



Taylor Configurator User Reference Guide

(Version 1.0)

November 2021



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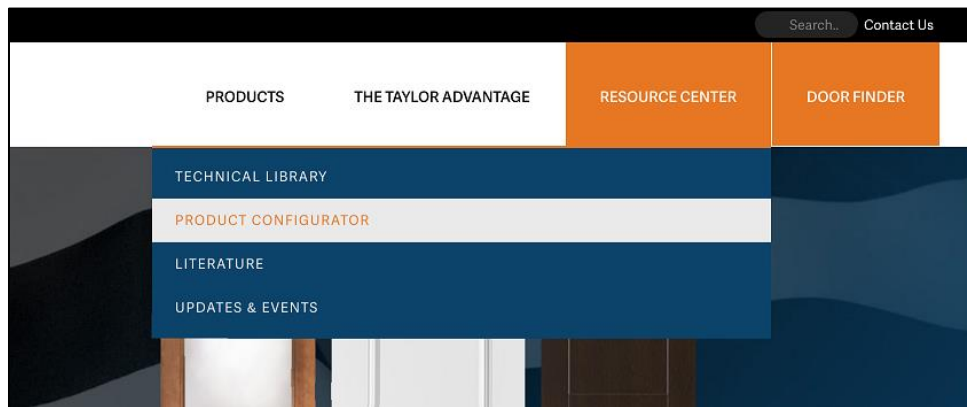
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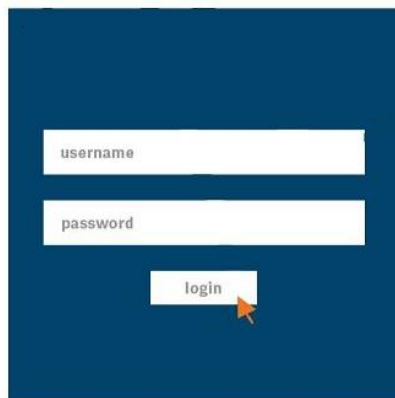
Requesting a Configurator Login

Objective: Requesting a login for the Configurator.

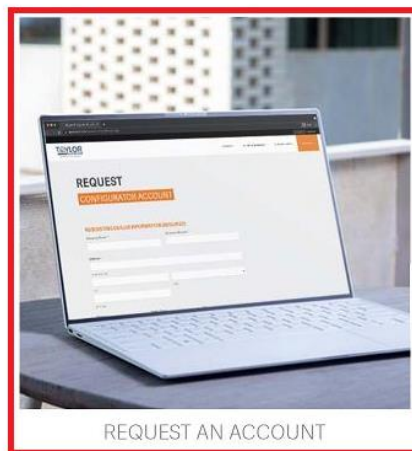
1. Navigate to **www.taylordoor.com**.
2. Hover over "Resource Center" in the upper right-hand corner and select "Product Configurator."



3. Select "Request an Account" and fill out the required information.



PRODUCT CONFIGURATOR



REQUEST AN ACCOUNT



USER GUIDE



4. The request will be sent to Taylor for the user account to be created.
5. A Taylor representative may reach out to the dealer to confirm that the requester is a current employee and whether they have security for quote/view only or to be able to place orders on behalf of the dealer.
6. User accounts are typically activated within 24 hours of being submitted.



Creating Desktop Shortcut for Configurator

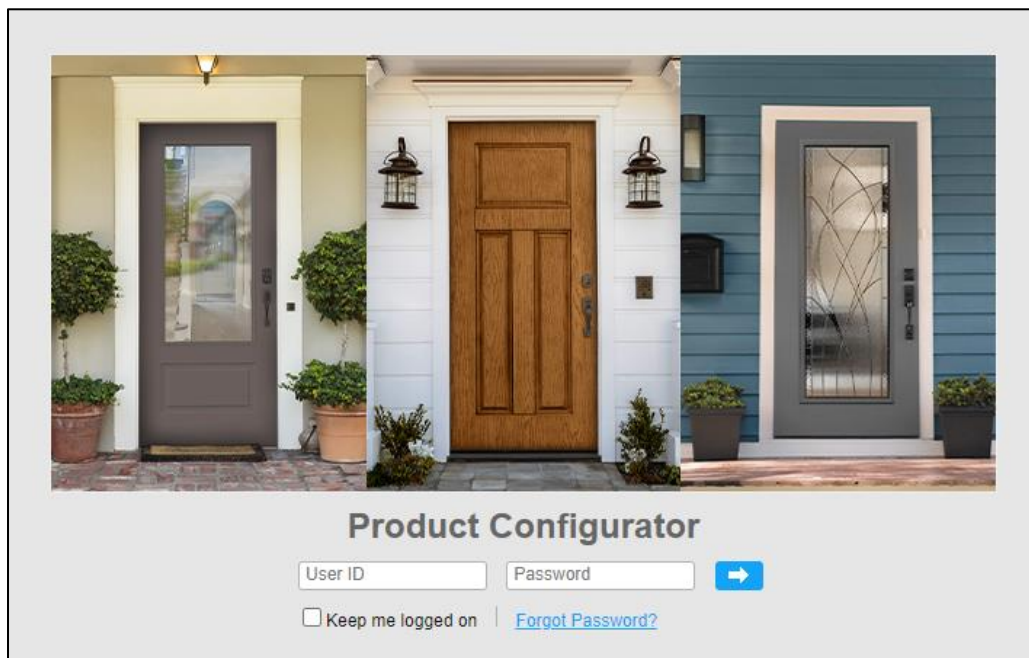
Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

Google Chrome (see Windows starting on page 13, iPad on page 18)

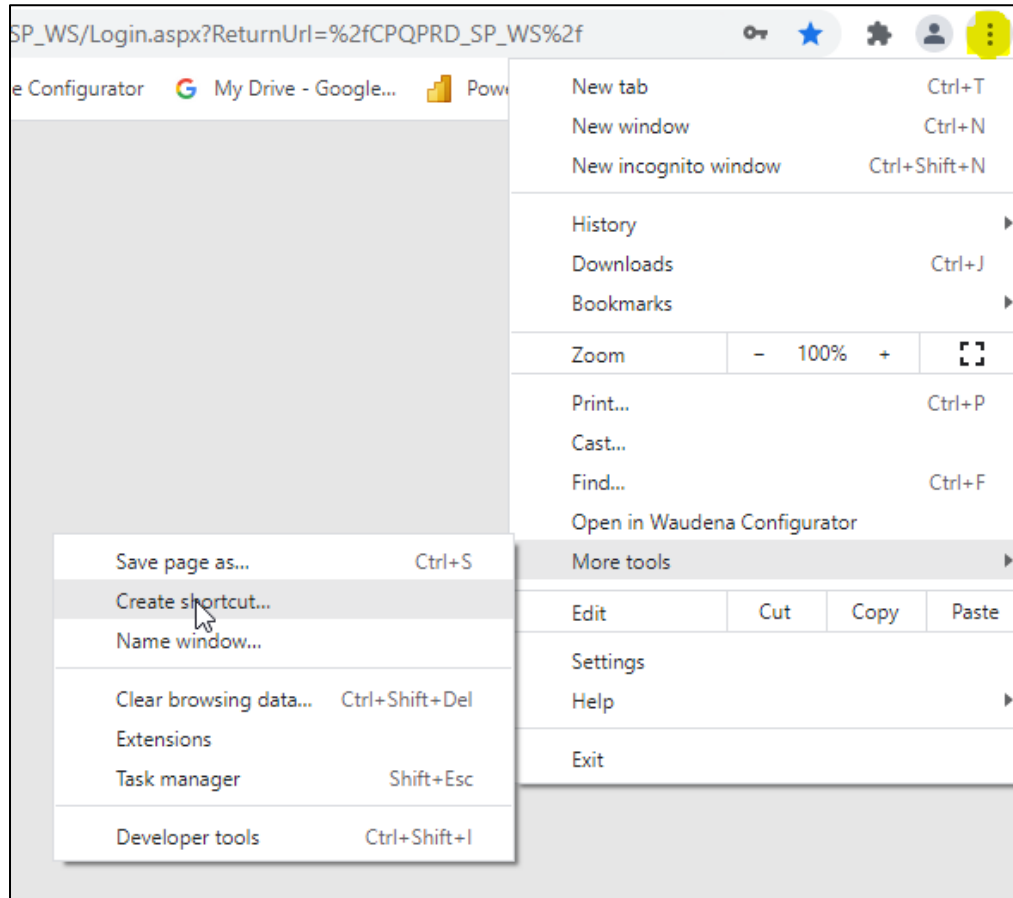
1. Create a folder on the user's desktop and label the folder "Icons".
2. Copy the Taylor Configurator icon file to the Icon folder.



