

Dealer Extranet 3 Quotations User Guide



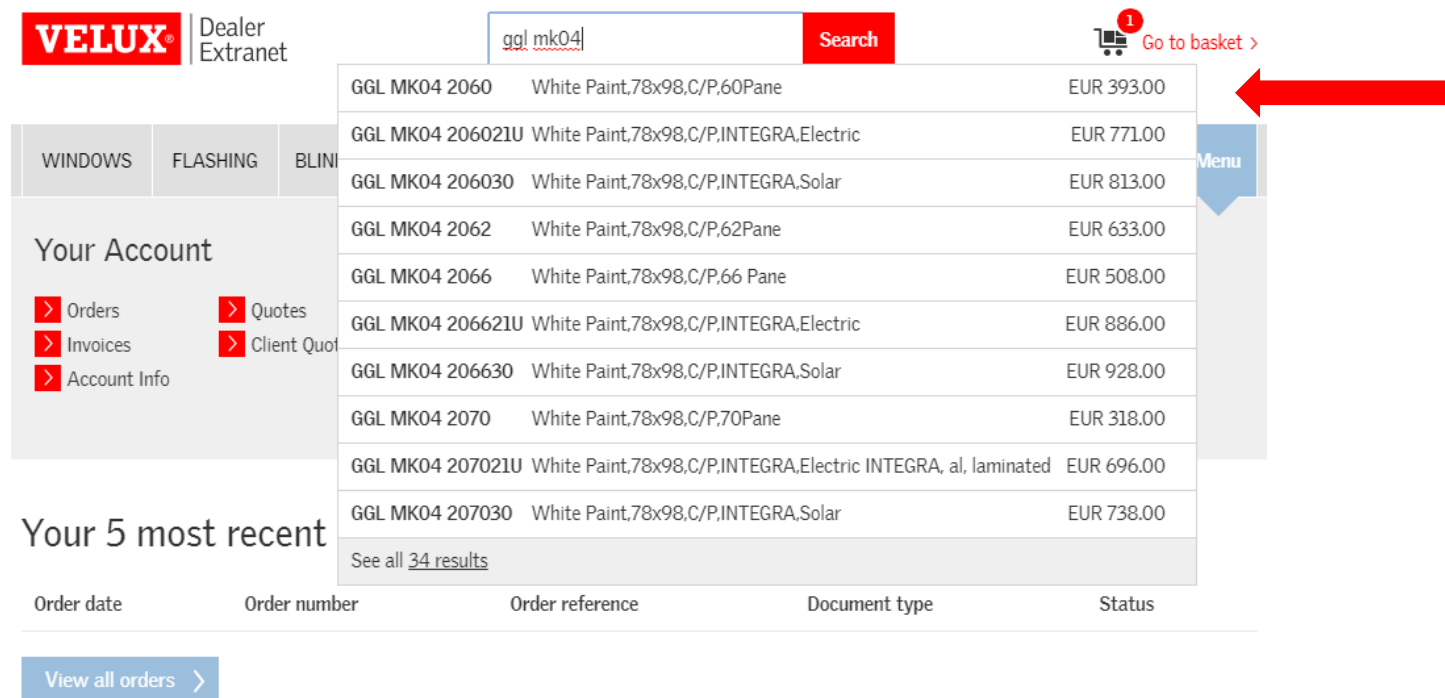
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Creating a quote with VELUX discount

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.



