

## Troubleshooting Guide

This section provides guidance to resolve popup errors or display issues, and to understand warning boxes that may be encountered in **CTB Quote™ Plus**. Administrator permissions may be required to resolve account settings. Sections with more details are referenced, as applicable.

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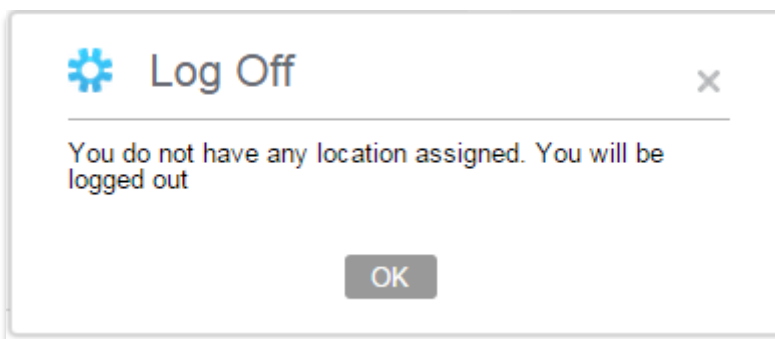
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## Login Issues

### Location Popups

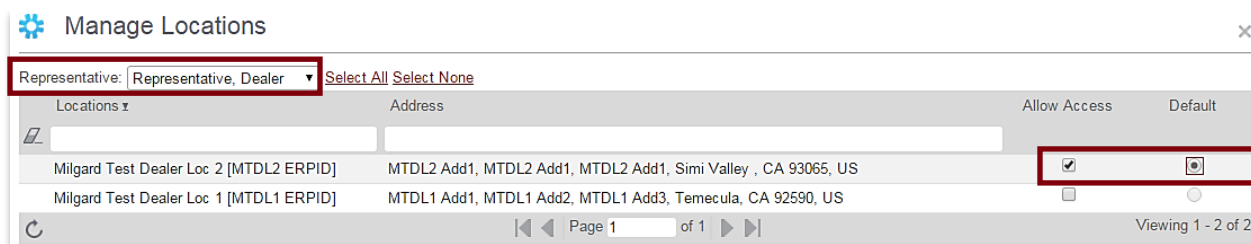
**Location** management is an administrator action within **Account Information**. Administrators must assign each **Representative** with access to at least one **Location**.

**Scenario:** Login is successful followed by a 'Log Off' popup (screenshot below)



### Resolution:

- An administrator must log in to **CTB Quote™ Plus** to resolve. //If you are the administrator and receive a **Location** error, contact your Milgard Sales Representative for setup resolution.//
- Navigate to: **Account Information>My Company Profile**
- Select the **Manage Location** button
- Select the **Representative** from the drop-down list in order to assign a **Location**
- Select **Allow Access** to at least one **Location**. Set a Default if applicable.
- Manage Locations has an **OK** button to save changes. Select **OK** to save the **Location** update.

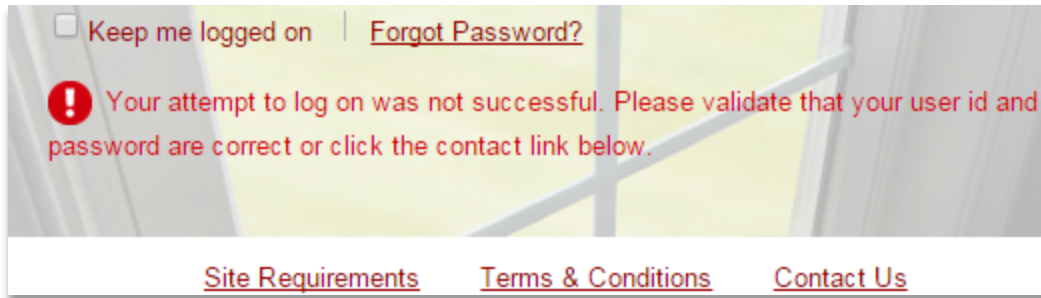


If the **Manage Locations** screen is closed, without clicking **OK**, the changes **are not saved!!!**  
See **Account Information – Administrator** section for more details.

## Invalid Login

A valid **User ID** and **Password** are required to log in to **CTB Quote™ Plus**. Passwords are case sensitive.