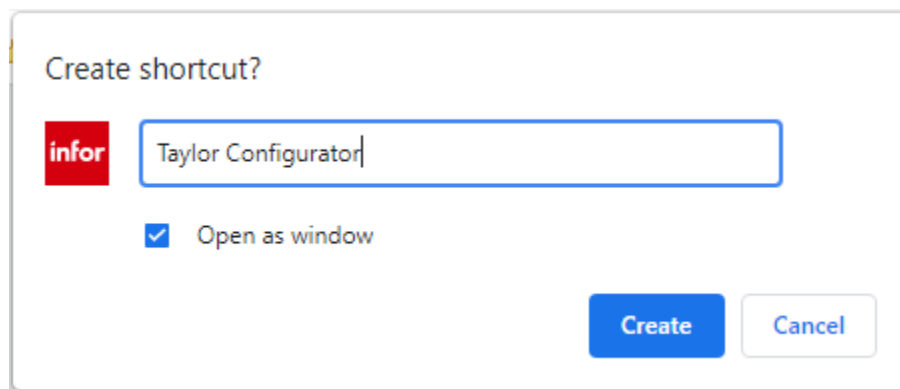
3. Open Google Chrome and enter ***configurator.wausausupply.com*** into the address bar to go to the sign in page.



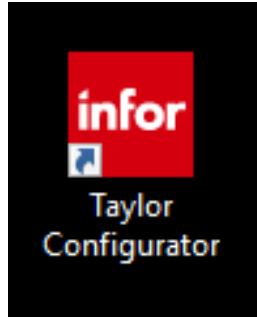
4. In the upper right-hand corner of Chrome, click on the vertical ellipsis, select "More tools" and "Create shortcut...".



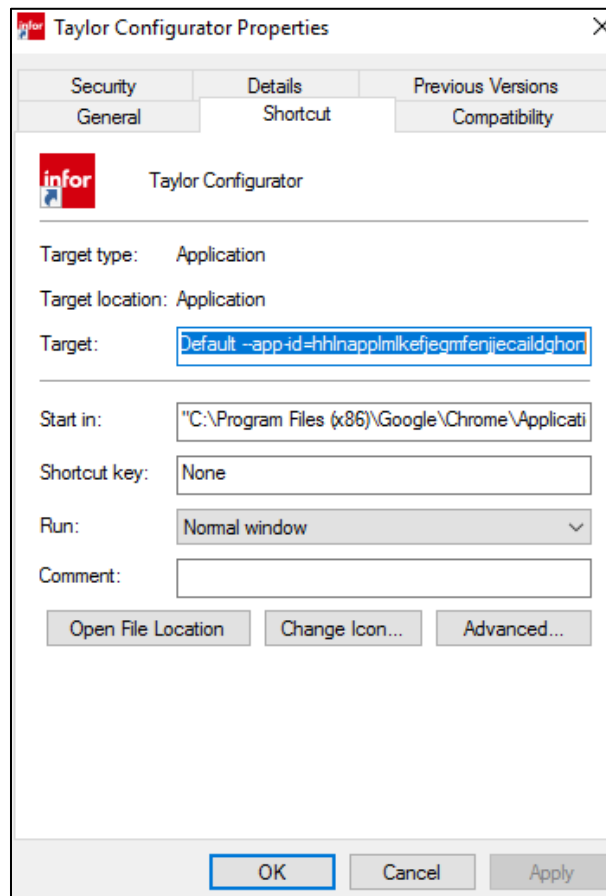
5. The "Create shortcut" window will open. Change the name from the default to Taylor Configurator, check "Open as window" and select "Create".



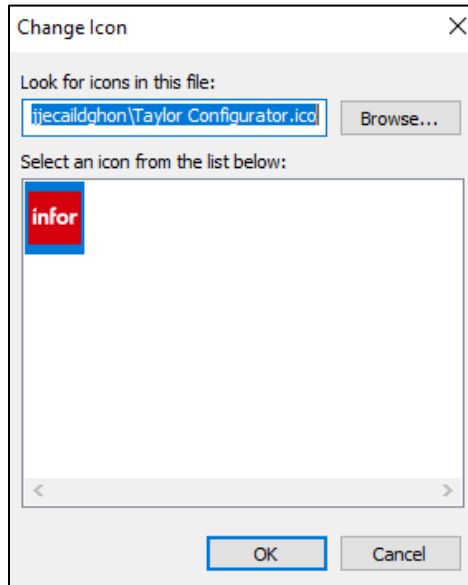
6. Close Chrome and you will now have an icon on the desktop that will look like this:



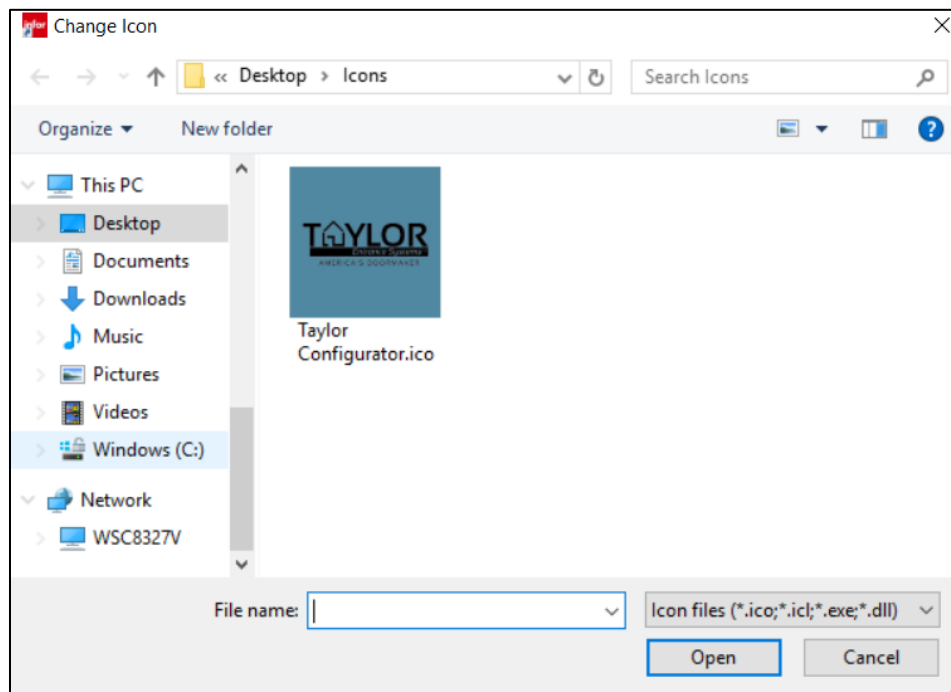
7. Right click on the icon and select "Properties".
8. The window below will pop up. Select "Change Icon...".