VELUX Dealer Extranet

Search: Search

[Go to basket](#) ¹

| Order date | Order number | Order reference | Document type | Status |
|------------|--------------|------------------|---|------------|
| | | GGL MK04 2060 | White Paint,78x98,C/P,60Pane | EUR 393.00 |
| | | GGL MK04 206021U | White Paint,78x98,C/P,INTEGRA,Electric | EUR 771.00 |
| | | GGL MK04 206030 | White Paint,78x98,C/P,INTEGRA,Solar | EUR 813.00 |
| | | GGL MK04 2062 | White Paint,78x98,C/P,62Pane | EUR 633.00 |
| | | GGL MK04 2066 | White Paint,78x98,C/P,66 Pane | EUR 508.00 |
| | | GGL MK04 206621U | White Paint,78x98,C/P,INTEGRA,Electric | EUR 886.00 |
| | | GGL MK04 206630 | White Paint,78x98,C/P,INTEGRA,Solar | EUR 928.00 |
| | | GGL MK04 2070 | White Paint,78x98,C/P,70Pane | EUR 318.00 |
| | | GGL MK04 207021U | White Paint,78x98,C/P,INTEGRA,Electric INTEGRA, al, laminated | EUR 696.00 |
| | | GGL MK04 207030 | White Paint,78x98,C/P,INTEGRA,Solar | EUR 738.00 |

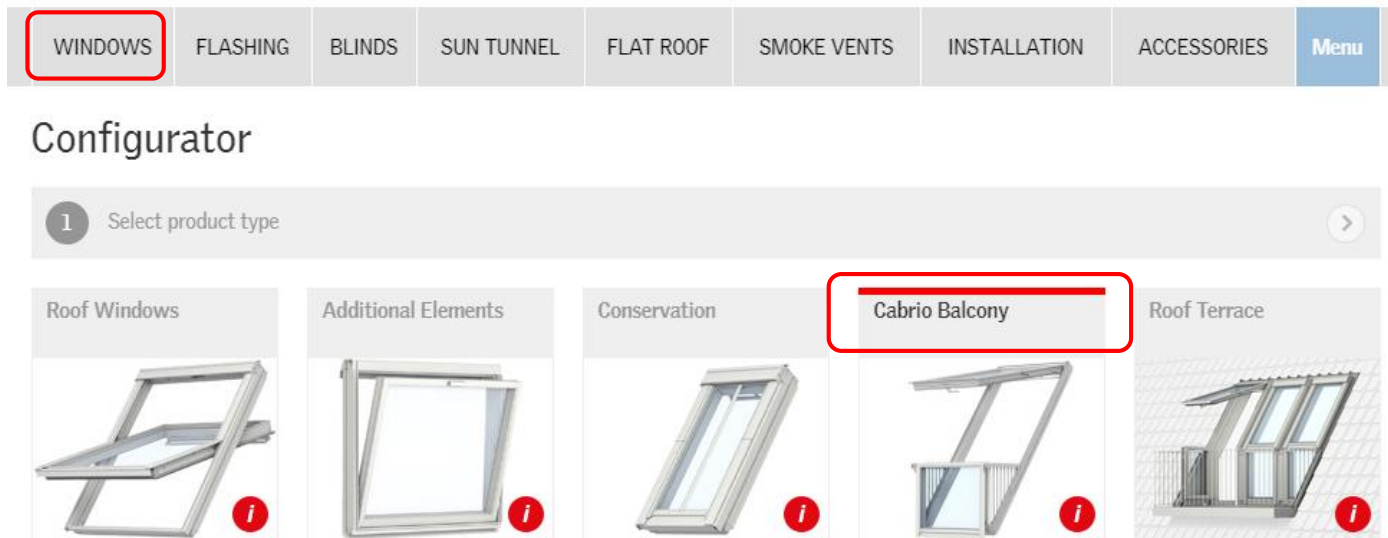
See all [34 results](#)

[View all orders](#)

Creating a quote on a customers account

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, the click on Cabrio Balcony.



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 Choose... ▼
 Roofing Material Tile up to 120mm profile ▼
 Size Choose... ^

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

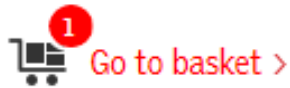
Products (2 out of 2)

| Product code | Description | Delivery time | | | | |
|----------------|---|---------------|--------------|----------------|---|--------------------|
| GDL PK19 SD0W1 | System GDL, EDW + add line reference | 7 days | GBP 1,912.00 | + Client quote | 1 | Add ★ |
| GDL SK19 SD0W1 | System GDL, EDW + add line reference | 7 days | GBP 2,057.00 | + 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 do not complete this section, it will complete with the date and your name.