**Scenario:** an unsuccessful log on message appears on the login screen (screenshot below)



### Resolution:

- Check that the **Caps Lock** key (on the keyboard) is not locked on (unless the password is in all uppercase).
- Use the **Forgot Password** link if you have forgotten your password. // A valid **User ID** and **Email** address on the **My Profile** page is required to successfully receive a new password via **Email**./
- Verify the **User ID** with your Administrator. **User IDs** are not case sensitive.
- Have the Administrator log in to **CTB Quote™ Plus** and change your password:
  - **Account Information>My Company Profile > Representatives** tab
  - Select the **Representative** and provide a temporary password for the **Representative** // **Representatives** can change their own password in **Account Information>My Profile** once they can successfully log on to **CTB Quote™ Plus** with a temporary password.//

## IE Login Screen

**Scenario:** *Internet Explorer* users may see field misalignment (misaligned fields are displayed below).

**Compatibility Mode** must be turned **off** to resolve. //See [Internet Explorer Issue](#) for more details.//



### Resolution:

- In the IE browser, uncheck any compatibility checkboxes in **Tools> Compatibility View Settings**

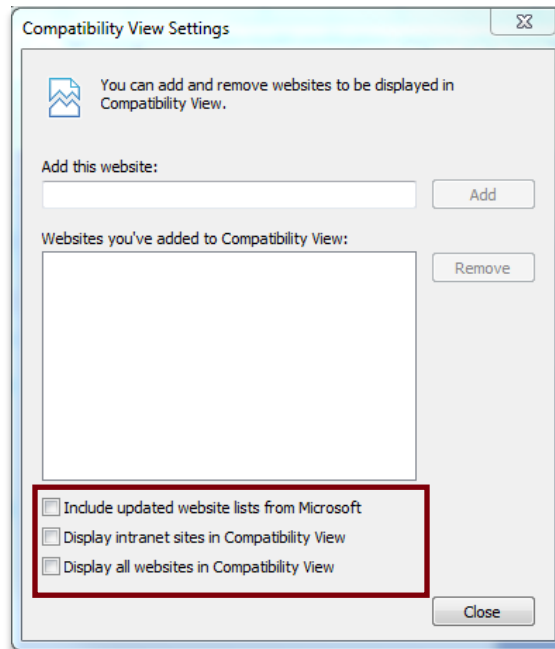
## Display issues

### Internet Explorer (IE) Issue

**Scenario:** My Company only allows Internet Explorer and **CTB Quote™ Plus** doesn't display correctly.

**Resolution:**

- **Compatibility Mode** must be turned **off** (disabled) in Internet Explorer.
- In IE menu > **Tools > Compatibility View Settings**, uncheck compatibility checkboxes.
- Remove CTBQuotePlus.com if listed as a Website in Compatibility View.

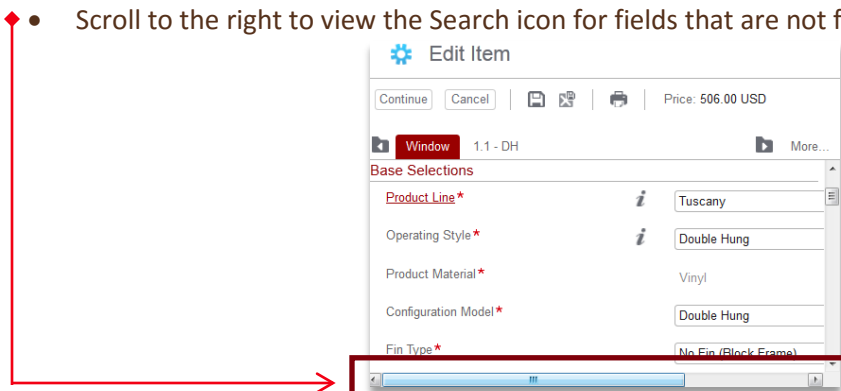


### Search Icon is Hidden

**Scenario:** Within the **Item Configurator**, some fields do not display the **Search** icon for visual selection.

**Resolution:**

- Screen resolutions of 1920 or less can limit the visibility of screen data. A horizontal scrollbar will appear at the bottom of the **Item Configurator** to scroll left and right for hidden areas.
- Scroll to the right to view the Search icon for fields that are not fully visible.



## Unexpected Application Behavior

**Scenario 1:** Page has missing sections, buttons, or fields

**Scenario 2:** Inactive or no visible button response

**Scenario 3:** Unexpected behavior or incorrect link to a new page

**Scenario 4:** CTB Quote™ Plus display an **Error** screen on the **Login** page after some action




The above scenarios may occur when **CTB Quote™ Plus** has had application updates but your browser is ‘caching’ information. Browsers will *cache* web pages in order to load them more rapidly for future visits. Caching can interfere with updated information available from web applications.

