Line is easily identified by the red color and underline, which is distinctive from other field names.
4. Hover the mouse over the **Tool Tip** for Product Line. The **Tool Tip** popup box appears.



5. Move your mouse away from the underlined area to close the **Tool Tip** popup. //Tool Tips are offered throughout the **Item Configurator** to offer build assistance.//

Info Link Characteristics

Info Links are located in the **Item Configurator** as hyperlinks to Milgard product pages or brochures (i.e. web pages and Adobe PDF links). Use **Info Links** for extra information to assist with product builds.

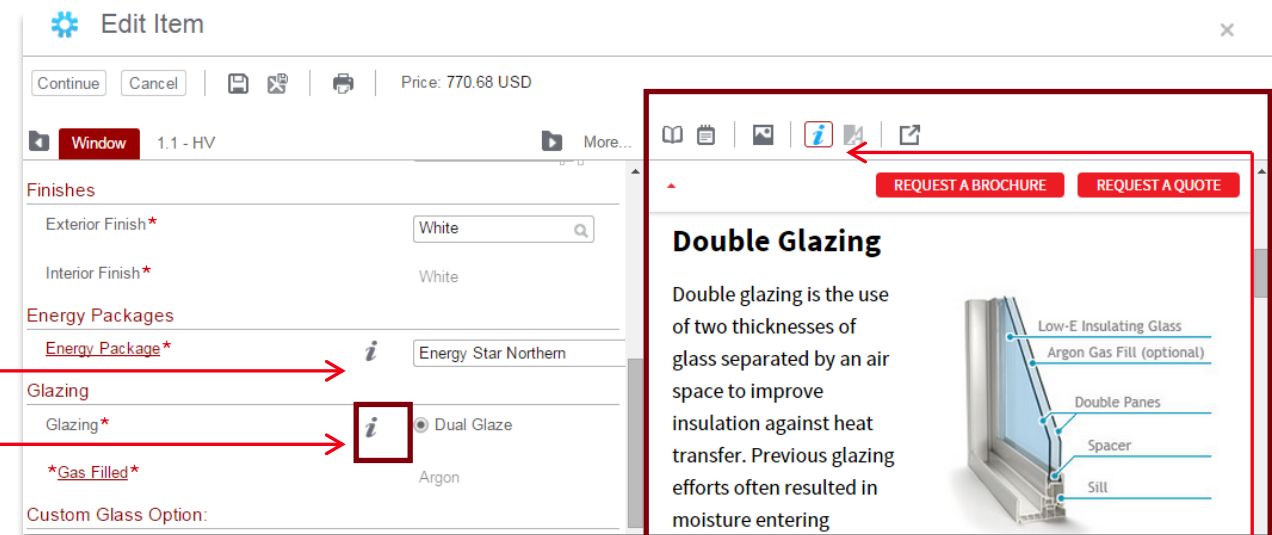
❖ **Info Links** offer the following types of product information:


- ◇ Assists with product build information
- ◇ Offers more detailed product information
- ◇ Identifies shipping or installation suggestions
- ◇ Indicates ratings or standards
- ◇ Provides product photographs

View Info Links

Info Links are identifiable by the italic letter *i* icon next to the field name in the **Item Configurator**. More information is available for any field where the italic *i* icon is located.

1. In the **Item Configurator**, locate a field name with the italic *i* icon. //The illustration below shows two **Info Links** visible next to **Energy Package** and **Glazing**. The **Glazing Info Link** is selected. Note the Double Glazing section shown on the right.//



2. Click the italic *i* icon. The linked page appears in the right panel under *Information View* .
3. Separate scrollbars are available for the left and right panels. Scroll the *Information View* in the right panel as you would any other web page, to include clicking on web links, if available.

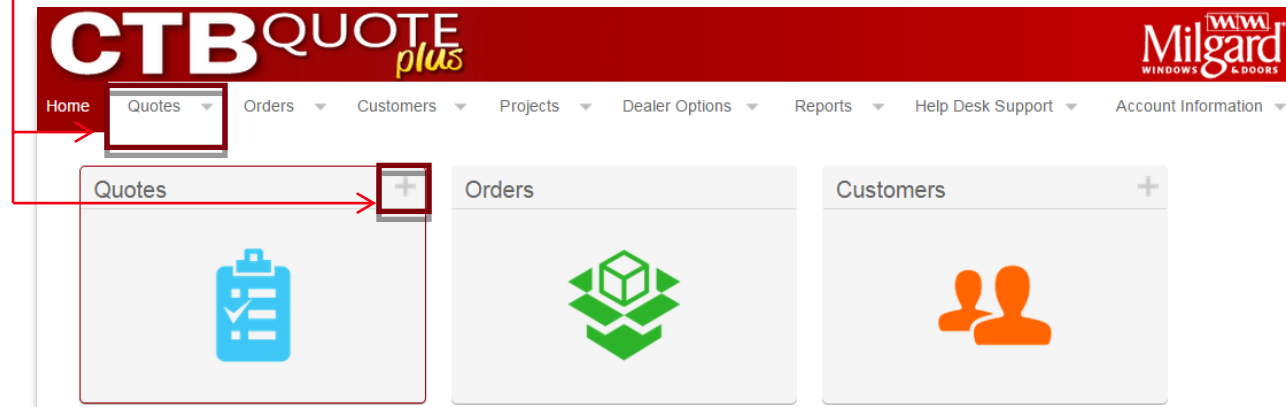


Browser settings may affect the way that PDF's are opened. Most browsers handle PDF files inside a web page which **CTB Quote™ Plus** will display within the *Information* panel. The PDF may download instead //see [Troubleshooting](#) for details//.

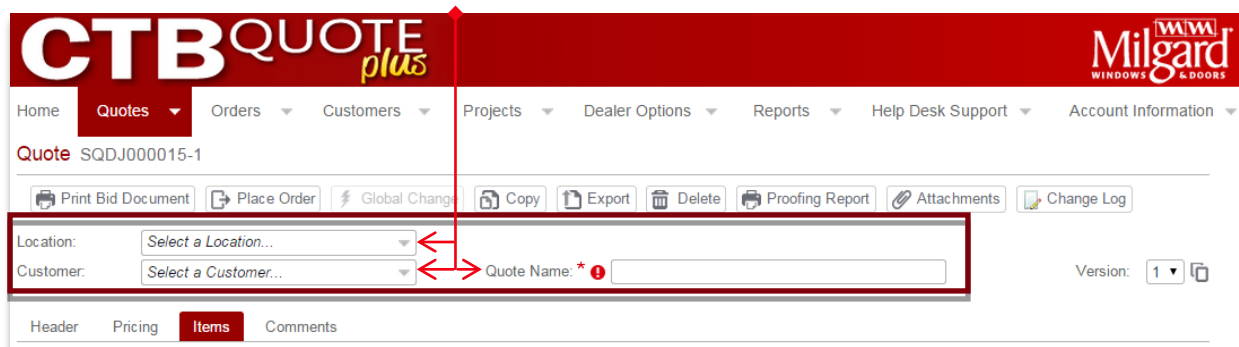
Detailed Quote Steps

The following section provides detailed steps to building a new **Quote** for a *Tuscany Window*.

1. Open Quotes from the Navigation Ribbon>Quotes >New or the Home page >Quotes tile> Add icon.

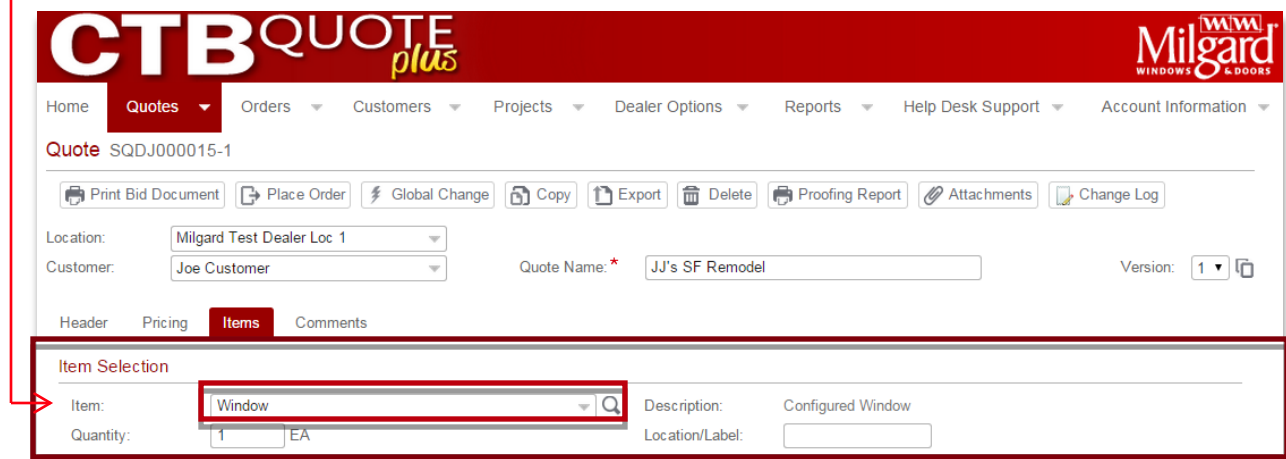


2. The **Quotes** page opens. Select **Location** (if applicable) and **Customer** from the drop-down menu and add a **Quote Name** for easy identification.



3. The **Items** tab is the default tab for new **Quotes**. If it is not active, click on the **Items** tab to find the **Item Selection** area.

4. This example depicts building a **Quote** for a **Window**. The steps are the same for a **Door**. In the **Item Selection** area, select **Window** from the **Item** drop-down menu.



- The **Quantity** for the **Window** is defaulted to '1' and the optional **Location/Label** field is blank. Update the **Quantity** field and specify a **Location** or add a **Label**, if applicable.
- Click the **New Item** button to begin the **Window** build. The **Item Configurator** opens

The screenshot shows the 'Item Configurator' interface. At the top, there's a navigation bar with 'Home', 'Quotes', 'Orders', 'Customers', 'Projects', 'Dealer Options', 'Reports', 'Help Desk Support', and 'Account Information'. Below that, the quote ID 'SQDJ000015-1' is displayed. A toolbar contains buttons for 'Print Bid Document', 'Place Order', 'Global Change', 'Copy', 'Export', 'Delete', 'Proofing Report', 'Attachments', and 'Change Log'. The 'Location' is set to 'Milgard Test Dealer Loc 1' and the 'Customer' is 'Joe Customer'. The 'Quote Name' is 'JJ's SF Remodel' and the 'Version' is '1'. The 'Items' tab is selected, showing an 'Item Selection' section with 'Item: Window' and 'Quantity: 1 EA'. Below this is a 'Preferences' section with a grid of dropdown menus for 'Product Line', 'Exterior Finish', 'Exterior Glass', 'Int. Glass Thickness', 'Grids', 'Fin Type', 'Interior Finish', 'Interior Glass', 'Gas Filled', 'Screen Mesh', 'Opening Type', 'Energy Package', 'Ext. Glass Thickness', and 'Breather Tube'. A 'New Item' button is highlighted with a red box and an arrow.



The **Item Configurator** provides the fields (i.e. questions) to build an **Item**. Default answers are auto-filled to save time. Update or answer all fields, as applicable.

- From the **Item Configurator**, the primary build tab (e.g., '**Window**') to begin the overall **Window** selections. //The steps below will answer the minimum required questions to build a Window.//

The screenshot shows the 'New Item' dialog box. It has a title bar with a gear icon and the text 'New Item'. Below the title bar, there are buttons for 'Continue', 'Cancel', and a 'Price: 0.00' field. At the bottom, there's a tab labeled 'Window' which is highlighted with a red box and a red arrow. To the right of the 'Window' tab are several icons, including a play button, a book, a calendar, and an information icon.




Some fields have **Tool Tips** and **Info Links** *i* which provide additional information to assist with selections. (see [Tool tips and Info Links](#) for more details).

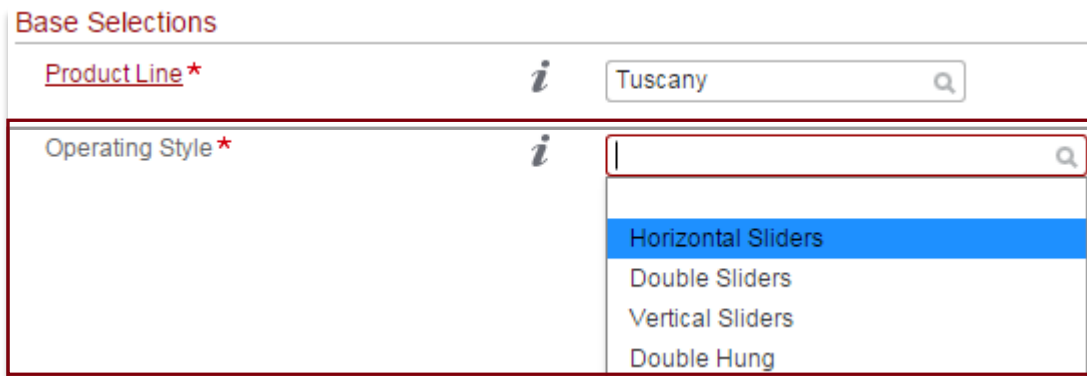
8. In the **Base Selections** area, choose a **Product Line** by clicking on the field *Search* icon . A pop-up window opens with a visual list of tiles to select from // the example will illustrate “Tuscany”//.




Base Selections


Product Line * *i* 

9. For the next build question, select an **Operating Style** by clicking *inside* the **Operating Style** answer field // the example below illustrates selecting “Horizontal Sliders” from the drop-down list//.



Base Selections

Product Line * *i* Tuscany 

Operating Style * *i* 


- Horizontal Sliders
- Double Sliders
- Vertical Sliders
- Double Hung


10. Answer the **Configuration Model** by clicking inside the answer field or the field *Search* icon .



Configuration Model * 



The previous steps illustrate two ways to select an option: the *Search* icon  and the drop-down list. If familiar with Milgard products, or prefer to use the keyboard, the following keys can be used to quickly answer fields and progress through questions: type the first, or unique, letter of the selection and/or use the keyboard arrows; use the *Tab*, and *Enter* keys to select and advance. The *Spacebar* can be used for select options (e.g. **Opening Type**).

11. Answer the **Fin Type** by clicking inside the answer field or the field *Search* icon . The configurator has enough data to automatically answer the remaining **Base Selection** fields.



Fin Type * 



CTB Quote™ Plus provides default answers for standard **Item** selections. For example, default answers are applied to *Energy Packages*, *Glazing*, and *Glass* areas. Review the auto-fill defaults and modify any selections, as needed.

12. In the *Dimensions* area, select an **Opening Type** option and enter the **Size**. //The example displays **Call Out** selected with a **4020 Size**; **Width** and **Height** are auto-filled from **Call Out Size**//.


