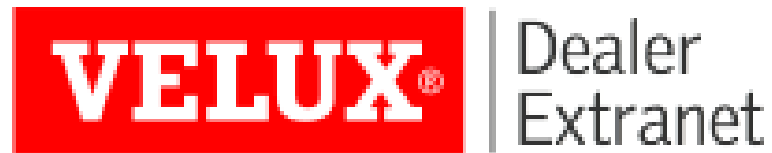


Dealer Extranet 3 Quotations User Guide



Contents:


Creating a Quote with VELUX Discount	<u>3-9</u>
Creating Quotes for Clients (from an existing quote)	<u>10-16</u>
Creating Quotes for Clients (with configurator)	<u>17-20</u>
Search and View Quotes	<u>21</u>

Creating a Quote with VELUX discount

You can prepare a quote which shows the prices you receive from VELUX in one of 2 ways.

1) If you know the product code you require, you can use the search bar at the top of the screen. As you type the code a list of products will appear which you can select from. You can either type the full code, or select the product you require by clicking on it in the list.

<input type="text" value="ggl ck04"/>		<input type="button" value="Search"/>
GGL CK04 2050	VRW, al, non laminated	GBP 266.00
GGL CK04 2060	VRW, al, 5-STAR, RNR	GBP 332.00
GGL CK04 2070	VRW, al, laminated	GBP 282.00
GGL CK04 2070Q	VRW, Burglary Resistant	GBP 430.00
GGL CK04 2570H	Roof window, black al, ext. glazing bar	GBP 328.00
GGL CK04 3050	Lacq.Pine,55x98,C/P,50Pane	GBP 228.00
GGL CK04 3060	Lacq.Pine,55x98,C/P,60Pane	GBP 294.00
GGL CK04 306021U	Lacq.Pine,55x98,C/P,INTEGRA,Electric	GBP 594.00
GGL CK04 306030	Lacq.Pine,55x98,C/P,INTEGRA,Solar	GBP 628.00
GGL CK04 3062	VRW, al, sound reduction	GBP 464.00
See all 31 results		



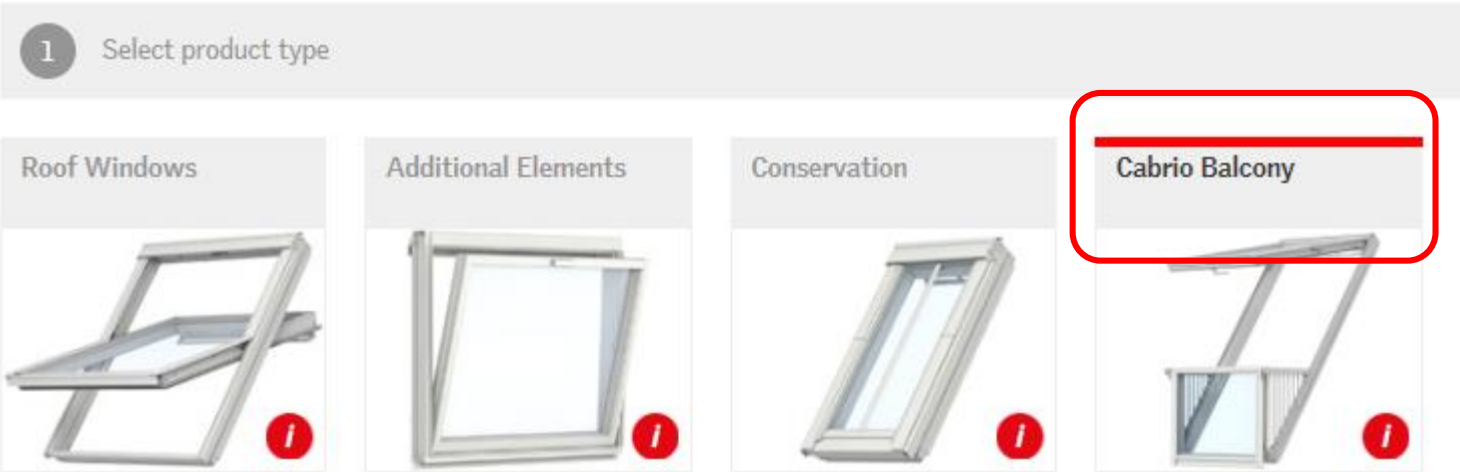
Creating a Quote with VELUX discount

Option 2: If you are not sure of the codes for the items you require, you can also use the configurator to locate the items you require.