### **Resolution:**

- **Log Off** and close the browser, prior to logging back in, to resolve most web application cache issues.
- Manually clear the browser cache to resolve unexpected application behaviors.
  - Press **Ctrl + Shift + Delete** keys simultaneously to clear the cache in most browsers.
  - Close and reopen the browser prior to logging into applications. //If Ctrl + Shift + Delete does not work for you, clear the cache using the browser Menu option (below).//
- **Browser Menu Resolution**
  - Google Chrome:
    - Menu option: Open the settings **Menu>History> Clear Browsing data**
    - Ensure **Images & Files** and **Hosted app data** are checked to be cleared
    - For timeframe, select “the beginning of time”
    - Close and reopen the browser prior to logging into **CTB Quote™ Plus**
  - Firefox:
    - Menu option: Open the settings **Menu>Privacy...History** section> **Clear your Recent History link**
    - Ensure ‘**Cache**’ is checked to be cleared, then click **Clear Now**
    - For time range, select “Everything”
    - Close and reopen the browser prior to logging into **CTB Quote™ Plus**
  - IE 9+:
    - **Tools> Delete Browsing History**
    - Ensure **Temporary Internet Files** is checked to be cleared, then click **Delete**
    - Close and reopen the browser prior to logging into **CTB Quote™ Plus**

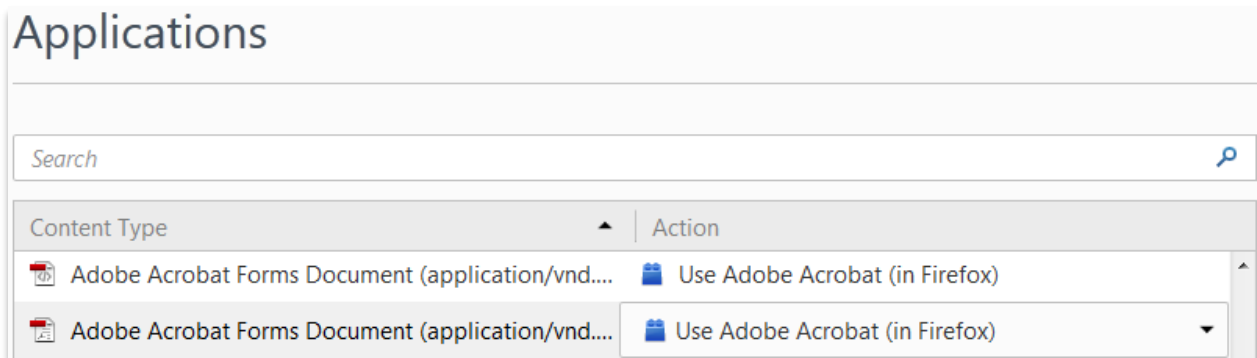
## No Info Link Data

Browser settings may affect the way that PDF's are opened. Most browsers display PDF links inside a web page which **CTB Quote™ Plus** will display within the *Information* panel when an Info Link  to a PDF is selected.

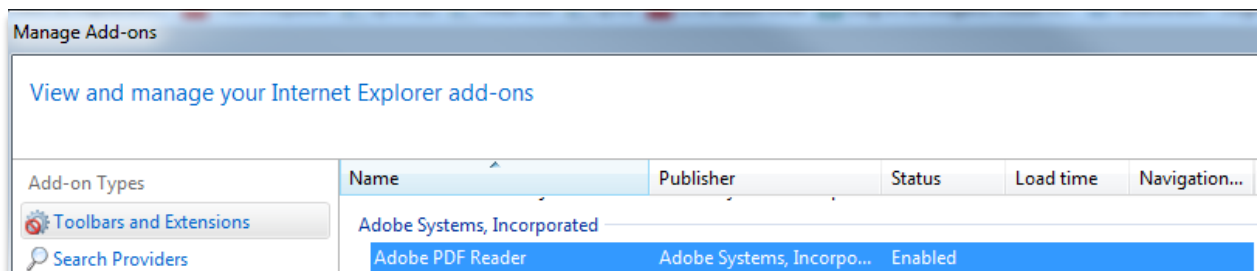
**Scenario:** No information is displayed in the *Information panel* in the **Item Configurator** when an **Info Link** is selected.