9. Select "Browse" in the window that pops up.

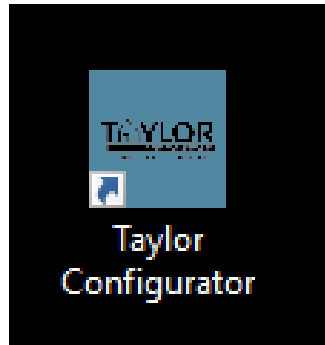


10. Locate the folder you labelled "Icons" and select the Taylor icon. Double click on it or highlight it and select "Open" to choose the icon.





11. Click "OK" in the icon window and again click "OK" in the Properties window.
12. You're done. Your desktop shortcut should now appear as below. The user can now double click that icon to launch directly into the login screen.



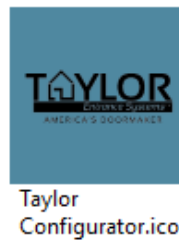
Creating Desktop Shortcut for Configurator

Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

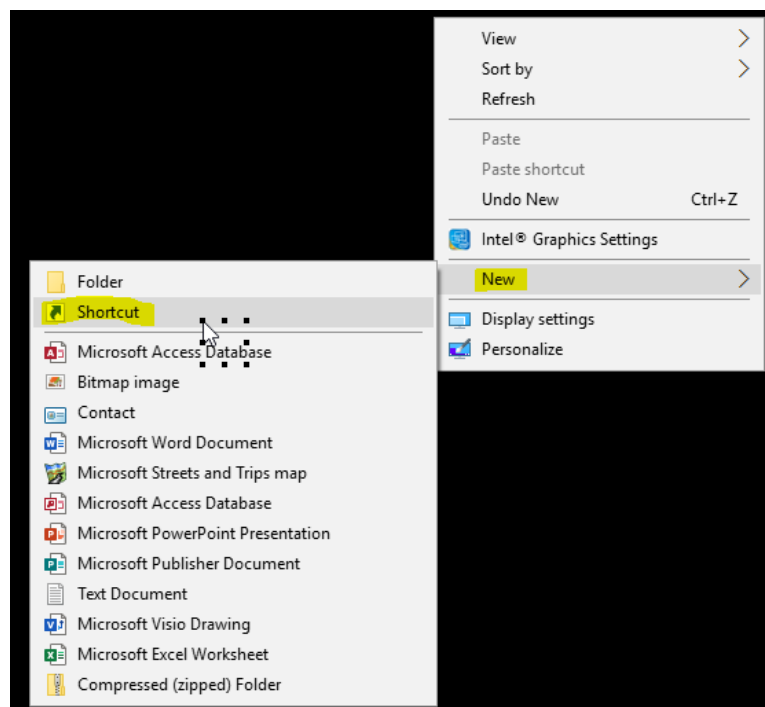
Windows

Note: Google Chrome is the preferred browser and will provide the best user experience.

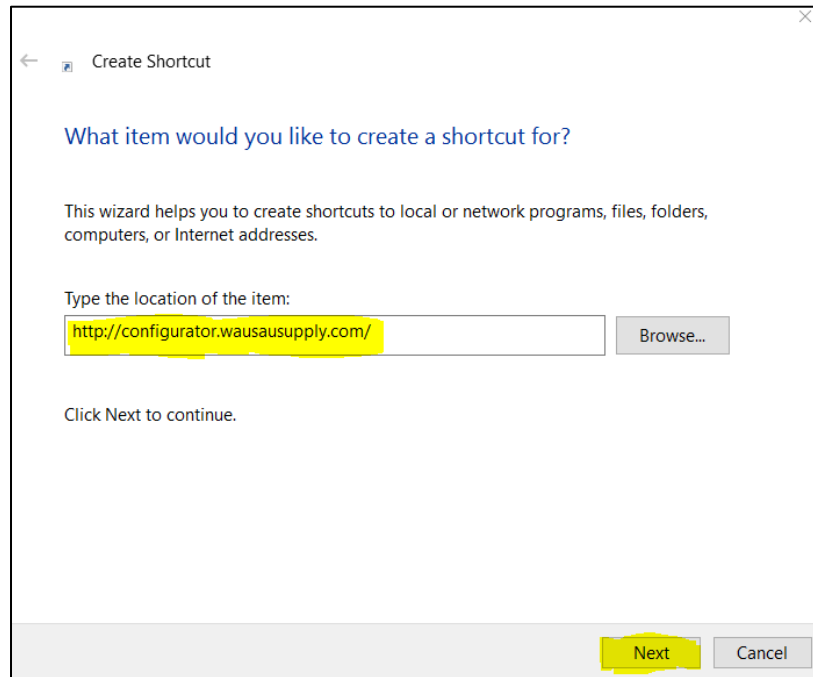
1. Create a folder on the user's desktop and label it "Icons".
2. Copy the attached Taylor Configurator icon file to the Icon folder.



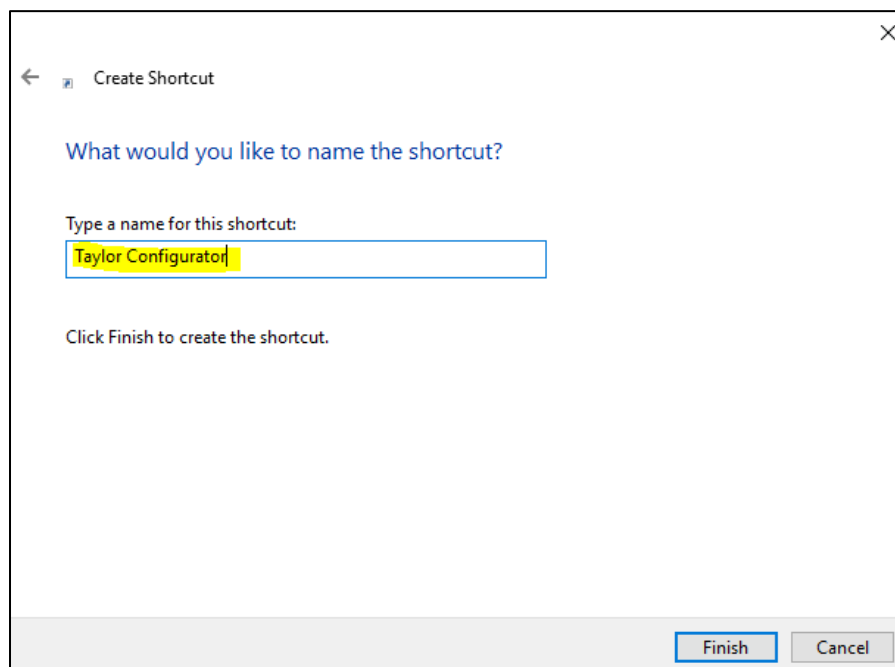
3. Right click anywhere on the desktop and select "New" and "Shortcut".



