

Web Center Dealer Manual

**FOR AGALITE CUSTOMERS
POWERED BY FENEVISION**

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Getting Started

Important Notes:

Welcome to the Agalite WebCenter Portal, powered by Fenetech.

The WebCenter can be used by you as a wholesaler or retailer to create quotes and orders for your customers and upload them to the website of the manufacturer (Agalite). To minimize confusion in terminology, the manufacturer will be referred to as the “**Administrator**” throughout this document. Wholesalers and retailers (you) will be referred to as “**Dealers**,” and your customers will be referred to as “**Customers** or **End Users**.”

For assistance, please fill out the WebCenter contact form located at:

www.agalite.com/web-contact/. For questions about an order, please contact an Agalite CSR or Sales Rep.

*A note about the structure of this document: the **Getting Started** section is designed to cover only the minimal amount of information needed in order to begin using the web center program. All other information is listed under its appropriate section heading and explained in greater detail. Sections are separated out by the header sections shown at the top of the webpage: **Dashboard, Search, Quotes, Orders, Support, Setup, and My Login***

**Thank you, and we hope you enjoy your
WebCenter experience.**

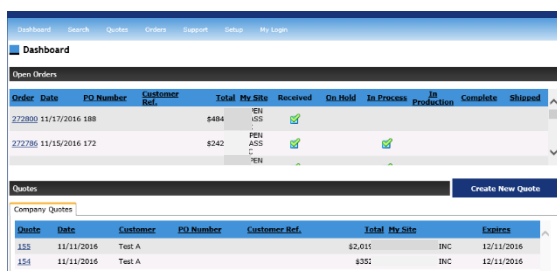
Obtaining a WebCenter Login and Setting Up WebCenter

You will be provided with a username and generic password for your first login. It is **highly** recommended that you change this password once you have gained access to the program. *The WebCenter program requires an internet connection, either through the use of wireless (wi-fi) or through cellular data.*

1. Dealers will be provided the link to access the WebCenter in the email that will provide them with their username and password. From there, copy and paste the link into the browser. (It is also recommended that once this screen loads, the Dealer save it as a “Favorite” to their browser.) This screen should appear:



2. Enter the provided username and password in the appropriate fields. If the computer or device being used is secure, the dealer can check the “Remember Me” box. However, if the device is likely to be used by multiple other users, it is recommended that the box be left empty.
3. Once the login information has been entered and accepted, the following screen will appear:



Order	Date	PO Number	Customer Ref.	Total	My Site	Received	On Hold	In Process	In Production	Complete	Shipped
272780	11/17/2016	188		\$484	VEN	40%					
272786	11/15/2016	172		\$242	POB	ASS					

Quote	Date	Customer	PO Number	Customer Ref.	Total	My Site	Expires
155	11/11/2016	Test A			\$2,601	INC	12/11/2016
156	11/11/2016	Test A			\$391	INC	12/11/2016

The figure above shows the **Dashboard**. *Note that the “My Site” information has been blocked out for privacy reasons.* This is the location for all summary information for the Dealer.

This page will show all Open Orders (even if they have been entered by a Customer Service Representative prior to obtaining the WebCenter Program). Any quotes created will be shown in the quotes section of the page. More information will be provided on the Dashboard in a later section.

See our Training Video here: <https://youtu.be/8mPrLZjQOfk>

Creating a Basic Customer Account:

Dealers **MUST** enter a customer account into their database prior to entering any quotes or uploading any orders. The quote creation and upload functions will be unusable until a customer account is created.

1. Click on the **Setup** Tab shown at the top part of the screen, and then click on **Customers** from the dropdown menu.



The left side of the screen will show customer any customer accounts

2. Click the **Add New Customer**.



3. The right side of the screen will populate with the information to be filled in.
4. The required fields are: **Name** and **Billing Address**. All other information is optional at this point and will be explained in greater detail in later sections. Once the necessary information has been entered, select the **Add** option at the top of the screen to create a customer. A summary of the account information will appear to the right after the **Add** button has been selected.

Creating a Basic Quote

1. Select the **Quotes** tab at the top of the screen. From the dropdown menu select **Entry**



- Create a quote directly from the Dashboard by clicking on the **Create a Quote** button.



This screen will appear:

A screenshot of a web form titled 'Add Quote' with a 'Cancel' button in the top right corner. The form is divided into two columns. The left column contains fields for 'Customer:' (with a dropdown menu showing '(Required)'), 'Quote Date:', 'Est. Delivery Date:', 'Expiration Date:', and 'Entered By:'. The right column contains fields for 'Measurement Type:', 'Status:', 'Terms:', 'PO Number:', 'Customer Ref.:', 'Salesperson:', and 'Quote Contact:'. At the bottom of the form, there are two text areas labeled 'Quote Comment:' and 'Quote Notes:'. The form has a light blue header and a white body.

1. Select the customer that the quote is for from the dropdown menu beside **Customer**.
The **Measurement Type** and **Status** fields will automatically populate. If you have set **Terms** or **Sales Person**, these fields will also populate, however only if one selection exists for each field, otherwise the individual entering the quote will have to make the

selection. The process for entering this information will be covered in the **Setting Terms and Ship Via** section. After the customer has been selected, the **Markup Multi:** selection will appear beneath the **Quote Contact** field.