### Resolution:

- The PDF may have downloaded instead of opening in a tab or window. Check the Downloads folder to see if the PDF downloaded.
- Change the browser settings to open PDF's within the browser instead of saving (or downloading) by default
  - Firefox (screenshot below)
    - **Settings Menu>Options>Applications**
    - Find **Adobe Acrobat Forms Document** under **Content Type** column
    - Ensure that the **Action** column reads **Use Adobe Acrobat (in Firefox)**. Use the drop-down menu to change the **Action** for **Adobe Acrobat Forms**



- Google Chrome
  - Google displays PDF's within the browser by default
  - Open the Settings **Menu> Settings > Show advanced settings> Privacy > Content Settings> Plugins > Manage Individual Plugins Manage Individual Plugins** to change how PDF's are opened.
- Internet Explorer (screenshot below)
  - IE displays PDF's within the browser by default
  - Open **Tools> Manage Add-ons**
  - Ensure that **Adobe Systems, Incorporated (Adobe PDF Reader)** is enabled.



## Place Order Data Missing

All fields on the **Header** tab are meant to reference the **Customer**. The **Place Order Screen** fields are for reference from the **Dealer** to Milgard. This behavior is consistent: a **Customer**-requested ship date is available on the **Header** tab and a **Dealer**-requested ship date, on the **Place Order** screen. Both dates can be different with the Dealer Requested Ship date earlier than the **Customer-requested** date. Milgard only sees the **Place Order** fields.

**Scenario:** I entered a **PO Number** and **Requested Ship date** on the Header tab and **CTB Quote™ Plus** is asking for the same information on the **Place Order** screen.

Additional Information			
Construction Type:	*	30: Multi-Family New Home Construct	
		Requested Ship Date:	7/31/2015
Contact Source:		Payment Terms:	
P.O. Number:	*	Shipping Instructions:	
Contact Information			
Contact:		Phone:	123-555-1212
Email:		Mobile:	234-555-1212
		Fax:	

### Resolution:

- The Milgard required fields appear on the **Place Order** screen (Dealer to Milgard).
- **Customer** Header tab fields are available for Customer referencing, if applicable. If the PO Number should appear on Print Bid Documents for the Customer, use the same PO Number for both screens.

## Change Log is Empty

The Change Log functions as an audit trail for primary Quote modifications. Versioning and Copy functions both start with a new audit trail or Change Log so that modifications that occur on that Version or Copy are recorded as from the moment created.

**Scenario 1:** I made a new version of my Quote and my **Change Log** does not reflect all of my entries.

**Scenario 2:** I made a Copy of my Quote and the **Change Log** does not reflect any entries.

**Scenario 2:** My **Library** configured Items, added to the Shopping Cart, are not in the **Change Log**.

### Resolution:

- There is no error with an empty **Change Log** for new copies/versions. By design, the **Change Log** audits the changes made as of creation date. **Items** already in the Shopping Cart from a Copy or Version cannot be carried over, as they occurred on a different copy/version.
- For complete audit trail data in the **Change Log**, only create new **Quotes** and create the **Items** to be added to the Shopping Cart. The Change Log does not monitor **Library** inserts.

## Usage Issues

### Auto-Save Not Working

All of the *main pages* in **CTB Quote™ Plus** (e.g., **Quotes, Customers, Projects** ) auto-save data.

**Scenario:** **Price Adjustments, Attachments, Change Password**, or other button *popup screens* did not save my changes or actions.

**Resolution:**

- Most **CTB Quote™ Plus** pop-up windows or screens offer the option to *view* pop-up data. They can be canceled or closed without saving changes. To **save** changes when the **OK** or **Save** buttons are available, be sure to select **OK** or **Save** when changes have been made.