Your shopping basket

~~Purchase Order/Reference*~~

[Continue shopping](#) [Order Upload](#)

| Product code | Description | Delivery time | Quantity | List price | Total price |
|---------------------------|--|---------------|--|--------------|--|
| GGL MK04 3050 | Lacq.Pine,78x98,C/P,50Pane + add line reference | 17 days | - <input type="text" value="2"/> + Remove | EUR 298.00 | EUR 596.00  |
| GDL SK19 2066P1 | White Paint,Cabrio upper 114x252,66Pane + add line reference | 2 days | - <input type="text" value="1"/> + Remove | EUR 1,486.00 | EUR 1,486.00  |
| Total, EUR excl. VAT: | | | | | <u>2,082.00</u> |
| Total, EUR Including VAT: | | | | | <u>2,560.86</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 "**Confirm Pricing**".

Requested delivery date:

(Dates subject to normal VELUX lead times & cut off time)

- Split delivery - *Delivery on the earliest possible date. (Stock items delivered together, non-stock items grouped & delivered with the item with the longest lead time)*
- Complete delivery - *Delivery of complete order on the earliest possible date.*
- Select a later delivery date. - *VELUX deliver Monday to Friday excluding holidays.*

Place of delivery:

- Branch address
- Direct delivery

The order will ship to:

The VELUX Company Ltd
Woodside Way
KY7 4ND Glenrothes

Confirm Pricing >

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.

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 | GDL SK19 SD0L001 | Single roof balcony + flashing | To be confirmed | EUR 2,628.00 | 27.0% | EUR 1,918.44 |
| 1 | GDL SK19 2066LP1 | Roof balcony, al, 3-layer pane | | | | |
| 1 | GDL SK19 2066LP2 | Roof balcony, al, 3-layer pane | | | | |
| 1 | EDL SK19 0000 | Flashing, al | | | | |
| Sub total, EUR: | | | | | | 1,918.44 |
| Total, EUR excl. VAT: | | | | | | <u>1,918.44</u> |
| Total, EUR Including VAT: | | | | | | <u>2,359.68</u> |

[< Edit basket](#)


Save as Quote

Confirm Order >

Quote will be valid to 14. August 2016

Creating a quote with VELUX discount

The screen below will display whilst your quote 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 01 848 8775 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. We recommend always using the Transfer to basket option so you can add your PO number and delivery information.

Quote number 0022099475

Expiration date 15/07/2016

Customer number

| Quantity | Product code | Description | Delivery time | List price | Discount | Net Sales Price |
|---------------------------|---------------|---------------------------------|---------------|------------|----------|-----------------|
| 1 | DML MK04 1085 | El. blackout, Beige Thermo, Uni | 7 days | EUR 235.00 | 42.0% | EUR 136.30 |
| Sub total, EUR: | | | | | | 136.30 |
| VAT, EUR: | | | | | | 31.35 |
| Total, EUR excl. VAT | | | | | | <u>136.30</u> |
| Total, EUR Including VAT: | | | | | | <u>167.65</u> |



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



[Create client quote](#) [Transfer to basket](#) [Place order >](#)

(with updated conditions)

(+ Update/add PO No.)

(Check quote carefully
-
Official PO No. must be on
quote before ordering
or
call VELUX to add)

To turn the quote into an order click transfer to basket



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 interface. At the top left is the VELUX logo and 'Dealer Extranet'. A search bar contains 'Prod. name, Model no.' and a 'Search' button. Below this is a navigation bar with tabs for 'WINDOWS', 'FLASHING', 'BLINDS', 'SUN TUNNEL', 'FLAT ROOF', and 'SMOKE VENTS'. The main content area is divided into 'Your Account' and 'Tools'. In 'Your Account', 'Quotes' is highlighted with a red box. In 'Tools', 'Client Quote Tool' is visible. Below this is a 'Quote history (1 out of 1)' table.