Dimensions	
Opening Type *	<input type="radio"/> Rough Opening <input type="radio"/> Net Frame <input checked="" type="radio"/> Call Out
Call Out Size *	<input type="text" value="4020"/>
Callout Width *	48
Callout Height *	24

13. The *Finishes* area appears. Select an **Exterior** and **Interior Finish** from the drop-down list. //Depending on the **Item**, **Interior Finish** may auto-fill. The example illustrates **Exterior Finish** 'White' selected and the **Interior Finish** 'White' gets defaulted.//


Finishes	
Exterior Finish *	<input type="text" value="White"/>
Interior Finish *	White

14. The *Configurator* auto-fills default answers for the *Energy Packages*, *Glazing*, and *Glass* areas. The next required area is *Grids*. Select an answer for **Grid Type**. //For the example, no grids are added.//


Grids	
Grid Type *	<input type="text"/>

15. With **Grid Type** selected, the remaining build questions appear. Review and update selections by clicking inside the answer field or click on the field's *Search* icon .

Grids	
Grid Type *	<input type="text" value="None"/>
<u>Checkrail</u> *	<input type="text" value="None"/>
Misc	
Lock Type *	<input type="text" value="SmartTouch"/>
Window Opening Control Device *	<input type="text" value="None"/>
<u>Fresh Air Flow Vent</u> *	<input type="text" value="None"/>
Screen	
Screen *	<input type="text" value="Standard with Fiberglass Mesh"/>


16. Answer the **Screen Delivery Method**, if not auto-filled, by clicking inside the answer field or click on the field's *Search* icon .




Screen



Screen* 

Screen Delivery Method*


17. Once **Screen Delivery Method** is answered, the primary **Window** build is complete. *Sub-tabs* may appear for individual frame questions (e.g., **Handing**). Answer or update any remaining sub-tab questions //the example illustrates one *sub-tab* (i.e. **1.1-HV**) with a default **Handing** of 'XO'//.

 **New Item**


|   |  | Price: 397.00 USD




 Window **1.1 - HV**  More..



HV

Handing* 

18. Click the **Continue** button to progress through final build options.

 **New Item**


|   |  | Price: 397.00 USD




 Window **1.1 - HV**  More..








The build tabs (e.g. '**Window**', '**Door**'), sub-tabs (e.g., **1.1-HV**), **Comments** and **Dealer Options** tabs identify the various options available for a **Line Item**. Tabs for specific settings and options appear as the build process continues.

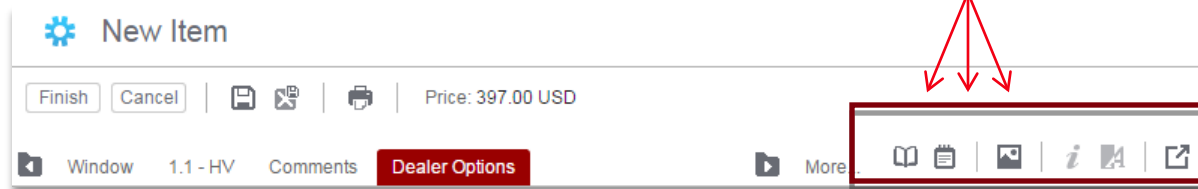
19. Add **Comments** and **Dealer Options**, if applicable //see [Line Comments](#) for details//.

 **New Item**

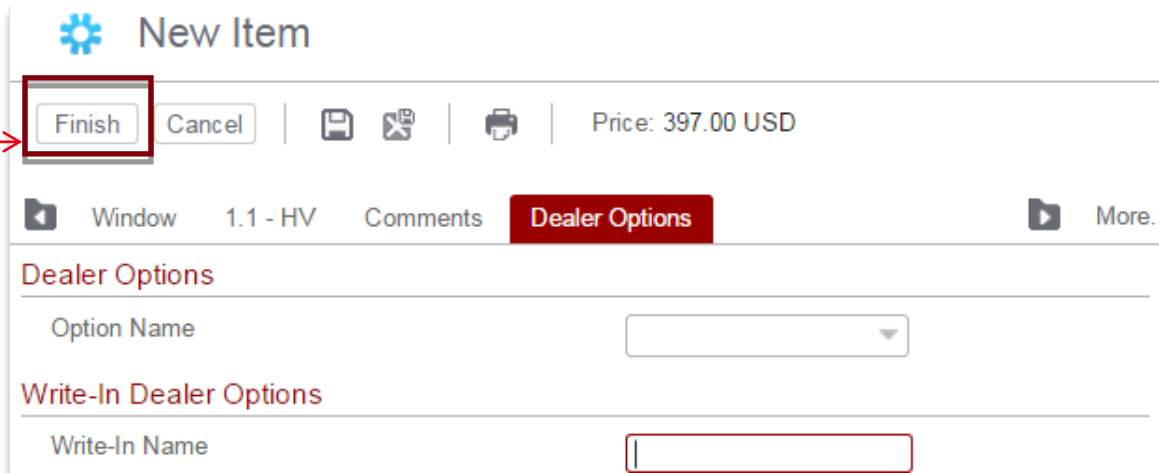
|   |  | Price: 397.00 USD

 Window 1.1 - HV  More..

20. Review the final build specifics in the *Configurator visualization pane* (i.e., right panel) by clicking on the **Line Item Summary**  icon, **Line Item Details**  icon, or **Line Item Image**  icon.



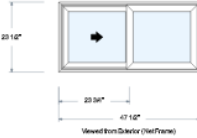
21. Click the **Finish** button to finalize the **Window** build.

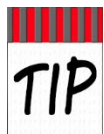


22. The **Item Configurator** closes and the newly built **Item** appears in the **Quote Lines** area (i.e., *Shopping Cart*). Continue to build additional **Quote Items**, as applicable.

Quote Lines

Validate All Collapse All Total Quantity: 1 Windows, 0 Doors Total Price: 138.95

Line	Location/Label	Item	Qty	UOM	Price	Total
1		Window	1	EA	138.95	138.95
Edit Item Copy Adjust Price More...		Configured Window Tuscany, 8120T, HV, 1 3/8" Setback, Ext White /Int White, Call Out 4020, U-Factor: .34, SHGC: .28, VT: .53 Size = Net Frame 47 1/2 X 23 1/2 , Model = Half Vent , Handing = Half Vent XO , Glass = 3/32" SunCoat (Low-E) over 3/32" Clear , Other Glass = Gray EdgeGuard Spacer , Hardware = SmartTouch Lock , Screen = Standard with Fiberglass Mesh , Clear Opening = Width 21 3/16, Height 20 1/2, Sqft 3.02 , Calculations = Unit Area (sq. ft.) 8, Unit Perimeter (nominal in lineal ft) 12' , Other Ratings = CPD: MIL-A-224-02287-00001	Line Details		Remove	
						
			View Image			



A quick way to build multiple **Items** from the same **Product Line** (e.g., for different sized windows) is to **Copy Line Items** . In the *Shopping Cart*, click the **Copy** link to copy the **Line Item** and then click the **Edit Item** link to make changes to the copied **Line Item**.

Build a Window with Preferences

The following steps describe building a **Window** using **Preferences** in a **New Quote**. The same steps apply for using **Preferences** to build a **Door** or **Wall System**.

Steps to Build a Window with Preferences

1. Open a new Quote from the Navigation Ribbon>Quotes> New.
2. On the **Quote** page, complete the *Header* section with a **Location** (if applicable), **Customer**, and a **Quote Name** (see [Detailed Quote Steps](#) for more details).
3. From the **Items** tab > **Item Selection** > **Item** drop-down list, select '**Window**'.

The screenshot shows the CTBQUOTE plus software interface. At the top, there's a navigation ribbon with 'Quotes' selected. Below it, the quote ID 'SQDJ000083-1' is displayed. A toolbar contains various actions like 'Print Bid Document', 'Place Order', 'Global Change', 'Copy', 'Import', 'Export', 'Delete', 'Proofing Report', 'Attachments', and 'Change Log'. The 'Header' section includes fields for 'Location' (Milgard Test Dealer Loc 1), 'Customer' (Bob Builder), 'Quote Name' (Rosewood apartments), and 'Version' (1). The 'Items' tab is active, showing the 'Item Selection' section with 'Window' selected in the 'Item' dropdown, 'Configured Window' as the description, and '1 EA' as the quantity.

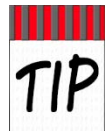
4. The **Preferences** tab appears. Select a **Product Line** //in the example, **Tuscany** is selected.//

The screenshot shows the 'Preferences' tab for the 'Window' item. The 'Product Line' is set to 'Tuscany'. Other preference fields include 'Fin Type', 'Opening Type', 'Exterior Finish', 'Interior Finish', 'Energy Package', 'Exterior Glass', 'Interior Glass', 'Ext. Glass Thickness', 'Int. Glass Thickness', 'Gas Filled', 'Breather Tube*' (checked), and 'Grids*'. The 'Breather Tube*' field is checked. At the bottom, there are buttons for 'New Item', 'Add', 'Reset selected options', 'Library', 'Write-In Dealer Options', and 'Product Catalog'.



In order for accurate build options to be available for selection, the **Product Line** must be selected prior to other fields.

5. Pre-select additional **Preference** options for quick build //in the following example, **Fin Type**, **Opening Type**, **Finishes**, **Energy Package** and **Grid** fields will be pre-selected.//



Preferences are optional. If a **Product Line** (e.g., Tuscany) is a common order, setting it as a **Preference** will preselect **Tuscany** in the **Item Configurator**. All selections are updateable in the **Item Configurator**.

- When build **Preference** selections are complete, click the **New Item** button. //The following pre-selected and auto-filled fields will answer ten (10) build questions in the **Item Configurator**://

The Preferences window contains the following fields:

- Product Line: Tuscany
- Exterior Finish: White
- Exterior Glass: SunCoat (Low-E)
- Int. Glass Thickness: [Empty]
- Grids*: No
- Fin Type: 1 3/8" Setback
- Interior Finish: White
- Interior Glass: Clear
- Gas Filled: Argon
- Screen Mesh: [Empty]
- Opening Type: Net Frame
- Energy Package: Energy Star Northern
- Ext. Glass Thickness: [Empty]
- Breather Tube*: [Unselected]

Buttons at the bottom: New Item (highlighted), Add, Reset selected options, Library, Write-In Dealer Options, Product Catalog.



When a **Preference** selection (e.g., **Energy Packages**) requires related options, the fields appear selected, but grayed out, and can only be edited if the primary selection is changed.

- The **New Item** button checks **Preference** selections against rules, removing answers with conflicts. The **Item Configurator** opens to prompt for the remaining **Window** build questions and will also prompt for any invalid selections. Answer the remaining prompted fields in the **Item Configurator**.

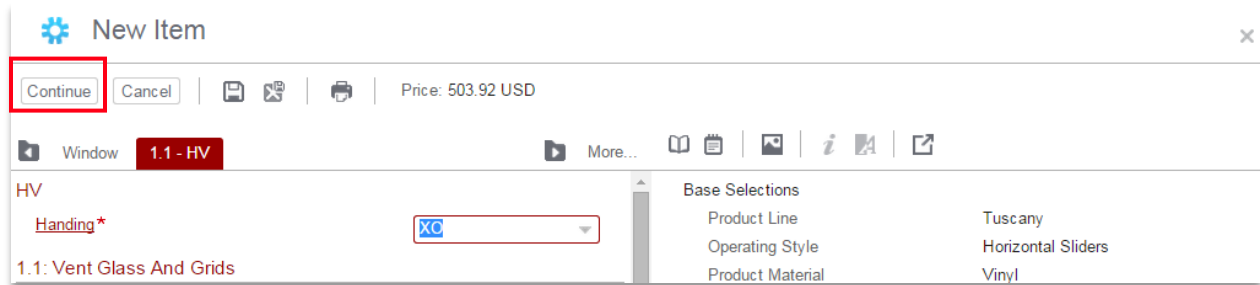
The New Item window displays the following configuration:

- Price: 503.92 USD
- Window: 1.1 - HV
- Product Line*: Tuscany
- Operating Style*: Horizontal Sliders
- Product Material*: Vinyl
- Configuration Model*: Half Vent
- Fin Type*: 1 3/8" Setback
- Series Code*: 8120T
- Frame Accessories*: None
- Dimensions:
 - Opening Type*: Net Frame
 - Exact Width*: 36
 - Exact Height*: 48
- Base Selections:
 - Product Line: Tuscany
 - Operating Style: Horizontal Sliders
 - Product Material: Vinyl
 - Configuration Model: Half Vent
 - Fin Type: 1 3/8" Setback
 - Series Code: 8120T
 - Frame Accessories: None
 - Dimensions:
 - Opening Type: Net Frame
 - Exact Width: 36
 - Exact Height: 48
 - Finishes:
 - Exterior Finish: White
 - Interior Finish: White
 - Energy Packages:
 - Energy Package: Energy Star Northern
 - Glazing:
 - Glazing: Dual Glaze

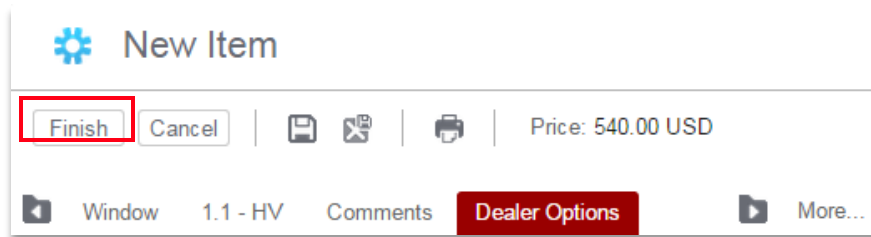


The example **Preference** selections, along with default auto-filled fields, completed all but four fields in the **Item Configurator** (*Operating Style, Configuration Model, Width, and Height*). Your Milgard location may have more (or fewer) fields to answer in order to meet build requirements.

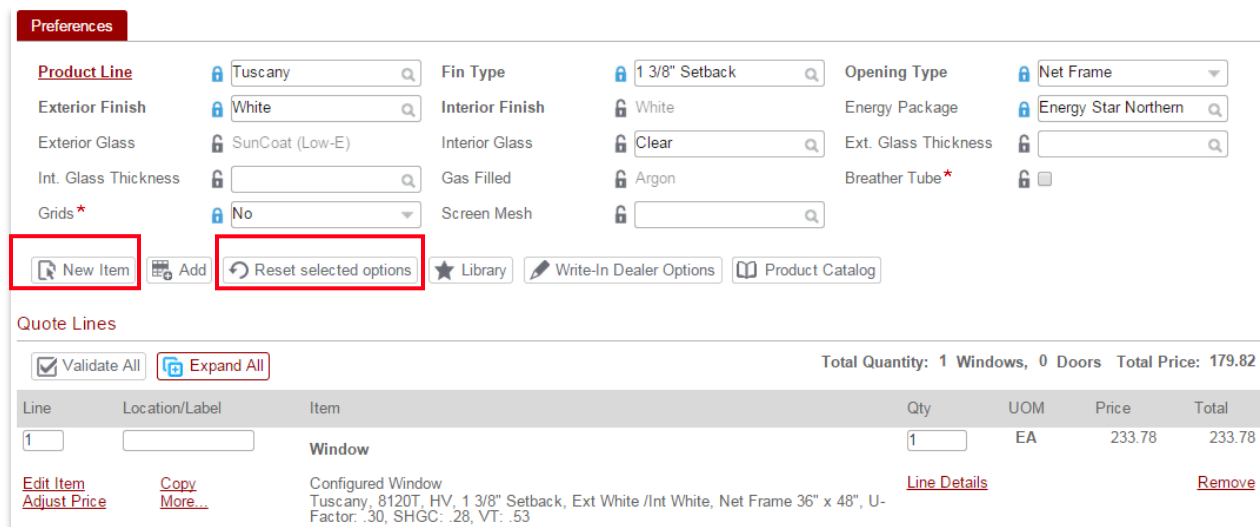
8. Click the **Continue** button to progress through the remaining build options.



