

HGI WEB CENTER MANUAL

Dashboard

The 'Dashboard' dialog serves as the home page for the HGI Web Center. This page provides an outline of the functions available to users.

The image below represents the dashboard for the HGI Web Center user at the Dealer level.

HOME GUARD
DOORS & WINDOWS

bj

Dashboard

CREATE QUOTE

Orders

Order	Date	PO Number	Customer Ref	Total	Est Delivery Date	Status
771576	2/20/2025	4	TEST 4	\$1,750.00		Received
771573	2/20/2025	5	TEST 5	\$1,000.00		Received
771566	2/20/2025	15	TEST 15	\$5,000.00		Received
771561	2/20/2025	16	TEST 16	\$1,750.00		Received
771557	2/20/2025	19	TEST 19	\$1,750.00		Received
771553	2/20/2025	18	TEST 18	\$5,000.00		Received
771542	2/20/2025	17	TEST 17	\$1,000.00		Received
771535	2/20/2025	2	TEST 2	\$1,750.00		Received
771421	2/18/2025	2	TEST 2	\$0.00		Received
771419	2/18/2025	21	21	\$500.00		Received

Rows Per Page 10 1 - 10 of 85

Company Quotes

Quote	Customer	Date	PO Number	Customer Ref	Total	Expires
148613	{HomeOwner Sale - Larissa Bai	2/17/2025			\$1,000.00	3/19/2025

Open Orders

The 'Open Orders' section of the Dashboard shows *all orders* pending at the Manufacturer:

Order	Date	PO Number	Customer Ref	Total	Est Delivery Date	Status
771576	2/20/2025	4	TEST 4	\$1,750.00		Received
771573	2/20/2025	5	TEST 5	\$1,000.00		Received
771566	2/20/2025	15	TEST 15	\$5,000.00		Received
771561	2/20/2025	16	TEST 16	\$1,750.00		Received
771557	2/20/2025	19	TEST 19	\$1,750.00		Received
771553	2/20/2025	18	TEST 18	\$5,000.00		Received
771542	2/20/2025	17	TEST 17	\$1,000.00		Received
771535	2/20/2025	2	TEST 2	\$1,750.00		Received
771421	2/18/2025	2	TEST 2	\$0.00		Received
771419	2/18/2025	21	21	\$500.00		Received

Rows Per Page 10 1 - 10 of 85

The 'Orders' section displays open orders on the Home Guard Side. The orders displayed have been uploaded from Web, Remote Order Entry, or originated in Home Guard's internal order entry system.

Order - Order number assigned. Selecting on the order number link will display the 'Order Status' page for the order.

- **PO Number** - Purchase order number for the order.
- **Customer Ref.** - Job reference for the order.
- **Total** - Total cost to the Dealer including taxes and surcharges.
- **Est. Delivery Date** - Estimated date the order will be delivered to the customer. This column supports sorting to sequence the visible orders by the Estimated Delivery Date. This column header label is defaulted as 'Est. Delivery Date'.
- **Status** - Current status of the order. Orders can have the following statuses:
 - o **Received** - The order was received by the Manufacturer.
 - o **On Hold** - The order has been placed 'On Hold'. The image below illustrates the 'Header Information' Order Status' page of the order that has been placed 'On Hold':

Order - #771573

HomeOwner Sale - Larissa Baker

Ack. Date

Est. Delivery Date

3/14/2025

Ship Date

MORE

Item	Qty	Part	Size	Price	Total
1	1	ENTRY DOORS - ENTRY DOOR UNIT	32 W X 77 13/16 H		
DOOR CONFIGURATION(SINGLE), SIDELITES(NOSIDE), TRANSOM(NOTRAN), FRAME TYPE(WD), DOOR SWING(LHI), NOMINAL WIDTH(32INCH), NOMINAL HEIGHT(CUSTH=[77.8125]), JAMB DEPTH(45625), SLAB TYPE(SMNC), DOOR STYLE(S), PANEL STYLE(2P), CUTDOWN CHARGE(CUTD1), INSIDE COLOR(PAINT, INSIDE PAINT(EG605)), OUTSIDE COLOR(MATCH), INSIDE JAMB FINISH(MATCHJIN), CLAD WRAP?(YES-CL, CLAD COLOR(WH280)), GLASS TYPE(CLEAR), CLEAR GLASS(HALF LITE CLEAR(SV6)), GLASS FRAME(GFSAD), DOOR HARDWARE FINISH(SN), LOCKSET/HANDLESET(KPO), PEEPSITE/KNOCKER(NOPEEP), HINGE(SPRGHNG), SECURITY PLATE(BOSECP), CASING(NOCASING), BRICKMOLD(BRICKMOLD), THRESHOLD(THRESHOLD TYPE(CPNCAT), THRESHOLD FINISH(MILL)), JAMB SIZE(EJAMBSIZE=[33.4375W X 79.5H])					
				Surcharge:	\$50.00
				Subtotal:	\$5,975.59
				Tax:	\$0.00
				Non-Taxable Misc:	\$0.00
				Total:	\$5,975.59

Order Date

2/20/2025

- o **In Process** - The order was acknowledged by the Manufacturer.
- o **Shipped** - The order was shipped.
- o **Partially Shipped** - The order was partially shipped.

- **Mfg Customer** - Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

Quotes

The 'Quotes' section of the 'Dashboard' (bottom portion) lists all non-expired quotes currently pending in Web entered by the Dealer. These quotes have not been uploaded to the Manufacturer.

When the Dealer is logged in, the quotes screen will show Dealer quotes. Select the 'Company Quotes' from the quote type drop down to view 'Company Quotes'. The image below illustrates the Dealer's view of the 'Company Quotes' tab.

