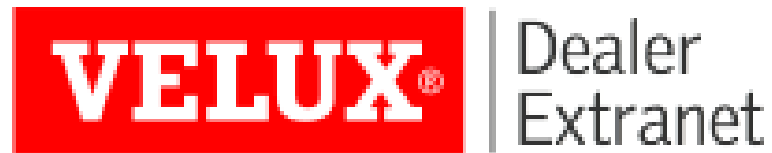


# Dealer Extranet 3 Quotations User Guide



# Contents:

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Creating Quotes for Clients (from an existing quote)	<a href="#"><u>10-16</u></a>
Creating Quotes for Clients (with configurator)	<a href="#"><u>17-20</u></a>
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# Creating a Quote with VELUX discount

You can prepare a quote which shows the list price and discount 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. The number of products will reduce as you type, narrowing down the options. You can either type the full code, or select the product you require by clicking on it once you can see it on the list. (Please bear in mind that for some products the list may be very long so you might have to type the complete product code before it shows on the list).

ggl ck04		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 <a href="#">31 results</a>		

# Creating a Quote with VELUX discount

2) If you don't know the code of the product you require, you can find it using the configurator. For example, if you wish to order 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.

Navigation menu: WINDOWS (highlighted), FLASHING, BLINDS, SUN TUNNEL, FLAT ROOF, SMOKE VENTS, INSTALLATION, LOFT LAD

HINT: Download your Dealer Extranet 3 User Guides from the Latest News section on your home page.

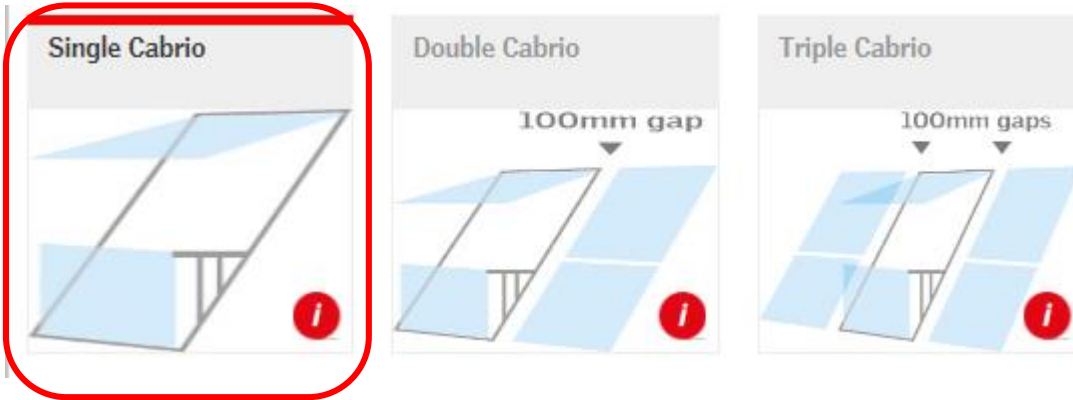
## Product Configurator

1 Select product type

- Roof Windows
- Additional Elements
- Conservation
- Cabrio Balcony** (highlighted)

# 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

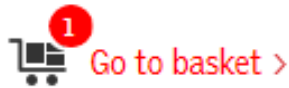
**Products (1 out of 1)**

Product code	Description	Delivery time		
GDL SK19 SD0L1	System GDL, EDL <a href="#">+ add line reference</a>	7 days	GBP 2,034.00	+ Client quote 1 <b>Add</b> <span>★</span>

# 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 <a href="#">+ add line reference</a>	7 days	- <input type="text" value="1"/> + <a href="#">Remove</a>	GBP 2,053.00	GBP 2,053.00 
Total, GBP excl. VAT:					<b><u>2,053.00</u></b>
Total, GBP Including VAT:					<b><u>2,463.60</u></b>
					<a href="#">Empty basket</a>

# Creating a Quote with VELUX discount

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

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.

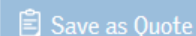
Please note: Your order/quote is not processed yet. Confirm it by clicking "Confirm Order" or "Save as Quote" below.

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:						<b><u>1,498.69</u></b>
Total, GBP Including VAT:						<b><u>1,798.43</u></b>

[< 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. You can also access this screen from the **"Quotes from VELUX"** tab on the Home Page

Orders Invoices **Quotes from VELUX** Quotes for clients Account Info Favourites

**Disclaimer: PLEASE NOTE:** If you wish to transfer a quote to an order you must transfer it to your basket first to allow you to update your Purchase Order Number. Failure to do so may result in invoicing issues with your branch/Head Office.

Delivery times quoted are estimates only. Current delivery dates will be confirmed upon placing your order.