9. Click the **Finish** button to finalize the window build.



10. Click the **New Item** button to build another **Window** with the same **Preferences**. //Preferences are saved on the same **Quote** to provide the workflow for multiple **Window** builds with the same selections.//



Preference selections are retained after a build. **CTB Quote™ Plus** will retain the most recently used **Preferences** between sessions for the same **Quote**. The **New Item** button looks to the **Preference** selections each time it is clicked. Use the **Reset selected options** button to clear all **Preference** selections.

Energy Packages

All Milgard windows and patio doors are designed to meet tough thermal and solar requirements of state and local jurisdictions. **Energy Packages** are available in **CTB Quote™ Plus** to provide a simple selection approach to further improve the energy efficiency of windows and doors.

Energy Package Ratings

Zone	U-Factor	SHGC	Features
Energy Star v5(Northern)*	0.3	-	SunCoat®+Argon+EdgeGardMAX®
Energy Star v6 (North-Central)	0.3	0.4	SunCoat®+Argon+EdgeGardMAX®
Energy Star v6 (South-Central)	0.3	0.25	SunCoatMAX®+Argon+EdgeGardMAX®
Energy Star v6 (Southern)	0.4	0.25	SunCoatMAX®
High Efficiency Package	0.27	0.32	SunCoat®/i89+Argon+EdgeGardMAX®
R5	0.20	0.25	Triple Glaze, SunCoat® (surface 2 & 5)+ Krypton+Foam Spacer
Title 24	0.32	0.25	

*Energy Star V6 Northern goes into effect January 1, 2016



The table above identifies the *U-factors* and *Solar Heat Gain Coefficients* (i.e., SHGC) applicable for each regional package. The **Preferences** section will list regions available.

- ❖ **Dual and Triple Glazing** - Energy efficient windows use dual or triple pane glass (or glazing) to better insulate and help reduce energy usage
 - ◇ **SunCoat® and SunCoatMAX® Low-E Glass Coatings** - Low-E means 'low emissivity' and describes glass that has a solar control coating to improve thermal performance.
- ❖ **Spacers** - keep a window's dual glass panes the correct distance apart for optimal insulation between panes.
 - ◇ **EdgeGard® and EdgeGardMAX® Spacers**- provide superior insulating properties and helps to reduce condensation.
 - ◇ **Argon and Krypton Gas-filled Spacers** – enhances thermal performance without getting in the way of the view.

Add an Energy Package Using Preferences

The steps below depict adding an **Energy Package** to a Window using **Preferences**, but the process can be manually done within the **Item Configurator** from the **Quote > Item > Window > New Item** selection.

1. From the **Quotes** page, under the **Items** tab, select **Window** from the **Item** drop-down list.

The screenshot shows the CTBQUOTE plus software interface. At the top, there are navigation menus for Home, Quotes, Orders, Customers, Projects, Dealer Options, Reports, Help Desk Support, and Account Information. Below this, there are search fields for Customer (Washington Construction) and Quote Name (Rainier Welcome Center). The 'Items' tab is selected, and the 'Item' dropdown is set to 'Window'. The 'Description' is 'Configured Window' and the 'Quantity' is '1 EA'.

2. From the **Preferences** section, select the **Product Line**. *Tuscany* is selected for the example. The **Product Line** will set available field options. //Note that **Energy Package** is defaulted to *None*.//

The screenshot shows the 'Preferences' section of the software. The 'Product Line' is set to 'Tuscany'. The 'Energy Package' field is set to 'None'. A red box highlights the 'Energy Package' field and its search icon. Below the preferences, there are buttons for 'New Item', 'Add', 'Reset selected options', 'Library', 'Write-In Dealer Options', and 'Product Catalog'.

3. For the **Energy Package** field, use the visual selection (search icon) to select the appropriate **Energy Package** option. //For the example, *Energy Star South-Central* will be selected.//

The screenshot shows the 'Select a Value' dialog box for the Energy Package field. It displays four maps of the United States representing different energy star regions: None, Energy Star Northern, Energy Star North-Central, and Energy Star Southern. Below the maps are four options: Energy Star South-Central, 4th Surface High Performance, High Efficiency, and R5. The 'Energy Star South-Central' option is highlighted with a red box.

Preferences

Product Line	Tuscany	Fin Type		Opening Type	
Exterior Finish		Interior Finish		Energy Package	Energy Star South-Cen
Exterior Glass	SunCoatMAX (Low-E)	Interior Glass	Clear	Ext. Glass Thickness	
Int. Glass Thickness		Gas Filled	Argon	Breather Tube	
Grids*		Screen Mesh			

Buttons: New Item, Add, Reset selected options, Library, Write-In Dealer Options, Product Catalog



The selected **Energy Package** determines mandatory **Energy Package** fields to satisfy rating requirements. In the screenshot above, **SunCoatMAX (Low-E)** and **Argon** are required for **Energy Star South-Central** and cannot be altered. //Note that **Interior Glass** has defaulted to **Clear**, however, can be altered for this field.//

- Select any other **Preferences**, as applicable, and then select the **New Item** button to open the **Item Configurator** and complete the build. //See [Preferences](#) for details.//

Preferences

Product Line	Tuscany	Fin Type	1 3/8" Setback	Opening Type	Call Out
Exterior Finish	Espresso	Interior Finish	White	Energy Package	Energy Star South-Cen
Exterior Glass	SunCoatMAX (Low-E)	Interior Glass	Clear	Ext. Glass Thickness	
Int. Glass Thickness		Gas Filled	Argon	Breather Tube	
Grids*	No	Screen Mesh			

Buttons: New Item, Add, Reset selected options, Library, Write-In Dealer Options, Product Catalog

- Select any remaining **Window** fields and the **Continue** button to progress with build options.

New Item 1.1 - DS

Buttons: Continue, Cancel, Price: 35.00 USD

Window 1.1 - DS

Dimensions

- Opening Type* Rough Opening Net Frame Call Out
- Call Out Size* 6042
- Callout Width* 72
- Callout Height* 50
- Bottom Window Height* 18

Finishes

- Exterior Finish* Espresso
- Interior Finish* White

Energy Packages

- Energy Package* Energy Star South-Central

Glazing

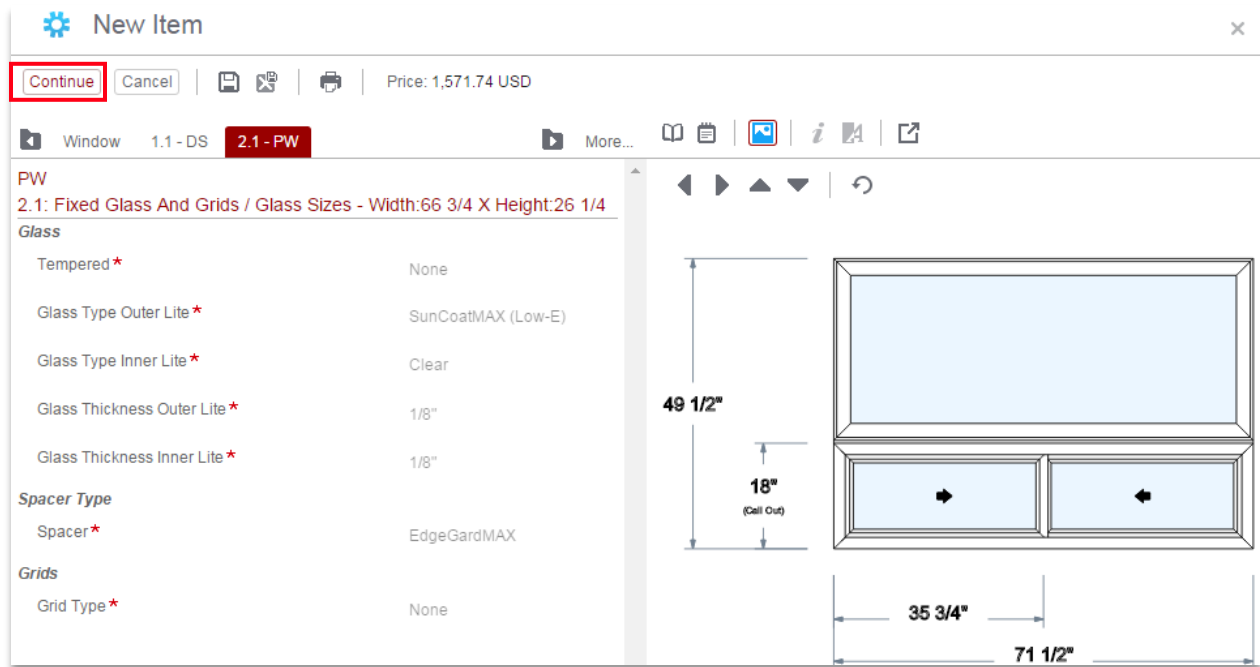
- Glazing* Dual Glaze

Base Selections

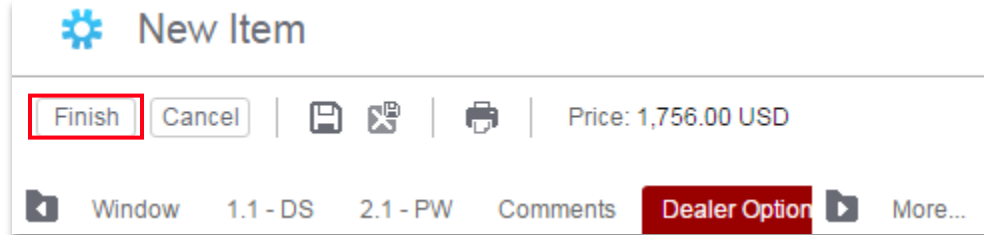
Product Line	Tuscany
Operating Style	Double Sliders
Product Material	Vinyl
Configuration Model	Double Slider Below Picture
Fin Type	1 3/8" Setback
Series Code	8125T
Frame Accessories	None
Dimensions	
Opening Type	Call Out
Call Out Size	6042
Callout Width	72
Callout Height	50
Bottom Window Height	18
Finishes	
Exterior Finish	Espresso
Interior Finish	White
Energy Packages	
Energy Package	Energy Star South-Central
Glazing	



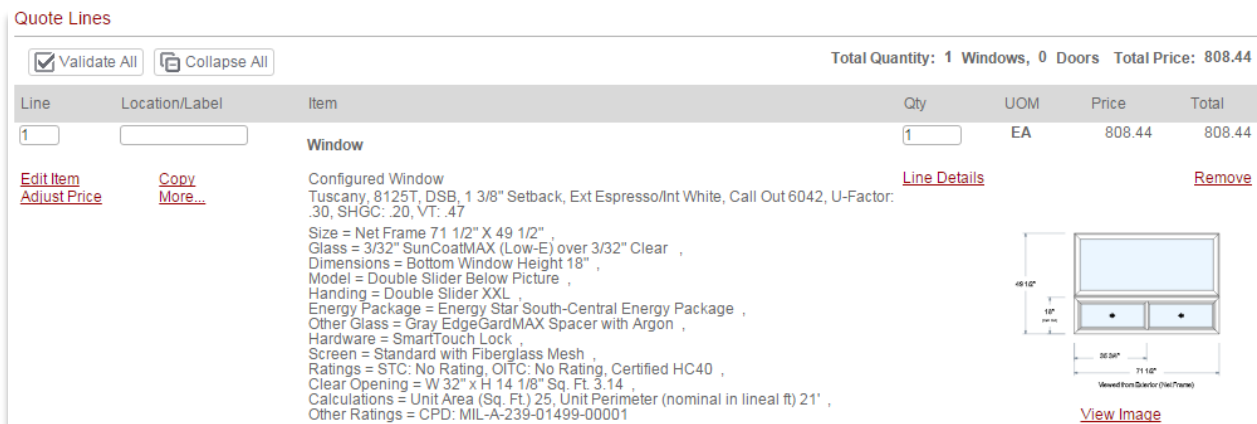
Note that the Glass options (below) are completed and cannot be edited on the **Glass** sub-tab(s). Return to the **Window** tab if the overall **Energy Package** settings need to be changed to accommodate specific requirements.



6. Click the **Finish** button to finalize the build.

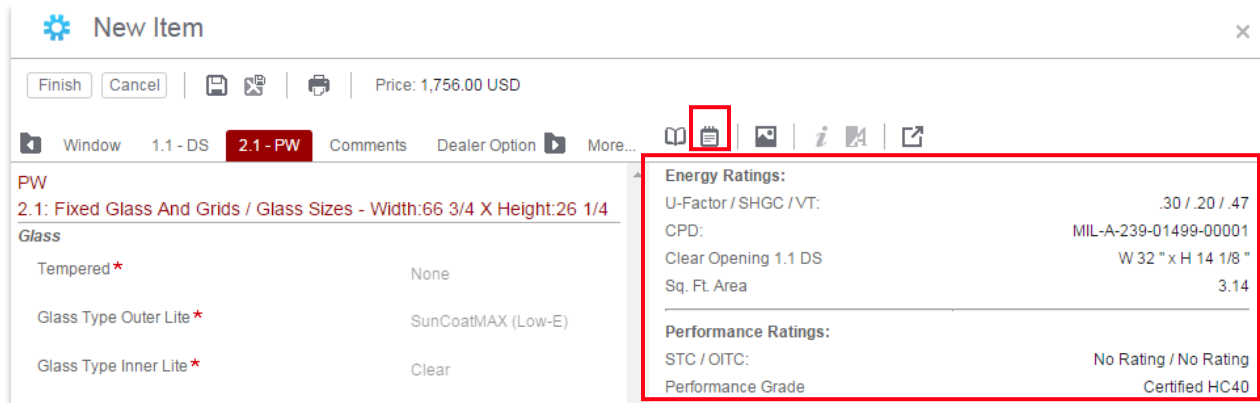


7. The **Energy Package**, added from **Preferences** to a **Window**, is listed in the **Shopping Cart** and the steps are complete. Use the [Edit Item](#) link to make any changes.



Energy Packages Characteristics

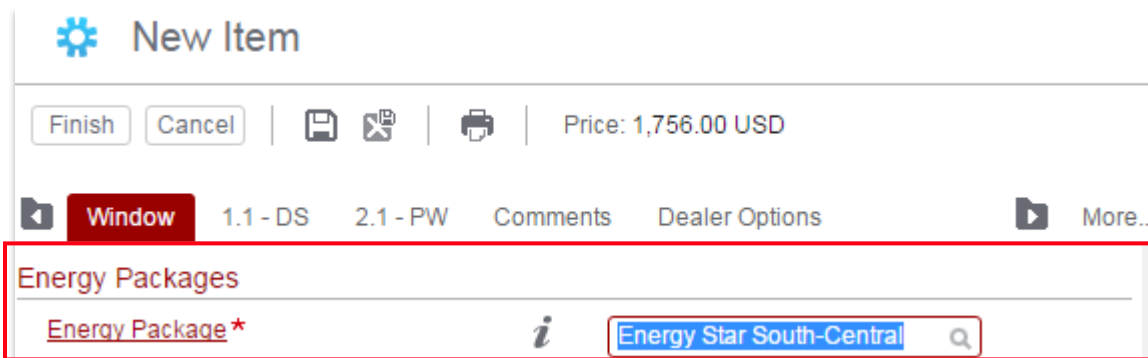
- ❖ **Energy Packages** can be selected from **Preferences** or added in the **Item Configurator**.
- ❖ Details for **Energy Package ratings** can be viewed in the *Details View* from the right panel.