Quote	Customer	Date	PO Number	Customer Ref	Total	Expires
148613	{HomeOwner Sale - Lari:	2/17/2025			\$5,975.59	3/19/2025
148404	{HomeOwner Sale - Lari:	2/14/2025			\$0.00	3/16/2025
147854	{HomeOwner Sale - Lari:	2/7/2025			\$5,936.48	3/9/2025
147469	{HomeOwner Sale - Lari:	2/3/2025			\$5,432.35	3/5/2025



Add Quote

ADD

CANCEL

Customer

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

{HomeOwner Sale - Larissa Baker}

Add Quote

Users logged in as Dealers can enter quotes via the 'Add Quote' screen. To add a quote, select the 'Create Quote' button on the Dashboard or within Quote Maintenance. If required, select the user's site from the 'Mfg Site' dropdown. In the 'Customer' drop-down, select the for whom the quote is intended.

The 'Add Quote' screen is broken up into four sections as seen below. Each section can be viewed by selecting the header to expand each section.



Add Quote

ADD

CANCEL

Customer

{HomeOwner Sale - Larissa Baker}

Quote

Sales

Billing Address

Shipping Address

- **Mfg Customer** - Manufacturer's name and site. This drop down is only visible to users assigned to multiple manufacturing sites for a single customer.
- **Customer** - Web customer assigned to the quote.
Note: If there are no existing customers setup, a quick quote customer will be created with the default settings from Home Guard. This customer will be dealer's name in {}. The pricing method for this quick customer defaults to Discount From List.
- **Quote**

Quote ^

Measurement Type

Imperial

Status

Available

PO Number

Customer Ref

Quote Contact

Quote Comment

Notes

- o **Measurement Type** - Imperial or Metric.
- o **Status** - Status of the quote. The two status values to choose from are 'Available' and 'On Hold'. Users can determine the default status in 'Setup' >> 'Company' >> 'Settings' >> 'Default Quote Status'.
- o **PO Number** - Purchase order number for this quote, not the Manufacturer's PO Number.
- o **Customer Ref** - Contractor job reference for this quote, not the Dealer's Ref.
- o **Quote Contact** - Person to contact regarding the quote.
- o **Quote Comment** - Any comments regarding the quote.
- o **Notes** - Any notes regarding the quote. (These will not be seen by Home Guard when uploaded)

• Sales

Sales ^

Salesperson

johnson, bruce

Terms

Discount %

- o **Salesperson** - Personnel in the Dealer's company responsible for the sale.
- o **Terms** - Preconfigured in 'Terms and Ship Via'.
- o **Markup Mult** - Percentage of markup from the Manufacturer's price (If pricing is set based off 'Discount from List' or by 'Gross Profit Margin' then this field will change accordingly). When this field is changed after line items have been added to a quote, all pricing will be recalculated to reflect the new value even if the price has been overridden (excluding web-only charge parts).

- **Billing Address** - The address all financial information will go to. This information defaults to the information configured on the customer but can be edited here.

Billing Address ^

Name

{HomeOwner Sale - Larissa Baker}

Address 1

Address 2

City

State

Zip Code

Phone

Fax

- **Shipping Address** - Address to which the order will be shipped to. Marking 'Same as bill address' will use the same address entered for billing and will not be editable. This section will also allow for ship via to be selected, drop ship to be checked, and comments to be entered.

Shipping Address ^

☐ Same as billing address

Name

{HomeOwner Sale - Larissa Baker}

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Ship Via

Shipping Comment

- **Mfg Shipping Address** - Enabled if the manufacturing site had multiple ship to addresses configured through Core. Allows the user to select from the list of configured address. This is the address the manufacturer will ship the order to. Disabled if Drop Ship is checked.

Quote Entry

Quotes may be created and modified by Dealers in 'Quote Entry'.

Add Quote

ADD

CANCEL

Quote - #150299

HomeOwner Sale - Larissa Baker

{HomeOwner Sale - Larissa Baker}

Available

LESS ^

Quote

Contact
 Comment
 PO Number
 Customer Ref
 Est. Delivery Date

Sales

Salesperson
johnson, bruce
 Terms

Billing

{HomeOwner Sale - Larissa Baker}
 Phone

Shipping

{HomeOwner Sale - Larissa Baker}
 Phone
 Ship Via
 Comment

Category

Part

ADD

Item	Qty	Part	Size	Price	Total
				Surcharge:	\$0.00
				Subtotal:	\$0.00
				Tax:	\$0.00
				Total:	\$0.00

UPDATE QTY

Entered By

johnson, bruce

Date

3/6/2025

Expires

4/5/2025

The 'Quote Entry' screen includes two sections: 'Quote Header' and 'Line Item Grid'. 'Quote Header' displays the details entered in the 'Add Quote' screen along with some additional functions. In the 'Line Item Grid', the user will add items to the quote.

Quote Header

The 'Quote Header' contains the following:

- **Quote Information** - Displays important information regarding the quote. When the Quote Entry screen first opens, the quote information will be hidden but can be viewed by using the 'More' icon below the Customer Name. To edit the quote information, select the 'Pencil' icon located at the top right of each informational section. It will display the 'Edit Quote' page, which is like the 'Add Quote' page, with a section expanded based on which pencil icon was selected. When all information is entered, select the 'Save' button to save the information and return to the Quote Entry screen.
- **FINISH** button closes the quote and displays the dashboard. Selecting this button will not prevent the quote from being modified in the future. The user can return to this dialog and edit the quote (including changing the customer) at any time until it expires or until it has been uploaded to the Manufacturer.
-  - The 'Print' button prints the selected quote report in PDF format. The following selections are all variations of the 'Quote' report that can be printed.
 - o Quote
 - o Quote w/o Pricing - Quote without line item pricing, item subtotal pricing, and total pricing.
 - o Quote w/o Line Item Pricing - Quote with only subtotal and total pricing.
 - o Quote List - Quote with list pricing.
 - o Quote Selling - Quote with list and normal pricing.
 - o Quote Accounting - Quote with list pricing, price book pricing, costs and margins.
-  - The 'Download' button allows the user to save the quote as a Word or Excel file as well as in a CSV and XML format.
 - o CSV - Exports the quote information to a csv file format. The quote export file name will be {quotenumber}.csv.
-  - Displays 'Global Options Changes' dialog. This allows the user to globally change options for all line items and alternate wizard selections on the quote.