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

At the bottom right, there is 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 instruction 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 | DML MK04 1085 | El. blackout, Beige Thermo, Uni | 7 days | EUR 235.00 | 42.0% | EUR 136.30 |
| Sub total, EUR: | | | | | | 136.30 |
| VAT, EUR: | | | | | | 31.35 |
| Total, EUR excl. VAT | | | | | | <u>136.30</u> |
| Total, EUR Including VAT: | | | | | | <u>167.65</u> |



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

Disclaimer The document you create here is held between you and your customer. VELUX does not access, track or surveil who your customers are, or what prices you offer them. Quotes you create for your customers are your own responsibility.

Add products to your client quote

- + [+ Add to Client Quote](#)

Hint: You can add products to client quotes from the search and product configurator results

Quote

Mr A Test
Any Road
Co Anywhere

1

Upload logo here

Your contact:

2

This quote is valid until:

| Product code | Description | Quantity | List price | Discount | Net Sales Price |
|--------------------------|--|---|-------------------------------|--|-------------------------------|
| GGL CK02 2060 | White Paint,55x78,C/P,60Pane + add line reference | <input type="text" value="1"/> Remove | EUR 351.00 EUR 351.00 each | <input type="text" value=""/> % or amt. 3 | EUR 351.00 EUR 351.00 each |
| Delivery charge | <input type="text" value="Delivery charge text"/> | | Amount 5 | | |
| Discount on total amount | <input type="text" value="Discount text"/> | | | <input type="text" value=""/> % or amt. 4 | |
| | | | Price, excl. VAT: | | 351.00 |
| | | | VAT, : | | 80.73 |
| | | | Total, Including VAT: | | 431.73 |

[Save Client Quote](#) or [Send, export or preview...](#)

Upload your company logo here from Account Info Page

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 %.

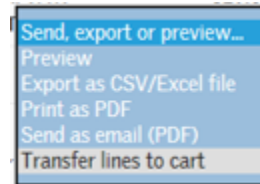
Add any delivery charge that applies (**5**)

Please Note: The accuracy and requirement for any level of consent for private information entered into the Client Quote Tool will be the sole responsibility of the logged in user and must comply with GDPR legislation.

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 is 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.

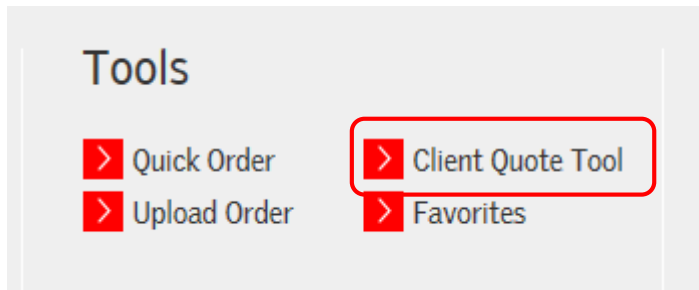


Creating a client quote using the configurator

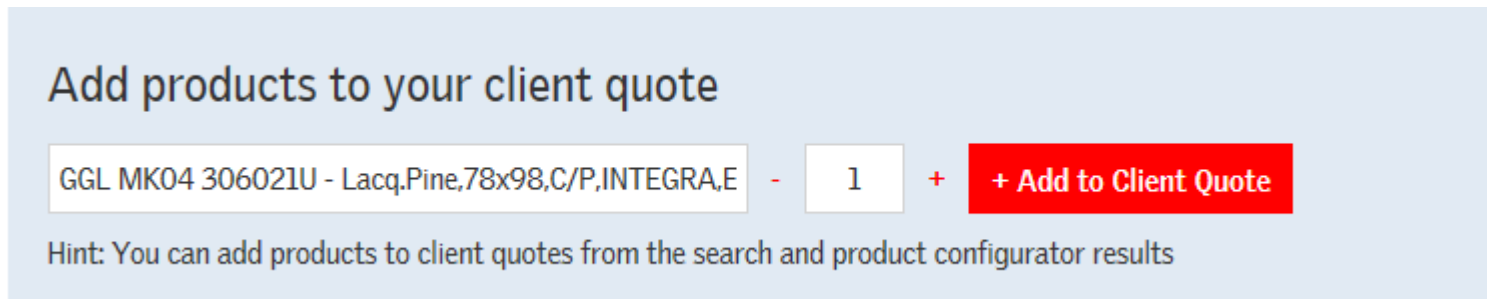


You can also create a client quote from scratch.

