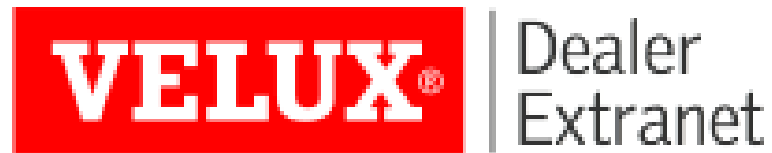


# Dealer Extranet 3 Quotations User Guide



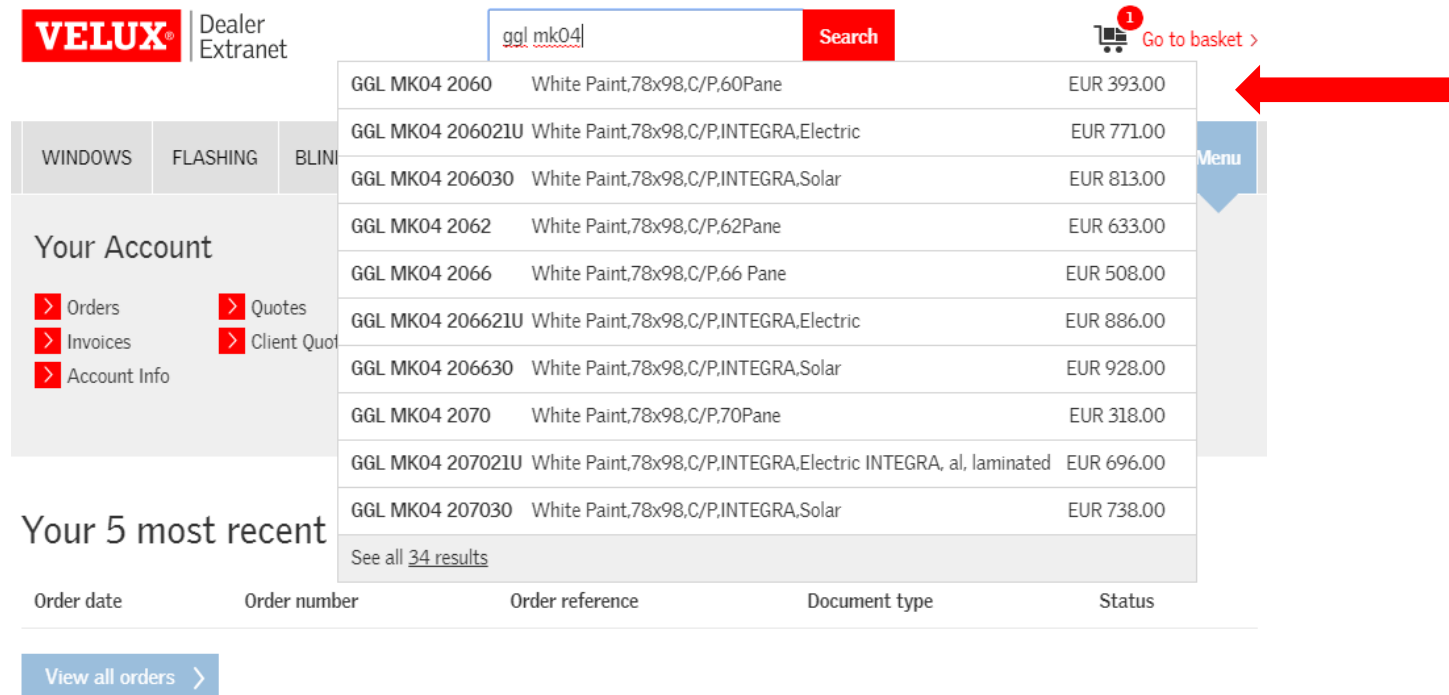
# Contents:

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Creating Quotes for Clients (from an existing quote)	<a href="#"><u>10-16</u></a>
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Search and View Quotes	<a href="#"><u>21</u></a>

# 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.



The screenshot shows the VELUX Dealer Extranet interface. At the top, there is a search bar with the text 'ggl mk04' and a 'Search' button. To the right of the search bar is a shopping cart icon with a '1' notification and a 'Go to basket >' link. Below the search bar is a table of search results. A red arrow points to the search results table.

