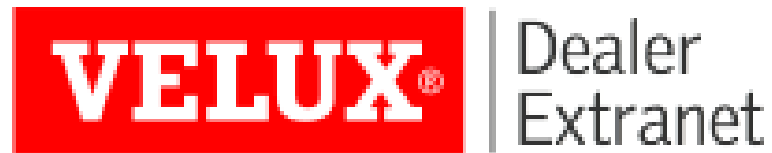


# Dealer Extranet 3 Orders User Guide



# Contents:

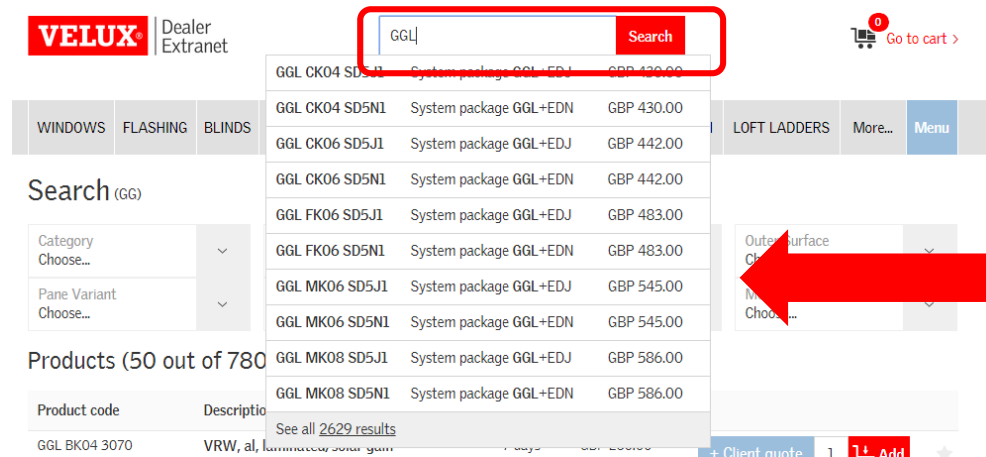
Processing an Order - Options	<u>3</u>
Search Bar	<u>4</u>
Configurator	<u>5</u>
Quick Order	<u>6</u>
Quick Order – spares & non standard products	<u>7</u>
Favourites	<u>8-9</u>
Process an order from a quote (inc. Specials)	<u>10-12</u>
Upload Tool	<u>13-14</u>
Deleting/Amending Orders	<u>15</u>
Saving the order	<u>16-21</u>
Search & View Orders	<u>22-23</u>
Reordering a previous order	<u>24</u>

# Processing an order

There are 6 options when you want to process an order.

1. [Search Bar](#)
2. [Configurator](#)
3. [Quick Order](#) (inc. Spares, old style flashings & non-standard products)
4. [Order Favourites](#)
5. [Order from a Quotation \(inc. Specials\)](#)
6. [Upload Tool](#)

# Search Bar



There is a search bar where you can enter the product codes if you know them. Once you start typing, a list of suggestions will appear. If the product comes up on the list, just click on the item and add to basket. There maybe a large number of options so you might have to type the complete code before the product you want is shown. Alternatively click the link at the bottom to see all results.