2. Enter a **PO Number** into the PO field (Please note this is not the same PO Number that will be entered in order to upload a quote to the manufacturer. This is a PO for the Dealer's reference only and *will not* be available to the Manufacturer. *
3. If this quote references a particular customer or job, enter a name or keyword for that quote into the **Customer Ref:** section.
4. Select the appropriate sales person from the **Salesperson** dropdown menu.
5. If there is a specific person to contact for this quote, please enter this information in the **Quote Contact** field.
6. Enter any pertinent information in the **Quote Comments** and **Quote Notes** fields.
7. Scroll down the page and confirm the **Shipping** and **Billing Information** fields are filled out correctly. Add any comments in the **Shipping Comments** box if relevant.
8. Select a location from the **Ship Via** dropdown if applicable. If not, leave blank.
9. Confirm that all information is correct and filled out in its entirety and then click the **Add** button at the bottom of the page.

Note that the **Quote Contact and **Customer Ref:** fields will transfer over to the Manufacturer's website.*

After selecting the **Add** button, the **Quote Entry** screen will load:

The screenshot shows the 'Quote Entry' screen with a blue header bar. Below the header, there are tabs for 'Quote', 'Shipping', and 'Invoicing'. The 'Quote' tab is active, displaying a form with the following fields:

Quote Number:	190	PO Number:		Salesperson:	
Quote Date:	11/22/2016	Customer Ref.:		Contact:	
My Site:		Terms:	2% 10 Net 30	Est. Delivery Date:	12/22/2016
Customer:	Test A	Discount Mult.:		Exp. Date:	
Status:	Available			Entered By:	
Comment:					

Below the form, there are two dropdown menus: 'Category' (with the text 'Please select a category') and 'Part' (with the text 'Please select a part'). To the right of the 'Part' dropdown is an 'Add' button. Below these is a table with the following columns: Item, Qty, Part, Size, Price, and Total.

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

10. Select a product category to begin your quote. Options for Agalite customers include: Accent, Estate, Estate-Sliders, Fresco, Silhouette, Silhouette Elite, and Vision, and Glass.
11. After selecting the product category, select a specific model in the **Part** dropdown menu.
12. After selecting the appropriate model from the dropdown menu, click the **Add** button to move on to the next section.
13. Enter in the dimensions as indicated by the diagram to the right. Alter any of the dropdown sections below in accordance with the customer's needs. Note that items in red font are required. The rest of the page will not load until those conditions have been satisfied.

Add Quote Item Cancel

Part

Qty:

Width:

Height:

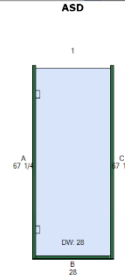
Dimensions

Dimension	Option	Input
DOOR WIDTH	DW - STANDARD DOOR WIDTH	28
FLUSH CBI	(None)	
DOOR HEIGHT	ASDH - ADD STANDARD HEIGHT	67 1/4
ANEL GDI U1 SQUARE	(None)	
ADD FILLER	(None)	
HINGE DIRECTION	(Right)	

List Item Comment:

Cancel

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14. Once all of the required fields have been satisfied and all other changes are made as needed, click the **Add** button to complete the quote.

15. The quote page will now display the updated quote information as shown below.

Quote Shipping Invoicing

Quote Number: 190
Quote Date: 11/22/2016
My Site:
Customer: Test A
Status: Available
Comment:

PO Number:
Customer Ref.: 2% 10 Net 30
Discount Mult.:

Salesperson:
Contact:
Est. Delivery Date: 11/29/2016
Exp. Date: 12/22/2016
Entered By:

Category: ACCENT **Part:** ASD - Accent Swing Door Add

Item	Qty	Part	Size	Price	Total
1	1	ASD - Accent Swing Door	28 W X 67 1/4 H	\$370.00	\$370.00

DOOR WIDTH{DW={28}}, DOOR HEIGHT{ASDH={67 1/4}}, HINGE DIRECTION{HL}, COLOR{SIL}, GLASS TYPE{CL}, HANDLE{D6}, MISC PRICE
 DETAIL{PRICE}

Surcharge: \$20.00
Subtotal: \$390.00
Tax: \$0.00
Total: \$390.00

*If the quote includes multiple products, simply repeat steps **10-15** until all items are included.*

The Dashboard

See our Training Video here: <https://youtu.be/8mPrLZjQOfk>

This section will go into greater detail on the **Dashboard** and its capabilities.

The screenshot shows the Dashboard interface. At the top is the 'Open Orders' section with a table listing orders. Below it is the 'Quotes' section with a 'Create New Quote' button and a table of company quotes. At the bottom is a banner for 'AGALITE Presents: Gridtech HD Glass'.

Order	Date	PO Number	Customer Ref.	Total	My Site	Received	On Hold	In Progress	In Production	Complete	Shipped
222800	11/17/2016	188		\$484.38							
222789	11/15/2016	172		\$242.19							

Quote	Date	Customer	PO Number	Customer Ref.	Total	My Site	Expires
150	11/22/2016	Test A			\$390.00		12/22/2016
153	11/11/2016	Test A			\$2,019.79		12/11/2016
154	11/11/2016	Test A			\$352.63		12/11/2016

To return to the Dashboard from any screen in the program, either select the **Dashboard** from the tab menu, or select **Home** from the menu in the top corner of the screen.

The **Dashboard** is useful for summarizing information about current orders and quotes and for sorting through information by: **Quote/Order #, Date, Customer, PO Number, Customer Ref. and Total.**

The **Expires** heading indicates the date that the system will automatically delete a quote if it is not uploaded to the manufacturer. It is also possible to filter by this heading.

The **My Site** function lists the company name and site location for the order or quote, if applicable. Otherwise it will just list the company name.

In the **Open Orders** section of the Dashboard, users can check the status of an order by noting the column headings to the right of **My Site**. These are: **Received, On Hold, In Progress, In Production, Complete** and **Shipped**.

An order will show as **Received** after it has been uploaded to the manufacturer website. This is an automatic function and *does not* indicate that the order has been acknowledged.