Global Option Changes - #150330

Question

WINDOW COLOR

Old Option

WH - WHITE

New Option

LO/WHT - LIGHT OAK / WHITE

CHANGE

These items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

These issues must be resolved before the items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

In this image, the question selected from the 'Question' drop-down was WINDOW COLOR. Under the 'Old Option' drop-down, WH - WHITE was selected; under the 'New Option' drop-down LO/ WHITE - was chosen. Select 'Change'. The following screen will appear, confirming and saving the change.

Global Option Changes - #150330

SAVE

CANCEL

Question

GLASS PACKAGES

Old Option

{Any}

New Option

{None}

CHANGE

These items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value
☒	1	Innovations-DoubleHung - Innovations Double Hung Window-	WINDOW COLOR	WH - WHITE	LO/WHT - LIGHT OAK / WHITE	
☒	2	Innovations-DoubleHung - Innovations Double Hung Window-	WINDOW COLOR	WH - WHITE	LO/WHT - LIGHT OAK / WHITE	

These issues must be resolved before the items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

If the option selected supports option values, the 'Old Value' and 'New Value' dropdowns will show. The user will then be able to change the option values as well. Once changed, the new value can be adjusted by selecting the pencil icon and selecting a new value from the dropdown in the items before saving.

-  - Copies the entire quote to a new quote.
-  - Deletes the current quote.

Line Item Grid

The 'Line Item Grid' displays the list of items that are being ordered on the quote.


Category
Windows-Innovations

Part
Innovations-DoubleHung - Innovations Double Hung Window-

ADD

Item	Qty	Part	Size	Price	Total	
1	1	Innovations-DoubleHung - Innovations Double Hung Window-	32 W X 32 H			  
SIZING(EXACT), WINDOW COLOR(WH), GLASS PACKAGES(CON100), FULL OR PER SASH(FULLWN), GLASS TYPE FULL{ANNEAL}, TINT FULL WINDOW{CLEAR}, COLONIAL OR PATTERN{NOGRID}, WINDOW OPTIONS(FOMFIL SILLEX), SCREEN OPTIONS(FLEXSCREEN, FULL SCREEN MATERIAL(FULLSN)), NFRC LABEL(DH-LBL)						
2	1	Innovations-DoubleHung - Innovations Double Hung Window-	32 W X 32 H			  
SIZING(EXACT), WINDOW COLOR(WH), GLASS PACKAGES(CON100), FULL OR PER SASH(FULLWN), GLASS TYPE FULL{ANNEAL}, TINT FULL WINDOW{CLEAR}, COLONIAL OR PATTERN{NOGRID}, WINDOW OPTIONS(FOMFIL SILLEX), SCREEN OPTIONS(FLEXSCREEN, FULL SCREEN MATERIAL(FULLSN)), NFRC LABEL(DH-LBL)						

UPDATE QTY

Surcharge:
Subtotal:
Tax:
Total:

Entered By
johnson, bruce
Date
3/6/2025
Expires
4/5/2025

The following information can be found in the 'Line Item Grid':

- **Item** - Numeric identifier for the sequence of the line item on the order.
- **Qty** - Quantity being ordered.
- **Part** - Part being ordered.
- **Size** - Ordered height, width, and thickness of the part.
- **Price** - Calculated price of a single part.
- **Total** - Total price of the line item give the part price and quantity.
- **Options** - Below each line item is a comma delimited list of the options selected for the part.
- **Surcharge** - Total amount being applied to the order by surcharges. Clicking the link will display a list for surcharges and the values associated with them.
- **Subtotal** - Summation of all line item totals and surcharge value.
- **Tax** - Total tax calculated for the order. Clicking the link will display a list of the taxes and percentages being applied to the quote.
- **Total** - Summation of the subtotal and tax on the quote.
- **Entered By** - User that created the quote.
- **Date** - Date the quote was created.
- **Expires** - Calculated date of when the quote is set to expire.

The currency the quote displays will be the 'Order Currency' of the customer. The format of the values, including comma and decimal separators, will display based on the culture settings of the browser being used.

Entering a Line Item

Users can enter line items to a quote using two different methods.

Conventional Method

To enter line item information using the conventional mode, complete the following:

1. Select a category from the left drop-down list. This will filter the part list to only the parts that exist in the selected category.
2. Select a part from the right drop-down list.


Category
Windows-Innovations

Part
Innovations-DoubleHung - Innovations Double Hung Window-

ADD

3. Select 'Add' to view the 'Item Properties' screen. This screen allows the user to configured the line item quantity, sizing and comments.

Item Properties

Qty	1
Call Size	
Width	28 inches
Height	32 inches
Line Item Comment	

ADD
CANCEL

Enter the required information in the following fields:

- o **Quantity** - Line item quantity.
- o **Call Size** - Width and height of the ordered part in using the industry standard call size. The value entered in this field will be converted to the specified measurement type on the quote header and the converted value will be displayed in the Width and Height fields. The standard format of this field is FIFI where F = Feet and I = Inches.
- o **Width** - Width of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
- o **Height** - Height of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
- o **Line Item Comment** - Field to enter any necessary comments regarding this specific line item.

4. Select 'Add' to view the 'Add Quote Item' page. This screen allows the user to select options for the line item. the line item quantity, sizing, options, and comments. The following image shows an example of an 'Add Quote Item' page for a single window.

Note: The header at the top of the screen indicates the part number and quote number of the part being added. If an existing part is being edited, the line item number will be appended to the end of the header.