- ❖ The **Proofing Report** lists **Energy Package** details.



- ❖ **Energy Packages** can be added or changed from within the **Item Configurator** on the **Item** tab (i.e., *Window* tab in the screenshot below).




- ❖ The Expanded view in the **Shopping Cart** will display **Energy Package** selections.

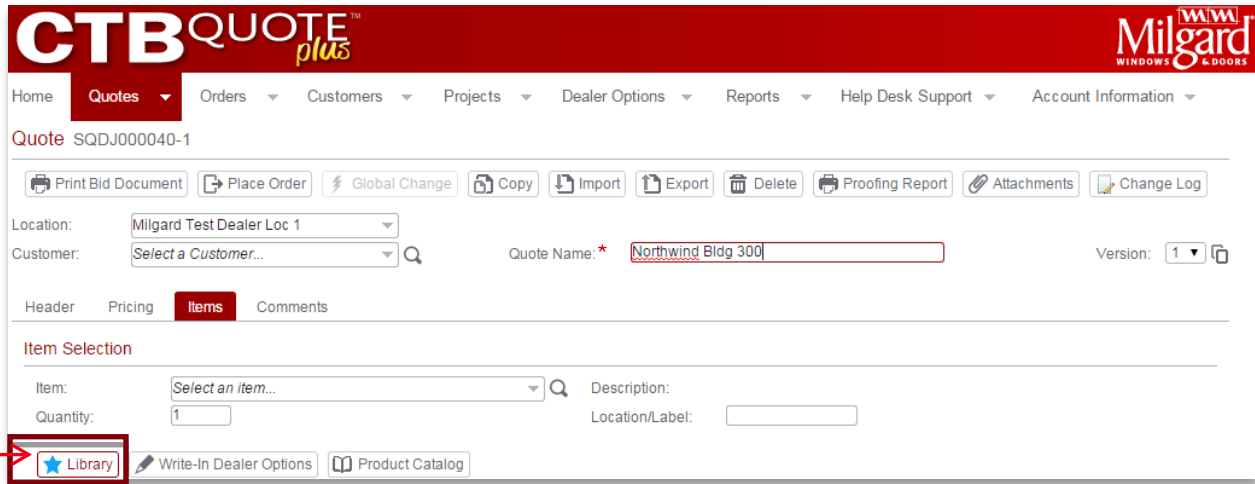


Using Library Items for Quote Builds

Library Items can be quickly added to **Quotes**. This section describes the steps to add a **Library Item** to a new **Quote**. The same steps apply to add a **Library Item** to an existing **Quote** //See [Library Items](#) for details to add **Items** to the Library//.

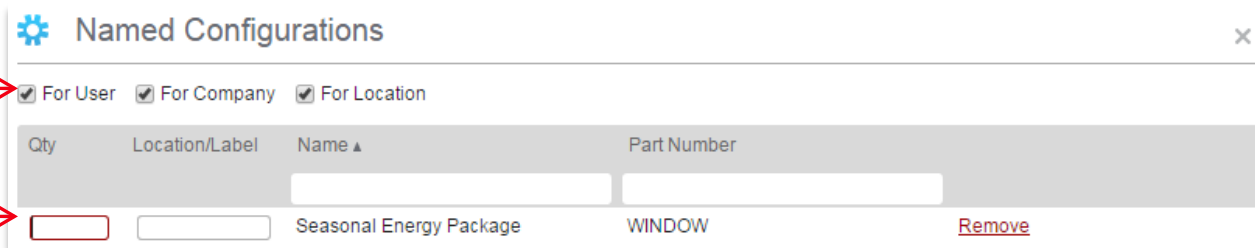
Steps to Add Quote Items from the Library

1. Open a new **Quote** //Navigation Ribbon>Quotes>New// and provide required *Header* information, as applicable //see [Detailed Quote Steps](#) for details//.
2. With the **Items** tab active, click on the **Library** button  located in the **Item Selection** area.



The screenshot shows the 'CTBQUOTE plus' software interface. At the top, there's a navigation ribbon with 'Quotes' selected. Below it, the quote ID 'SQDJ000040-1' is displayed. A toolbar contains various action buttons like 'Print Bid Document', 'Place Order', 'Global Change', 'Copy', 'Import', 'Export', 'Delete', 'Proofing Report', 'Attachments', and 'Change Log'. The 'Location' is set to 'Milgard Test Dealer Loc 1' and the 'Customer' is 'Select a Customer...'. The 'Quote Name' is 'Northwind Bldg 300' and the 'Version' is '1'. The 'Items' tab is active, and the 'Item Selection' area shows a search for 'Select an item...' and a quantity of '1'. At the bottom of the 'Item Selection' area, the 'Library' button is highlighted with a red box and an arrow.

3. The *Named Configurations* screen opens with a list of **Library Items**, if available. //Note that “**Seasonal Energy Package**” is available from steps in the previous section, [Add Items to a Library](#)://



The screenshot shows the 'Named Configurations' dialog box. It has a gear icon and a close button. Below the title bar, there are three checkboxes: 'For User' (checked), 'For Company' (checked), and 'For Location' (checked). A table with the following columns is displayed: 'Qty', 'Location/Label', 'Name', and 'Part Number'. The table contains one row: '1', an empty field, 'Seasonal Energy Package', and 'WINDOW'. A 'Remove' button is located to the right of the row.

4. In the **Qty** (i.e., Quantity) field, enter the number of *Seasonal Energy Package Windows* to add to the **Shopping Cart**.
5. Optionally, add a **Location/Label** identifier.



If the **Library** folder is full of entries, check or uncheck the folder access-level to filter results (e.g., if **For User** is the only folder selected, only **Library Items** created by you will be displayed.) To display all available **Library Items**, ensure that all three folders are checked.

- Click the **Add** button to add the **Library Item** to the *Shopping Cart*.



Library Items have the same characteristics as any other configured *Shopping Cart Items*. Once added to **Quote Lines**, they can be reordered, edited, copied, etc.

- The **Library Item** is added to the **Shopping Cart** with **Comments** carried over from the original saved configuration.



Line Item attachments are not saved with **Library Items**. See [Quote Copy](#) as an alternative to **Library Items** if attachments need to be retained with the **Line Item**.

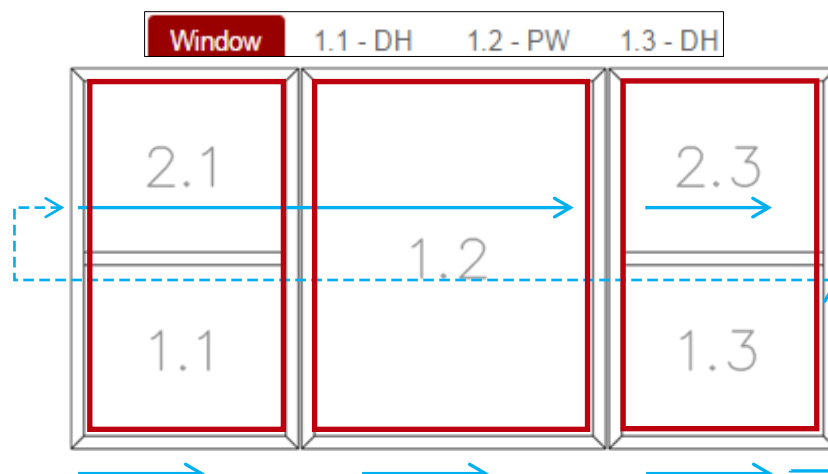
Understanding Glass Numbering in CTB Quote™ Plus

Milgard uses an industry standard for glass numbering and applies this model in **CTB Quote™ Plus**. Understanding glass numbering is helpful when customizing [Glass](#) or [Grids](#) and when building [Special Composite Designs](#). This section provides illustration for the glass numbering system and how it applies in sub-tabs.

Glass Numbering 101

The illustration below depicts an example of the numbering used in **CTB Quote™ Plus** tabs:

- ❖ Numbers read: Left to Right & Bottom to Top.
- ❖ Sub-tabs are created for each frame In **CTB Quote™ Plus**, with separate **Glass/Grid** sections for each **Lite**. The diagram below creates 3 sub-tabs (**1.1, 1.2, and 1.3**)



- ◇ Sub-tab **1.1 – DH** would offer glass/grids sections for 1.1 and 2.1.
 - ◇ Sub-tab **1.2 – PW** would offer only one glass/grid section for 1.2
 - ◇ Sub-tab **1.3 – DH** would offer glass/grids sections for 1.3 and 2.3
- ❖ In order to customize Glass or Grids in the glass sections (i.e., on the sub-tabs), **Customize Grids by Lite** or **Customize Glass by Lite** must read “Yes” and will highlight yellow to allow for sub-tab edits. Customize Glass by Lite and Customize Grids by Lite are both located on the Item tab (e.g., Window or Door).




If the numbering is unfamiliar, an easy way to recall how it works is that high-rise buildings number floors from bottom to top. A specialty room with a 2-story ceiling, using the 1st and 2nd floors, is still located on the lowest floor (i.e., 1st floor).

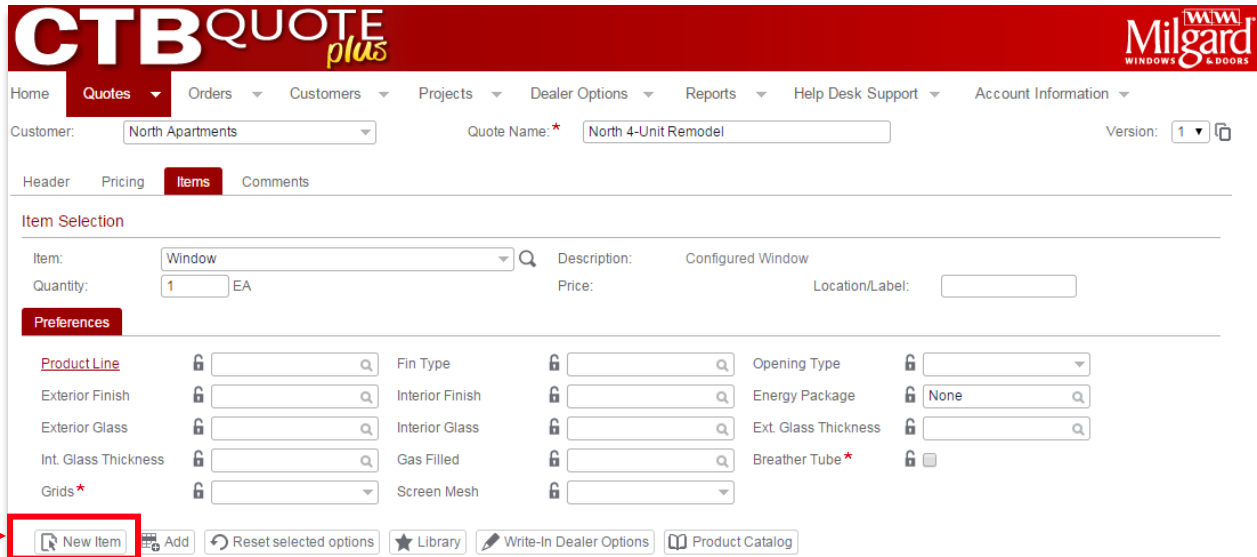
Customize Glass By Lite

Customized Lites can be built within **CTB Quote™ Plus** to accommodate a wide range of glass and grid design requirements. This section provides the steps to customize **Glass** on a **Window** or **Door**.

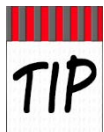
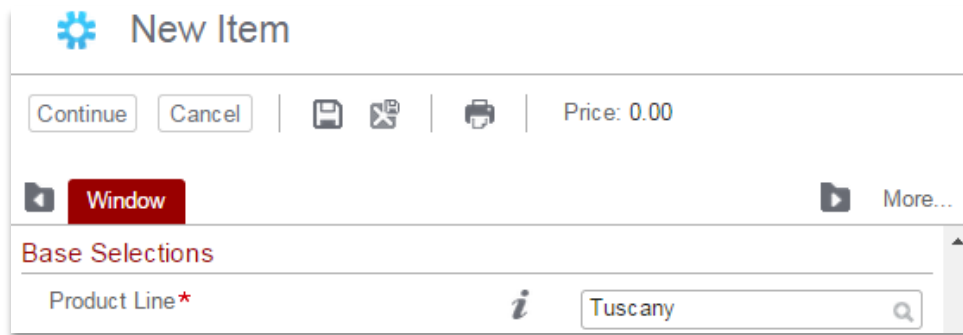
Steps to Customize Glass By Lite

The following steps illustrate customizing the left vent on a **Tuscany Horizontal Slider**. The same steps can be applied to make other **Glass** customizations (to include customized glass for **Doors**).

1. From the main **Quotes** page, select **Window** as the **Item** and click the **New Item**  button to build the **Window**. (See [Detailed Quote Steps](#) for more details on building a **Quote**).

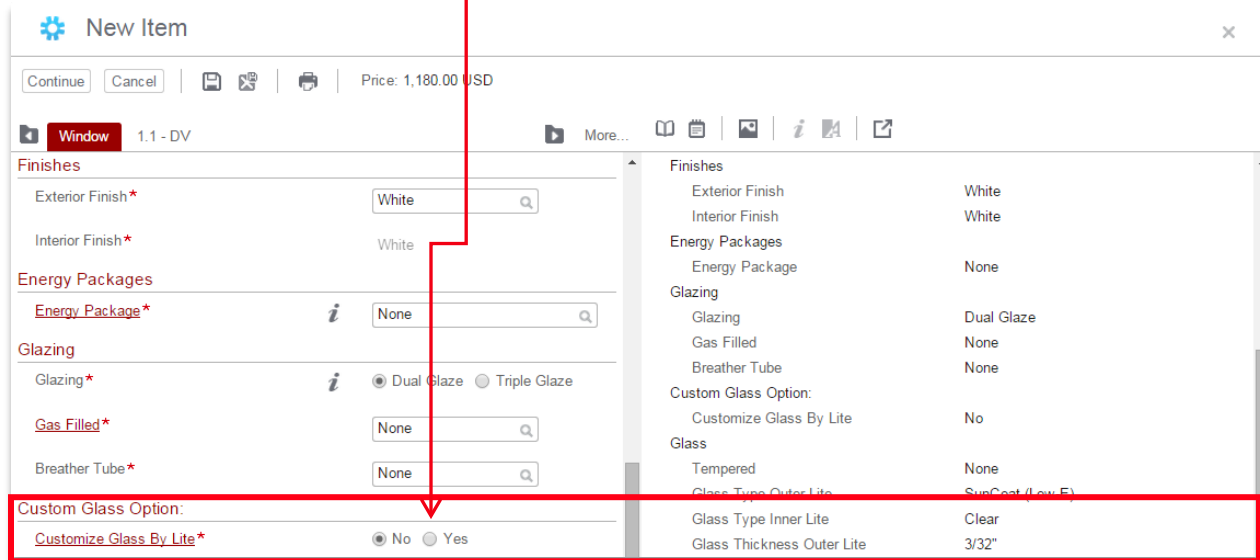


2. The **New Item** button opens the **Item Configurator** to the **Window** tab. Answer the questions to build a **Window** through the **Finishes** section. //The example build will display the following: **Tuscany >Horizontal Sliders >Double Vent >1 3/8" Setback >Call Out: 9040>Sash: ¼>White**//.