For example, if you want to quote for a Single Cabrio Balcony package, size SK19 to suit a tile roof, click on Windows at the top of the screen, then click on Cabrio Balcony.

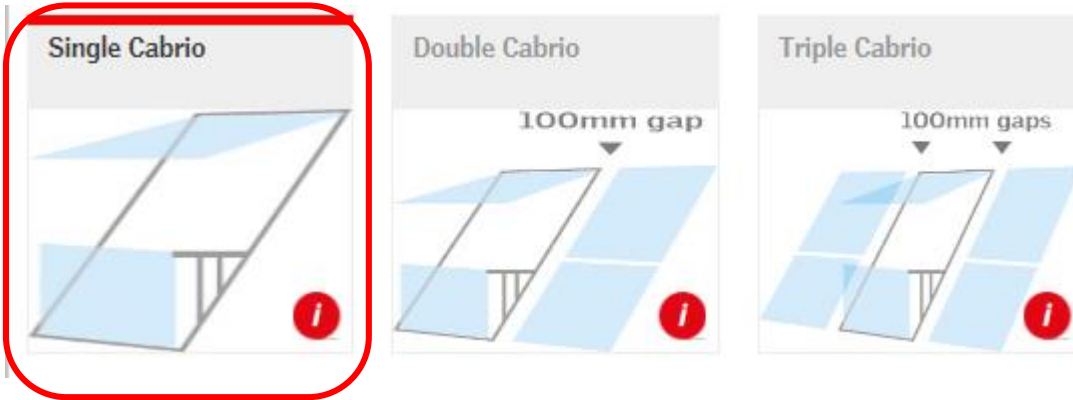


Product Configurator



Creating a Quote with VELUX discount

Now select the Single Cabrio



You can now select the type of flashing and/or window size to narrow down the list of products until the item you require can be seen below. Enter the quantity you require and click **Add**.

3 Configure Product

Pane Variant: Multiple ▼
 Roofing Material: Slate ▼
 Size: SK19 (1140 x 2520) ▲

PK19 (940 x 2520) 1
 SK19 (1140 x 2520) 1

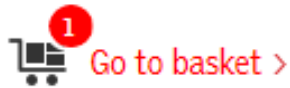
Products (1 out of 1)

Product code	Description	Delivery time		
GDL SK19 SD0L1	System GDL, EDL + add line reference	7 days	GBP 2,034.00	+ Client quote 1 Add

Creating a Quote with VELUX discount

Repeat for any other products you wish to add to the quote.

Once you have added all of the items you require on the quote, click on the basket symbol at the top right of your screen to view your shopping basket.



Creating a Quote with VELUX discount

Add any reference you require on the quote. If you already know the PO number please use it here.


Your shopping basket

Purchase Order/Reference:



[Continue shopping](#)

[Order Upload](#)

Product code	Description	Delivery time	Quantity	List price	Total price
GDL SK19 SD0W1	System GDL, EDW + add line reference	7 days	- <input type="text" value="1"/> + Remove	GBP 2,053.00	GBP 2,053.00 
Total, GBP excl. VAT:					<u>2,053.00</u>
Total, GBP Including VAT:					<u>2,463.60</u> Empty basket

Creating a Quote with VELUX discount

Complete the place of delivery to select whether you want delivery to the **Branch address or Direct Delivery** to your customer. Completing this section will ensure that you and your customer are aware of any carriage charges.

If you have Super Dealer access you can select which branch the order is to go to.

Once completed click "**Get Price & Delivery Time**".

Requested delivery date:

- Delivery a.s.a.p - *We will deliver on your requested delivery date if you place your order before 4:00 pm.*
- Select a delivery date. VELUX deliver Monday to Friday excluding holidays.

Place of delivery:

- Branch address
- Direct delivery

Please pick the relevant address:



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

Get Price & Delivery Time >

Creating a Quote with VELUX discount

The next screen will show your price and discounts. Click **Save as Quote** at the bottom of the screen. Quotes are valid for one month from the date of processing.