Add Quote Item - Innovations-DoubleHung - #150349
ADD CANCEL

SIZING
 EXACT - EXACT SIZE OR TIP TO TIP SIZE

PERCENT TOP SASH
☐ PORIEL - PERCENT TOP SASH

WINDOW COLOR
☒ BK/WHT - BLACK EXTERIOR ON WHITE

PREMIUM METALLIC LCK
☒ AB - ANTIQUE BRASS HARDWARE

(None)

AB - ANTIQUE BRASS HARDWARE

SN - SATIN NICKEL HARDWARE

MB - MATTE BLACK HARDWARE

COLONIAL OR PATTERN
☒ NOGRID - NO GRIDS

WINDOW OPTIONS
☐ FOAMWP - FOAM WRAP PERIMETER OF MAIN FRAME
☒ FOMFIL - FOAM FILLED MAIN FRAME
☐ HEADDEX - HEAD EXPANDER
☒ SILLEX - SILL STARTER
☐ CLATCH - CHILD PROOF LATCH

SCREEN OPTIONS
 FLEXSCREEN - FLEX SCREEN FULL

FULL SCREEN MATERIAL
 FULLSN - STANDARD FIBERGLASS SCREEN MATERIAL

PREVIEW
OPTIONS
PRICING - [\$366.25]

Viewing Inside Viewing Outside
INSIDE
OUTSIDE
BOTH

Item Size: 28 W X 32 H EDIT

Item Comment:

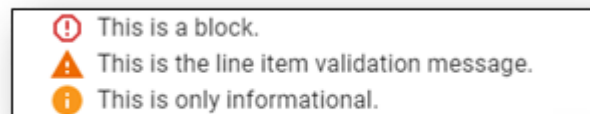
5. **Configure Options.** If an option is required, the user will not be able to make further selections until the required choice is made. This option selection process is much like the 'Options Wizard' found in 'Order Entry' in Core.

6. If validation exceptions occur, work to resolve the issue identified by each. Exceptions are generally a result of a poor combination of options and/or sizes, so making necessary changes to options can resolve the exception. Line item validation is configured in Core specifically for each part. There are three types of exceptions: Info, Line Item Exception, and Block.

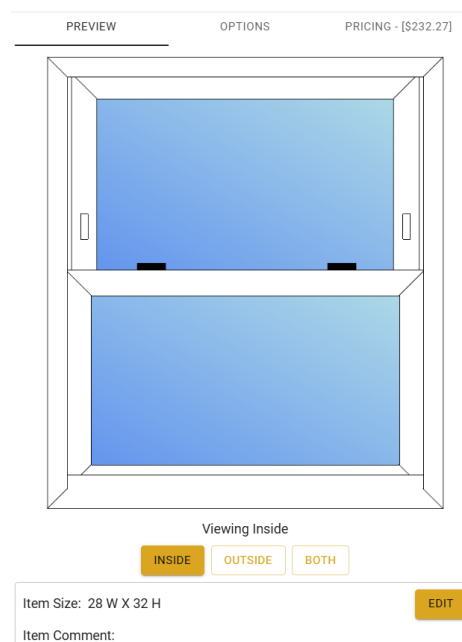
o **Block** - A block exception will display in the Option Wizard screen with a red brick icon. These exceptions will prevent the user from adding the line item to the quote. The user must resolve the exception before Option Wizard can be finished.

o **Line Item Exception** - A line item exception will display in the Option Wizard screen with a yellow icon. These exceptions will cause the line item to turn read and will display in the line item exceptions and policies screen when attempting to acknowledge the order.

o **Info** - An info exception will display information in the Option Wizard screen with a blue icon. These exceptions do not display in the line item exceptions screen on the quote; does not cause the line item to turn red.



7. Users can see an image of the quoted item by choosing 'Preview'. The default view is from the outside. Select 'Inside' to change the image view from the inside. While viewing from the inside, the user can go back to the outside view by selecting 'Outside'. Alternatively, the user may select 'Both' to see the inside and outside view side-by-side.



- To see a summary of the item's options, select 'Options'.

PREVIEW	OPTIONS		PRICING - [\$ 000.00]
Question	Option	Description	Input
SIZING	EXACT	EXACT SIZE OR TIP TO TIP SIZE	
WINDOW COLOR	WH	WHITE	
GLASS PACKAGES	CON100	CONSERVISION 100 - EDGE GUARD, LOE 366, ARGON	
FULL OR PER SASH	FULLWN	FULL WINDOW BOTH SASHES SAME	
GLASS TYPE FULL	ANNEAL	STANDARD ANNEALED GLASS	
TINT FULL WINDOW	CLEAR	CLEAR GLASS	
COLONIAL OR PATTERN	NOGRID	NO GRIDS	
WINDOW OPTIONS	FOMFIL	FOAM FILLED MAIN FRAME	
WINDOW OPTIONS	SILLEX	SILL STARTER	
SCREEN OPTIONS	FLEXSCREEN	FLEX SCREEN FULL	
FULL SCREEN MATERIAL	FULLSN	STANDARD FIBERGLASS SCREEN MATERIAL	
NFRC LABEL	DH-LBL	NFRC LABELS	

- To view the estimates price of the item and options selected, select 'Pricing'.

Note: User must have permission to "View Pricing" in order to see the Pricing tab.

PREVIEW	OPTIONS	PRICING - [\$ 000.00]	
		Price	
Part Price:		\$0.00	
Options:			
Question	Option	Description	Price
GLASS PACKAGES	CON100	CONSERVISION 100 - EDGE GUARD, LOE 366, ARGON	\$ 000.00
Options Price:		\$ 000.00	
Item Price:		\$ 000.00	

When all fields are completed and required options have been configured, 'Add' will appear. Select 'Add' to add the line item to the quote.

10. To edit a line item, select the link in the 'Part' column, to display the 'Edit Quote Item' screen.
11. To view an image of the unit, select the thumbnail and a larger image will open for all standard option wizard parts.

12. To view the surcharges, select the 'Surcharge' link.

- To change the quantity of an item, enter the new amount in the provided field and select **UPDATE QTY**
- To view a line item price breakdown, select the link in the price column.