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](#)

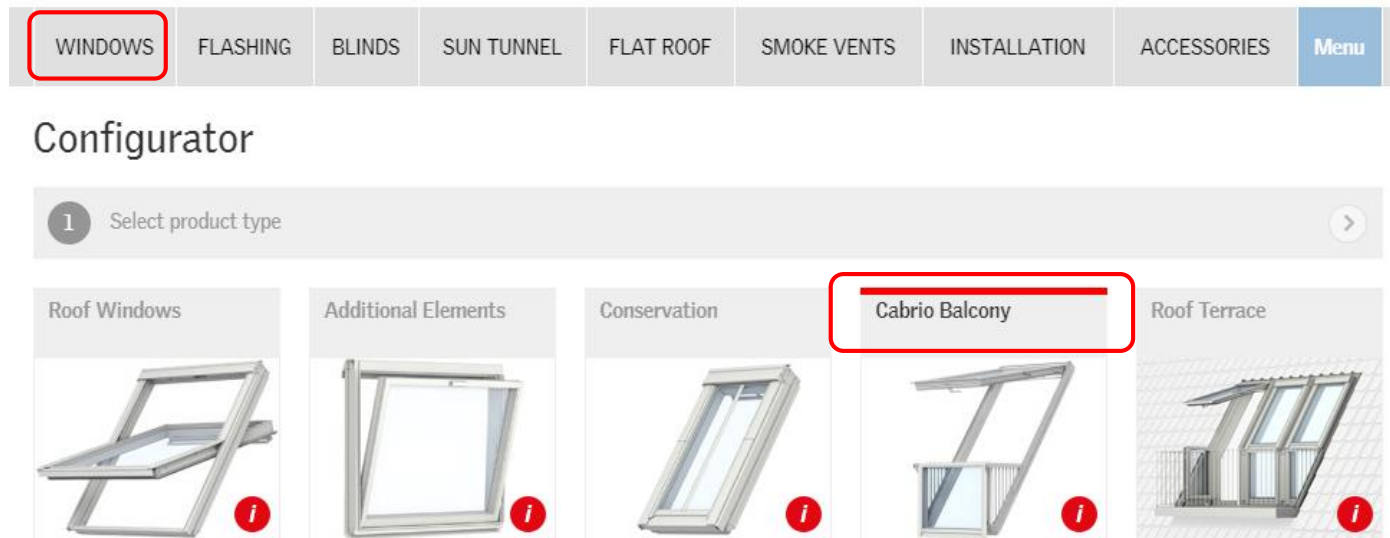
Order date      Order number      Order reference      Document type      Status

[View all orders >](#)

# Creating a quote on a customers account

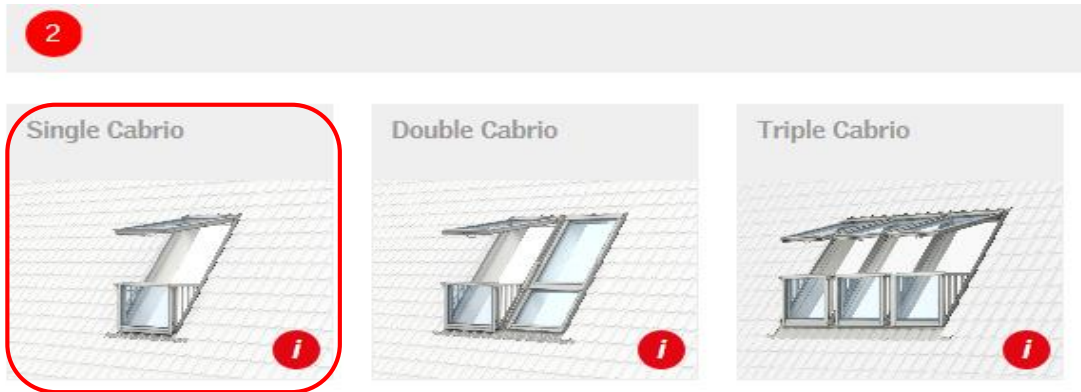
Option 2: If you are not sure of the codes for the items you require, you can also use the configurator to locate the items you require.