An order that is placed **On Hold** will have a red check mark (see below). Check the hold reason by clicking on the order number and selecting the “Hold” tab that will appear in red.



Acknowledgements will be indicated when the **In-Progress** bar has a green check mark under it similar to the one under Received shown below.

In Production, will be update as an order moves through the production process. Example is provided below:

Schedule	Batch	Unit	Bin	Item/Order	Part	Station	Date/Time	Status	Container
22366	1	1	1	1/1	ASD180 - Accent Swing Door with One 180° Panel	PUB-CPAK1	11/15/2016 10:15:47 AM	Complete	
22366	1	1	1	1/1	DOOR1 - 001_DOOR1	PUB-BOX	11/15/2016 10:14:40 AM	Accepted	
22366	1	1	1	1/1	PANEL1 - 101_PANEL1	PUB-SEAM	11/15/2016 10:20:22 AM	Accepted	

An order that has completed production but has not been loaded onto a truck for shipping will show **Complete**.

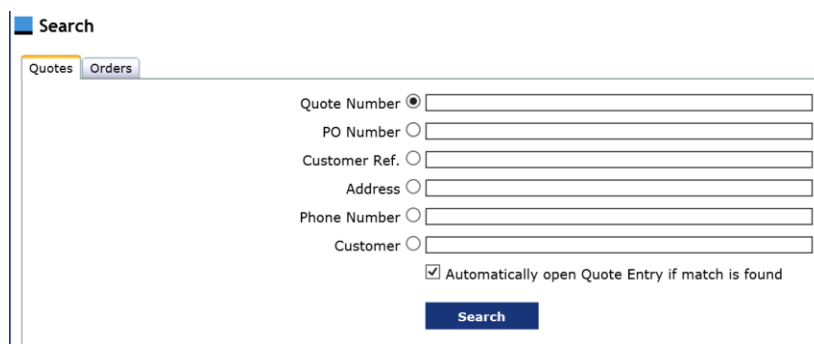
An order will show as shipped when it has a green or red check mark under the **Shipped** heading. Green checkmarks indicate that the order was shipped in full while a red checkmark indicates a partial shipment. Further details are available by clicking on the order number and then selecting the Ship Date in the information header

Search

See our Training Video here: <https://youtu.be/4LevFYtiu80>

Searching for a Quote or Order

1. To perform a search for a particular quote or order, select the **Search** tab at the top of the screen.
2. The search screen will load.



If searching for a Quote, simply enter the relevant information into the corresponding field. Example: If searching by phone number, enter the whole or partial phone number into the **Phone Number** field.

3. If searching for an Order, first select the Order tab at the top of the screen, and then follow the directions outlined in step 3.
4. Select the **Search** button.
5. If an exact match is found, that order or quote will open automatically, if not, a list of applicable orders or quotes will be shown.
6. The user will have to scroll the matches to find a particular quote. Once found, select the order number to view details

21 orders found

Order	Date	My Site	PO Number	Customer Ref.
272800	11/17/2016		188	
272786	11/15/2016		172	
272785	11/15/2016		173	

7. Click on an order or quote number to see further details.

Quotes

Additional Quote Entry Information:

Category	Part
ACCENT	ASD - Accent Swing Door

Item	Qty	Part	Size	Price	Total
1	1	ASD - Accent Swing Door	28 W X 67 1/4 H	\$370.00	\$370.00

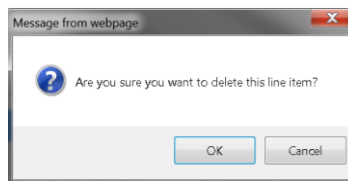
DOOR WIDTH{DW={28}}, DOOR HEIGHT{ASDH={67 1/4}}, HINGE DIRECTION{HL}, COLOR{SIL}, GLASS TYPE{CL}, HANDLE{D6}, MISC PRICE
DETAIL{PRICE}

[Update Qty](#)

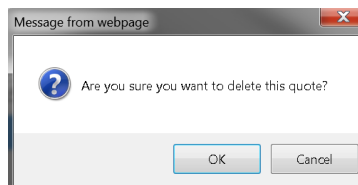
Surcharge:	\$20.00
Subtotal:	\$390.00
Tax:	\$0.00
Total:	\$390.00

To change the quantity of a product ordered: select the **Qty** field above the specified quote. Then enter in the new number of product. The price and subtotal fields will update automatically. Then select the dark blue button just beneath the **Qty** field.

To delete a quote item: Hit the red circle “X” above the quote being deleted. This dialogue box will appear:



To delete a quote in its entirety: Select the red circle “X” at the top of the page. This dialogue



box will appear:

To export the quote to an Excel file: Select the file folder button left of the “Delete Quote” box. The file will automatically open in excel.

To change the glass type or finish color for all products in an order: Select the two arrows symbol to the left of the export icon.

Clicking this button will bring up the following screen:

In the **Question dropdown** menu select the attribute that is being changed (generally either Glass Type and Finish Color). In the **Old Options** dropdown menu, select the current attribute that is going to be changed, and in the **New Option** dropdown menu select the new attribute that will be put in its place. Once these selections are made, select the **Change** button to the right of the screen. The screen will now highlight the change(s) below.

Question		Old Option		New Option		
<div>COLOR</div>		<div>{None}</div>		<div>{None}</div>		<div>Change</div>
These items will be saved						
Item	Part	Question	Old Option	Old Value	New Option	New Value
1	ASD - Accent Swing Door	COLOR	SIL - SILVER		GLD - GOLD	

If the change is correct, click the **Save** button at the bottom of the screen. Now all products in the order will be updated to show the new attribute change. **If any errors occur when selecting the old and new options, the error will show in the bottom section of the screen. It will need to be resolved before any changes can be updated to the order.*

To print out the quote: To print out the quote, select the printer icon next to the global changes icon. A .pdf version of the quote will pop up and from there the Dealer has the option of printing saving, etc. Note that there are multiple formats available for printing.