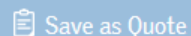
Please note: Your order/quote is not processed yet. Confirm it by clicking "Confirm Order" or "Save as Quote" below.

Customer information:

Delivery information:

Quantity	Product code	Description	Delivery date	List price	Your discount	Net Sales Price
1	GDL SK19 SD0W1	System GDL, EDW	To be confirmed	GBP 2,053.00	27.0%	GBP 1,498.69
1	GDL SK19 3066LP1	Roof balcony, al, 3-layer pane				
1	GDL SK19 3066LP2	Roof balcony, al, 3-layer pane				
1	EDW SK19 0000	Flashing, al, SW+				
Sub total, GBP:						1,498.69
Total, GBP excl. VAT:						<u>1,498.69</u>
Total, GBP Including VAT:						<u>1,798.43</u>

[< Edit basket](#)

 Save as Quote

Confirm Order >

Quote will be valid to 17. December 2015

Creating a Quote with VELUX discount

The screen below will display whilst your quote is saving:

Your Quote is being processed 

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

Once complete you will get the following message:

Your Quote is now complete.

See the details of your [Quote no. 0022093579](#)

Valid to: 24. December 2015.

Clicking on the quote no. will allow you to view the quote.

At this point the quote can be viewed by VELUX. Should you need assistance please contact us on 01592 778225 using the quote no. as a reference.

Creating a Quote with VELUX discount

When viewing the quote you will have the option to Print a copy, Create a client quote, Transfer to your shopping basket, or place an order with exactly the information on the quote. When placing an order we recommend always using the Transfer to basket option so you can add your PO number and delivery information.

Quote number 0022349065
Expiration date 15/09/2016
Customer number: 000000000

Customer information: Sterlingbuild Limited S169S Barnfield Road Unit 14, CT19 5SU FOLKESTON Park Farm Estate	Delivery information: Sterlingbuild Limited S169S Barnfield Road Unit 14,	Print
--	--	-------

Quantity	Product code	Description	Delivery time	List price	Discount	Net Sales Price
1	GGL MK04 2060	VRW, al, 5-STAR, RNR	2 days	GBP 312.00	27.0%	GBP 227.76
1	EDW MK04 0000	Flashing, al, SW+	2 days	GBP 57.00	27.0%	GBP 41.61
Sub total, GBP:						269.37
VAT, GBP:						53.87
Total, GBP excl. VAT						<u>269.37</u>
Total, GBP Including VAT:						<u>323.24</u>

To copy into a client quote click "Create client quote".

To turn the quote into an order click transfer to basket

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)
---	--	--

Creating a Client Quote from an existing Quote



VELUX Dealer Extranet 3 includes a tool you can use to create a quotation for your clients customizable with your company logo and including client discounts and delivery charges. Please refer to the **Account Information Guide** for more information on uploading your logo.

You can create a quote for a client in 3 ways.

If you already have a quote with discount (created by VELUX or yourself) you can use this to create a Client Quote. To do this, view the quote by clicking on **Quotes** in the Your Account section of the Home Page.

The screenshot shows the VELUX Dealer Extranet 3 interface. At the top, there are navigation tabs: WINDOWS, FLASHING, BLINDS, SUN TUNNEL, FLAT ROOF, SMOKE VENTILATION, and INS. Below these is a 'Your Account' section with a list of options: Orders, Invoices, Account Info, Quotes (highlighted with a red box), and Client Quotes. To the right is a 'Tools' section with options: Quick Order, Upload Order, Client Quote Tool, and Favorites. Below the 'Your Account' section is a 'Quote history (3 out of 3)' table with the following data:

Quote date	Expiration date	Quote number	Quote reference
16/08/2016	15/09/2016	0022349065	Town House

A red arrow points from the 'Quotes' menu item to the 'Quote history' table. Another red arrow points from the 'Quote history' table to a blue button labeled 'Create client quote'.

Creating a Client Quote from an existing Quote



Click on the Quote number to view it.

Please refer to the [Search/View Quotes](#) section of this guide for more instructions on how to search for a quote.