Please always check you orders before saving/placing to avoid errors as this may result in a restocking charge should you no longer require the product.

Returns are not accepted for special items (e.g. SPECIAL GGLK) and cancellation of such items can only be done before 16:00 on the day of ordering.

VELUX cannot take any responsibility for any errors in quotes/orders created by customers using Dealer Extranet.

Quote number 0022228683  
Expiration date 31/03/2016

Quantity	Product code	Description	Delivery time	List price	Discount	Net Sales Price
1	CFP 090120 S00M	Kerb 15 cm fixed, Q-pane, flat glass	24 days	GBP 786.00	27.0%	GBP 573.78
1	CFP 090120 0073Q	Kerb 15 cm fixed, Burglary proofed lowE-				
1	ISD 090120 2093	Flat glass, clear, IGU 93				
Sub total, GBP:						573.78
Total, GBP excl. VAT						<b>573.78</b>
Total, GBP Including VAT:						<b>688.54</b>

To print a copy of the quote click on the print icon.

To transfer the products into your shopping basket click **Transfer to basket**.

The **Place Order** button should **only** be used to place an order from a quote including products with codes starting "Special". The order placed will match the quote **exactly**. Please be aware that you will not have the opportunity to add a PO No. or amend the order in any way if you use this option. The quote reference will be used as your PO number. Contact VELUX prior to ordering if a PO number or site delivery address needs to be added.

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

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)

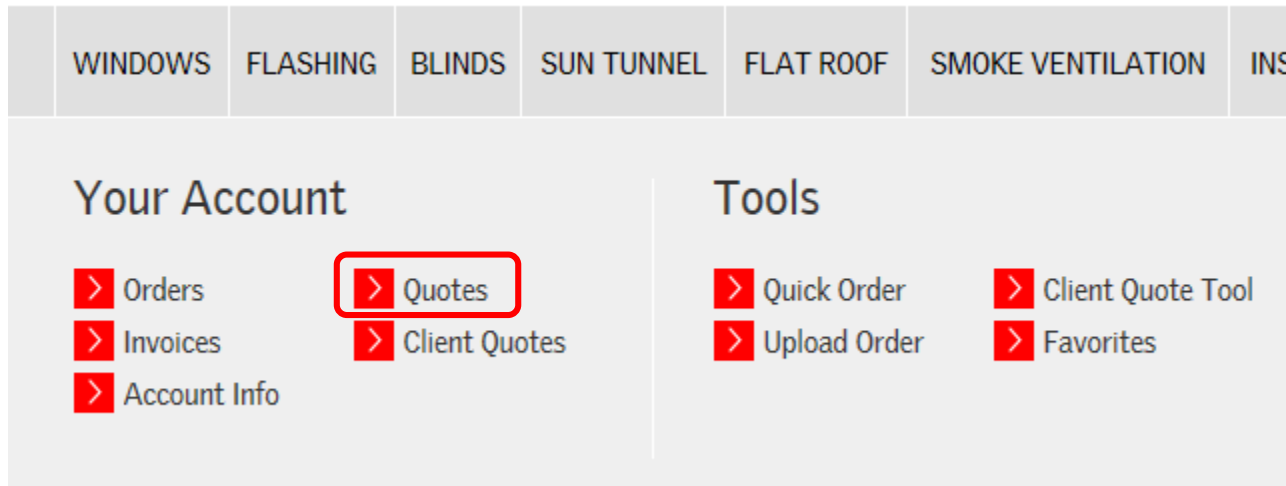
# Creating a Client Quote from an existing Quote



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.



# 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	<b>0022093365</b>	New Bungalow

Please refer to [page 23](#) for information on quotes which include Special products.

# 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						<b>559.08</b>
Total, GBP Including VAT:						<b>670.90</b>

[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**<sup>®</sup>

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 GBP 2,057.00 each	20% <b>3</b>	GBP 1,645.60 GBP 1,645.60 each
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

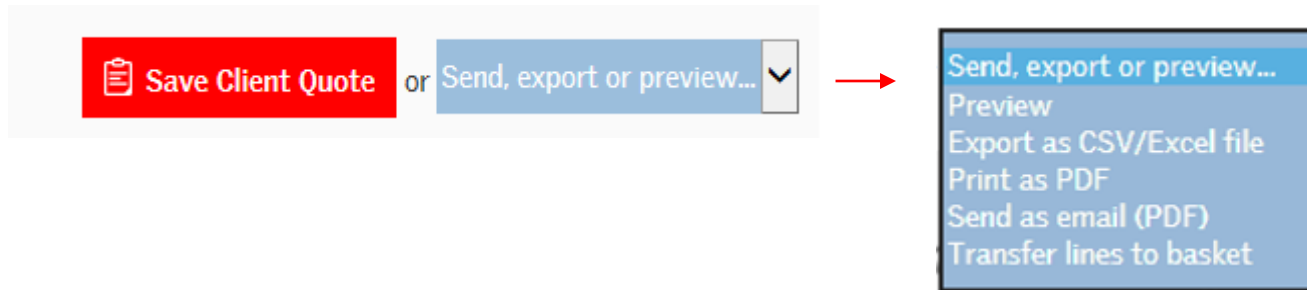
Save Client Quote or Send, export or preview...