Hung - Innovations Double Hung Window-

	Price	Total
	\$ 232.27	\$ 232.27
1	\$232.27	\$232.27
), TINT FULL WINDOW(CLEAR), COLONIAL OR PATTERN, BL}		
	Surcharge:	\$5.69
	Subtotal:	\$ 237.96
	Tax:	\$273.30
	Total:	\$ 511.26

Expires
4/6/2025

Price Breakdown - #150413-2

SAVE CANCEL

1

Item

2: Innovations-DoubleHung - Innovations Double Hung Window-

Size

28 W X 32 H

Part Price

\$0.00

Option Prices:

Question	Code	Description	Value	Price	
SIZING	EXACT	EXACT SIZE OR TIP TO TIF		\$0.00	
WINDOW COLOR	WH	WHITE		\$0.00	
GLASS PACKAGES	CON100	CONSERVISION 100 - EDG		\$232.27	
FULL OR PER SASH	FULLWN	FULL WINDOW BOTH SAS		\$0.00	
GLASS TYPE FULL	ANNEAL	STANDARD ANNEALED GL		\$0.00	
TINT FULL WINDOW	CLEAR	CLEAR GLASS		\$0.00	
COLONIAL OR PATTERN	NOGRID	NO GRIDS		\$0.00	
WINDOW OPTIONS	FOMFIL	FOAM FILLED MAIN FRAM		\$0.00	
WINDOW OPTIONS	SILLEX	SILL STARTER		\$0.00	
SCREEN OPTIONS	FLEXSCREEN	FLEX SCREEN FULL		\$0.00	

Rows Per Page 10 1 - 10 of 12 < >

The following fields exist in the 'Order Item Price Breakdown' dialog:

- o **Part Price** - Price of the part.
- o **Item Weight** - Weight of the item selected.
- o **Overall Weight** - Weight of the ordered item and sub line items.
- o **Item Cost** - Cost for the item. Will be the same as overall cost when the ordered part does not have sub line items. However, when the ordered item has sub line items (that have a cost), the overall cost will exceed the item cost.
- o **Overall Cost** - Sum of all item costs on the ordered item and all sub line items.
- o **Item Sq. Ft. Price** - Sum of the part and option prices for the item per square foot.
- o **Overall Sq. Ft. Price** - Sum of all part and option prices on the ordered item and all sub line items per square foot.
- o **Item Price** - Sum of the part and option prices for the item. Will be the same as overall price when the ordered part does not have sub line items. However, when the ordered item has sub line items (that are priced), the overall price will exceed the item price.
- o **Overall Price** - Sum of all part and option prices on the ordered item and all sub line items.

Note: If a price is overridden, changing any manufactured-priced options will recalculate the overridden price.

15. To view the tax assigned to the order, select the tax link.

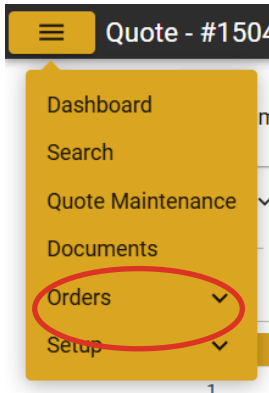
Taxes

Tax	10.0000%
Tax 1	0.0000%
Tax 2	0.0000%
Tax 3	0.0000%
Tax 4	0.0000%

SUBMIT CANCEL

16. Use  to copy the current line item and paste it at the end of the quote.
17. Use  and  to re-order the line items.
18. Use  will delete the line item from the quote.

'Quote Entry' can be accessed by selecting the quote number for the intended quote from the Dashboard or from Quote Maintenance.



Quote Maintenance

The 'Quote Maintenance' screen provides a centralized location in which quotes can be uploaded, edited, and / or deleted. To access the 'Quote Maintenance' screen, select 'Quotes Maintenance' from dropdown menu.

Quote Maintenance CREATE QUOTE										
Available										
☐	Quote	Date	Customer	Total	My PO Number	My Customer Ref	Est. Delivery Date	Expires		
☐	150413	3/7/2025	{HomeOwner Sale - La	\$			3/28/2025	4/6/2025		
☐	150397	3/7/2025	{HomeOwner Sale - La	\$0.00				4/6/2025		
☐	150383	3/7/2025	{HomeOwner Sale - La	\$0.00				4/6/2025		
☐	150382	3/7/2025	conrad	\$0.00				4/6/2025		
☐	150381	3/7/2025	{HomeOwner Sale - La	\$0.00				4/6/2025		
☐	150349	3/6/2025	Bruce Johnson	\$0.00				4/5/2025		
☐	150346	3/6/2025	{HomeOwner Sale - La	\$0.00				4/5/2025		
☐	150330	3/6/2025	{HomeOwner Sale - La	\$			3/28/2025	4/5/2025		
☐	150124	3/5/2025	{HomeOwner Sale - La	\$0.00				4/4/2025		
☐	148613	2/17/2025	{HomeOwner Sale - La	\$			3/21/2025	3/19/2025		
Rows Per Page 10 1 - 10 of 12 < >										
UPLOAD SELECTED QUOTES TO MANUFACTURER										

Note: The number of quotes that display per page defaults to 10; however, that value can be changed by using the 'Rows Per Page' drop down.

The drop-down contains the following quote classifications to manage quotes:

- **Available** - Quotes that have been entered except those with a status of 'On Hold'.
- **On Hold** - Quotes placed on hold. This occurs in the initial 'Add Quote' screen.
- **Uploaded** - Uploaded quotes.
- **Expired** - Expired quotes. When accessed through the drop-down, the user can select the quote number. This will take the user back to the 'Quote Entry' screen where the expiration date of the quote will appear in red.

Quote - #138715

FINISH

HomeOwner Sale - Larissa Baker

test

Available

This quote has expired on 10/20/2024.