Quote – a standard quote page showing pricing and relevant information.

Quote without pricing – removes all pricing from the quote page.

Quote without Line Item Pricing - removes all line item prices and only shows totals.

Quote List – shows the quote at the list price only.

Quote Selling – shows the quote at the list price and at the price the customer is being charged.

Quote Accounting – Shows the quote at the list, dealer cost, and dealer selling prices.

To copy a quote line item: Select the paper icon beside the order that will be copied. The order will automatically duplicate below. Then click on the **Part** hyperlink to open the order's options page and make any necessary changes.

To Change an item's rank in the quote listing: Quotes with multiple line items will have green up and down arrows between the **Copy** and **Delete** functions. To adjust the ordering of a particular item, simply select the appropriate directional arrow and the line item will adjust to that new position.



Editing Quote Header Information: To edit any information in the **Header Information** section, select the edit button to the right of **Header Information**. This will bring the fields up to be edited as needed (as seen on pages 6-7).

Viewing the Shipping/Invoicing Information: Selecting either the **Shipping** or **Invoicing** tabs to the right of the **Quote** tab allows the user to view the information saved for either category.

Viewing Customer Notes: *These are notes specific to this customer that the Dealer has entered into the Customer's account per the Customer Setup page. These notes will appear on all quotes or orders for this customer.*

Customer Notes can be viewed by hovering the mouse (or finger/stylus) over the green circle symbol.



Note that clicking on the symbol prompts the message to appear as a popup dialogue box.

Finishing an Order: To finish an order, click the **Finish** button at the top of the page. Note that an order can still be altered once this button has been selected.

Using the Product Navigation Feature: To use the **Product Navigation** feature, select the picture frame icon on the quote entry page. The page will load with images and text explaining choice options. The questions asked will direct the consumer to the appropriate product for their needs, and from there the customer or dealer may enter the necessary product information shown on page 7. Also note that clicking on the green icons next to certain images will provide more information and link to the appropriate page on the Agalite website.



Isometric View – This function, available on the **Edit Quote Item** page and beneath the product diagram, allows users to view applicable products in a more dynamic view. Note that this does not work for any standard slider, swing door or product with only 180° panels. The view will work with 90°, 290°, or NEO doors.

Uploading a Quote to the Manufacturer

See our Training Video here: <https://youtu.be/8mPrLZjQOfk>

*Please note that uploading a quote to the manufacturer **automatically** turns it into an order.*

1. Select the **Quote** tab, and then **Maintenance** from the dropdown menu.

2. All recently created quotes that have not been deleted or expired will be shown in the **Available** category. View **Expired** quotes by selecting “expired” from the dropdown. View previously upload quotes by selecting the **Uploaded** option from the dropdown. View quotes that have been placed on hold by selecting the **On Hold** selection.
3. Note that Quotes with red circles indicate an error. Hovering the mouse of the circle will give more detail about the error. Dealers *cannot* upload quotes with errors without special permission from the administrator.

Quote Maintenance

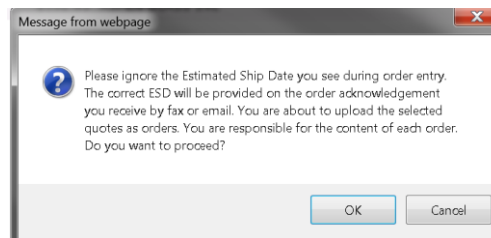
Available

	Quote	Date	Customer	Total	My Site	Mfg PO Number	Mfg Customer Ref.	Expires
<input type="checkbox"/>	191	11/22/2016	TEST B	\$463.50			Edit	12/22/2016
<input type="checkbox"/>	190	11/22/2016	Test A	\$1,497.54			Edit	12/22/2016

4. Select the **Edit** link beside the quote(s) that will be uploaded.
5. Enter in a PO number for the order. This can be the same number as entered in the earlier version, or it can be entirely new depending on Dealer preference. If the PO number will be the same as the order number, select the **Order** bubble. If it will be the same as the PO placed in the quote, select **PO**, and if it will be entirely new, enter it into the empty field on the bottom.
6. **Mfg. Customer Ref.** is not required; however, the additional information can be helpful. If the Dealer only wants the CSR to see the customer, select the **Customer** bubble, if the Dealer would like the CSR to see the Customer and Order Number, select the **Order-Customer** bubble. If the Dealer would like to copy over the **Customer Ref.** from the Quote entry, select the **Customer Ref.** bubble. And finally, if they Dealer would like to enter something entirely new, put it in the empty field at the bottom.

Note: It is possible to set an automatic, predetermined Mfg. Quote Number. This will be discussed in greater detail in a later section.

7. After the needed information is uploaded, select the **Update** button. The line item will now show the updated PO and MFG. Customer Ref. Fields.
8. Select the check mark box to the left of the Quote Number on all quotes that will be uploaded.
9. Click the **Upload Selected Quotes to Manufacturer.**
10. A Dialogue box will pop up asking the user to confirm that they want to upload the selected quotes and reminding them that they take full responsibility for the uploaded content. To proceed, select **OK**.



*****IT IS HIGHLY RECOMMENDED THAT ALL USERS REVIEW THE QUOTE UPLOAD CHECKLIST ATTACHED TO THIS DOCUMENT PRIOR TO UPLOAD*****

The Checklist is available at the end of this document and covers all necessary information for an order. Please be aware that any shortage of information in an order will result in delays and possibly order errors.