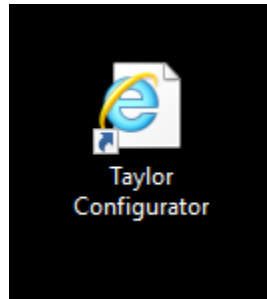
4. The shortcut window will open so you can type the destination of the shortcut. Enter ***http://configurator.wausausupply.com*** as the destination and select "Next".



5. In the next window, enter "Taylor Configurator" as the name for the shortcut and select "Finish".

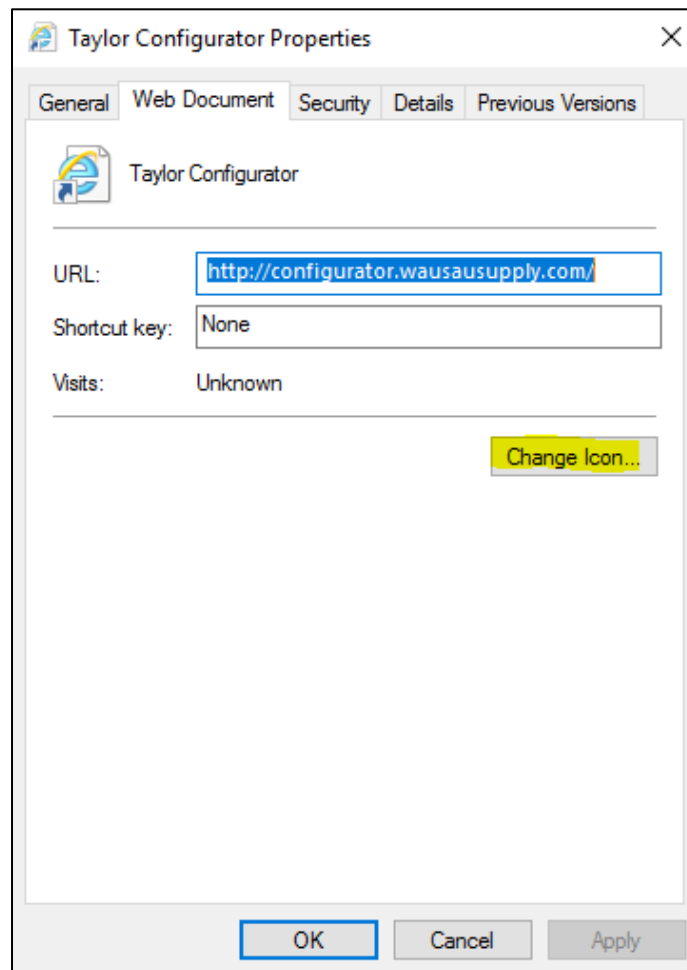


6. You will now have an icon on your desktop that will look like this:

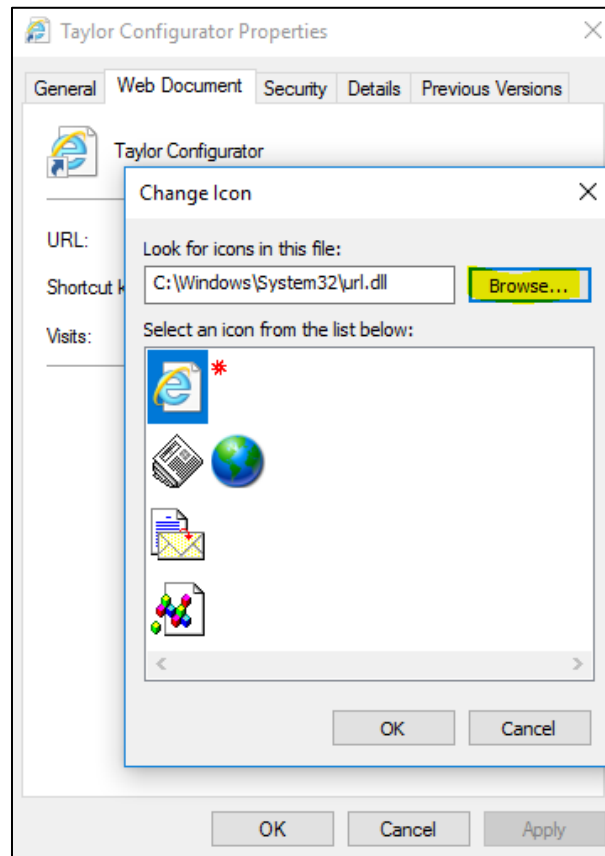


7. Right click on the icon and select "Properties".

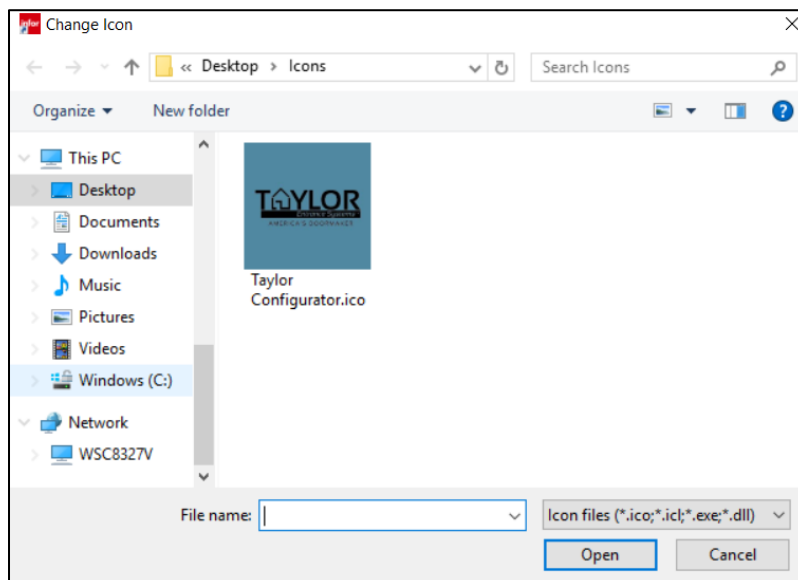
8. The window below will pop up. Select "Change Icon..."



9. Select "Browse" in the window that pops up.

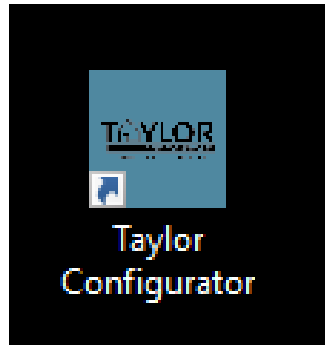


10. Locate the folder you labelled "Icons" and select the Taylor icon. Double click on it or highlight it and select "Open" to choose the icon.