RENEW

MORE

Item	Qty	Part	Size	Price	Total
1	1	ENTRY DOORS - ENTRY DOOR UNIT	21068	\$	\$

DOOR CONFIGURATION(SINGLE), SIDELITES(NOSIDE), TRANSOM(NOTRAN), FRAME TYPE(WD), DOOR SWING(LHI), NOMINAL WIDTH(34INCH), NOMINAL HEIGHT(80INCH), JAMB DEPTH(45625), SLAB TYPE(PSNC), DOOR STYLE(F), INSIDE COLOR(PAINT, INSIDE PAINT(WH280)), OUTSIDE COLOR(MATCH), INSIDE JAMB FINISH(MATCHJIN), CLAD WRAP?(NO-CLAD), GLASS TYPE(CLEAR), CLEAR GLASS(FULL LITE CLEAR(F10)), GLASS FRAME(GFSAD), DOOR HARDWARE FINISH(SN), LOCKSET/HANDLESET(SCHLAGE, SCHLAGE LOCKS(GEORGE), DEADBOLT(THUMB), KEYING(NOKAI), PEEPSITE/KNOCKER(NOPEEP), HINGE(BALLHNG), SECURITY PLATE(20GSP), CASING(NOCASING), BRICKMOLD(BRICKMOLD), THRESHOLD(THRESHOLD TYPE(CPNCAT), THRESHOLD FINISH(MILL)), JAMB SIZE(EJAMBSIZE=[35.4375W X 81.6875H])

Select 'Renew' button next to the expired date. The following screen will appear:

Renew Quote

☒ Preserve Price
 ☐ Recalculate Price

OK

CANCEL

To renew the quote with the same price intact, indicate 'Preserve Price' and select 'OK'. To recalculate a new price, indicate 'Recalculate Price'. This will return the user to the 'Quote Entry' screen where the user can adjust the price by selecting the price.

Quote Maintenance

CREATE QUOTE

Expired

	Quote	Date	Customer	Total	My PO Number	My Customer Ref	Expired	
☐	147469	2/3/2025	(HomeOwner Sale - Larisse	\$			3/5/2025	
☐	147016	1/27/2025	(HomeOwner Sale - Larisse	\$			2/26/2025	
☐	145352	12/24/2024	(HomeOwner Sale - Larisse	\$0.00			1/23/2025	
☐	143428	11/20/2024	60 OFF CUSTOMER	\$0.00			12/20/2024	
☐	143297	11/19/2024	(HomeOwner Sale - Larisse	\$0.00			12/19/2024	
☐	143296	11/19/2024	(HomeOwner Sale - Larisse	\$0.00			12/19/2024	
☐	143294	11/19/2024	(HomeOwner Sale - Larisse	\$0.00			12/19/2024	
☐	143222	11/19/2024	(HomeOwner Sale - Larisse	\$0.00			12/19/2024	
☐	143191	11/18/2024	(HomeOwner Sale - Larisse	\$0.00			12/18/2024	
☐	142719	11/12/2024	(HomeOwner Sale - Larisse	\$0.00			12/12/2024	

Rows Per Page 10 1 - 10 of 321

DELETE QUOTES

When viewing the expired quotes in Quote Maintenance, a 'Delete Quotes' button will appear at the bottom of the screen. By selecting multiple quotes using the checkboxes in the grid, or the 'Check All' checkbox in the column headers, the 'Delete Quotes' button can be used to delete multiple expired quotes at the same time.

The following columns and action buttons exist in the 'Quote Maintenance' screen:

- ☐ - Select checkbox. Check before uploading the quote
- Information** - Displays icons to provide additional information regarding the quote. The following icons may appear for each quote:

- o  - Quote has at least one line-item with an exception. Clicking the icon will display a prompt with the exceptions that exist on the quote.
 - o  - Identifies quotes entered by the Contractor that have not yet been submitted. These cannot be uploaded, deleted, or copied by the Manufacturer's customer.
- Quote - Quote number that contains a link to the quote entry dialog.
 - Date - Date the quote was entered.
 - Customer - Customer's name.
 - Total - Quote total. This value could change if the quote expires unless pricing is preserved.
 - My PO Number - Unless the Dealer has indicated upon 'Company' setup that any 'PO Number' is to be overridden, this value will represent the 'PO Number' that was entered when the quote was entered. If the Dealer has indicated that a PO number must be entered, select . 
 - My Customer Ref - Unless the Manufacturer has indicated in Company setup that any 'Customer Ref' identifier is to be overridden, this will be the 'Customer Ref'.
 - Est. Delivery Date - Estimated date the order will be delivered after it has been uploaded. This field is read-only and updates daily until quote is uploaded to Home Guard.
 - Requested Date - Requested delivery date by the web customer. By default, this field is blank unless a contractor quote was submitted with a requested date. This field can be edited by using the edit icon (as seen below) on the row. A date can then be selected by using the date picker. If the date selected does not fall on a valid shipping date for the customer in Core, a message will appear indicating this along with the closest valid shipping dates both before and after the date selected. Once a quote is uploaded to Home Guard, a message will appear indicating whether or not the 'Required Date' on the resulting order is changed to the 'Requested Date' submitted with the quote.
 -  - Enter a 'PO Number' and 'Customer Ref.' These values will be uploaded to the Manufacturer as the 'Mfg PO Number' and 'Mfg Customer Ref' on the order. The default selections can be specified in the Dealer's 'Company' setup dialog.

Edit Quote - 150413

PO Number

- ☐ Order
- ☒ PO
- ☐ Custom

Customer Ref

- ☐ Customer
- ☐ Order-Customer
- ☐ Customer Ref
- ☐ Custom

OK

CANCEL

- **Expires** - Date the quote will expire.

- **Mfg Customer** - Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.
-  - Converts the quote into a PDF formatted report that can be printed.
-  - Copy the quote to a new quote and automatically open 'Quote Entry' for the new quote.
- **UPLOAD SELECTED QUOTES TO MANUFACTURER** - Select to upload quotes. The following message will appear:

Quote Maintenance ✕

You are about to upload the selected quotes as orders. You are responsible for the content of each order. Do you want to proceed?

YES

NO

1. Select 'Yes' to upload the quote(s).

Note: If Privacy Policy and Terms of Service are enabled, the user must select the checkbox agreeing to both before the OK button will be enabled.

2. While quotes are being uploaded, the screen will become disabled to prevent any unexpected changes while the quotes are actively being uploaded.
3. If the quote does not upload, a message will appear that will provide a reason for the failure to upload:


Confirmation

Failed

Quote	Message
150383	A Customer Reference is required for order '150383'.