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

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	0022093365	New Bungalow

Creating a Client Quote from an existing Quote



To turn the existing quote into a client quote, click on Create client quote at the bottom of the screen.

Quantity	Product code	Description	Delivery time	List price	Discount	Net Sales Price
1	GGL CK04 2050	VRW, al, non laminated	7 days	GBP 266.00	27.0%	GBP 194.18
1	GGU CK02 0070Q	VRW, Burglary Resistant	16 days	GBP 422.00	27.0%	GBP 308.06
1	DKL MK06 4621S	Blackout bl., Disney, Planes 2	8 days	GBP 98.00	42.0%	GBP 56.84
Sub total, GBP:						559.08
Total, GBP excl. VAT						559.08
Total, GBP Including VAT:						670.90

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

[Transfer to basket](#)
(with updated conditions)

[Place order](#) >
(with quote conditions)

You will get the option to create a new client quote, or to add the items to an existing client quote.

You can create/add to a Client Quote from this Quote

[Create a new Client Quote](#)

...or add it to an existing Client Quote

Quote ID	Customer reference	Quote ends	Last changed
5		06/12/2015	06/11/2015 13:11

[Add to this quote](#)

Creating a Client Quote from an existing Quote



Quote

Mr A Test
Anywhere
Any Town
AN7 1WN
Tel 0123 456 789 **1**

VELUX®

Your contact:
John Smith 09876 543 210 **2**

Your quote ID: 7

This quote is valid until: 16/12/2015

Product code	Description	Quantity	List price	Discount	Net Sales Price
GDL SK19 SD0W1	System GDL, EDW <small>+ add line reference</small>	1 <small>Remove</small>	GBP 2,057.00 <small>GBP 2,057.00 each</small>	20% 3	GBP 1,645.60 <small>GBP 1,645.60 each</small>
GDL SK19 3066LP1	Roof balcony, al, 3-layer pane	1			
GDL SK19 3066LP2	Roof balcony, al, 3-layer pane	1			
EDW SK19 0000	Flashing, al, SW+	1			

Delivery charge: Direct to site delivery GBP 10.00 **5**

Discount on total amount: Discount text % or amt. **4**

Price, GBP excl. VAT: 1,655.60
VAT, GBP: 331.12
Total, GBP Including VAT: 1,986.72

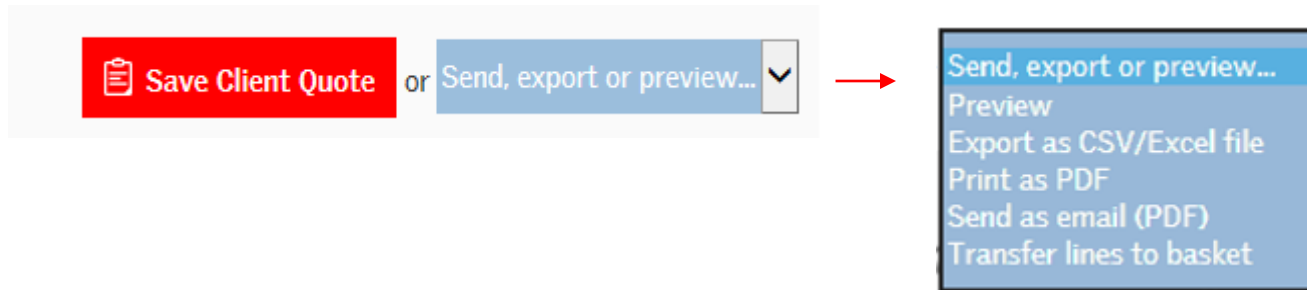
Save Client Quote or Send, export or preview...

Your company logo here.

In this screen you can:
Add your customers address details in the Client information section(**1**)
Add your contact details (**2**).
Input the discount you wish to offer your customer at line level (**3**), or for the full order (**4**), either as a percentage (by entering an amount then a % sign) or as a value by leaving off the %.
Add any delivery charge that applies (**5**)

Creating a Client Quote from an existing Quote

Once you have completed your quote you can click Save Client Quote to save in Dealer Extranet, or if you click Send, export or preview you will get the option to either Preview a copy of the quote, Export as a .csv/Excel file, Print as a .PDF, send via email (.PDF), or add the items to your shopping basket to place an order.