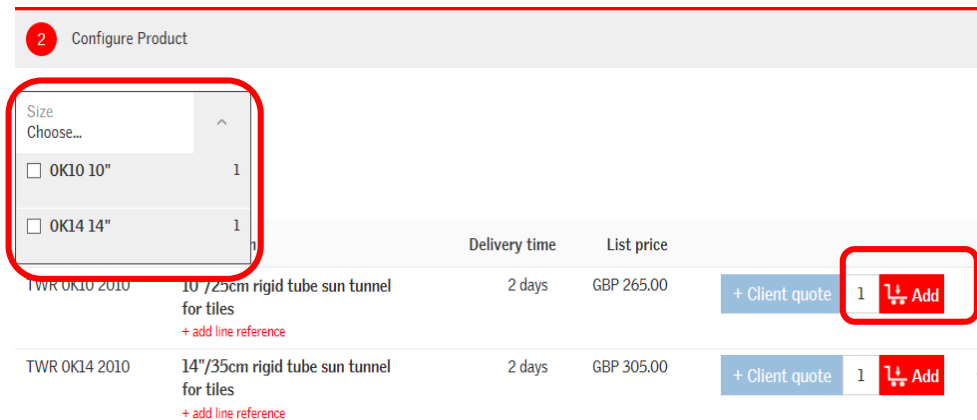
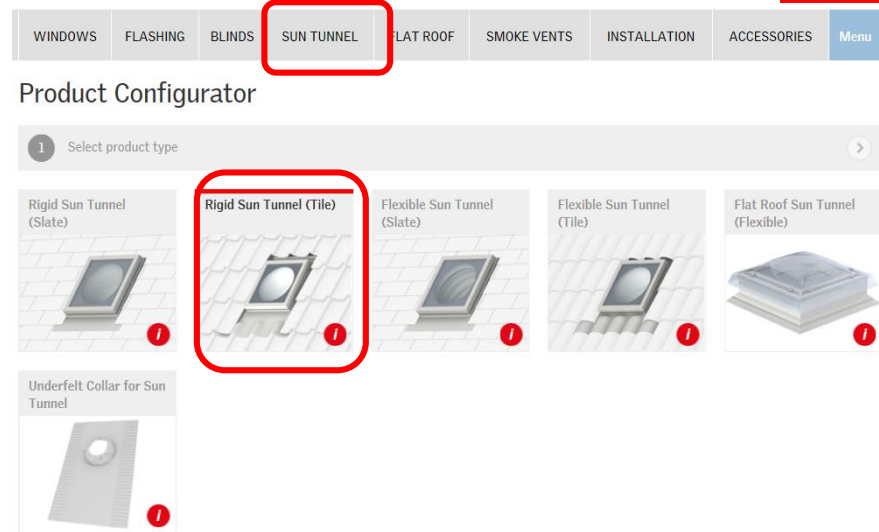
You can continue to use this method to complete the order or switch to using the configurator if you are unsure of product codes. You can also see the price of the product before you select it. Please note that this price is ex V.A.T. and before discount

**If the product doesn't appear in the Search Bar please refer to [page 7](#) for instructions on how to order using the Quick Order tool for spare parts, old style flashings and other non-standard products.**

Please see [pages 16-21](#) for saving the order

# Configurator

Something new for DE3 is the configurator tool. This feature provides a guided search. Choose the category you want to search from the ribbon at the top and make the selection from there.



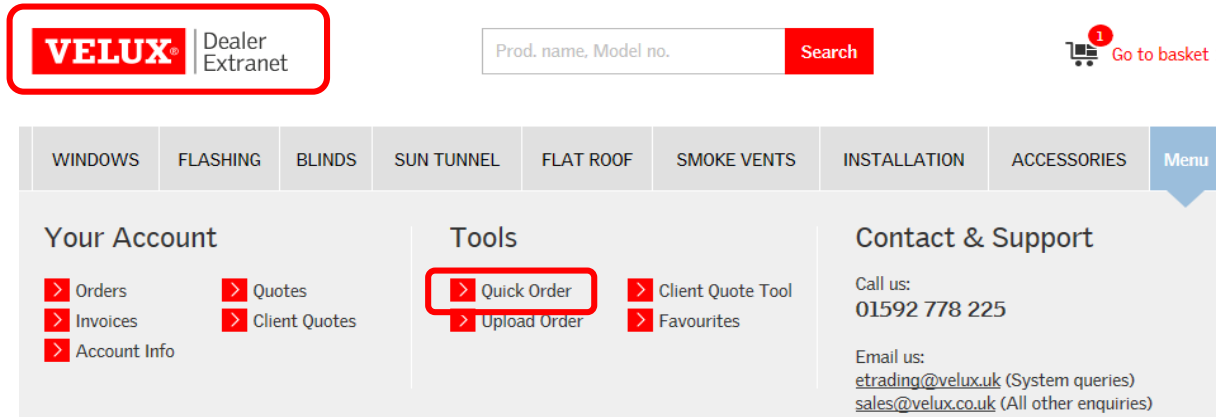
Once you click on the selected item, a drop down box will appear to enable you to narrow down your selection.