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.



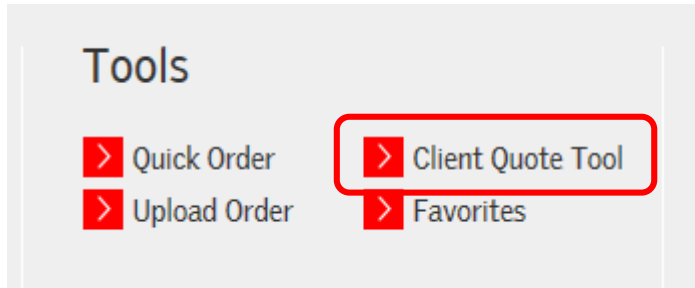


# Creating a Client Quote using the configurator

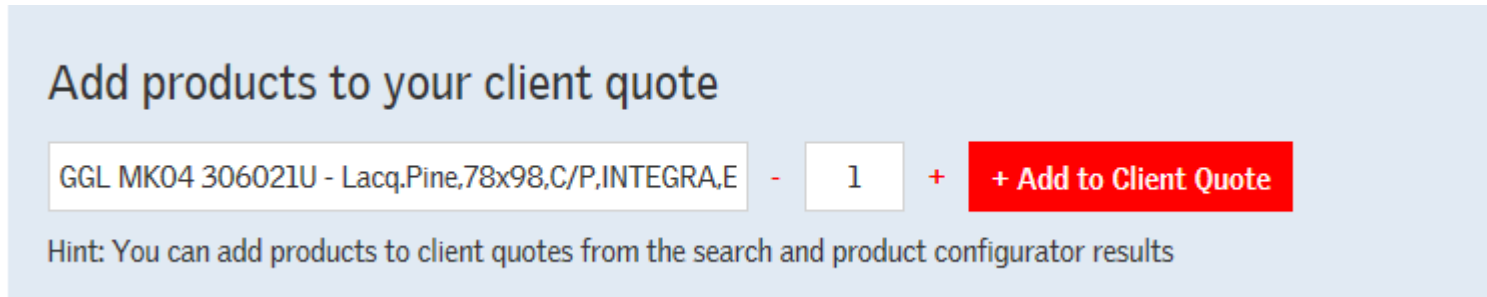


You can also create a Client Quote from scratch.

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 on [page 15](#).

# Creating a Client Quote using the configurator



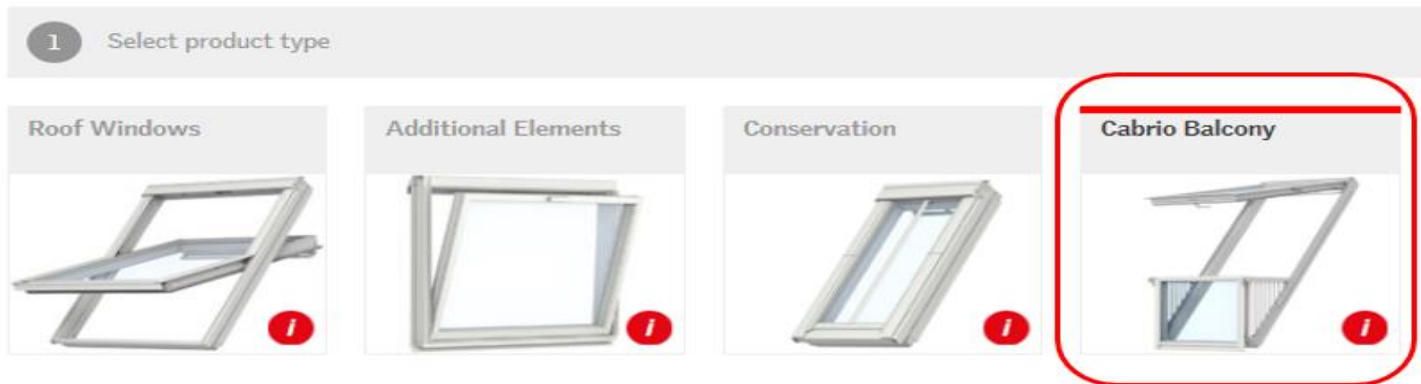
If you do not know the product codes you require, you can use the configurator to find them.