11. Click "OK" in the icon window and again click "OK" in the Properties window.
12. You're done. Your desktop shortcut should now appear as below. The user can now double click that icon to launch directly into the login screen.



Creating Desktop Shortcut for Configurator

Objective: Create a desktop shortcut for Product Configurator to increase visibility and ease of access.

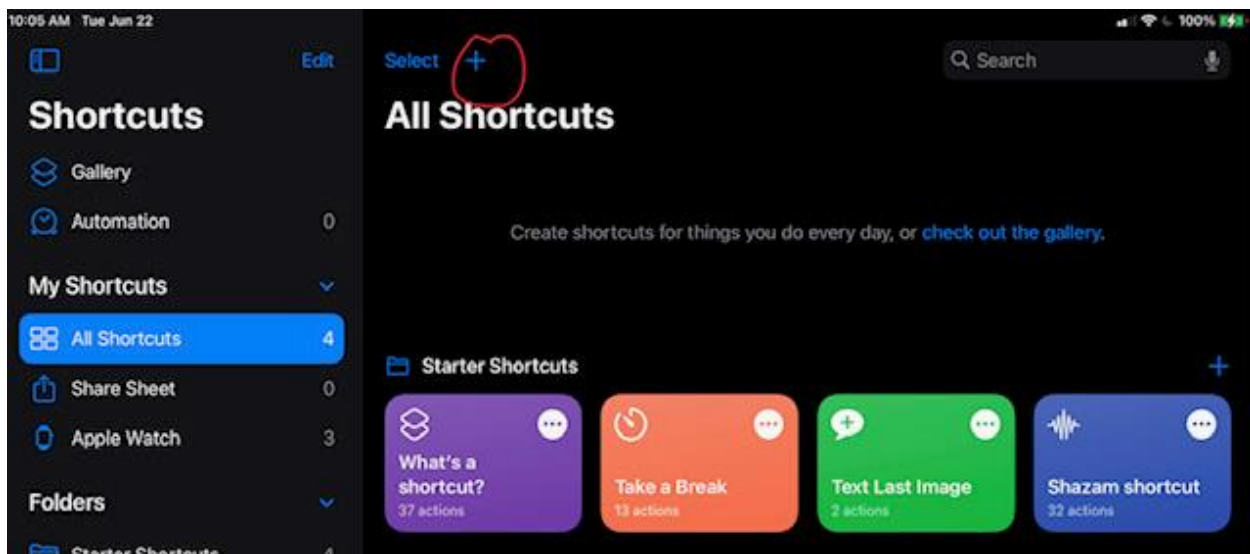
iPad

Notes: Google Chrome should be added to the iPad before creating the shortcut. Instructions provided using iOS 14.6, other iPad versions may work differently. Update is recommended before adding the shortcut.

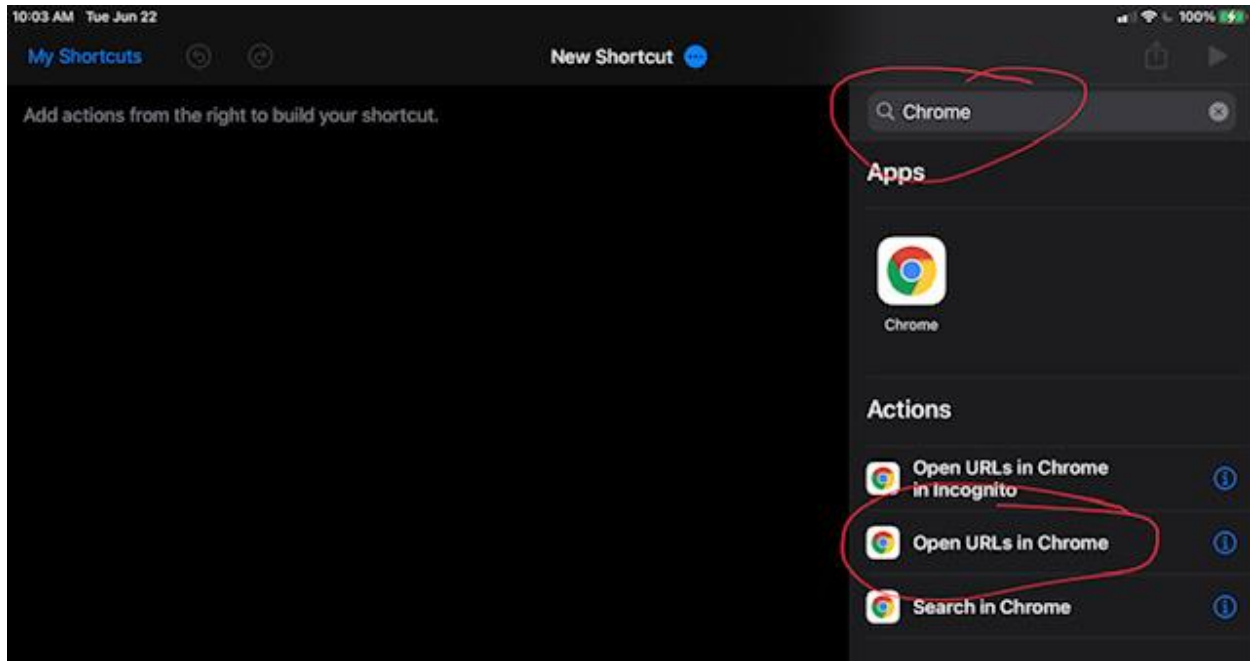
1. Send the Taylor icon file, in .jpg format, to the user's iPad via e-mail or Airdrop and save it to the photo album.
2. Open the "Shortcuts" app on the iPad.



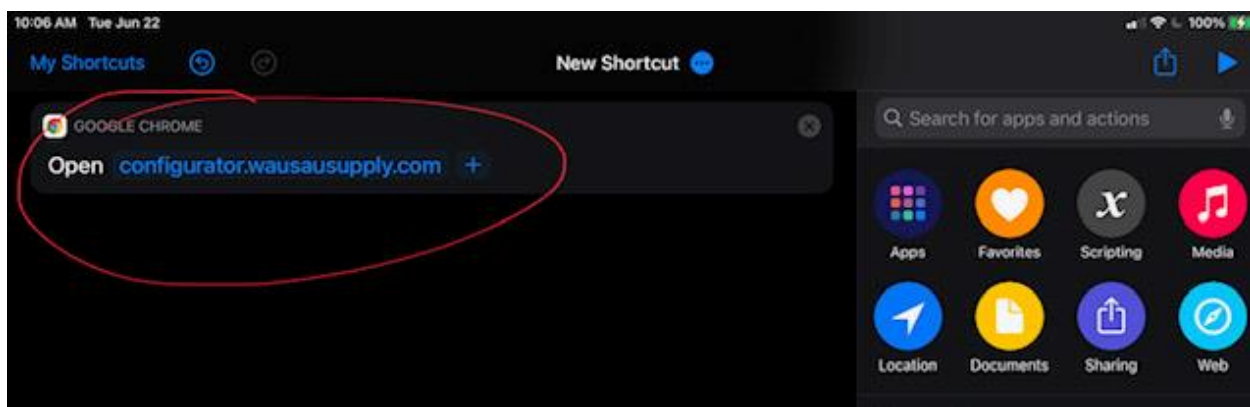
3. Select the "+" to create a new shortcut.