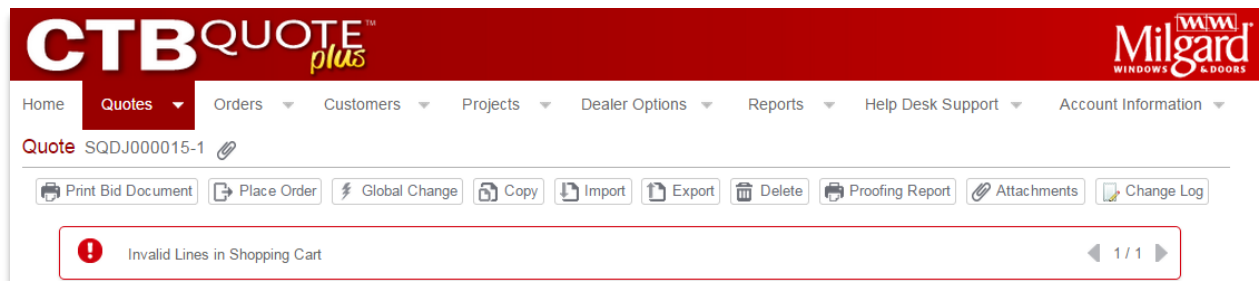
### Attention Required or Invalid Lines in Shopping Cart

Unresolved fields in the **Item Configurator** require attention. This can occur from changes to **Quote Location**, a *Global Style* change, or a product update for **Items** in the *Shopping Cart*.

**Scenario 1:** I see “*Invalid Lines in Shopping Cart*” warning at the top of my **Quote**.

**Scenario 2:** I used **Global Changes** and now see ‘*Attention Required*’ in the *Shopping Cart* area.

**Scenario 3:** I used the **Validate All** button and now see ‘*Attention Required*’ in the *Shopping Cart* area.



Quote Lines

Validate All  Expand All Total Quantity: 6 Windows, 1 Doors Total Price: 0.00

Line	Location/Label	Item	Qty	UOM	Price	Total
1	LivRoom	Window	2	EA		Attention Required
<a href="#">Edit Item</a>		<a href="#">Start Over</a>	Configured Window		<a href="#">Remove</a>	

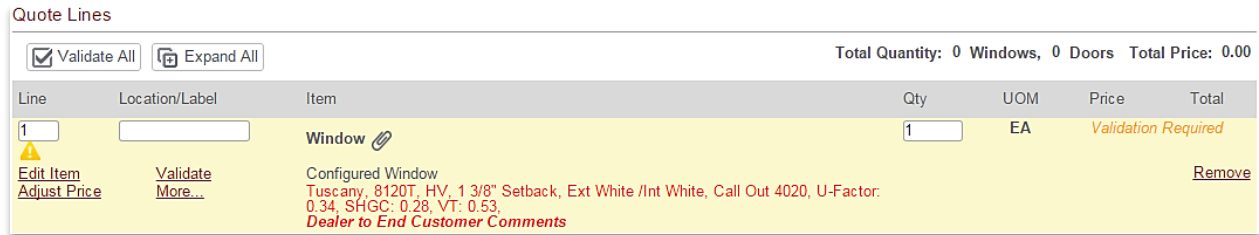
**Resolution:**

- Click the **Edit Item** link to open the **Item Configurator**. Answer any unresolved fields that are prompted. Select the **Continue** and **Finish** buttons to complete the build, in order to resolve. The *Shopping Cart* will update and the ‘*Attention Required*’ message should disappear.
- See **Quotes> Shopping Cart** section for Line Item editing details.



## Validation Required Warning

Validation in the *Shopping Cart* may be required to ensure that the most current application settings (e.g., build requirements and pricing checks) have been verified (i.e., validated). It is a best practice to use the **Validate All** button prior to converting a **Quote** to an **Order** (i.e. **Place Order** function) to eliminate errors.



**Scenario 1:** I copied a **Quote** and when the **New Quote** opened, there is a “*Validation Required*” in the *Shopping Cart* area.

**Scenario 2:** I added **Quote** Items from the **Library** and see “*Validation Required*” in the *Shopping Cart*.

**Scenario 2:** I applied **Global Changes** to a **Quote** and see “*Validation Required*” for **Items** in the *Shopping Cart*.

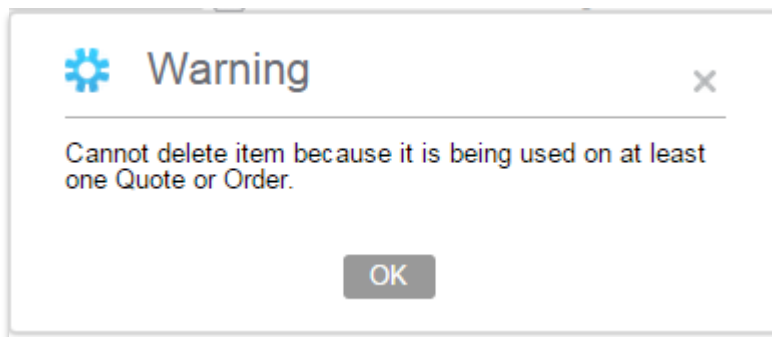
### Resolution:

- Click the **Validate All** button to clear the requirement message from the *Shopping Cart*.
- If the ‘*Attention Required*’ warning appears, see [Attention Required](#) Resolution

## Delete Dealer Option Warning

A *Warning* pop-up box occurs when trying to delete a **Dealer Option**.