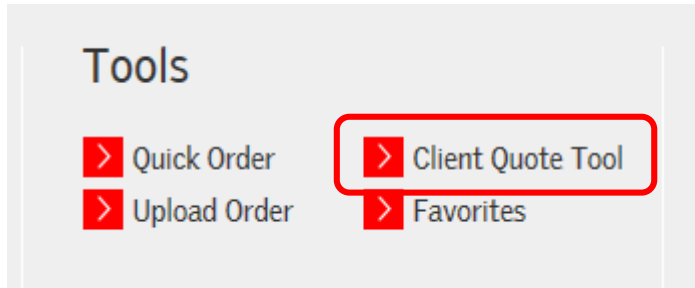


Creating a Client Quote using the configurator

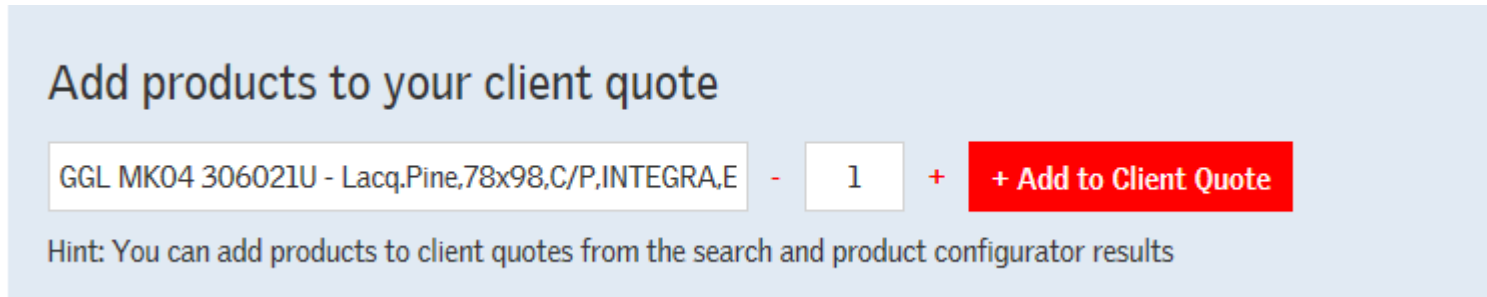


You can also create a Client Quote from scratch.

If you know the product codes you require simply click on the Client Quote Tool in the Tools section of the Home Page.



Type in the code of the product(s) you wish to quote for, add the quantity and click Add to Client Quote



Once all the items have been added you can customize the quote with discounts, shipping charges etc. as shown in the preceding pages.

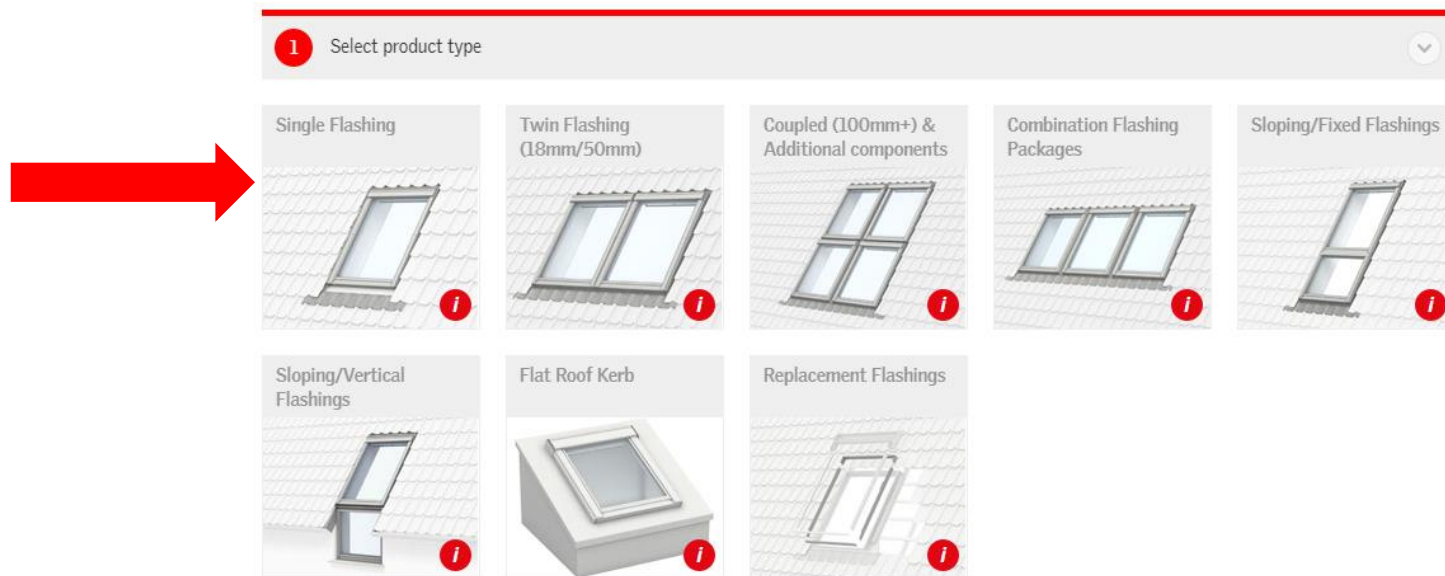
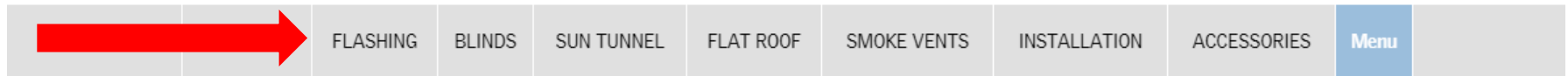
Creating a Client Quote using the configurator