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 Cabrio Balcony package size SK19 to suit a tile roof, click on Windows at the top of the screen, then select Cabrio Balcony.



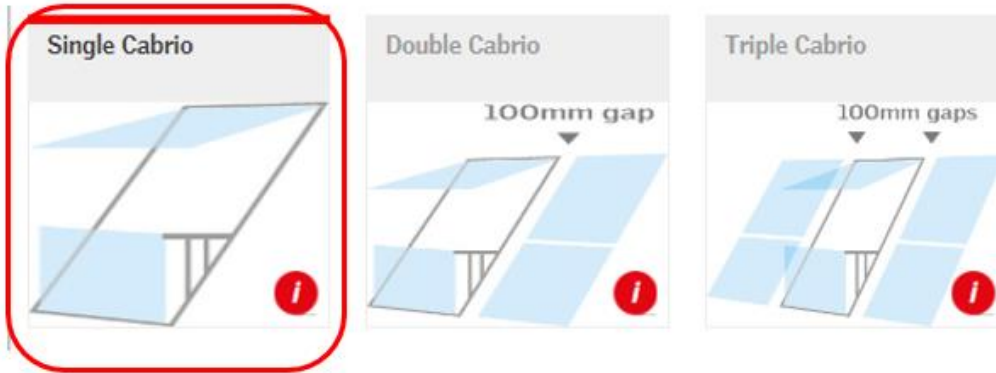
## Product Configurator



# Creating a Client Quote using the configurator



Now select the Single Cabrio



You can now configure the product by 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.

3 Configure Product

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

Products (1 out of 1)

Product code	Description	Delivery time	Price	Quantity	Action
GDL SK19 SD0L1	System GDL, EDL <small>+ add line reference</small>	7 days	GBP 2,034.00	1	+ Client quote <input type="text" value="1"/> <input type="button" value="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

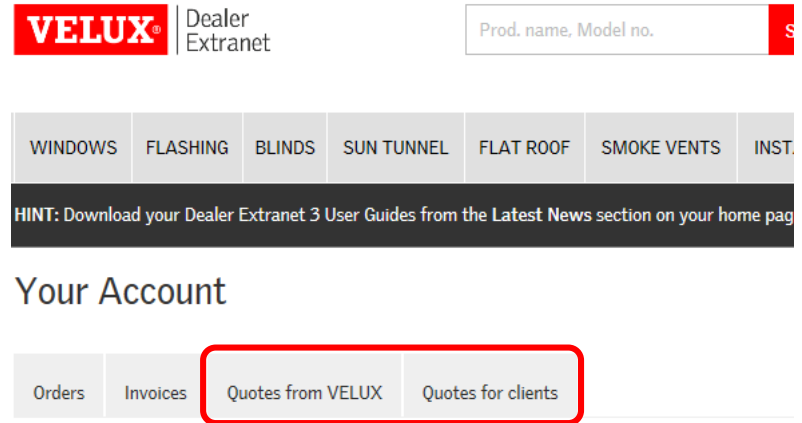
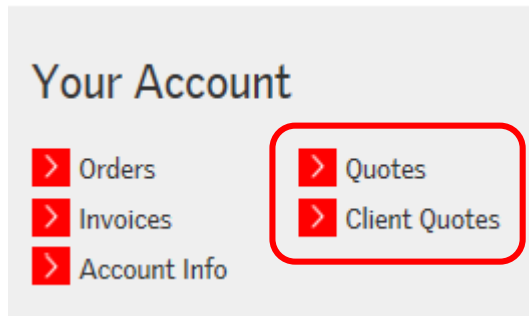
Quote ID	Customer reference	Quote ends	Last changed
6	Any Company	16/12/2015	16/11/2015 15:48

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.



# Search/View Quotes

You can search by Quote no., Quote reference or select a date range to view. Once you locate the quote you want, click on the Quote number to view it. The search works in the same way for Quotes from VELUX and Quotes for clients.

Orders
Invoices
Quotes from VELUX
Quotes for clients

**Find quote**

Search for:  Search

Start date:

End date:

## Quote history (1 out of 1)

Quote date	Expiration date	Quote number	Quote reference
10/11/2015	10/12/2015	<a href="#">0022093077</a>	10/11/2015 Gina

# Quotes for Special Products

Quotes for Special Products can only be prepared by VELUX. 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 for the product 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 31/03/2036

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 and no goods will be supplied. No special products will be supplied free of charge, and we will always email/fax a copy of the completed quote when it is ready.**

If you wish to place an order from a quote containing a Special product please ensure that the quote exactly matches your full order, including the delivery address, and contact VELUX to have your official PO number added to the quote as you will not have the opportunity to amend this prior to saving the order.