Alternatively the product that you require may be showing below. Add the quantity and click to add this to your basket when you are happy with your choice.

Please see [pages 16-21](#) for saving the order

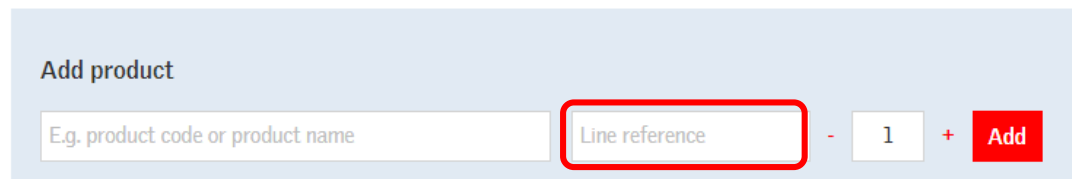
# Quick Order

If you know the codes of the products you want to order, you can use the Quick Order Tool. From the home page, go to the Tools section click on **Quick Order**. If you have navigated somewhere else on the site and need to return here, just click on the VELUX Dealer Extranet Logo in the top left corner.



This works exactly the same as the search bar mentioned previously. If you know the code just type it in. Then add each item to the basket.

**Please note** - The **Line reference** is an internal reference for you, and VELUX will not see this. For larger orders it may be useful to reference the lines if they are for multiple customers or plots, but this is optional.



Please see [pages 16-21](#) for saving the order

# Quick Order

To order spare parts, flashings for the previous generation of windows and non-standard products that cannot be found in the search bar or configurator just type the code into Quick Order, fill in the quantity and click **Add**. Once you have added all items you require click **Add order to basket**.



Prod. name, Model no.

- WINDOWS
- FLASHING
- BLINDS
- SUN TUNNEL
- FLAT ROOF
- SMOKE VENTS
- INSTALLATION
- ACCESSORIES

## Quick Order

**Add product**

-

+

The product will be added to the basket. The price & delivery time will be blank and the description will show "Material to be validated". This information will appear after clicking the Check Price & Delivery Time button.

Product code	Description	Delivery time	Quantity	List price	Total price
EDL C02 0000	Flashing, al <small>+ add line reference</small>		<span style="margin-right: 5px;">-</span> <input style="width: 30px; text-align: center;" type="text" value="1"/> <span style="margin-left: 5px;">+</span> <a href="#" style="color: blue; font-size: small;">Remove</a>		
				Total, GBP excl. VAT:	<u>0.00</u>
				Total, GBP Including VAT:	<u>0.00</u>
					Empty basket

# Favourites

To make it quicker and easier to place an order for products you order regularly, such as stock items, you can add these to your favourites. All products have a star next to them when you view the product either in your basket or the configurator. Clicking on this star adds the item to your favourites.

## Your shopping basket

Purchase Order/Reference:

[Continue shopping](#)

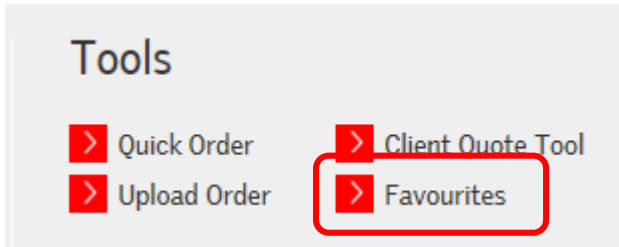
[Order Upload](#)

Product code	Description	Delivery time	Quantity	List price	Total price	
GGL CK04 2070	VRW, al, laminated <a href="#">+ add line reference</a>	2 days	- <input type="text" value="1"/> + <a href="#">Remove</a>	GBP 232.00	GBP 232.00	



# Ordering Favourites

You can access your Favourites from the Tools section of the Home Page or by pressing Menu at any time.



Simply enter the quantity you require and click Add to basket.

## Your Account



## Favourites

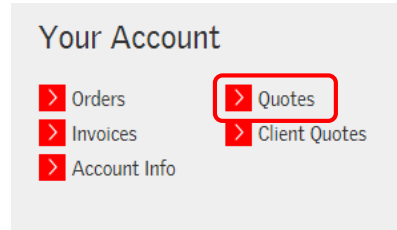
You can always favourite or unfavourite a product by clicking the star next to it. By favouriting products, you can easlily identify them no matter where you are in the VELUX Dealer Extranet.