Selections on the **Window** tab apply to *all* glass in a **Window**. In order to enable access to individual glass settings, **Customize Glass By Lite** must be set to 'Yes' for sub-tab editing. //Individual glass customizations also apply when **Door** is the primary tab.//

- Once the **Finishes** section is answered, the **Custom Glass Option** section appears below **Glazing**. The default answer for **Customize Glass By Lite** is 'No'. In order to customize **Lites** individually, change **Customize Glass By Lite** to 'Yes'.

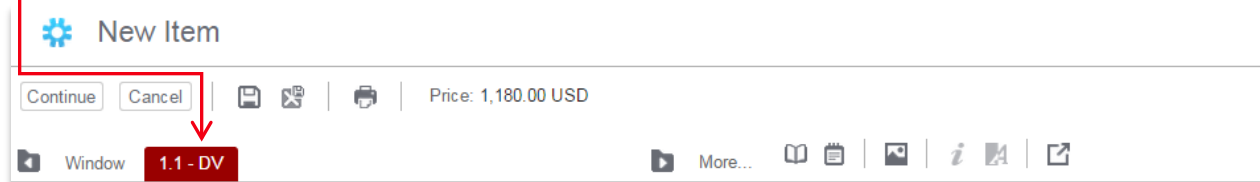


- The **Customize Glass By Lite** field highlights to yellow when answered 'Yes'. Glass fields are then enabled on the sub-tab(s) to be customized, individually. Answer the remaining **Window** tab questions.

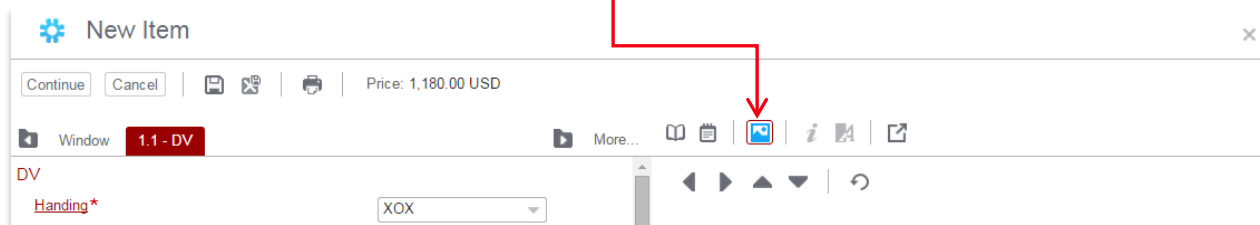
Custom Glass Option:

Customize Glass By Lite* No Yes

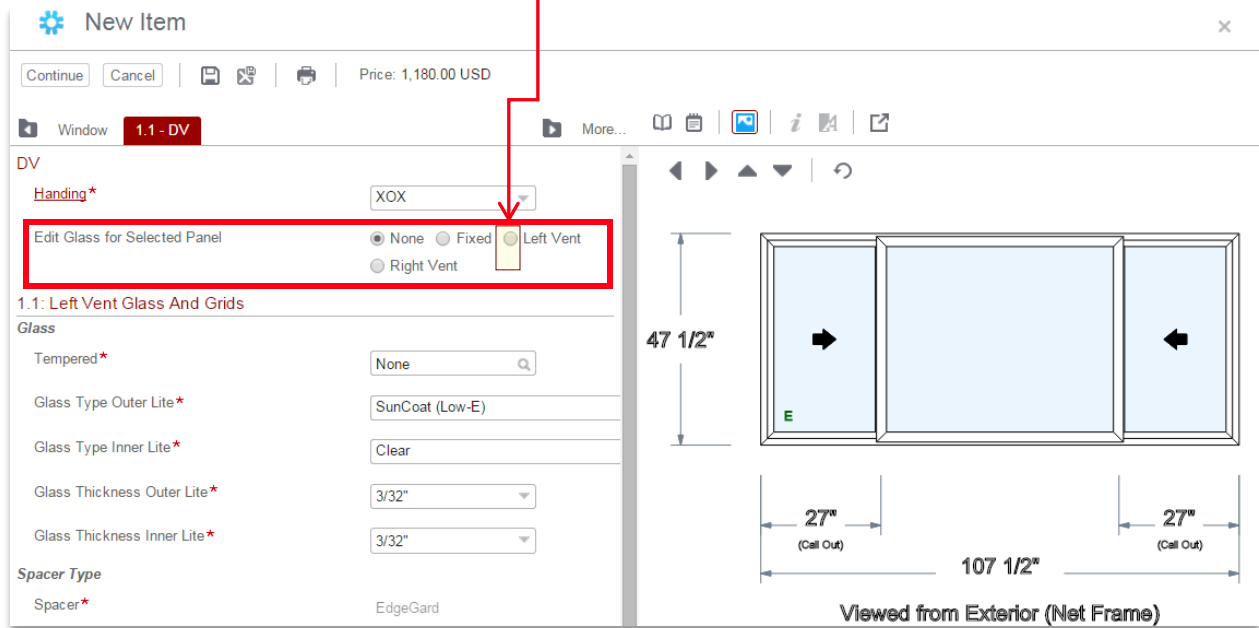
- Once all questions on the **Window** tab are answered, the **Glass** sub-tab (i.e. **1.1 – DV**) appears next to the **Window** tab. Click on the sub-tab, if not active, to customize **Lites**.//The sub-tab should display automatically when **Window** tab questions are completed.//



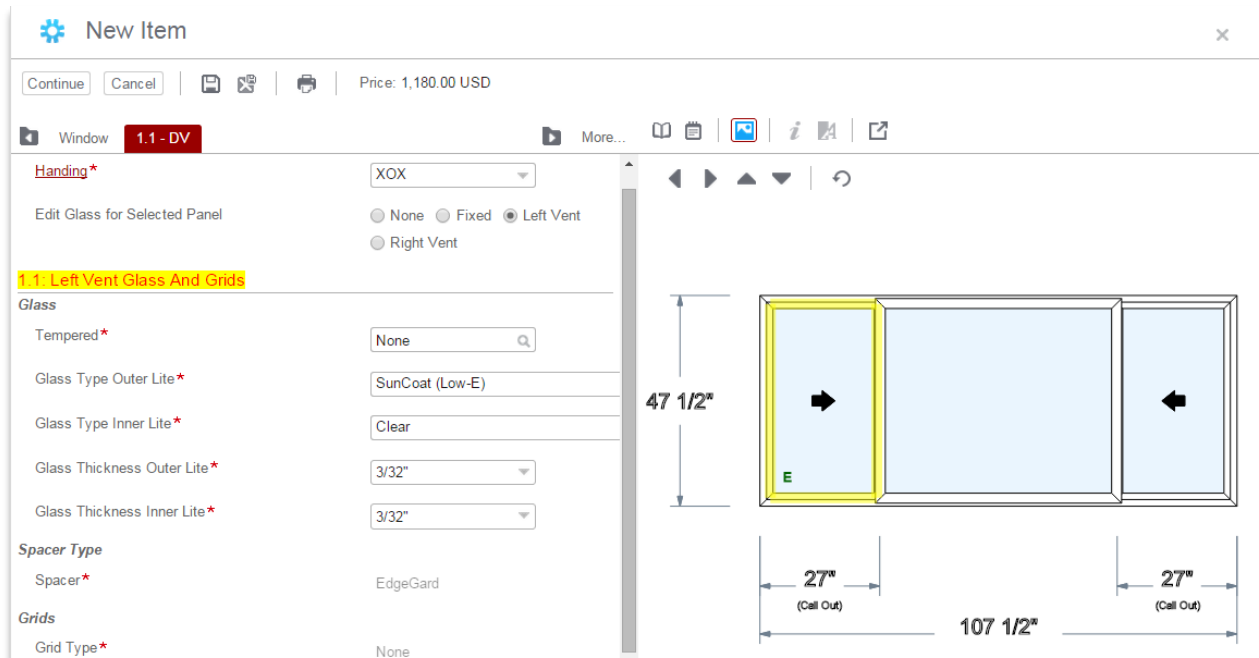
- On the sub-tab, verify or update the **Handing** field. Change the right panel view to **Image View** to facilitate answering questions with visual cues.



- Under the **Handing** field, find the field: **Edit Glass for Selected Panel**. The default selection is 'None'. Change the panel selection to see visual cues to assist with customizations. //For the example, 'Left Vent' will be selected.//

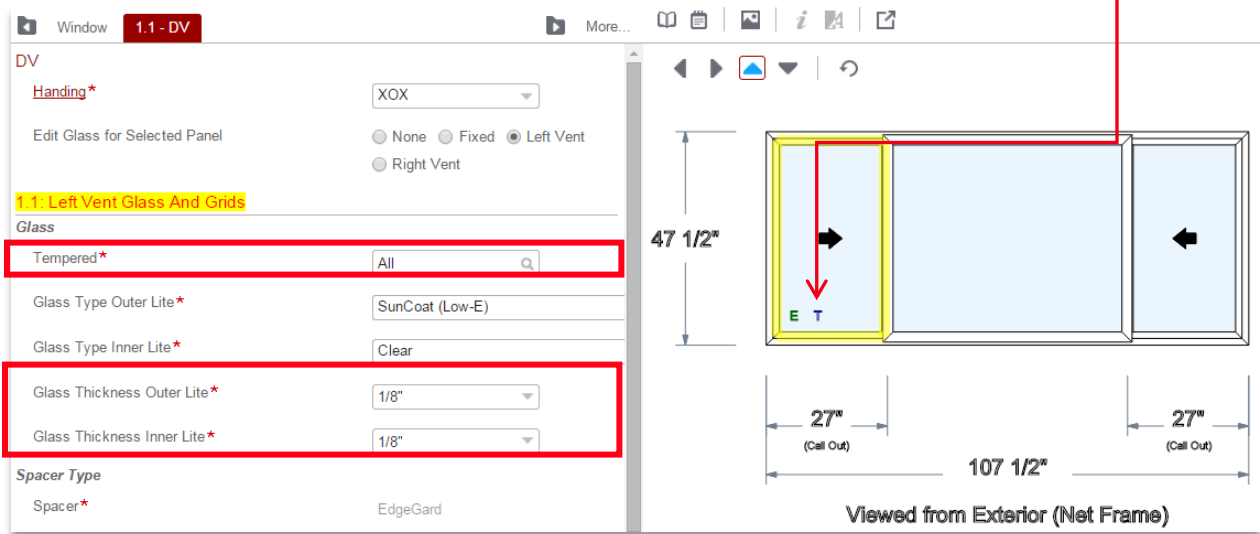



- The sub-tab section for **1.1 Left Vent Glass and Grids** and *Image View glass* are updated with highlighted cues for the panel selected. Customize each **Glass** section, as applicable.



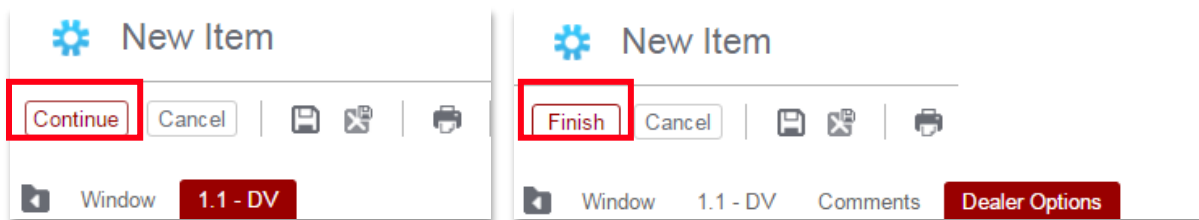
Sub-tabs provide sections (e.g., **1.1 Left Vent Glass and Grids**) to customize each panel. If the highlighted panel in the *Image View glass* is not the intended **Glass** to customize, simply change the selection for the **Edit Glass for Selected Panel** until the applicable panel is highlighted. Note that the *Image View* depicts the **Window** from the exterior, as indicated.

9. For the example, the **1.1: Left Vent Glass and Grids** section is customized to **Tempered = 'All'**. The *Image View* (in the right panel of the **Item Configurator**) updates with the visual indicator of **'T'** in the *Left Vent*. Update the remaining Left Vent fields, as applicable. //Note that the **Glass Thickness** is automatically adjusted to meet minimum build requirements for **Tempered Glass**. //



The image view on the right updates with customizations when visual indicators are available. The visual cue with *Tempered* is a capital letter **'T'**. The **'E'**, for Egress, is on the Image when applicable. If you do not see the image in the right panel, you can change the view for the right panel. Click the picture icon  above the right panel to see images.

10. **Customize Glass by Lite** is complete for the Left Vent. Finalize the build, as applicable, with the **Continue** and **Finish** buttons (See [Detailed Quote Steps](#) for more details on building a **Quote**).




If fields on the sub-tab are not editable, select the **Window** tab to ensure that the field **Customize Glass By Lite** is set to **'Yes'** and highlighted **yellow**.

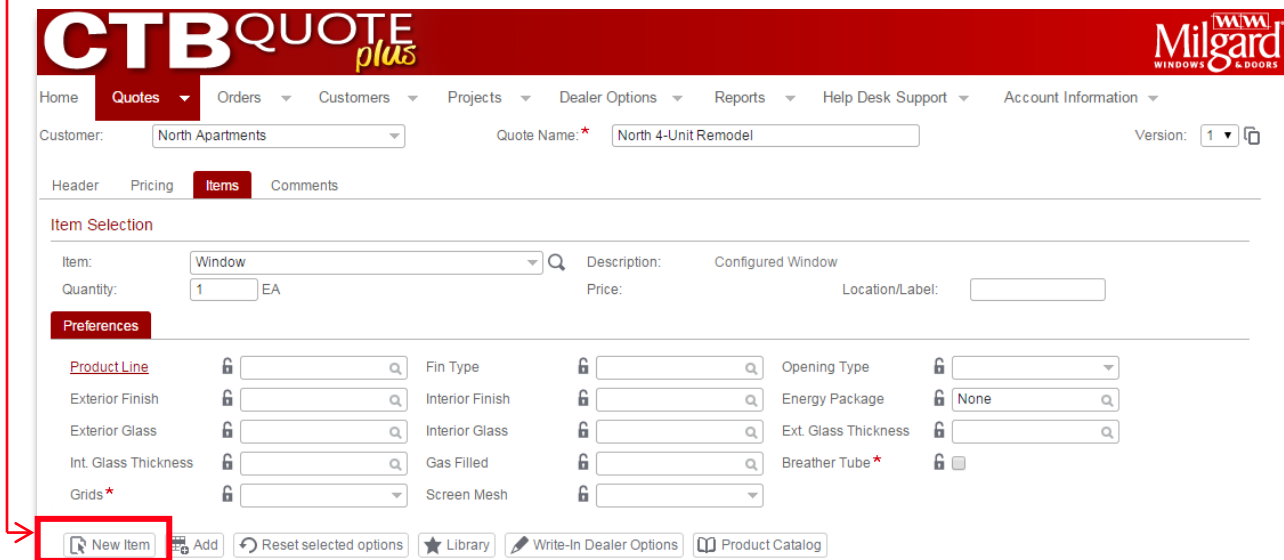
Customize Grids by Lite

Customized Lites can be built within **CTB Quote™ Plus** to accommodate a wide range of glass and grid design requirements. This section illustrates how to customize **Grids by lite**.