11. After the order(s) is uploaded successfully, the screen will change to show its Order number, quote number and summary. Click on the computer icon to the right of the quote to print out the order upload acknowledgement.












12. The order will also update in the Dashboard. It will move from the **Quotes** section to the **Open Orders** and will have a green checkmark indicating that it was received by the manufacturer.

The Dealer can print out the Order either from the screen shown above, or by selecting the order from the Dashboard. Note that Orders can only be printed to show the acknowledgement, and (unlike quotes) cannot show any other forms of pricing than the acknowledgement,

Copying Orders:

The Dealer can copy entire orders from the **Quote Maintenance** screen.

Quote Maintenance								
Available ▼								
	Quote	Date	Customer	Total	My Site	Mfg PO Number	Mfg Customer Ref.	Expires
<input type="checkbox"/>	190	11/22/2016	Test A	\$1,497.54				Edit 12/22/2016   
<input type="checkbox"/>	155	11/11/2016	Test A	\$2,019.78				Edit 12/11/2016   
<input type="checkbox"/>	154	11/11/2016	Test A	\$352.63				Edit 12/11/2016   

To Copy Quotes that have not been uploaded: Select the paper icon to the right of the specific quote. The quote will now copy into a new quote.

To Copy Orders that have already been uploaded: Select **Uploaded** from the dropdown shown above, and then select the paper icon to the right of the order number.

To Copy Orders that are On Hold: Select the **On Hold** option from the dropdown shown above, and then select the paper icon to the right of the order number.

To Copy Quotes that have expired: Select the **Expired** option from the dropdown shown above, and then select the paper icon to the right of the order number.

Orders

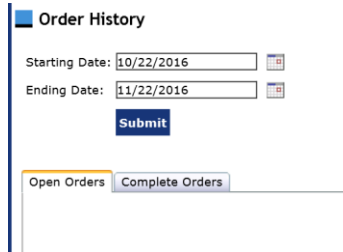
See our Training Video here: <https://youtu.be/4LevFYtiu80>

Reviewing the Order History

1. Select the **Orders** tab and then **Order History** from the dropdown menu.



2. The order history tab will load.



3. Enter a starting date in the **Starting Date** field, either by manually entering the values (in the shown format) or by selecting the calendar to the right of the field and searching for the date that way.
4. Enter a ending date in the **Ending Date** field, using one of the two methods outlined above.
5. Select the **Submit** button.
6. All orders submitted between the dates will show below. A line of text will appear beneath the **Submit** button detailing how many orders have been placed/completed in the given period, depending on the Open/Complete status.
7. Orders that have not been closed as of the time of the search will be shown under the **Open Orders** tab. Orders that have been closed at the time of the search will show under **Complete Orders**.
8. Clicking on the Order number will bring up a complete summary of the order information, similar to the examples shown in previous sections.

Reviewing Purchase History

1. Select the **Orders** tab, and then **Purchase History** from the dropdown menu.
2. The **Purchase History** screen will load.



3. Enter the starting date in the **Starting Date** field, either by manually entering the values in the format shown, or by clicking on the calendar icon to the right of the field and searching that way.
4. Enter the ending date in the **Ending Date** field using one of the two methods explained in the previous step.
5. Determine the search parameter: **Customers, Orders, Parts, or Options**.
6. For **Customers**: Select the Customer button. All purchases made within the specified time period will be displayed, seperated out by customer.

*The Customer selection can be further defined by selecting one of the sub-dividers under the **Customers** heading. P = Parts, O = Options, OR= Orders. The customer rank/quantity/total sales and percentage can all be sorted by alphabetical or numerical order by selecting the appropriate heading (Example: to rank customers by Total Sales: select the **Total Sales** heading and the values will be ranked in ascending or descending order.*

The order entrant(s) will be noted in parenthesis next to the sub-dividers.

*Totals for **Quantity**, **Total Sales**, and **Percentage** will be shown at the bottom of the screen for all sub-dividers:*

7. For **Orders**: Select the **Order** button. All orders made within the specified timeframe will be shown, along with the number of items within each order, the total sales, and the percentage amount.
8. For **Parts**: Select the **Parts** subdivide. All parts ordered within the specified timeframe will appear below.

**Note: Clicking on a specific part will show what options were sold for that particular part during the specified time frame.*

9. For **Options**: Select the **Options** sub-divide.

**Note: Selecting the “P” to the left of the option will show what parts were sold with the specified option.*

Support

See our Training Video here: <https://youtu.be/4LevFYtiu80>

This section contains all relevant documents for the Web Center, including the dealer checklist, this manual and any other needed materials. Simply select “Support” and then “Files.”

Setup

See our Training Video here: <https://youtu.be/9eGe9HrysEY>



Customer Setup (Details)

Select **Setup**, and then **Customer** from the dropdown.

To Edit an Existing Customer's Information

1. Select the Customer's Name from the list on the left of the screen.
2. The right side of the screen will display all of the Customer's information.
3. Select the **Edit** button at the top right corner.
4. The customer's information can now be updated.

Customer Notes: Any notes that apply to a specific customer can be placed in the **Notes** field. These notes will display on all quotes and orders and will be visible by the Administrator.

Making a Customer Inactive: To suspend a Customer's account on the WebCenter (i.e. they are no longer able to receive quotes or orders), select the **Inactive** box. This can be a permanent or temporary measure. To undo: simply follow the steps outlined at the beginning of this selection and then unclick the box.

Creating a Default Customer: Default customers create settings that are automatically applied to new accounts. All Default Customer information is automatically transferred to the new account, however it is possible to edit the information for the new customer. To undo the Default Customer: Select the Default Customer, **Edit**, and uncheck the **Default Customer** box. Hit **Apply**. Changes will apply.