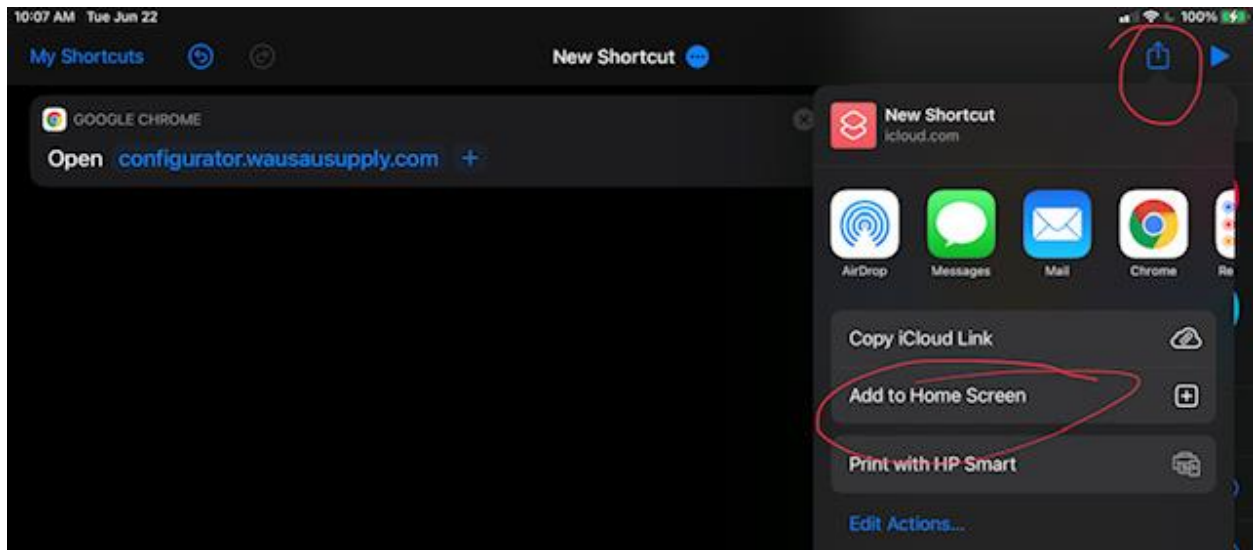
4. In the next window, type **Chrome** into the search field and select "Open URLs in Chrome".



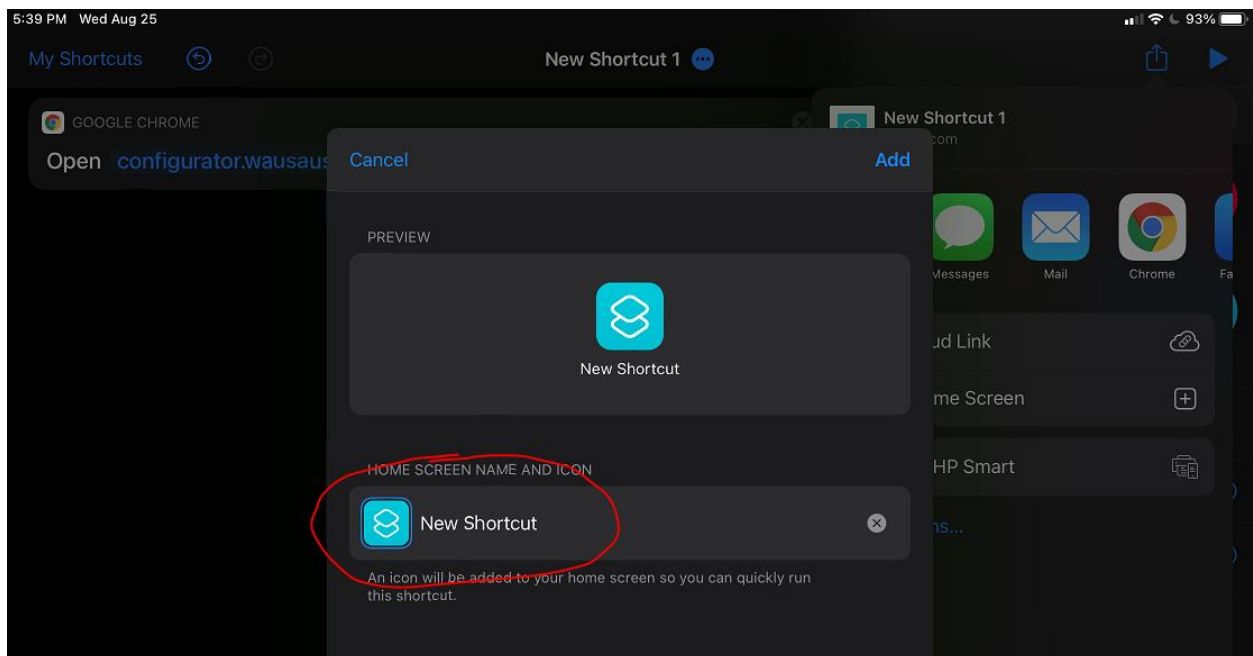
5. When prompted, type **configurator.wausausupply.com** into the URL field and hit "Done".



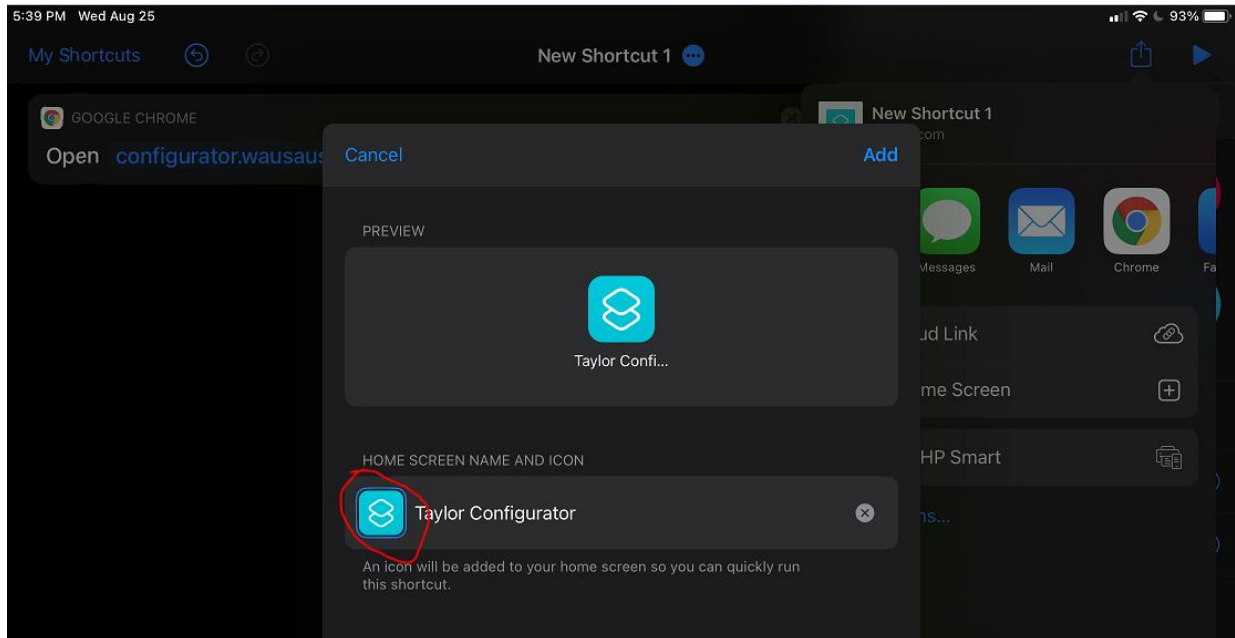
6. Select the "share/upload" button in the upper right-hand corner and select "Add to Home Screen".