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

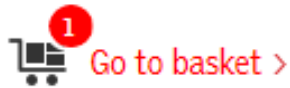
Products (2 out of 2)

Product code	Description	Delivery time				
GDL PK19 SD0W1	System GDL, EDW <a href="#">+ add line reference</a>	7 days	GBP 1,912.00	+ Client quote	1	Add
GDL SK19 SD0W1	System GDL, EDW <a href="#">+ add line reference</a>	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 <a href="#">+ add line reference</a>	17 days	- <input type="text" value="2"/> + <a href="#">Remove</a>	EUR 298.00	EUR 596.00 
GDL SK19 2066P1	White Paint,Cabrio upper 114x252,66Pane <a href="#">+ add line reference</a>	2 days	- <input type="text" value="1"/> + <a href="#">Remove</a>	EUR 1,486.00	EUR 1,486.00 
Total, EUR excl. VAT:					<b><u>2,082.00</u></b>
Total, EUR Including VAT:					<b><u>2,560.86</u></b> <a href="#">Empty basket</a>

# 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:

(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.

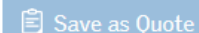
Customer number


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:						<b><u>1,918.44</u></b>
Total, EUR Including VAT:						<b><u>2,359.68</u></b>

[< 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

Customer information:		Delivery information:		Print		
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".

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 interface. At the top left is the VELUX logo and 'Dealer Extranet'. A search bar contains the text 'Prod. name, Model no.' and a 'Search' button. Below the search bar is a navigation menu with categories: WINDOWS, FLASHING, BLINDS, SUN TUNNEL, FLAT ROOF, and SMOKE VENTS. The 'Your Account' section is visible, containing links for Orders, Invoices, Account Info, and **Quotes** (which is highlighted with a red box). Under 'Tools', there are links for Quick Order, Upload Order, Client Quote Tool, and Favourites. A 'Quote history (1 out of 1)' table is shown below the navigation menu. At the bottom right, there is a blue button labeled 'Create client quote'.

Quote date	Expiration date	Quote number	Quote reference
15/06/2016	15/07/2016	<a href="#">0022099474</a>	Quote Example

# 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	<b>0022093365</b>	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

- 1 + [+ 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:

Joe Smith 087777777

2

This quote is valid until: 14/08/2016

Product code	Description	Quantity	List price	Discount	Net Sales Price
GGL CK02 2060	White Paint,55x78,C/P,60Pane <a href="#">+ add line reference</a>	★ - 1 + <a href="#">Remove</a>	EUR 351.00 EUR 351.00 each	% or amt. <b>3</b>	EUR 351.00 EUR 351.00 each
Delivery charge	<input type="text"/>		Amount <b>5</b>		
Discount on total amount	<input type="text"/>			% or amt. <b>4</b>	
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.

In this screen you can:

Add your customers address details in the Client information section(1)

Add your contact details (2).

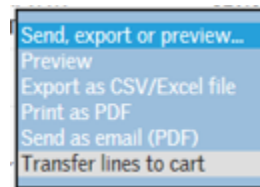
Input the discount you wish to offer your customer at line level (3), or for the full order (4), either as a percentage by entering an amount then a % sign, or as a value by leaving off the %.

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 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.