Product code	Description		List price	Quantity	
EDL CK04 0000	Single slate flashing,55x98	★	GBP 51.00	1	Add to basket
EDW MK04 0000	Single tile flashing,78x98	★	GBP 57.00	1	Add to basket
GGL CK02 2070	White Paint,55x78,C/P,70Pane	★	GBP 220.00	1	Add to basket
GGL CK04 2070	White Paint,55x98,C/P,70Pane	★	GBP 232.00	1	Add to basket
GGL MK04 2070	White Paint,78x98,C/P,70Pane	★	GBP 252.00	1	Add to basket
ZCT 200	Telescopic rod control	★	GBP 25.00	1	Add to basket

Please see [pages 16-21](#) for saving the order

# Processing an Order from a Quote

To access your quote(s) click on the **Quotes** section of the Account page.



Orders Invoices **Quotes from VELUX** Quotes for clients Ac

Find quote

Search for:  **Search** Start date:  End date:

Quote history (5 out of 5)

Quote date	Expiration date	Quote number	Quote reference
16/11/2015	16/12/2015	<b>0022093365</b>	New Bungalow
11/11/2015	11/12/2015	0022092997	Test with Discount
04/11/2015	04/12/2015	0022092675	04/11/2015 Ewa Heuni
29/10/2015	28/11/2015	0022092569	02/10/2015 Melisa Bi
29/10/2015	28/11/2015	0022092475	29/10/2015 Melisa Bi

This will allow to search for a specific quote, search between dates or you can just click on the quote if it is showing in the quote history list.

Please note that quotes are only valid for **1 month**. If it is over this time period, you will need a new quote.

Once you have the quote number just click on it to view your quote.

**(Continued)**

# Processing an Order from a Quote cont.



To place an order from the quote click on **Transfer to basket**.

Quantity	Product code	Description	Delivery time	List price	Discount	Net Sales Price
3	GGU MK04 0070	VRW, al, laminated	2 days	GBP 924.00	27.0%	GBP 674.52
3	EDL MK04 0000	Flashing, al	2 days	GBP 171.00	27.0%	GBP 124.83
Sub total, GBP:						799.35
VAT, GBP:						159.87
Total, GBP excl. VAT						<b>799.35</b>
Total, GBP Including VAT:						<b>959.22</b>

[Create client quote](#)  
(with updated conditions)

[Transfer to basket](#)  
(+ Update/add PO No.)

[Place order](#) >  
(Check quote carefully - Official PO No. must be on quote before ordering or call VELUX to add)

**\*\*VELUX RECOMMEND THAT YOU DO NOT USE THE [Place order](#) > BUTTON. ORDERING THAT WAY WILL CREATE AN ORDER WITH EXACTLY THE INFORMATION ON THE QUOTATION, INCLUDING PO NUMBER & DELIVERY ADDRESS. YOU WILL NOT GET THE OPPORTUNITY TO CHANGE ANYTHING BEFORE THE ORDER SAVES.\*\***

**When ordering from a quote which includes Specials the Place order button will be the only option given. For those orders, please call VELUX to have the official PO no. (and direct delivery address if required) added to the quote before placing the order.**


Please see [pages 16-21](#) for saving the order

# Processing an Order from a Quote cont.

Please be aware that that incomplete quotations which include Special products (codes starting with Special, for example SPECIAL FLA or SPECIAL GGLK) can be seen in Dealer Extranet 3 (DE3). When a Special product is required by a customer we will sometimes have to send away a request for pricing which can take some time. During that period the product will show a price of zero when you view the quote in DE3. The lead time may also be incorrect.