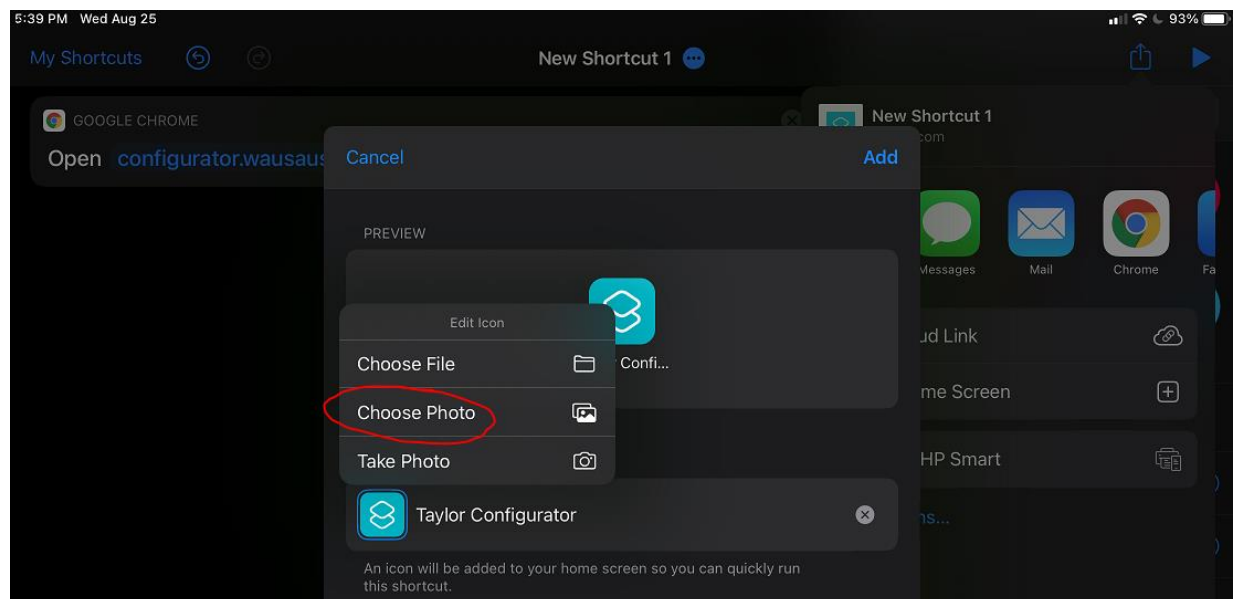
7. When prompted, select the area that says, "New Shortcut" and change it to **Taylor Configurator** or **Configurator** and select "Return".



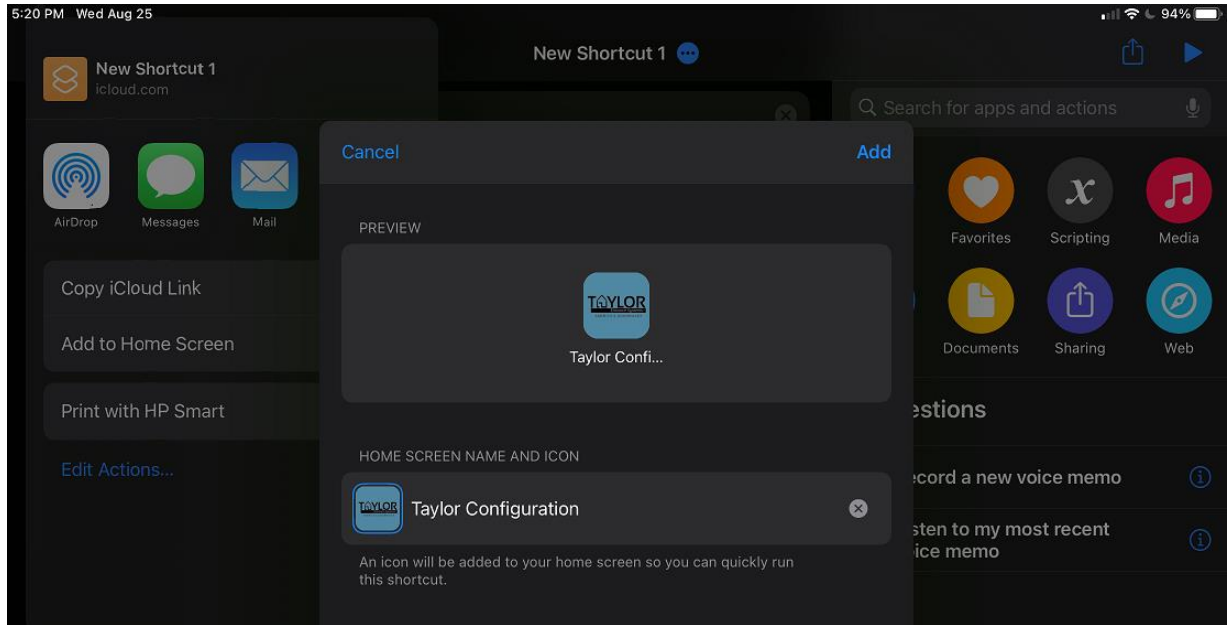
8. Select the icon symbol next to the name.



9. Click "Choose Photo" and select the Taylor image, that was placed on the device in step 1, from your photo gallery.



10. After confirming the name and image, select "Add" to place the shortcut on your desktop.



11. You should now have a Taylor Configurator shortcut on your desktop. Click on the icon for one-step access directly to the Configurator log in page.

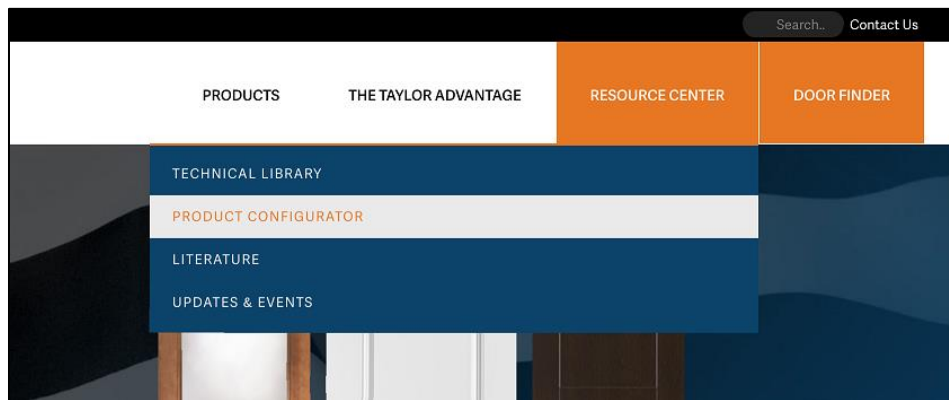


Logging in to Configurator

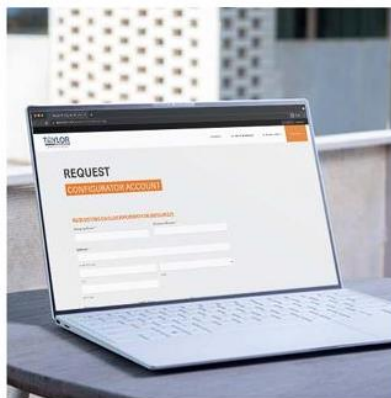
Via taylordoor.com

Note: For best performance, Google Chrome is the recommended web browser.