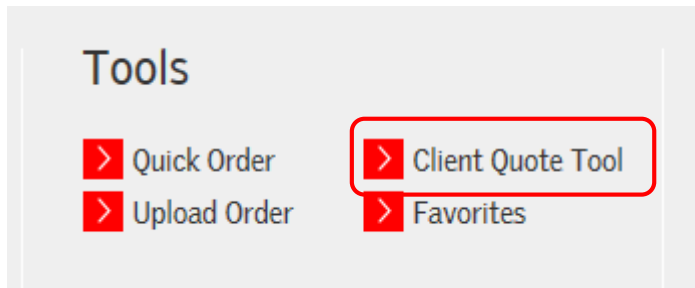


# Creating a client quote using the configurator

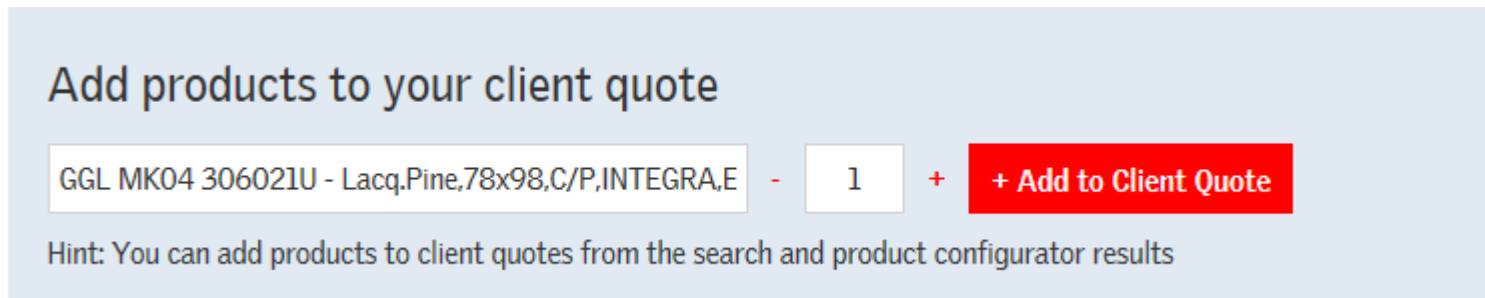


You can also create a client quote from scratch.

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.

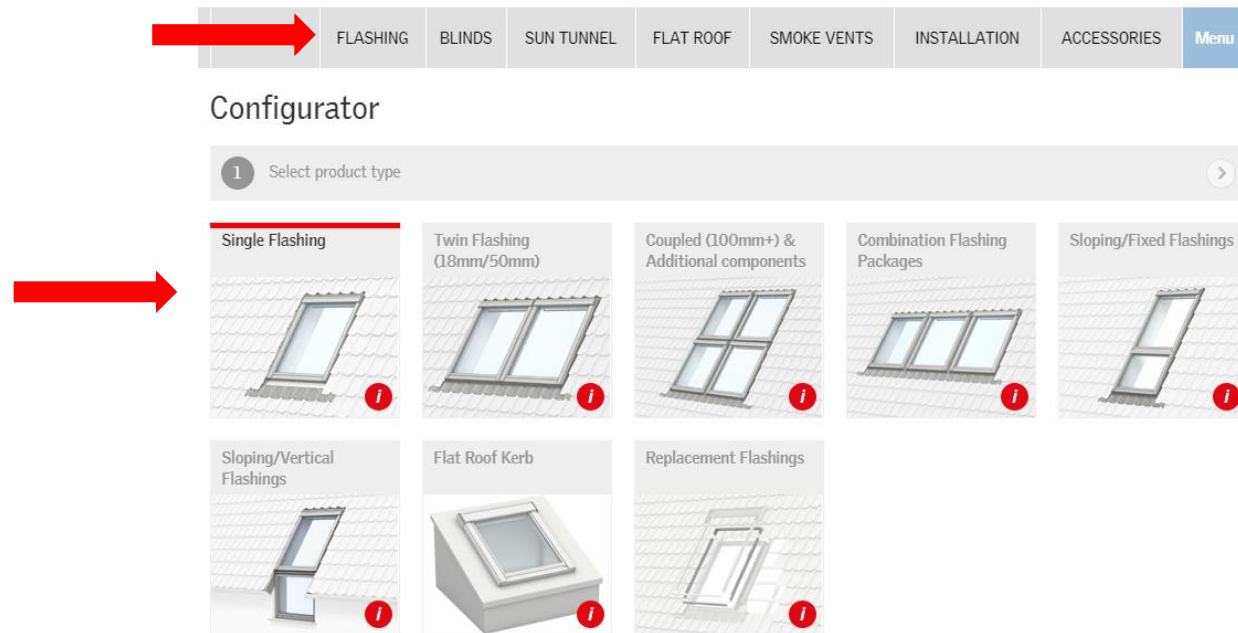
# Creating a client quote using the configurator



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 <a href="#">+ add line reference</a>	2 days	EUR 109.00	+ Client quote	1	Add
EDW MK04 0000	Single tile flashing,78x98 <a href="#">+ add line reference</a>	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