**Scenario:** When attempting to delete a **Dealer Option**, the *Warning* popup box appears.



### Resolution:

- If the **Dealer Option** has been previously used on a **Quote** or **Order**, it cannot be deleted. To prevent *future* use, add an expiration date to the **Available through** field.
- If the **Quote** has not been converted to an **Order**, remove all instances of the **Dealer Option** used in **Quotes** to enable the **Delete** function.

## HEP Approval Box

**High Exposure Project (i.e., HEP) Approval** popup boxes are triggered in **CTB Quote™ Plus** under certain circumstances.

**Scenario:** **Quote Items** were added to the *Shopping Cart* and then I received a HEP Approval warning box at the top of the **Quote**.



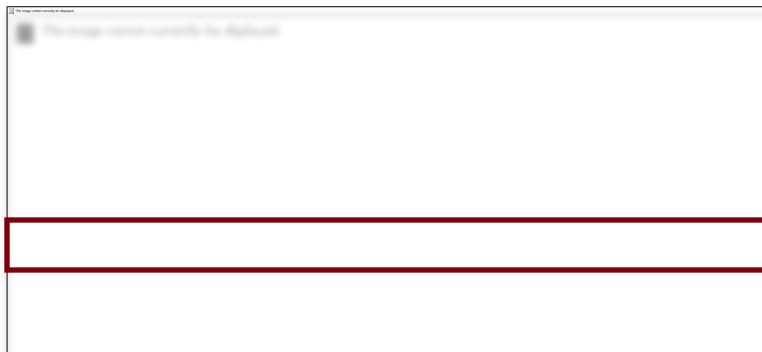
### **Resolution:**

- HEP Approval pop-ups prompt for contact with your Outside Sales Representative.
- An Order can still be placed, but contact may be made from a Milgard Representative.

## Validation Failure

*Validation Failure* popups are generally due to a missing required field. A commonly overlooked required field, **Construction Type**, is in the **Quotes> Header** tab, but other empty fields may cause it. Required fields have a red asterisk\* and if left empty will display a red encircled exclamation point.

**Scenario:** I tried to convert a **Quote** to an **Order**. When I clicked on the **Place Order** button, I received a **Validation Failure** popup.



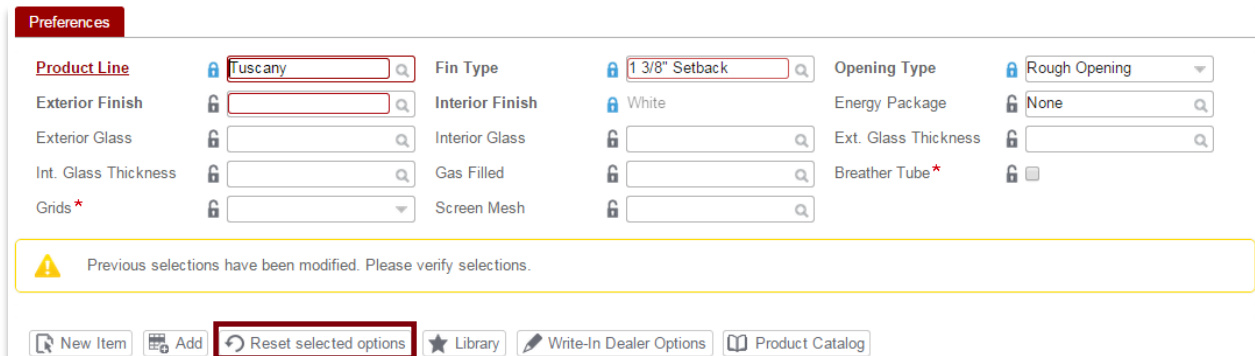
### **Resolution:**

- To place an **Order**, the **Construction Type** is a required field\* and must be completed. It is located on the **Place Order** screen. Select one of the required options from the drop-down list to resolve the error.
- On the **Validation Failure** popup, the message identifies the field(s) that invoked the error. Use the **Glossary** for assistance or review the **Quote** to locate any missing required\* fields.
- Locate any fields with a red asterisk\* or a red encircled exclamation point to ensure a response or selection has been made. Select the **Place Order** button to verify that all required fields\* have been completed.