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.

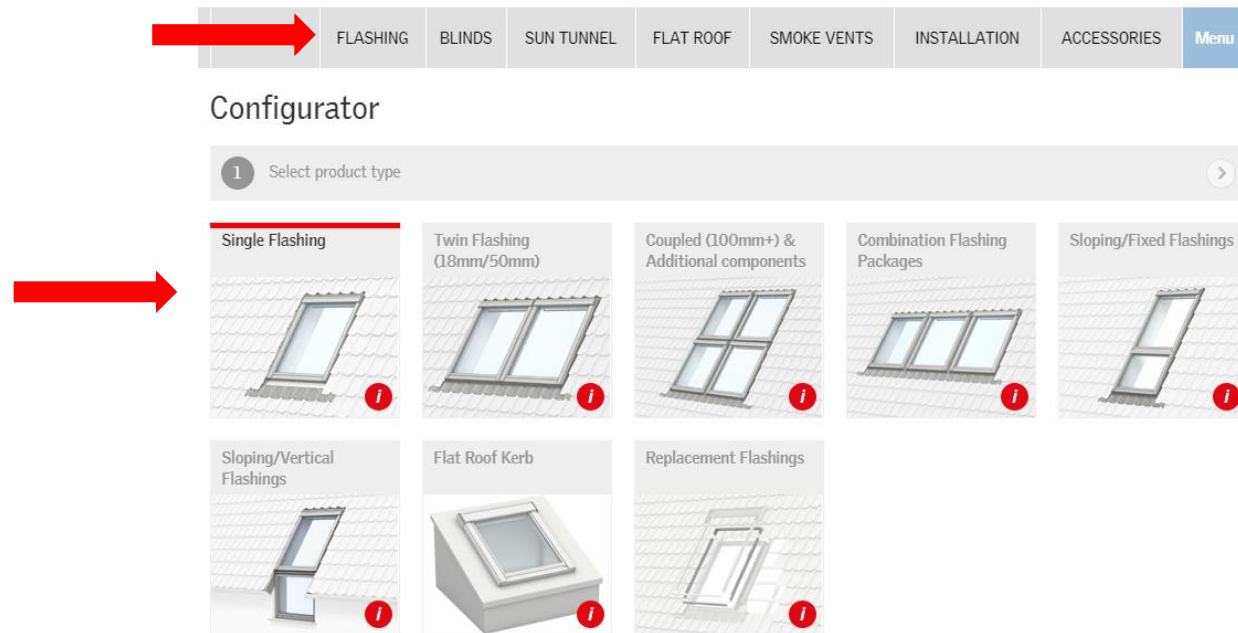
Creating a client quote using the configurator



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, you would click on the Flashing tab then onto 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 | EUR 109.00 | + Client quote | 1 | Add |
| EDW MK04 0000 | Single tile flashing,78x98 + add line reference | 2 days | EUR 72.00 | + 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 inputting 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 screenshot illustrates the navigation paths to the quote search section. On the left, the 'Your Account' menu includes 'Orders', 'Invoices', 'Quotes', and 'Client Quotes'. On the right, the 'Your-Account' menu includes 'Orders', 'Invoices', 'Quotes from VELUX', and 'Quotes for clients'. Red arrows point from these menu items to the 'Quotes for clients' section, which is highlighted in the main interface. This section contains a 'Find quote' search form with a 'Search for:' field (containing 'e.g. quote number'), a 'Search' button, 'Start date:' (16/05/2016), and 'End date:' (15/06/2016) fields. Below the search form is a 'Quote history (1 out of 1)' table.

| 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.