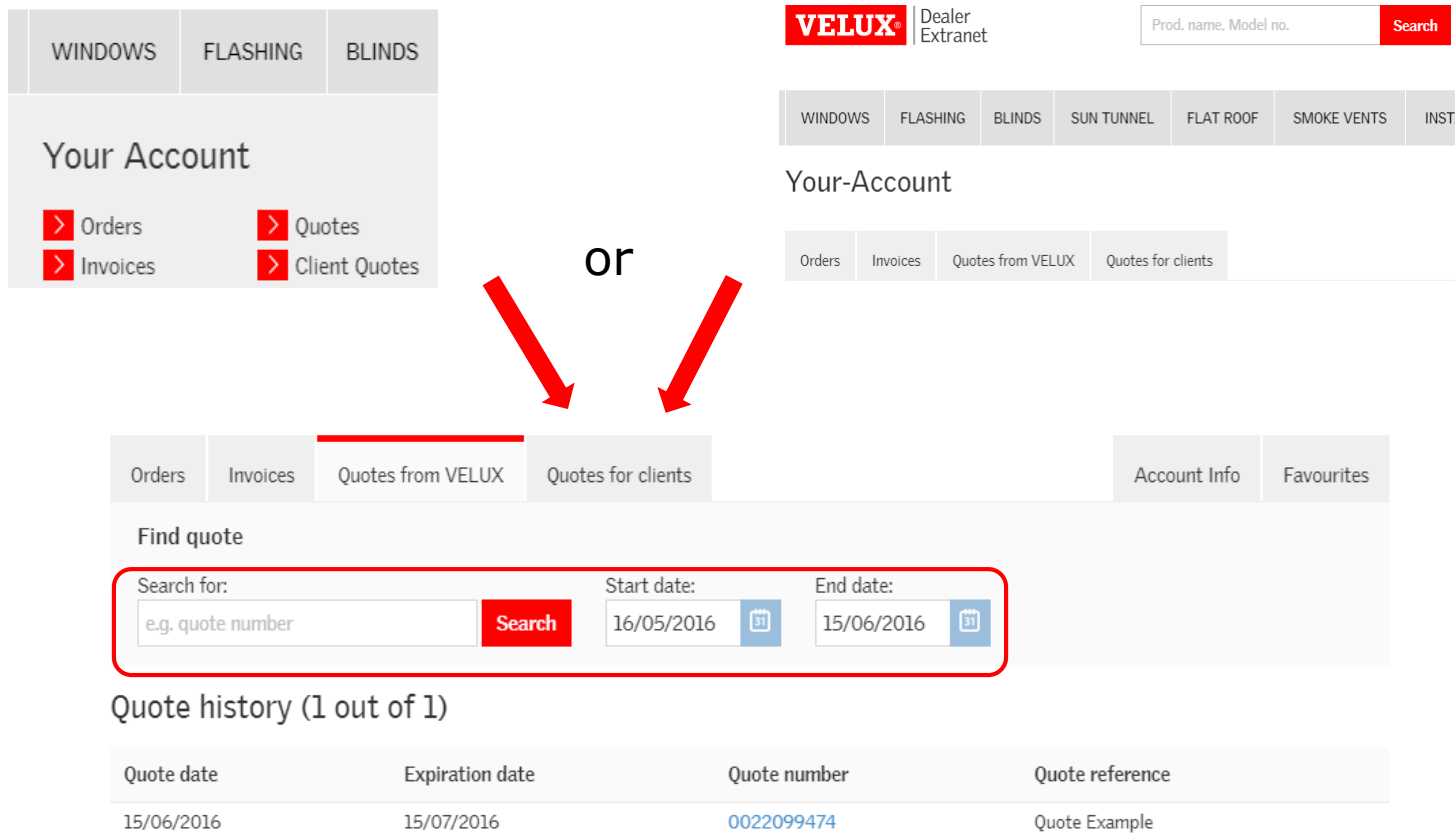
Quote ID	Customer reference	Quote ends	Last changed	
6	Any Company	16/12/2015	16/11/2015 15:48	Add to this quote



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 shows the VELUX Dealer Extranet interface. On the left, the 'Your Account' section contains links for Orders, Invoices, Quotes, and Client Quotes. On the right, the 'Your-Account' section contains links for Orders, Invoices, Quotes from VELUX, and Quotes for clients. Two red arrows point from the 'Quotes' and 'Client Quotes' links to the search interface below.

The search interface features a navigation bar with 'Quotes for clients' selected. Below the navigation bar is a 'Find quote' section with the following fields:

- Search for:** A text input field containing 'e.g. quote number' and a red 'Search' button.
- Start date:** A date input field containing '16/05/2016' and a calendar icon.
- End date:** A date input field containing '15/06/2016' and a calendar icon.

Below the search fields 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.