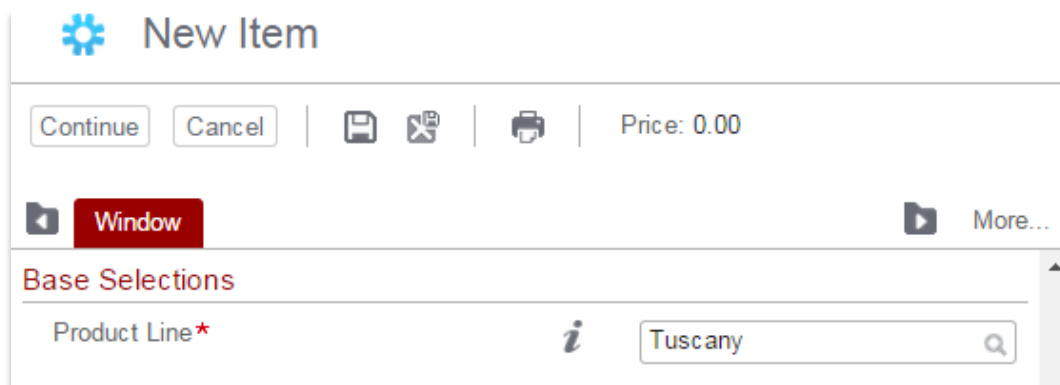
Steps to Customize Grids By Lite

The following steps illustrate customizing the grids on a **Tuscany Horizontal Slider**. The steps can be applied for other **Grid** customizations (to include **Doors**) within the application.

1. From the main **Quotes** page, select **Window** as the **Item** and click the **New Item**  **New Item** button to build the **Window**. //See [Detailed Quote](#) for more details on building a **Quote**.//



2. The **New Item** button opens the **Item Configurator** to the **Window** tab. Answer all prompts to build a **Window** through the **Finishes** section. //The example build will display the following: **Tuscany >Horizontal Sliders >Double Vent >1 3/8" Setback >Call Out: 9040>Sash: ¼>White**//.



- Once the **Finishes** section is answered, the **Grids** section appears below the **Glass** section. Locate the **Custom Grid Option** field. The default selection for **Customize Grids By Lite** is 'No'. Change the answer for **Customize Grids By Lite** to 'Yes'.

The image shows a 'New Item' configuration form with various sections. A red vertical line is drawn down the center of the form. A red box highlights the 'Custom Grid Option' section, and a red arrow points from the top of this box to the 'Yes' radio button.

New Item

Continue Cancel | Save | Print | Price: 0.00

Window More...

Exterior Finish* White

Interior Finish* White

Energy Packages

Energy Package* i None

Glazing

Glazing* i Dual Glaze Triple Glaze

Gas Filled* None

Breather Tube* None

Custom Glass Option:

Customize Glass By Lite* No Yes

Glass

Tempered* None

Glass Type Outer Lite* SunCoat (Low-E)

Glass Type Inner Lite* Clear

Glass Thickness Outer Lite* 3/32"

Glass Thickness Inner Lite* 3/32"

Spacer Type

Spacer* i EdgeGard

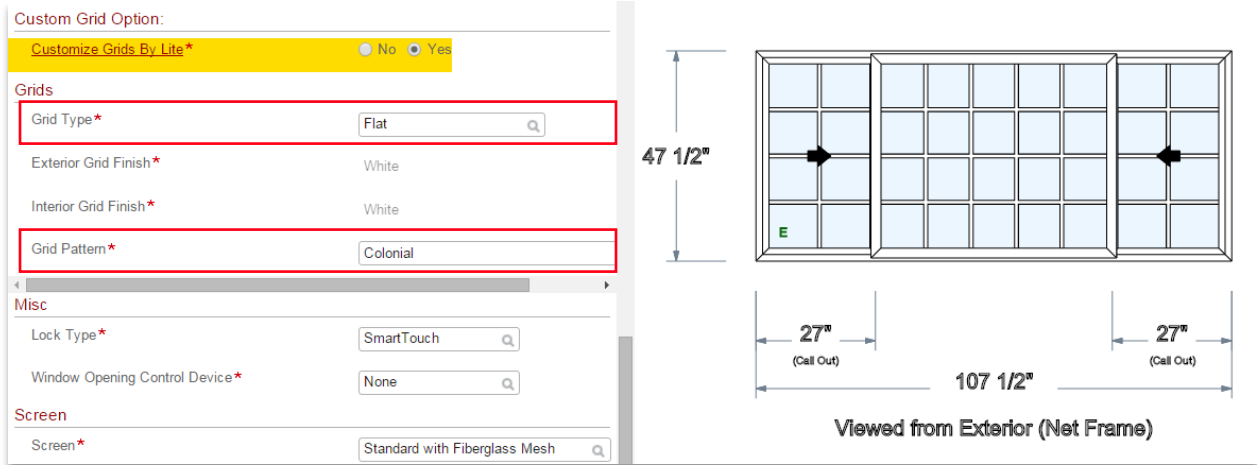
Custom Grid Option:

Customize Grids By Lite* No Yes

Grids

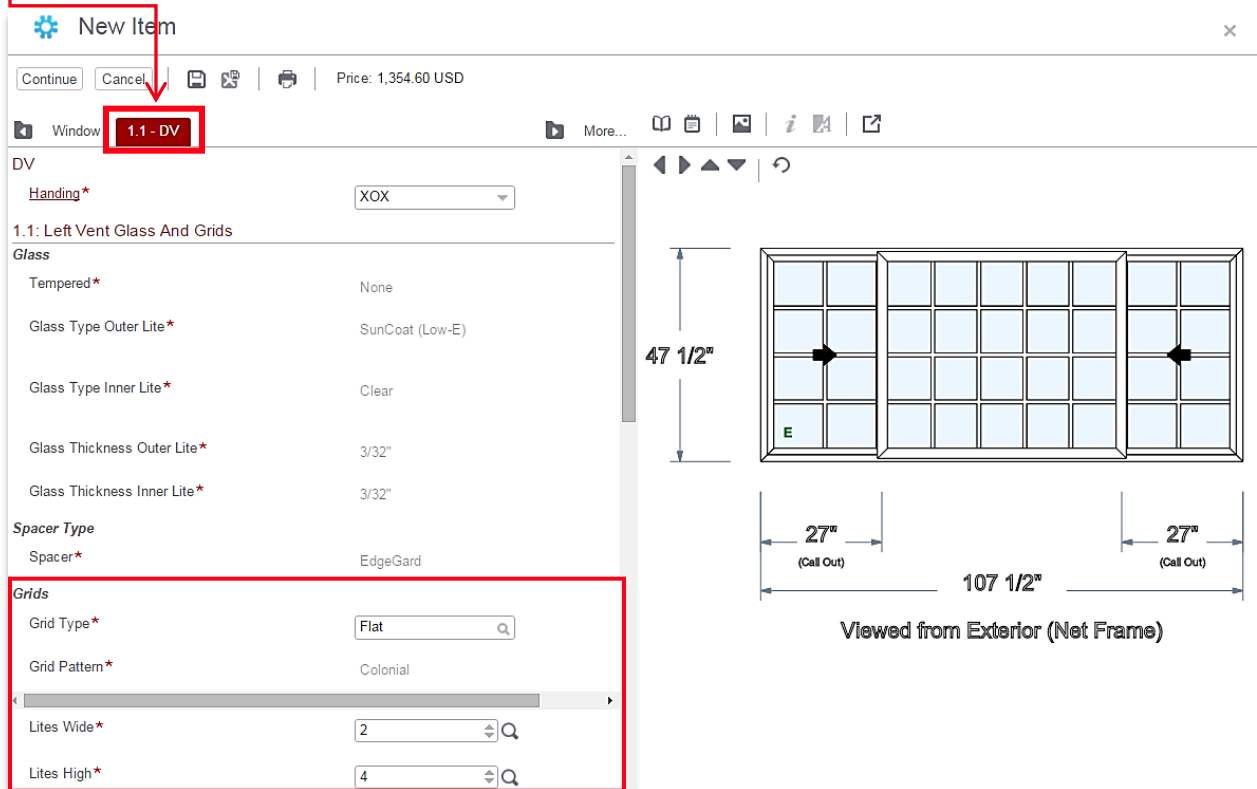
Grid Type* |

4. The line for **Customize Grids By Lite** highlights to **yellow** when answered 'Yes'. Answer the remaining **Grid** questions on the **Window** tab. //The example **Grid** answers are: **Flat** and **Colonial**. //

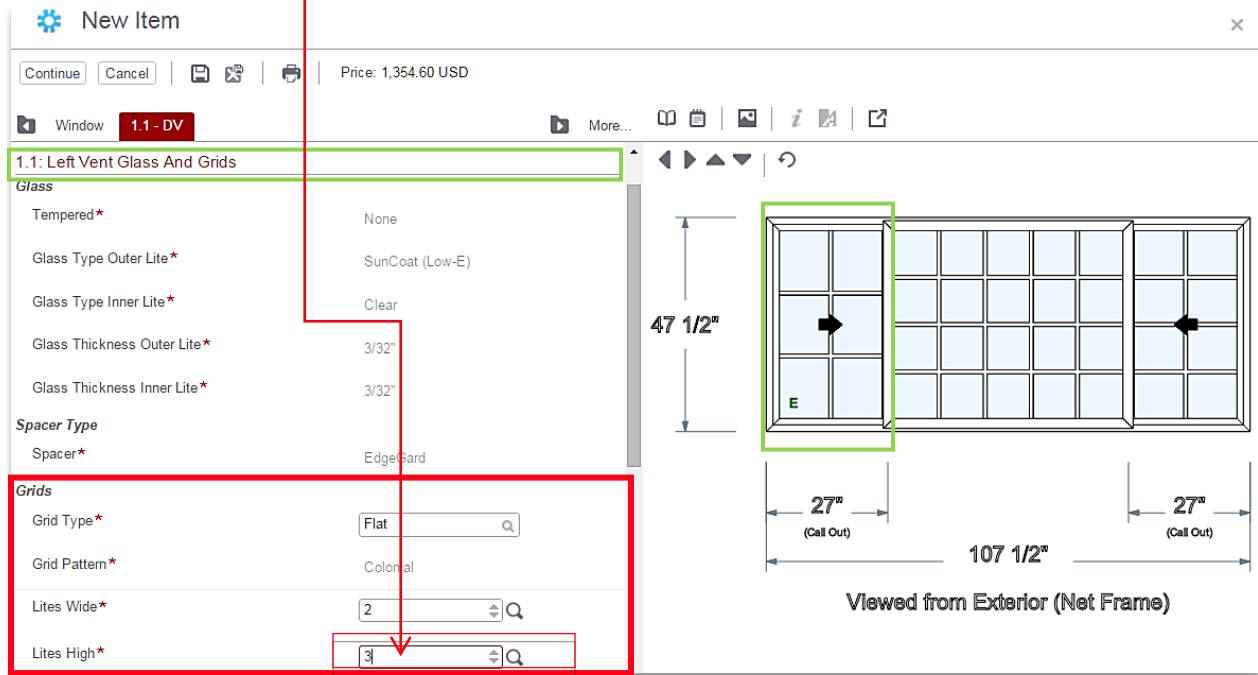



Answers for the **Grids** section initially apply to all glass and auto-fill with defaults for **Lites Wide** and **Lites High** (note the Image view on the right). Individual sub-tabs provide grid customization when **Customize Grids By Lite** is changed to 'Yes'.

5. Once all questions on the **Window** tab are answered, the **Glass** sub-tab (i.e. **1.1 – DV**) appears next to the **Window** tab. Click on the sub-tab, if not active, to customize **Grids**. //The sub-tab should display automatically when all **Window** tab questions are completed. Note the initial grid settings in the image below//

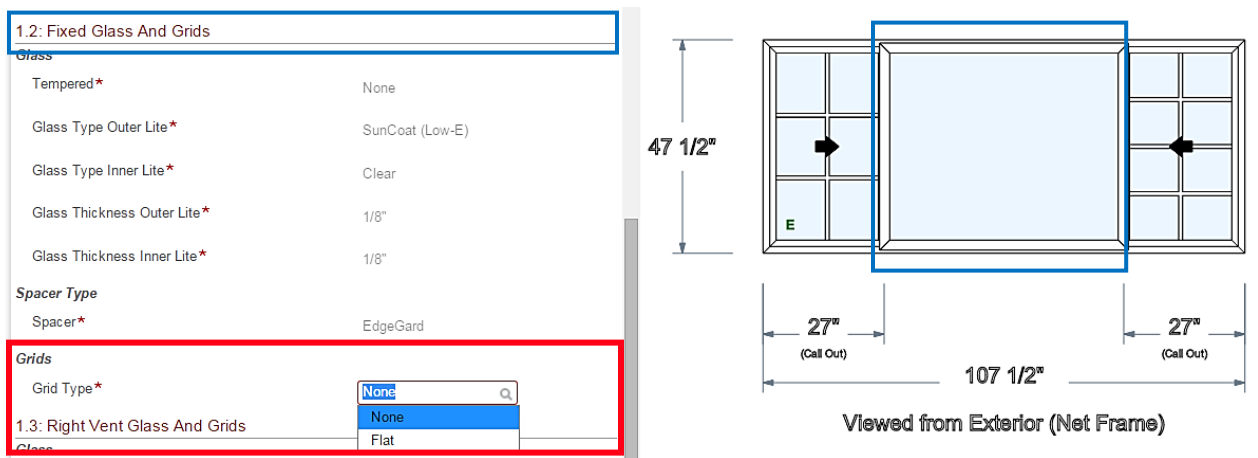


- On the sub-tab, each pane (e.g. *Left*, *Fixed*, and *Right*) has a **Grids** section. Find the **Grids** section for **1.1: Left Vent Glass and Grids** to customize. //For the illustration, **Lites High** has been changed from the default of '4' to **3**//