Note: The Default Customer is automatically bolded and underlined and labeled with (Default). Only one Customer may be the Default at a time.

Measurement Type: Select the **Measurement Type** dropdown menu and change **Imperial** to **Metric**. Hit **Apply** to save the changes.

Changing the Pricing Method: The system automatically sets **Markup From Cost** as the pricing method for all Customers. This can be changed to either: **Discount From List**, or **Gross Margin**.

Set multipliers by product collection: Enter the appropriate multiplier in the field next to the category.

Financial		
Pricing Method:	Discount From List ▼	
Category	Discount Mult.	Table
ACCENT	1.0000	▼
FRESCO	1.0000	▼
VISION	1.0000	▼
ESTATE SLIDERS	1.0000	▼
SILHOUETTE	1.0000	▼
SILHOUETTE ELITE SWING	1.0000	▼
ESTATE	1.0000	▼
GLASS	1.0000	▼
TRANSCEND	1.0000	▼

Note: Setting a Multiplier table is optional, and will be covered in a later section.

Selecting Default Customer Terms and Salesperson: The Dealer can select a default option for a customer's Sales Terms and Salesperson by selecting the applicable option(s) from the dropdown menus (shown below).

Terms:	▼
Salesperson:	▼

*Note: This section only explains how to add these options to a Customer. To see how to create the options, see the **Setting Payment Terms** section to set default customer terms, and the **Users** section to set a default salesperson. This step is optional.*

Tax Percent:	<input type="text" value="0.0000"/> %	Tax Title:	<input type="text"/>
Tax Percent 1:	<input type="text" value="0.0000"/> %	Tax Title 1:	<input type="text"/>
Tax Percent 2:	<input type="text" value="0.0000"/> %	Tax Title 2:	<input type="text"/>
Tax Percent 3:	<input type="text" value="0.0000"/> %	Tax Title 3:	<input type="text"/>
Tax Percent 4:	<input type="text" value="0.0000"/> %	Tax Title 4:	<input type="text"/>

Setting the Tax Percent and Tax Title: Set specific tax rates for each Customer by entering the rate(s) into the **Tax Percent** fields and then create labels for each tax percent in the **Tax Title** field to the right. This step is optional.

The Billing Address field is covered in the **Basic Customer Setup** section on pages 5 and 6.

Shipping Address: Select a default ship via route for a customer by selecting a route from the dropdown menu. If the Shipping Address is the same as the Billing Address, select the check mark at the top of the section. If it is not, enter the new address and information below.

*Note: This section does not explain how to set up ship via routes. That will be explained in the section **Set Ship Via Route**.*

Note: This step is optional.

5. Select **Apply** at the top right of the screen to apply all changes. Alternatively, select **Cancel** to disregard all changes.

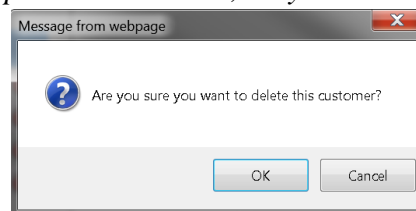
To Delete a Customer:

1. Select the red x next to the Customer's name.

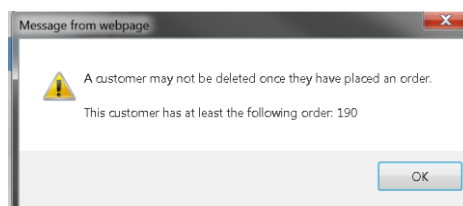


- 2.
3. A dialogue box will prompt. To delete Customer, select **OK**, otherwise, select **Cancel**.

**Note: Once a Customer has uploaded an order, they can no longer be deleted. They must be*



*made **Inactive**). Attempting to delete a Customer who has uploaded an order will prompt the*



following dialogue box:

*Additionally, Customers who have current **Quotes** cannot be deleted. The quote must be deleted before the Customer can be deleted.*

Creating Payment Terms

1. Select **Terms and Ship Via** from the **Setup** dropdown.

Terms	
2% 10 Net 30	Edit
Net 10	Edit
Net 30	Edit

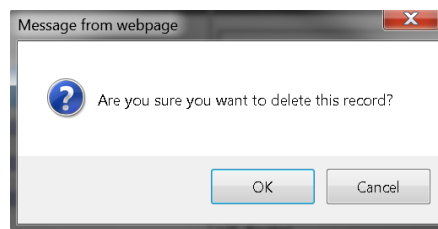
Ship Via	
FEDEX Express	Edit
FEDEX Ground	Edit
UPS	Edit

2. The screen will load as shown below: Note that the left half is for payment terms and the right is for ship via. This section will only cover the payment terms. The next section will cover the ship via.
3. Write the payment terms in the field at the top of the screen.
4. Once finished, select the **Add** button to finish.

To Edit Payment Terms: Select the **Edit** button. The field can now be edited. When finished, select **Update** to save or **Cancel** to revert to original.

To Delete a Payment Term:

Select the red circle to the right of the payment term. A dialogue box will prompt. To delete, select **OK**, otherwise select **Cancel**.



Setting Ship Via Routes

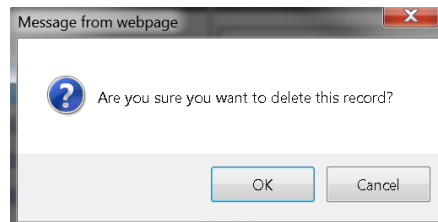
1. Follow steps 1 and 2 for setting up Payment terms above.
2. Enter the ship via term(s) into the field at the top right of the screen.
3. Select the **Add** button to finish.

To Edit a Ship Via Route:

Select the **Edit** button to the right of the route information. The field is now editable. Enter the new information and select **Update** to save or **Cancel** to revert to its original text.