4. Select  and make the necessary corrections.
5. Repeat step 1.
6. Once the upload is complete, a confirmation screen will appear that lists all quotes successfully uploaded in addition to any messages that apply to the uploaded quote(s). The message column that appears after the completion of the quote upload will indicate if the quote was uploaded without any changes or if there was some change to the resulting order in Home Guard Order Entry.

After a quote has been uploaded to Home Guard Order Entry, those orders and quotes can then be viewed by changing the filter to 'Uploaded'. The number on the left of the screen is the Manufacturer's order number. All successfully uploaded orders will now display in the 'Open Orders' section of the Dashboard. Uploaded quotes can be displayed in 'Quote Maintenance' with the 'Uploaded' filter selected.

Quote Maintenance							CREATE QUOTE
Uploaded							
Order	Quote	Date	Uploaded By	Total	Order PO Number	Order Customer Ref	
551627	13641	8/9/2014		\$0.00	BGB	Cornelia	 

- Order - Alpha-numeric identifier for the converted order in Home Guard Order Entry. Links to the order dialog.
- Quote - Alpha-numeric identifier for the quote. Links to the quote entry dialog.
- Date - Date the quote was entered.
- Uploaded By - Name of the user (dealer) who uploaded the quote to Home Guard.
- Total - Quote total cost.
- Order PO Number - 'PO Number' entered by the dealer, now on the order in Core.
- Order Customer Ref - 'Customer Ref' entered by the dealer, now on the order in Core.
- Mfg Customer - Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.
-  - Converts the quote into a PDF formatted report that can be printed.
-  - Copy the quote to a new quote and automatically open 'Quote Entry' for the new quote.

Note: Customer quotes are submitted for uploading. The Dealer uploads the quotes to the manufacturer.

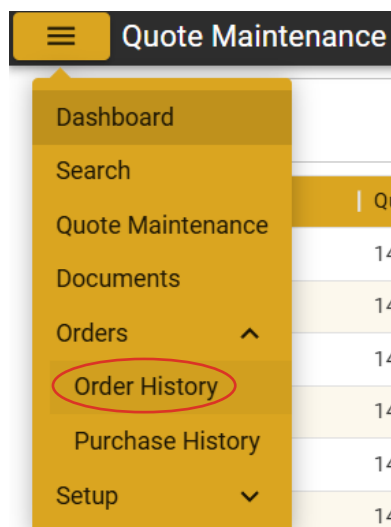


Orders

Orders are uploaded quotes by the Web user or are entered directly by the Manufacturer. The Dealer will be able to view both types of orders as they are processed by the Manufacturer. This section outlines the tools available to monitor orders.

Order History

The 'Order History' screen gives the user a snapshot of the open and complete orders and quotes for a specified date range. To access the 'Order History' screen, select 'Orders' >> 'Order History'.



Order History

Starting Date

2/7/2025

Ending Date

3/7/2025

SUBMIT

1. Once in the 'Order History' screen, specify a starting and ending date, and select 'Submit'.
2. Indicate the type of order to display by selecting 'Open Orders' or 'Complete Orders'. The columns in each tab are the same for both types of orders.

Order History

Starting Date

2/7/2005

Ending Date

3/7/2025

SUBMIT

Complete Orders

Order	Type	Date	PO Number	Customer Ref	Total
771421	Quote	2/18/2025	2	TEST 2	\$0.00
771376	Quote	2/18/2025	12	12	\$0.00
771375	Quote	2/18/2025		12	\$0.00
757764	Order	6/21/2024		TEST	\$
733270	Order	5/17/2023	PhilGlass		\$0.00
727416	Order	2/16/2023	STOCKFLEX		\$0.00
726536	Order	1/30/2023	FLEXONLY		\$0.00
726001	Order	1/18/2023	STOCK	FLEX SCREENS	\$0.00
720672	Order	10/13/2022	Phil Office Trim		\$0.00
719985	Order	10/4/2022	Phil Glass		\$

Rows Per Page

10

1 - 10 of 68

The 'Order History' screen details the following information:

- **Order** - Alphanumeric identifier of the order.
- **Order Type** - Type of order— 'Order' or 'Manufacturing'.
- **Date** - Date the order was uploaded.
- **PO Number** - Purchase order number.
- **Customer Ref.** - Contractor job reference number.
- **Total** - Total amount of order including taxes and surcharges.
- **Mfg Customer** - Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

Select the order number on the left to view the order status page, shown below (read only).

Order - #772095

HomeOwner Sale - Larissa Baker

Ack. Date

Est. Delivery Date

4/25/2025

Ship Date

LESS

Order

Contact

Comment

PO Number

26

Customer Ref

26

Sales

Salesperson

House, Account

Billing

HomeOwner Sale - Larissa Baker

Homeowner Address 1

Homeowner City, St 46741

Phone

6270969

Shipping

HomeOwner Sale - Larissa Baker

Homeowner Address 1

Homeowner City, St 46741

USA

Phone

6270969

Comment

General

HomeOwner Sale - Larissa Baker

Homeowner Address 1

Homeowner City, St 46741

Phone

6276060

Fax

6270969

Item	Qty	Part	Size	Price	Total
1	1	ENTRY DOORS - ENTRY DOOR UNIT	36 W X 80 H	\$	\$