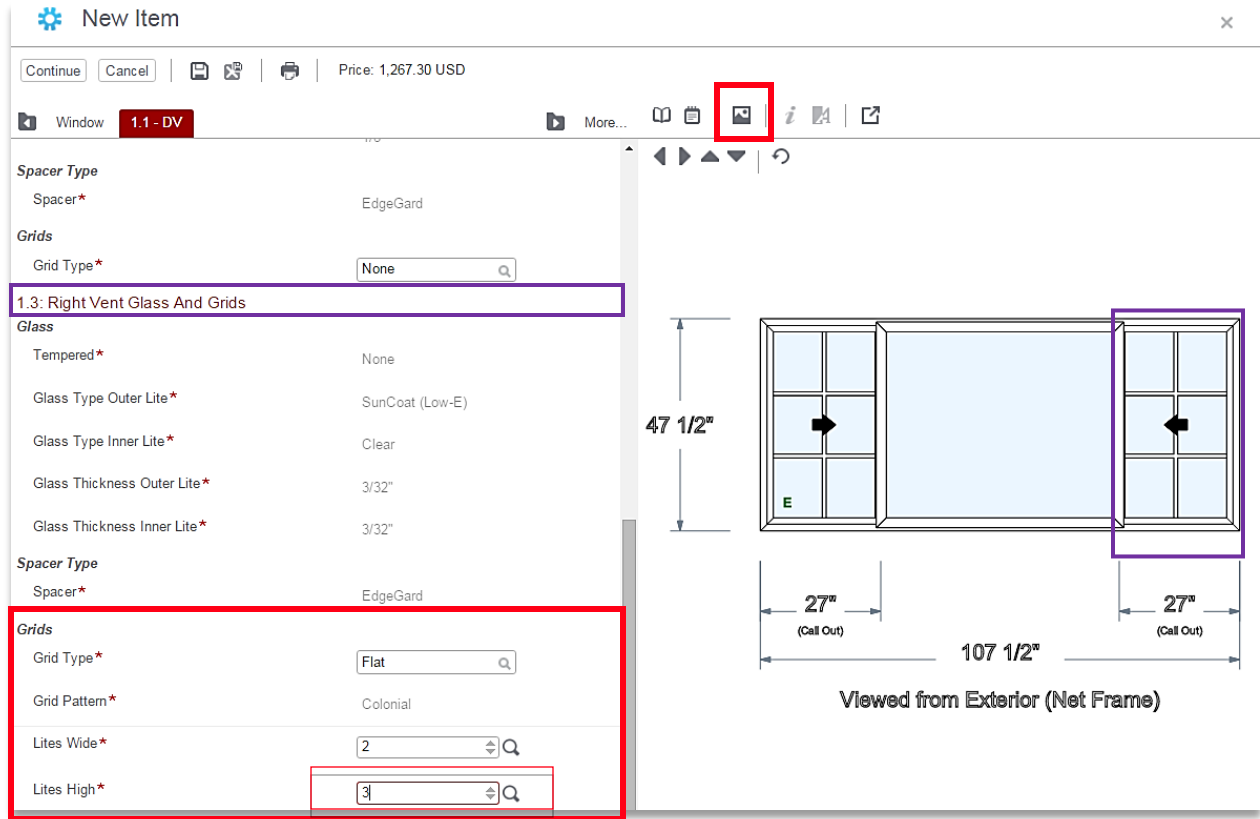


CTB Quote™ Plus images are interactive. The image panel, on the right, will update when **Grid** pattern changes are made. If you do not see the image in the right panel, you can change the view. Click the picture icon  above the right panel to see images.

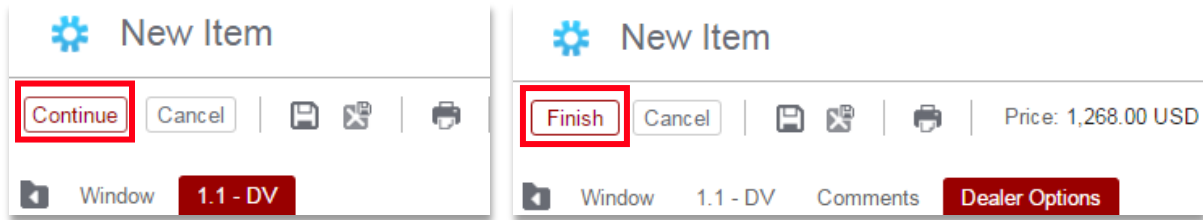
- Scroll down to find the **Grids** section for **1.2: Fixed Glass and Grids** to customize. //For the example, **Grid Type** was changed to '*None*'. Note that **Fixed Grids** are removed in the right Image view //



8. Customize the final **Grid** section for **1.3 Right Vent Glass and Grids**. // For the illustration, **Lites High** has been changed from the default '4', to **Lites High '3'**. The image panel on the right reflects the new customized **Grid** patterns.//



9. **Customize Grids by Lite** is complete, for this example. Finalize the build, as applicable, with the **Continue** and **Finish** buttons (See [Detailed Quote](#) for more details on building a **Quote**).



Building Composite Design or Muller Windows

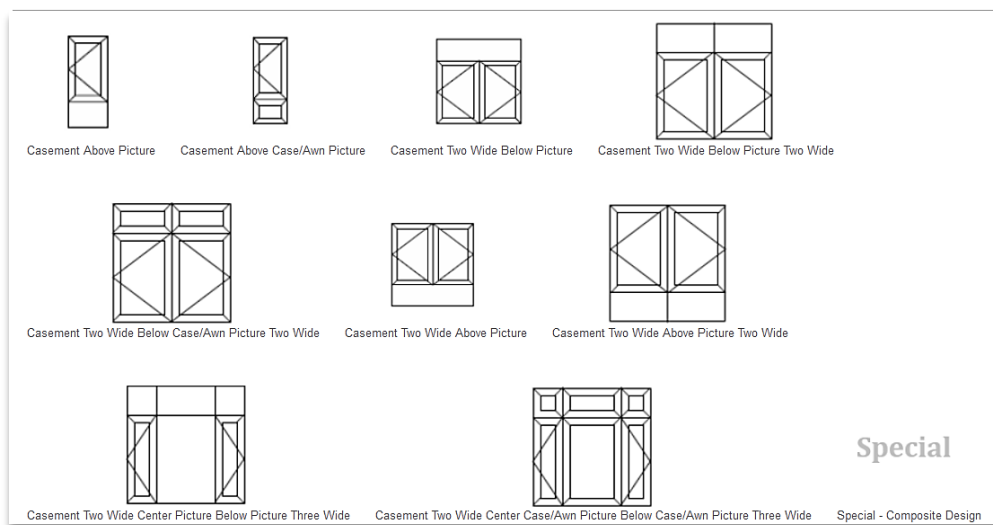
Special Composite Design is an option for customized builds. The most common builds are preconfigured within **CTB Quote™ Plus**, however, if the required build is not listed, special configurations are possible within the application. This section of the guide identifies build considerations and the steps to build **Special Composite Designs**.



The **Special Composite Design** option is designed to build window *models* that are not preconfigured. Use *Customized Glass* and *Lites* option(s) in **CTB Quote™ Plus** to apply custom lite settings (e.g., tempered left flank only) or specific grid patterns (e.g., 2x3 grids to either side of a picture window). //See [Customized Glass and Grids by Lite](#) for details.//

Composite Design Overview

- ❖ **Special Composite Design** involves basic **Quote**-building steps. For details on building an **Item** in the **Item Configurator**, review the [Quotes](#) chapter prior to building a special configuration.
- ❖ Special - Composite Design is a selection option within the Item Configurator>Configuration Model field. Select Special-Composite Design if a preconfigured build does not exist.
- ❖ **CTB Quote™ Plus** offers many popular preconfigured builds. Use the *Visual search icon* 🔍 for the **Configuration Model** field to see if the model already exists.



- ❖ **Special Composite Design** settings appear when selected for the *Configuration Model*. Available styles and models will be listed for individual glass units.
- ❖ Use the **Dealer to Milgard Comments** for **Special Composite Design** requests (e.g., IMR bar replacement with a muller bar) //see [Line Item Comments](#) for details//.
- ❖ **Total Dimensions** are set at the beginning of the build. *Unit Dimensions* will add one-half inch (½") for vertical and horizontal bar separations, as applicable. For equal distribution of *Units*, account for bar widths of ½ inch between and above Units.
- ❖ Retain the *Image view* 🖼️ in the right panel to match numbered units with *Unit* build questions.
- ❖ **CTB Quote™ Plus** identifies when minimum or maximum dimensions cannot be applied to special configuration options. Popup windows will clarify the height or width limitations and the steps to meet requirements.

Build a Special Composite Design or Mulled Window

The following steps describe building a *Tuscany* 3-wide casement with picture windows between and above. The same steps apply to all **Special Composite Designs**.

1. On the **Quote** page, with the **Items** tab selected, select **Window** from the **Item** drop-down list.

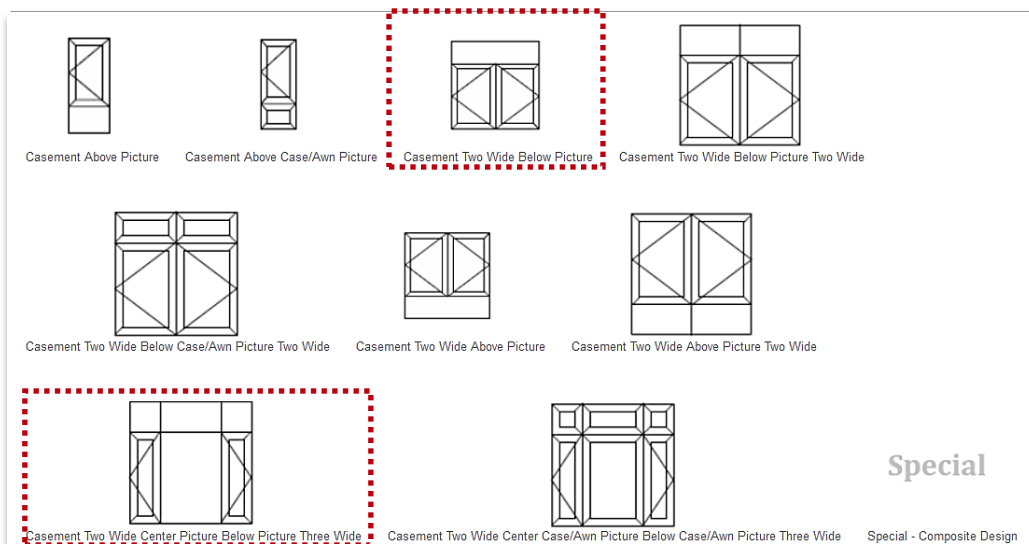
The screenshot shows the 'Items' tab in a software interface. At the top, there are tabs for 'Header', 'Pricing', 'Items', and 'Comments'. Below this is the 'Item Selection' section, where 'Window' is selected in the 'Item' dropdown, and 'CONFIGURED WINDOW' is shown in the 'Description' field. The 'Quantity' is set to '1 EA'. Below this is the 'Preferences' section, which contains various fields for configuration such as 'Selling Location', 'Opening Type', 'Energy Package', 'Ext. Glass Thickness', 'Breather Tube', 'Product Line', 'Exterior Finish', 'Exterior Glass', 'Int. Glass Thickness', 'Grids', 'Fin Type', 'Interior Finish', 'Interior Glass', 'Gas Filled', and 'Screen Mesh'. At the bottom of the preferences section, there is a row of buttons: 'New Item' (highlighted with a red box), 'Add', 'Reset selected options', 'Library', 'Write-In Dealer Options', and 'Product Catalog'.

2. Select the **New Item** button to open the **Item Configurator**.
3. Select a **Product Line**. //The example will illustrate *Tuscany*.//
4. Select an **Operating Style**. //The example will illustrate *Casement*, however, since **Special Composite Design** settings will be used, any **Operating Style** can be selected.//



The **Operating Style** field filters preconfigured options displayed under **Configuration Model** (the next build question). ANY **Operating Style** can be used for **Special Composite Design**, which will query and allow styles and models to be customized by individual **Unit**.

5. Use the *Visual search icon* for the **Configuration Model** field to see if the required configuration model already exists. //The illustration below shows several close matches (e.g., *Casement 2-wide Below Picture* and *Casement 2-wide + Center Picture Below Picture 3-wide*.//



6. For Configuration Model, select *Special – Composite Design* to build a special configuration.
7. Select a **Fin Type**. //The example illustrates '1 3/8' Setback.//
8. Enter the **Exact Width** and **Height** for the *overall* frame. //Unit Height and Width will be queried, individually, to fit inside the overall dimensions. The example illustrates 60" for **Exact Width** and 48" for **Exact Height**. Use the [tool tips](#) for Min-Max constraint information. //

Base Selections

Product Line* *i* Tuscany

Operating Style* *i* Casement

Product Material* Vinyl

Configuration Model* Special - Composite Design

Fin Type* 1 3/8" Setback

Dimensions

Opening Type* Net Frame

Exact Width* 59 1/2

Exact Height* 48

Select Special Configuration

Number of Units Wide*

9. Under *Special Configuration*, enter the **Number of Units Wide** (e.g., number of glass panes across). Enter the **maximum** units needed across any single row (e.g., for the example of 3 Units Wide on bottom and only 1 Unit Wide on top, 3 Units Wide will be entered.)
10. Enter the **Number of Units High** (e.g., how many rows). // Two will be used for the example.//



Once entries are made for **Units Wide** and **High**, the *Unit Dimensions* section appears and a **CTB Quote™ Plus** diagram is displayed in the right panel (illustrated below). The diagram is *only* to identify **Unit** numbering, not to illustrate the final window design.

2.1	2.2	2.3
1.1	1.2	1.3

11. Answer the build question for the **Configuration Model in Position 1.1**. //The example uses *Casement* for **Position 1.1**. Under *Unit Dimensions*, **Unit 1.1** is displayed to identify the location for the build query. Locate **1.1** in the right panel (illustrated below, in the diagram, with a yellow highlight around the **1.1** Unit. Each **Unit** query can be matched to the diagram for clarity.//



Remember to account 1/2 inch for each bar when calculating the Unit widths and heights. In the illustration, the 3-wide base row will have 2 bars (1 inch total) to account for when configuring Exact Width (e.g., 59.5 – 1” for bars = 58.5”. Divide 58.5 by 3 = **19.5** inches each).

12. Enter the **Exact Width** and **Height** for **Unit 1.1**, subtracting 1/2-inch for each vertical bar. // The example shows an overall net frame width of **59.5**. Subtract 1/2-inch for each vertical bar (59.5 – .5 - .5 = 58.5) and divide your answer by 3 for three equal lites, or enter a special size as determined by the **Customer**.//
13. Continue to enter **Configuration Model**, **Exact Width** and **Exact Height** for each *Unit 1* query. // For the example, **Unit 1.1** and **1.3** are **Casements**, each **19.5** Width and **29.5** Height. **Unit 1.2** is a **Picture** with the same size entries.//

- Once **Unit 1** queries are answered, **Unit 2.1** is queried. To create a single Picture Unit, the example illustrates using *Picture* for the **Configuration Model** and **59.5** to fill the entire width of **Unit 2.1**.
 //After **Unit 2** is answered, the diagram converts to the **CTB Quote™ Plus 2D** image in the right panel, as depicted below.//

- Answer the remaining (standard) build questions (e.g., **Finish, Grids, etc.**).
- Click the **Continue** button after all build queries are answered and verified. //For the example, **Handing** queries are answered **Left** and **Right**, respectively, for the **Casement Units** in the **1.1 FC** and **1.3 FC** tabs. //

- Enter Line Item Comments or Dealer Options, as applicable.
- Click the **Finish** button to complete the **Special Composite Design** build.