Quote number 0022235142

Expiration date 31/03/2016

Customer information:		Delivery information:		 Print		
Quantity	Product code	Description	Delivery time	List price	Discount	Net Sales Price
1	SPECIAL FLA	special Flashing	21 days	GBP 0.00		GBP 0.00
Sub total, GBP:						0.00
Total, GBP excl. VAT						<u>0.00</u>
Total, GBP Including VAT:						<u>0.00</u>

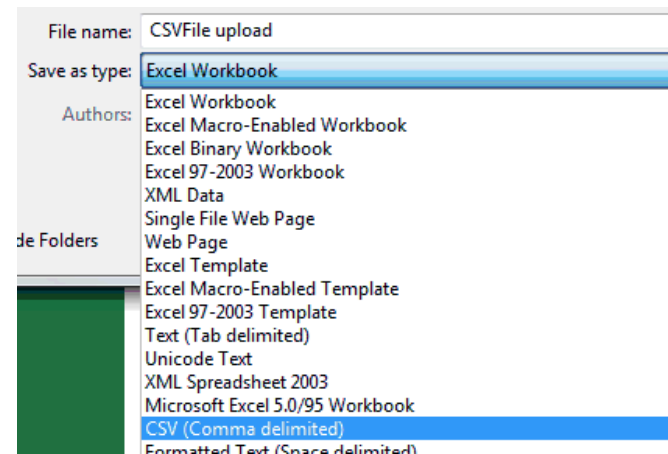
**Should you try to place an order from a quote like this, the order will error because the quotation is missing essential information. No special products will be supplied free of charge. Please wait for the quote to be completed with prices before ordering.**

# Upload Tool

To be able to use this tool, the Excel file must be laid out with the format – Product code;quantity;line reference (if required).  
Please do not add any spaces between the fields.

	A
1	GGL MK04 3050;27;Plot 9
2	DKL MK06 1085;22;Plot 10
3	GGL CK02 3070;15;Plot 11

**Make sure that the file is saved as a CSV file.**



**(Continued)**

# Upload Tool

1. Click on the **Upload Order** tool

2. Click **Choose File**, and select the file from your drive before clicking **Upload** (please see [page 13](#) for further info on how to upload the .csv files).

The **Upload complete** section will confirm how many lines have been uploaded and highlight any errors. Click **Add to basket**.

**Tools**

- Quick Order
- Upload Order**
- Client Quote Tool
- Favorites

Upload a file with products, quantities and line references

Choose File CSVFile upload.csv **Upload**

Upload complete:  
- 3 product lines successfully identified

**Add to basket**


Please see [pages 16-21](#) for saving the order

# Amending/Deleting Order Lines

You can amend quantities, or remove lines completely at any point until the order has been saved. If you need to make any changes to a saved order please contact VELUX on 01592 778225 before 4pm on the date the order is processed. Orders generally cannot be changed after this cut-off time.


To change the quantity click the **-/+** buttons either side of the quantity to reduce/increase it, or simply type over it, with the correct quantity.

To remove a line completely click **Remove** below the quantity box.


Product code	Description	Delivery time	Quantity	List price	Total price
GGL MK04 2070	White Paint,78x98,C/P,70Pane <small>+ add line reference</small>	2 days	- <input type="text" value="1"/> + <a href="#">Remove</a>	GBP 252.00	GBP 252.00 
Total, GBP excl. VAT:					<u>252.00</u>
Total, GBP Including VAT:					<u>302.40</u> <a href="#">Empty basket</a>

If all items in the basket are to be removed click **Empty basket**, which can be found below the total.


# Saving the order

Whatever method has been used to place the order, once the goods have been added click  [Go to basket >](#) at the top right of your screen.

Check all the details are correct and enter your purchase order number into the correct field.

 Your shopping basket

Purchase Order/Reference:  [Continue shopping](#) [Order Upload](#)

Product code	Description	Delivery time	Quantity	List price	Total price
GGL CK04 2070	VRW, al, laminated <a href="#">+ add line reference</a>	2 days	- <input type="text" value="1"/> + <a href="#">Remove</a>	GBP 232.00	GBP 232.00 
Total, GBP excl. VAT:					<b><u>232.00</u></b>
Total, GBP Including VAT:					<b><u>278.40</u></b>
					<a href="#">Empty basket</a>

**(Continued)**



# Saving the order (cont.)

## Requested delivery date:

- Delivery a.s.a.p - *We will deliver on the earliest possible date, subject to VELUX lead times. (Applies to orders placed before 4:00 pm).*
- Select a later delivery date. VELUX deliver Monday to Friday excluding holidays.