DOOR CONFIGURATION(SINGLE), SIDELITES(NOSIDE), TRANSM(NOTRAN), FRAME TYPE(WD), DOOR SWING(RHI), NOMINAL WIDTH(36INCH), NOMINAL HEIGHT(80INCH), JAMB DEPTH(45625), SLAB TYPE(SMNC), BUY OUT SLAB(BUYOUTSLAB=ITAYLOR QTY 1 - 36 X 80 CROSS BUCK - SMOOTH STEEL N/C), DOOR STYLE(S), PANEL STYLE(2P), INSIDE COLOR(PAINT), INSIDE PAINT(WH280), OUTSIDE COLOR(MATCH), INSIDE JAMB FINISH(MATCHJIN), CLAD WRAP?(YES-CL CLAD COLOR(WH280)), GLASS TYPE(CLEAR), CLEAR GLASS(HALF LITE CLEAR(S5)), GLASS FRAME(GFSAD), DOOR HARDWARE FINISH(SN), LOCKSET/HANDLESET(SCHLAGE, SCHLAGE LOCKS(GEORGE), DEADBOLT(THUMBT), KEYING(NOKA)), PEEPSITE/KNOCKER(NOPEEP), HINGE(BALLHNG), SECURITY PLATE(20GSP), CASING(NOCASING), BRICKMOLD(BRICKMOLD), THRESHOLD(THRESHOLD TYPE(CPNCAT), THRESHOLD FINISH(MILL)), JAMB SIZE(EJAMBSIZE=37.4375W X 81.6875H)

Surcharge:

\$

Subtotal:

\$

Tax:

\$

Non-Taxable Misc:

\$0.00

Total:

\$

18

Purchase History

Selecting the 'Purchase History' menu reveals the dialog displaying the total invoiced sales for a specified date range, total overall sales, item quantity, and percentage of item sales. The user can display information by 'Orders', 'Parts', or 'Options' for designated starting and ending dates.

1. Select 'Customers'. This will summarize Contractor information for all orders during the designated time.

Purchase History

Starting Date: 2/7/1992

Ending Date: 3/7/2025

CUSTOMERS ORDERS PARTS OPTIONS

1 customer found between 2/7/1992 and 3/7/2025.

Customer	Quantity	Total Sales	Percentage
P O OR {Orders Entered by Manufacturer}	58	\$ [redacted]	100.00%

Total Quantity: 58

Total Sales: \$ [redacted]

Rows Per Page: 10 1 - 1 of 1

2. Select either 'Orders' or the 'OR' from the 'Customer' column. This will display the orders placed by the selected Contractor.
3. Select either 'Parts' or the 'P' from the 'Customer' column. This will display the parts ordered by the selected Contractor.
4. Select either 'Options' or the 'O' from the 'Customer' column. This will display the *options* associated with the parts ordered by the selected Contractor.

Permissions

Two permissions directly affect the ability of Dealers to view or edit Contractor-created quotes. These are 'View Quotes (Company)' and 'View Quotes (Customer)' permissions. Note that administrator *Dealer* users have both these permissions set automatically.

PERMISSIONS	VIEW QUOTES (CUSTOMER) CHECKED 	VIEW QUOTES (CUSTOMER) NOT CHECKED
VIEW QUOTES (COMPANY) CHECKED 	User can see all quotes and orders (including those entered in WEB)	User can view all quotes and orders created by Dealers.
VIEW QUOTES (COMPANY) NOT CHECKED	User can view <i>all</i> quotes and orders he/she has personally entered, or for which he/she is represented as the salesperson on the quote.	User can view <i>Dealer</i> quotes and orders he/she has personally entered, or for which he/she is represented as the salesperson on the quote.

User Setup

Dealers can create administrator logins for their Contractors. To view, create, edit, or delete logins, select the appropriate SalesPerson in the drop-down next to the 'Add User' button.

Customer Setup

When a Customer is selected from the list on the left side of the screen, a 'Customer Logins' button becomes visible. When this button is selected, it redirects the user to 'User Setup' and chooses the selected Customer in the drop-down filter (so the Dealer can create logins).

Customer Quotes

The 'Customer Quotes' section lists all non-expired quotes currently pending in the Web Center that have been entered by the Sales Person. The quotes appear in this tab until either the Dealer uploads the quote to the Manufacturer, or the quote is deleted or expired.

When the Dealer is logged in, the quotes screen will show *both* Dealer quotes and Sales Person quotes as shown in the 'Company Quotes' section.

The 'Quotes List' displays the following information for a pending quote:

- **Quote** - Quote number. Selecting the quote number link will display the 'Quote Entry' page for the quote.
- **Customer** - Contractor.
- **Date** - Date the quote was entered.
- **PO Number** - PO number for the quote.
- **Customer Ref** - Contractor job reference for the quote.
- **Total** - Total currency amount for the quote including taxes and surcharges.
- **Submitted** - Checkmark indicating the quote has been submitted to the dealer.
- **Status** - Quote status.
- **Expires** - Date the quote must convert to an order so that the pricing given at the time the quote was entered is preserved. Home Guard Industries controls the number of days that quotes can exist before they expire.
- **Mfg Customer** - Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

All columns can be sorted by clicking on the column header.

If the Dealer opens a quote by selecting the 'Customer Quote' tab and selecting the quote number link, the phrase 'Submitted From Customer' will be visible in red in the upper right-hand corner of the 'Quote Entry' screen.

Permissions breakdown

The default permission is set to 'Administrator', equivalent to a standard user with all boxes checked. If a 'Standard User' is selected, permissions can also be selected. The following permissions can be selected:

- Approve Holds - Approve 'Web Approval' holds placed on quotes or orders by the Manufacturer.
- Create / Modify Customers & Pricing - User will have the ability to create and modify Contractors, their accompanying information, and pricing.
- Create / Modify Quotes - User will have the ability to create and modify quotes that can be uploaded to orders.
- Delete Quotes - The user can delete quotes that have not yet been uploaded as orders.
- Modify Quote Pricing - Allows the user to manually edit the pricing on quotes.
- Modify Quote Taxes - Allows the user to manually edit the tax pricing on quotes.
- Upload Quotes - Permits the user to upload quotes to the Manufacturer.
- Upload Quotes with Exceptions - Permits the user to upload quotes to the Manufacturer even if line item exceptions exist on the order.
- View Cost - View the cost from the Manufacturer for the line items on quotes.
- View Pricing - View the pricing information for the Dealer for line items and quotes, as well as the pricing tab in options wizard.
- View Quote Markup/Margin/Discount - View the markup/margin/discount pricing information for the Dealer for line items and quotes.
- View Quotes (Dealer) - View quotes generated by the Dealer.