Special Composite Designs Examples

Use Entire Height to Fill Two Rows

- ❖ In the following *Essence* illustration, the total *Net Frame* window dimensions are set to **60x48**
- ❖ The Special Configuration Settings are 3-wide, 2-high

The screenshot shows the 'Window' configuration interface. The 'Base Selections' panel includes: Product Line (Essence), Operating Style (Gable Picture Window), Product Style (Standard Frame), Product Material (Wood w/fiberglass exterior), Configuration Model (Special - Composite Design), and Fin Type (1" Setback). The 'Dimensions' section is highlighted with a red box and shows: Opening Type (Net Frame), Exact Width (60), Exact Height (48), Number of Units Wide (3), and Number of Units High (2). To the right, a technical drawing of the window is shown with dimensions: total height 48" (split into 18" and 29 1/2"), total width 60" (split into 20", 19", and 20"). The drawing is labeled 'Viewed from Exterior (Net Frame)'.

- ❖ To fill *both* rows, **Unit 1.3** is set to use the full Height (i.e. **48 inches**):

The screenshot shows the 'Unit Dimensions' panel for Unit 1.3, which is highlighted with a red box. The settings for Unit 1.3 are: Configuration Model in Position 1.3 (Case/Awn Picture), Bottom Rail (Short), Exact Width (20), and Exact Height (48). The technical drawing on the right is identical to the previous one, but the rightmost unit (Unit 1.3) is highlighted with a red box to indicate it is set to the full height of 48 inches. The drawing is labeled 'Viewed from Exterior (Net Frame)'.

Unequal Heights for Special Composite Designs

- ❖ In the following *Tuscany* illustration, the window dimensions are 60x48, 3-Wide, 2-High
- ❖ **Units 1.1 and 1.3** height dimensions are set differently from **Unit 1.2**

The screenshot shows a software window titled "Window" with a "More..." button and navigation icons. The interface is divided into a left-hand configuration panel and a right-hand technical drawing area.

Configuration Panel:

- Unit 1.1:** Configuration Model in Position 1.1* is "Casement". **Exact Width*** is 20. **Exact Height*** is 23 1/2. Vertical Bar Thickness* is 1/2. Horizontal Bar Thickness* is 1/2.
- Unit 1.2:** Configuration Model in Position 1.2* is "Picture". **Exact Width*** is 19. **Exact Height*** is 29 1/2. Vertical Bar Thickness* is 1/2. Horizontal Bar Thickness* is 1/2.
- Unit 1.3:** Configuration Model in Position 1.3* is "Casement". **Exact Width*** is 20. **Exact Height*** is 23 1/2. Horizontal Bar Thickness* is 1/2.

Technical Drawing: A "Viewed from Exterior (Net Frame)" drawing of a 60x48 inch window. It features a central unit and two side units. The total width is 60 inches, with individual unit widths of 20, 19, and 20 inches. The total height is 48 inches, with individual unit heights of 24, 23 1/2, and 24 inches. The top of the side units is gabled.

- ❖ Likewise, **Units 2.1 and 2.3** auto-fill remaining height dimensions which are different from the auto-fill height for **Unit 2.2**

The screenshot shows a software window titled "Window" with a "More..." button and navigation icons. The interface is divided into a left-hand configuration panel and a right-hand technical drawing area.

Configuration Panel:

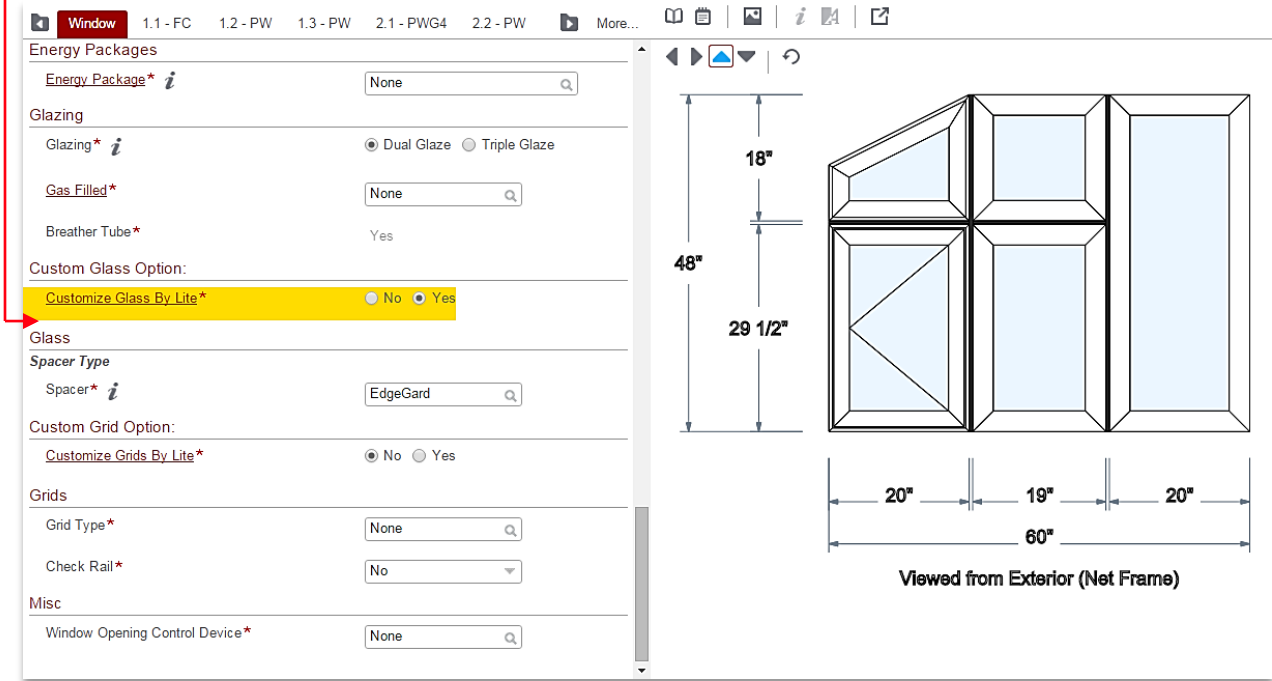
- Unit 2.1:** Configuration Model in Position 2.1* is "Trapezoid". **Exact Width*** is 20. **Exact Height*** is 24. Vertical Bar Thickness* is 1/2. **Short Leg Height*** is 8.
- Unit 2.2:** Configuration Model in Position 2.2* is "Picture". **Exact Width*** is 19. **Exact Height*** is 18. Vertical Bar Thickness* is 1/2.
- Unit 2.3:** Configuration Model in Position 2.3* is "Trapezoid". **Exact Width*** is 20. **Exact Height*** is 24. **Short Leg Height*** is 8. Series Code* is 8320T.

Technical Drawing: A "Viewed from Exterior (Net Frame)" drawing of a 60x48 inch window, identical to the one in the previous screenshot. It features a central unit and two side units. The total width is 60 inches, with individual unit widths of 20, 19, and 20 inches. The total height is 48 inches, with individual unit heights of 24, 23 1/2, and 24 inches. The top of the side units is gabled.

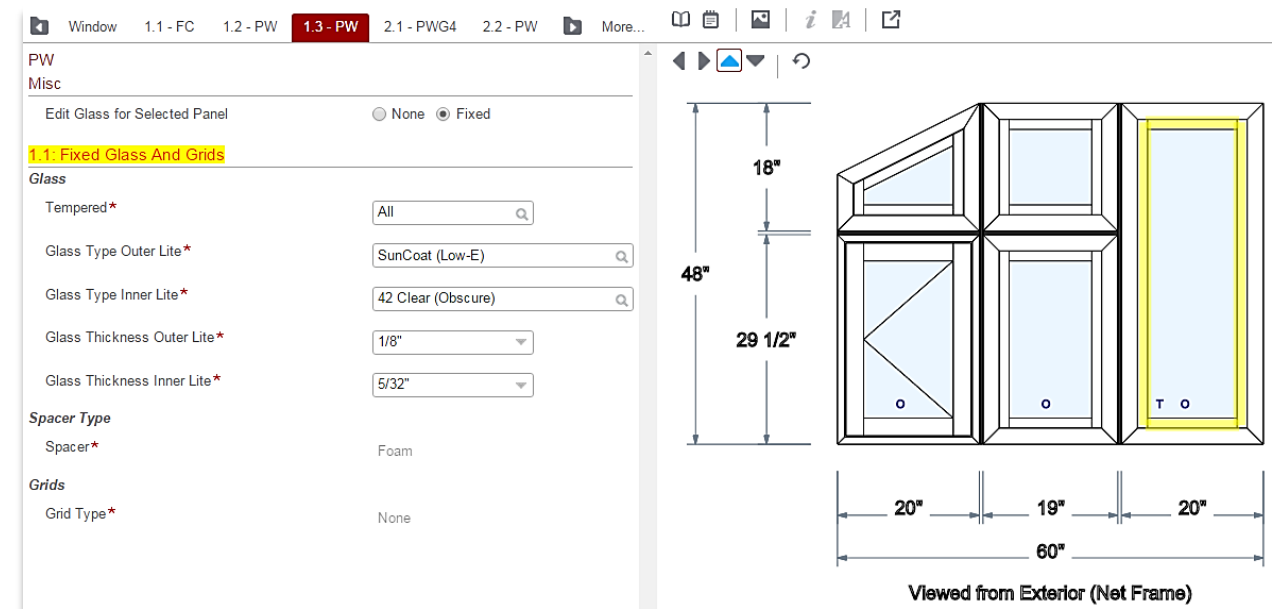
Customized Glass for Special Composite Designs

❖ **Customize Glass By Lite** functionality operates the same as standard window builds. It may be easier to finish the **Special Composite** build first and use the **Edit Item** link to add custom glass settings.

1. Open the **Item Configurator** >Window tab
2. Select 'Yes' for Customize Glass By Lite



3. Customize individual *Unit* glass on the associated **Glass tab** (i.e., **1.3-PW** in the illustration below)

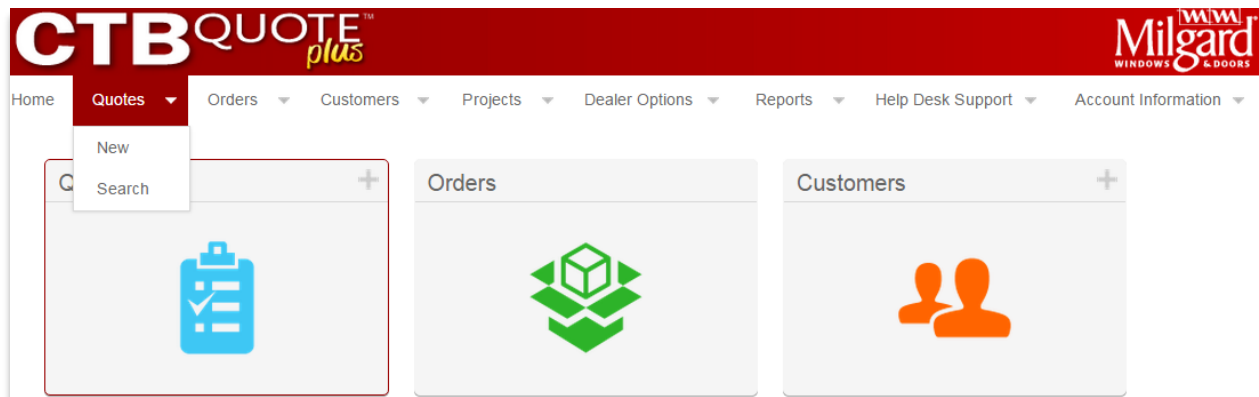


Quote Search Page

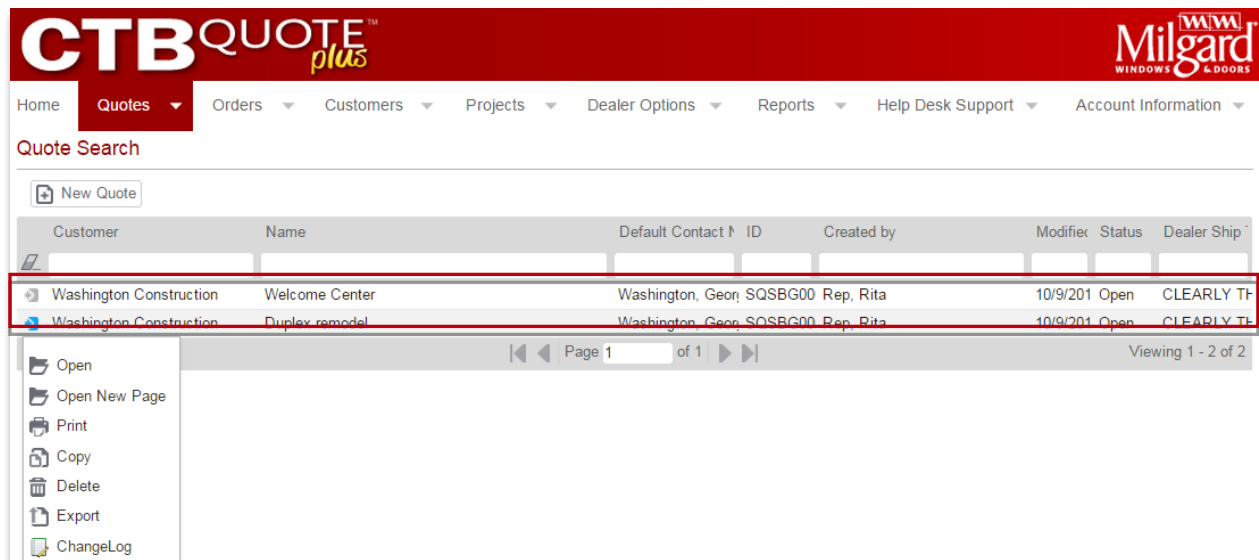
The **Quote Search** page lists all **Quotes** in **CTB Quote™ Plus** (including those converted to **Orders**). This section identifies search page options specific to **Quotes** //see [Search Functionality](#) for details//.


Quote Search View

- ❖ Access the **Quote Search** page from the **Navigation Ribbon> Quotes> Search** or with one-click from the **Home** page> **Quotes** tile.



- ❖ Visible **Quotes** are listed in the result grid. //Settings may limit **Quotes** to those under your profile.//



- ❖ **Action icon**  options for **Quotes**:
 - ◇ **Open**– opens the **Quote** to view or edit //Quotes with **Status 'Ordered'** cannot be opened//
 - ◇ **Open New Page**– opens the **Quote** in a new window or tab to manage or view multiple **Quotes**
 - ◇ **Print**– offers options to view, save, print or email **Quotes** in various report styles
 - ◇ **Copy**– creates a duplicate (all details) of the **Quote** and opens a new **Quote** page for editing
 - ◇ **Delete**– removes unwanted **Quotes** (cannot delete **Quotes** with the **Status 'Ordered'**)
 - ◇ **Export**– provides **Export** functionality to share **Quote** builds with other **CTB Quote™ Plus** users
 - ◇ **ChangeLog** - offers the audit trail of **Quote** activities (e.g., the history of the **Quote**)