## Preferences Caution Popup

**Preferences** have a few rules applied to assist with the pre-build selections. **Product Line** is the first rule applied and filters the options available for other field selections. If a **Preference** selection is made and then **Product Line** is changed, for example, a caution popup appears to advise that a selected option no longer applies and needs to be updated.

**Scenario:** I made various **Preference** selections and then received a popup that reads: “*Previous selections have been modified. Please verify selections.*”



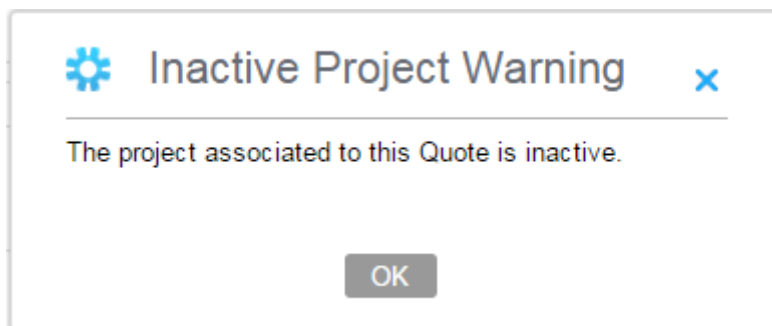
### Resolution:

- Select the **Reset selected options** button to clear the selected **Preferences** and start with the **Product Line** selection first. Then answer fields that are styled **bold** for the most common build selections.
- Generally, the invalid **Preference** field is cleared automatically (*Exterior Finish* in the screenshot above) and **CTB Quote™ Plus** will make it the active field. Select a valid option for the prompted field to resolve. If you’ve already mouse-clicked away, just review the **Preference** fields you’d like preselected.

## Inactive Project Warning

**Project Status** can be set to “Inactive”. If **Quotes** have been linked to a **Project** that is set to “Inactive”, **CTB Quote™ Plus** will provide a popup as a reminder.

**Scenario:** I opened a Quote and received a popup that reads: “*Inactive Project Warning.*”



### Resolution:

- Remove the link to the **Project** in the **Quote Header** tab.
- Open the **Project** and change the status to Active.

## Import-Export

### Exported File Behavior

Microsoft® Excel Files are not a part of **CTB Quote™ Plus**, however, the spreadsheet format, for exported files, is most often opened with Excel. Various computer and browser settings can affect file viewing behavior.

**Scenario:** I exported a **Proofing Report** and it isn't opening in *Excel*.

#### **Resolution:**

- Resolving different computer behaviors (between various browsers, Microsoft® Excel, and downloaded file security settings) is beyond the scope of this troubleshooting guide. However, it has been noted that confusion may occur when *Excel* is already open with another file and an attempt is made to open an exported file from **CTB Quote™ Plus**.
- When the **Export** button is selected from **CTB Quote™ Plus**, browsers generally display the file in the browser's footer area and/or auto-save files to the **Downloads** folder. Right click on the browser-displayed file to save it to a location that is easily found //the *Downloads* folder is generally the primary folder for most Windows users//. View any open spreadsheets in *Excel*. If you do not see the file exported from **CTB Quote™ Plus**, use Excel's **File> Open** function to browse to the folder where the file was saved.

### Imported XML File is Missing Information

**Scenario:** I received an exported **Quote** in XML format from a coworker. After Import, the **Customer** data and pricing Information is missing.

#### **Resolution:**

- Exported files provide a quick way of sharing Line Items with other users. By design, **CTB Quote™ Plus** import data only contains configured **Line Items** (e.g., **Window** and **Door** builds).

### My Imported XML File Caused an Invalid Shopping Cart Popup

**Scenario:** I imported a **Quote** in XML format from a coworker. There is now an '*Invalid Lines in Shopping Cart*' error.

#### **Resolution:**

- Exported XML data requires a **Customer** and **Location** to verify build requirements, which can differ from location to location. Ensure **Customer** and **Location** are completed.
- Select the **Validate All** button to run the verification tool.
- If the *Invalid Shopping Cart* popup is still visible after running the **Validate All** tool, line items need changes to meet build requirements. Select the **Edit** link to update. The **Item Configurator** will open to any fields that need attention.