## Place of delivery:

- Branch address
- Direct delivery

## Please pick the relevant address:

- VELUX, Woodside Way, KY7 4ND Glenrothes

[I want to place orders for another branch](#)


Get Price & Delivery Time >

- **Delivery a.s.a.p** – This option means that the goods will be delivered in line with standard Velux lead times. Orders placed after 4pm incur a 1 working day delay.
- **Select a later delivery date** – You can select a later date than the standard VELUX lead times. It is not possible to select an earlier date. ([see page 18](#))
- **Place of delivery** – Select delivery to branch address or, if you would like a direct delivery this will then open a new set of fields to enable you to do this. ([See page 19](#))
- **Pick the relevant address** - This will show any permanent delivery addresses that you use. Select which address you require from the list.
- If you would like to add a new permanent delivery address then you can request this by clicking **I want to place orders for another branch** and completing the details, and VELUX will access for you.

# Select a delivery date

Requested delivery date:

- Delivery a.s.a.p - We will deliver on the earliest possible date, subject to VELUX lead times. (Applies to orders placed before 4:00 pm).
- Select a later delivery date. VELUX deliver Monday to Friday excluding holidays.

26/11/2015 

2015 November


Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	1	2	3	4	5	6

House Name

House Name

The delivery date will default to **Deliver asap**. You also have the option to chose a later delivery date by clicking here.

Click on your chosen date. Once you have clicked on the date the box will close.

26/11/2015 

Please note that when selecting your date the normal lead times will apply.

# Direct delivery

Full name\*  
Full name

Street House Name  
Street name House Name

House number Postal code\*  
House number Postal code

City  
City

Mobile phone\* Email  
Mobile number E-mail address

Fill in the required mandatory fields then Enter

Select shipping address

Please select the correct shipping address.

- Velux Co Ltd, Woodside Way, GLENROTHES, Fife, KY7 4ND
- Core Products Ltd, Mitchell Buildings, Woodside Way, GLENROTHES, Fife, KY7 4ND
- Paint Tec Fife, Unit 2, Mitchell Buildings, Woodside Way, GLENROTHES, Fife, KY7 4ND

Select & Continue >

This will bring up a box where you can choose the correct the delivery address. Then click Select and Continue. New build and site addresses may not be available on the address list. Please choose the closest match and contact VELUX to amend the order once saved.

Please note: A delivery charge may apply for direct deliveries depending on the products/quantities ordered.

Once the delivery time and address information is complete click

Get Price & Delivery Time >

# Confirm Order

Check all details are correct and click

**Confirm Order** >

## Your Price & Delivery time

Please note: Your order/quote is not processed yet. Confirm it by clicking "Confirm Order" or "Save as Quote" below.


Customer number:

Customer information:

Delivery information:

Quantity	Product code	Description	Delivery date	List price	Your discount	Net Sales Price
1	GGL MK04 2060	White Paint,78x98,C/P,60Pane	To be confirmed	GBP 312.00	29,0%	GBP 312.00
Sub total, GBP:						312.00
Total, GBP excl. VAT:						<b><u>312.00</u></b>
Total, GBP Including VAT:						<b><u>375.20</u></b>

[< Edit basket](#)

 Save as Quote

**Confirm Order** >

Quote will be valid to 15. September 2016

# Confirm Order

## Your order is being processed

If you do not want to wait here for your order number, please check [Order history](#) in a few minutes.

If you experience problems processing your order, please contact us for further assistance.

Once the order has saved you will see the message below and the VELUX order confirmation number. You can click on the order number link to view the order.