To Delete a Ship Via Route: Select the red circle to the right of the **Edit** button

A dialogue prompt will appear. Select **OK** to delete or **Cancel** to keep.



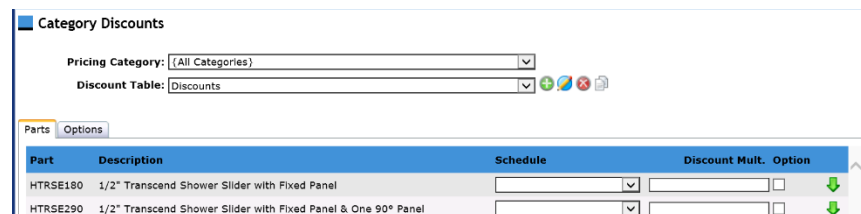
Setting up Pricing Schedules and Tables

The WebCenter allows the Dealer to program a variety of pricing options and tables in order to make Customer Account setup easier and Quoting more accurate. The Customer Setup page allows Dealers to choose one of three methods to charge a customer: the first is the default: **Discount from List**. This choice allows the Dealer to discount the price of any product from the amount listed in the Agalite catalog. The second option is the **Markup from Cost**. This method allows the Dealer to markup products based on the cost they will be charged by Agalite. The final method is the **Gross Margin** that allows the Dealer to set a specific margin above cost. The percentage will then be applied to all applicable products. These options can be customized by product, option, product category, customer.

Additionally, Dealers have the option of setting pricing using the **Schedules** table (discussed in greater detail below). This method allows the Dealer to calculate a numeric value based on the Area of the product, and then charge a specific charge by the unit inch. Note that the Schedules and other three pricing methods cannot be combined. In other words, Dealers cannot set a schedule and then create a discount from the amount in the Discount table. However, Dealers must put the schedule into an appropriate table in order to apply it to a customer. For example, if Customer XYZ is charged by Discount off of List, and the Dealer would like to create a schedule for this customer, the Dealer must place the schedule in a Discount table and then apply this table to the appropriate product category.

Discounts, Markups and Margins

1. Select the **Setup** tab, and then **Pricing** from the dropdown menu. Select **Discounts** from the side menu. *Note: The same general instructions in the section also apply to Markups and Margins. When first selecting, simply select Markups or Margins in place of Discounts. All other steps in this section apply, regardless of pricing structure chosen, however Discounts is shown for expediency.*

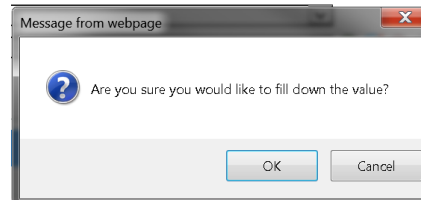


2. Begin by selecting the appropriate pricing category for the discount.
3. Select a Discount table from the **Discount Table** dropdown.
4. Select the Green plus sign to the right of the **Discount Table** field to create one.
5. Give the table a name and select **OK** to continue, otherwise select **Cancel**.
6. The **Parts** and **Options** tabs will now populate.

**Note: Selecting a schedule will supersede the discount/markup/margin of any other form of pricing. However, to put scheduled pricing on a product category, it must be entered through a discount/markup/margin table.*

7. Enter a Discount Multiplier for the appropriate part/option. Note that there is complete customizability on parts and options discounting. This step is required.
8. If the user wishes to make the discount multiplier apply to all options available for that specific part, select the **Options** box. Otherwise, leave unchecked.

9. To apply the discount multiplier to all parts in that pricing category (or to all parts/options below it) select the green down arrow to the right of the screen.
10. The following dialogue box will pop up. Select **OK** to continue, otherwise, select **Cancel**.



11. By selecting the **Options** tab, the user can sort by **Part** and **Option** Group.

To Edit a Discount Table: Select the Pencil icon to the right of the Discount Table field:



To Delete a Discount Table: Select the red X to the right of the Discount Table field:



To Copy a Discount Table: Select the two-page icon to the right of the Discount table field:



*Note: The copy function allows a discount table to be moved over as a new table or to an existing table. Select **OK** to save any changes (or confirm deletion), otherwise select **Cancel**.*

Schedules

Note: The pricing schedules are created based off of a “unit inch” (UI) measurement (height + width). A schedule can have multiple pricing values based off of different UI measurements

1. Select the **Setup** tab, then **Pricing** from the dropdown menu, and **Schedules** from the side menu.
2. Add a Schedule title to the schedule. Select the green plus to the right of the field to add.
1. A dialogue box will pop up. Put the schedule title in the empty field and select **Ok** to confirm, otherwise select **Cancel**.



- Once the title has been entered, the **UI** and **Price** fields will appear. Enter appropriate values into each field and select **Add**. A new field will appear below for more **UI** and **Price** values, though these are optional.

To Edit a Pricing Schedule: Select the pencil and circle icon to the right of the Schedule field.

To Delete a Pricing Schedule: Select the red circle “X” to the right of the Schedule field

To Edit a UI/Price line item: Select the **Edit** button to the right of the line’s information.

To Delete a UI/Price line item: Select the red circle “X” to the right of the line’s information.

For UI’s that go beyond the maximum value: In the event that a UI on an order or quote goes beyond the highest value given in the **UI/Price** line, there is an additional option at the bottom of the page to add an additional dollar amount per **UI** beyond the maximum.

Enter the desired values in the fields shown below and press the **Enter** or **Return** key on the keyboard.

Add an additional for every UI beyond the maximum.