If you do not know the product codes you require, you can use the configurator to find them.

Simply start by clicking on the type of product you require from the ribbon at the top of the home page.

For example, if you want to order a Single Tile MK04 Flashing, click on Flashing at the top of the screen, then select the appropriate flashing.



Creating a Client Quote using the configurator



You can now select the type of flashing and/or window size to narrow down the list of products until the item you require can be seen below. Enter the quantity you require and click +Client quote.

2 Configure Product

Outer Surface
Standard Grey

Roofing Material
Tile up to 120mm profile

Size
MK04 (780 x 980)

Products (2 out of 2)

Product code	Description	Delivery time	List price			
EDW MK04 2000	Single tile flashing,incl. BDX 78x98 + add line reference	2 days	GBP 86.00	+ Client quote	1	Add
EDW MK04 0000	Single tile flashing,78x98 + add line reference	2 days	GBP 57.00	+ Client quote	1	Add

Creating a Client Quote using the configurator



You can then choose to create a new Client Quote or add to an existing quote.

You selected:
System GDL, EDW

You can create a new Client Quote with this product

Create a new Client Quote

...or add it to an existing Client Quote

Quote ID	Customer reference	Quote ends	Last changed
6	Any Company	16/12/2015	16/11/2015 15:48

Add to this quote

You can then complete the quote by entering discounts and delivery charges etc. as shown on [page 15](#).

Search/View Quotes

If you need to search for a quote, click on Quotes or Client Quotes in the Your Account section which can be found on the **Home Page** or Quotes from VELUX / Quotes for Clients in the **Account Info** screen.

The image shows two navigation paths from the VELUX Dealer Extranet to the search page. The left path starts from the 'Your Account' menu where 'Quotes' and 'Client Quotes' are highlighted with a red box. The right path starts from the 'Your Account' sub-menu where 'Quotes from VELUX' and 'Quotes for clients' are highlighted with a red box. Red arrows labeled 'or' point from both paths to a central screenshot of the search page.

The search page features a navigation bar with 'Quotes from VELUX' and 'Quotes for clients' selected. Below the navigation bar is a 'Find quote' section with a search form. The search form includes a 'Search for:' field with the placeholder 'e.g. quote number', a 'Search' button, a 'Start date:' field with the value '16/05/2016', and an 'End date:' field with the value '15/06/2016'. A red box highlights the search form. Below the search form is a 'Quote history (1 out of 1)' section with a table of results.

Quote date	Expiration date	Quote number	Quote reference
15/06/2016	15/07/2016	0022099474	Quote Example

You can search by Quote no., Quote reference or select a date range to view