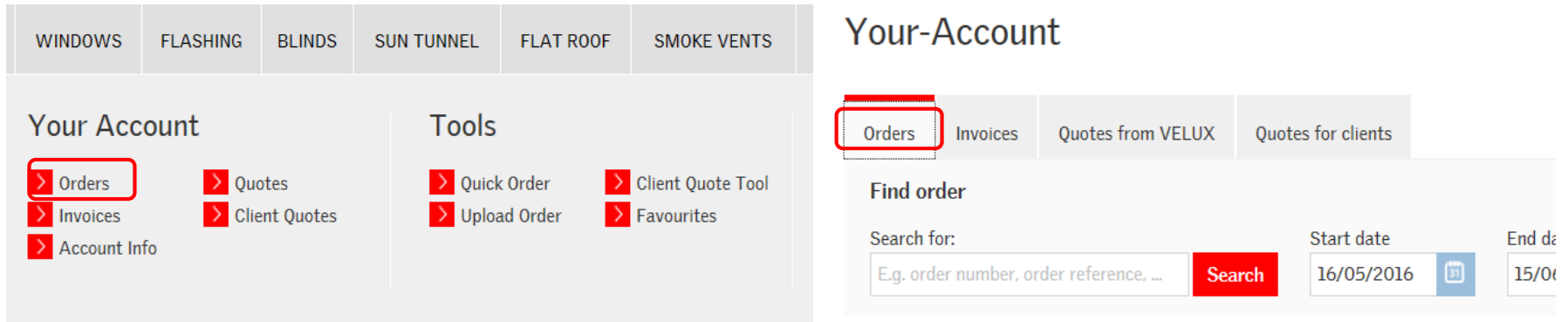
## Your order is now complete

See the details of your [Order no. 5008653928](#).

# Search/View Orders

Your 5 most recent orders can be viewed on the Home Screen.

If you need to search for an order, click on **Orders** in the Your Account section which can be found either on the **Home Page** or in the **Account Info** screen.



The screenshot shows the 'Your Account' section of the VELUX user interface. At the top, there are navigation tabs for 'WINDOWS', 'FLASHING', 'BLINDS', 'SUN TUNNEL', 'FLAT ROOF', and 'SMOKE VENTS'. Below these, the 'Your Account' section is divided into two columns: 'Your Account' and 'Tools'. In the 'Your Account' column, the 'Orders' menu item is highlighted with a red box. Other items in this column include 'Invoices', 'Account Info', 'Quotes', and 'Client Quotes'. The 'Tools' column contains 'Quick Order', 'Upload Order', 'Client Quote Tool', and 'Favourites'. To the right, the 'Your-Account' section has a sub-menu with 'Orders', 'Invoices', 'Quotes from VELUX', and 'Quotes for clients'. The 'Orders' item is also highlighted with a red box. Below this sub-menu is a 'Find order' section with a search input field containing 'E.g. order number, order reference, ...', a red 'Search' button, and date selection fields for 'Start date' (16/05/2016) and 'End date' (15/06/2016).

The **Find order** screen will open.

If you have Super Dealer access for more than one branch there will be a Select Dealer section where you can select the branch you wish to view. For other customers this section cannot be seen.



The screenshot shows the 'Find order' screen. At the top, it says 'Find order'. Below that, there is a 'Select dealer:' label followed by a dropdown menu. The dropdown menu is open, showing the selected option '12426495 Branch 2'.

# Search/View Orders

You can search by order number or reference, select a date range to view, or view by order status.

Once you locate the order you want, click on the Order Number to view it.


Orders
Invoices
Quotes from VELUX
Quotes for clients
Account Info
Favorites


**Find order**


Select dealer:

12426495
Branch 2

Search for:  Search

Start date:  

End date:  

Status:  

## Order history (2 out of 2)

Order date	Order number	Order reference	Customer name	Document type	Status
19/10/2015	5006531099	123asA		Order	Partially delivered
19/10/2015	5006531097	123		Order	Partially delivered

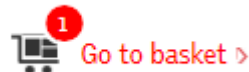
# Reordering from a previous order.

Once you have found the order, you just click on the order number. It will allow you to view the order. You can then click on the **Add entire order to basket** button.

Quantity	Product code	Description	Delivery date	List price	Your discount	Net Sales Price	Status
1	BBX CK04 0000	Vapour barrier for collar VRW	To be confirmed	GBP 23.00		GBP 23.00	
						Sub total, GBP:	0.00
						Total, GBP excl. VAT	<u>0.00</u>
						Total, GBP Including VAT:	<u>0.00</u>

**Add entire order to basket >**

Once you have done this click **Go to basket.**



Once you have added the goods to the basket you can change the quantity or remove products if you don't require them or add additional items. You can also change the delivery address if you wish. Refer to [page 16 -21](#) for instructions to Save the order.