Additional Pricing Options

Dealers can also modify a specific quote’s pricing with two other methods:

Applying a Discount/Margin/Markup to a specific quote: If the Dealer would like to override the pricing set up for a particular customer on *only a specific quote*, they may do so by entering the appropriate Discount/Margin/Markup in the field shown on the **Add Quote** page after selecting the customer. The value entered into this field will override all category pricing for only this quote.

**Note that this field will change depending on the customer’s pricing selection (Discount/Markup/Multiplier).*

Altering the price of an option: Dealers can also increase the price of a specific product option after completing the quote. Select the blue price on the **Quote Entry** screen.

This will bring up the line-item pricing for the product.

Line Item Price Breakdown: 190-1

Quantity: Item: Size:

Part Price:

Option Prices:

Question	Code	Description	Value	Price
DOOR WIDTH	DW	STANDARD DOOR WIDTH	28	\$0.00 Edit
DOOR HEIGHT	ASDH	ASD STANDARD HEIGHT	67 1/4	\$0.00 Edit
HINGE DIRECTION	HL	LEFT HINGE		\$0.00 Edit
COLOR	SIL	SILVER		\$0.00 Edit
GLASS TYPE	CL	CLEAR		\$0.00 Edit
HANDLE	D6	6" BACK TO BACK D-PULL		\$0.00 Edit
MISC PRICE DETAIL	PRICE	MISC PRICING DETAIL		\$0.00 Edit

Item Weight: Item Cost: Item Sq. Ft. Price: Item Price:

Overall Weight: Overall Cost: Overall Sq. Ft. Price: Overall Price:

[Save](#) [Cancel](#)

This page will allow the Dealer to see the item weight, the overall order weight, item and overall square footage, cost and price. Dealers can also edit the pricing for any option in the quote. Simply select the edit button next to the price and put in the new price. Select **Save** and the pricing will update. The quote price on the **Quote Entry** screen will now be bolded to show the change. *Note that Dealers will not be allowed to upload quotes with item costs below the manufacturer's.

***A note about excessive item cost/pricing:** On rare occasions, product options will have an item or option price that is extreme (for example, greater than \$5,000). This setting tells the Customer Service Representatives that that option price will need to be recalculated. The final quote price **will not** reflect this price. In these instances, please contact a Customer Service Representative for a correct quote amount.*

Updating Company Information and WebCenter Settings:

1. Select the **Setup** tab, and then **Company** from the dropdown menu.
2. Select the site location listed on the left. The company's current information will show on the right of the screen.

[Apply](#) [Cancel](#)

Company Name

Name:

Address Information

Address 1:

Address 2:

City:

State:

Zip Code:

Phone:

Fax:


Web URL:

Settings

Default Mfg PO Number: ☐ Order
☐ PO
☒ Blank (Override)

Default Mfg Customer Ref.: ☐ Customer
☐ Order-Customer
☐ Customer Ref.
☒ Blank (Override)

Default Quote Status:

 [Browse...](#)

[Upload Logs](#) [Clear Logs](#)

Note: A new account will not have information preloaded. That is the Dealer's responsibility.

3. Select the **Edit** button in the top right-hand corner.
4. Enter the information specified (e.g. Company Name, Address, etc.). *All information on this page is optional.*

Setting a Default MFG PO, Customer Ref., and Quote Status:

The dealer has the option to preset quote upload settings for convenience, but note that all settings are optional.

The default Mfg. PO can be set to appear as the Manufacturer's order number, the Dealer entered PO number (The Dealer's PO to their customer), or left as a blank to enter any value desired. To select a value, simply select the circle next to the option desired.

The default Mfg. Customer Ref. field can also be preset. Select either the Customer's name, their name and order number, or the Customer Ref., supplied by the Dealer in the quote entry page. Otherwise the field can be left blank and given any value at the time of upload.

Default Quote status: is usually set to Available, however, for Dealers that deal with many complex configurations that often require approval through the regular process, selecting the On Hold option can be of use. Simply select whichever option is applicable from the dropdown menu.

Uploading a Company Logo: At the bottom of the screen is a blank field with a **Browse** button to the right. Select it and find the appropriate file to upload the Company's logo. After the image has been selected, choose the **Upload Logo** button at the bottom of the screen to confirm, otherwise select **Clear Logo**.

5. Save all changes by selecting the **Apply** button at the top of the screen, otherwise select **Cancel**.

My Login

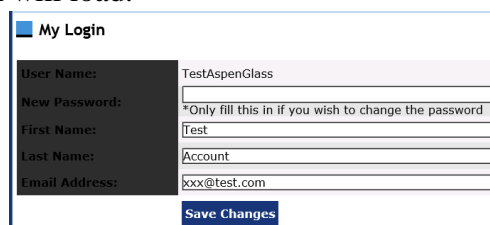
See our Training Video here: <https://youtu.be/4LevFYtiu80>

Used to change the User Account's password, Account User's full name and email address.

1. Select **My Login** from the tab menu.



2. The My Login screen will load.

A screenshot of the 'My Login' form. At the top, there is a blue header with a white square icon and the text 'My Login'. Below this, the form is divided into two columns. The left column contains labels for 'User Name:', 'New Password:', 'First Name:', 'Last Name:', and 'Email Address:'. The right column contains corresponding input fields. The 'User Name' field is pre-filled with 'TestAspenGlass'. Below the 'New Password' field, there is a small asterisk and the text '*Only fill this in if you wish to change the password'. At the bottom of the form, there is a blue button with white text that says 'Save Changes'.

Make any needed changes and select the **Save Changes** button, otherwise click away from the page to keep the information the same.

Miscellaneous Information

How to Sign Out: Select the **Sign Out** link in the very top corner of the page. The program will automatically log the user out and redirect the user to the sign in page.

The User's login username is displayed in the top right of the screen.