1. Navigate to www.taylordoor.com.
2. Hover over "Resource Center" and select "Product Configurator".



3. Select "Product Configurator" on the page.




REQUEST AN ACCOUNT



USER GUIDE

4. Enter *Username* and *Password* and select *blue arrow*.



Product Configurator

☐ Keep me logged on | [Forgot Password?](#)

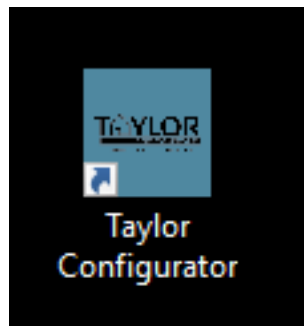


Logging in to Configurator


Direct Access

Note: For best performance, Google Chrome is the recommended web browser.

1. Select the desktop shortcut for Taylor Configurator or open your browser and navigate to ***configurator.wausausupply.com***.



2. Enter *Username* and *Password* and select the *blue arrow*.

The login screen for the Taylor Configurator. It features a header image showing three different door styles: a dark grey door with a glass insert, a wooden door, and a grey door with a glass insert. Below the image is the title 'Product Configurator' in a bold, black, sans-serif font. Underneath the title are two input fields: the first is for the username, containing the text 'user@dealer.com', and the second is for the password, containing a series of dots. To the right of the password field is a blue arrow button. Below the input fields is a checkbox labeled 'Keep me logged on' and a link labeled 'Forgot Password?' in blue text.

Product Configurator

user@dealer.com

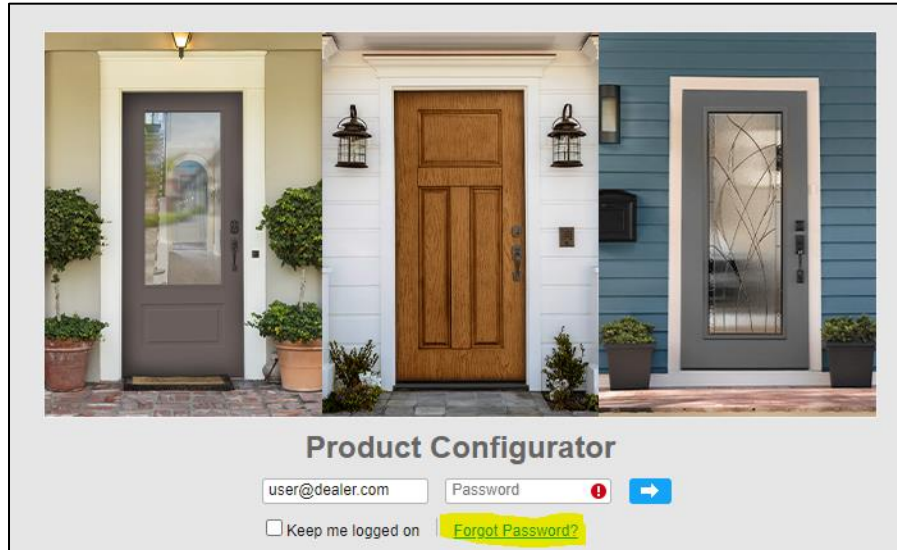
.....

☐ Keep me logged on | [Forgot Password?](#)

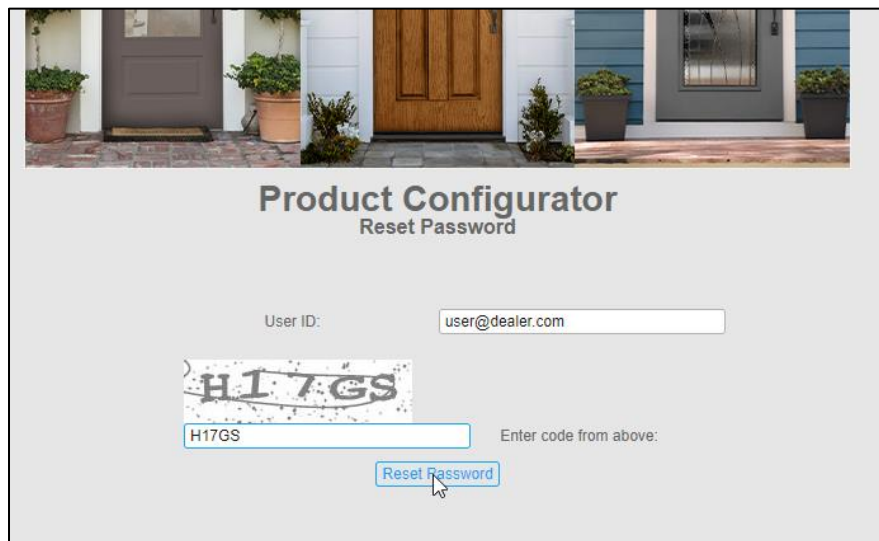
Recovering Forgotten Password

Objective: Replacing a password with a new password if the original is lost or forgotten.

1. On the log in page, select the link "Forgot Password?"



2. Enter your user ID, enter the code provided and select "Reset Password".



3. You will receive an e-mail shortly. Follow the steps provided in the e-mail to complete the recovery of your account.

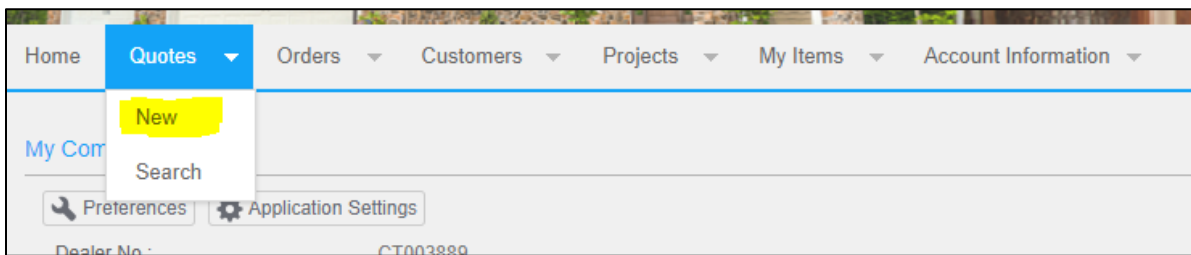
Entering a Quote

Objective: Enter a new quote for a Taylor item.

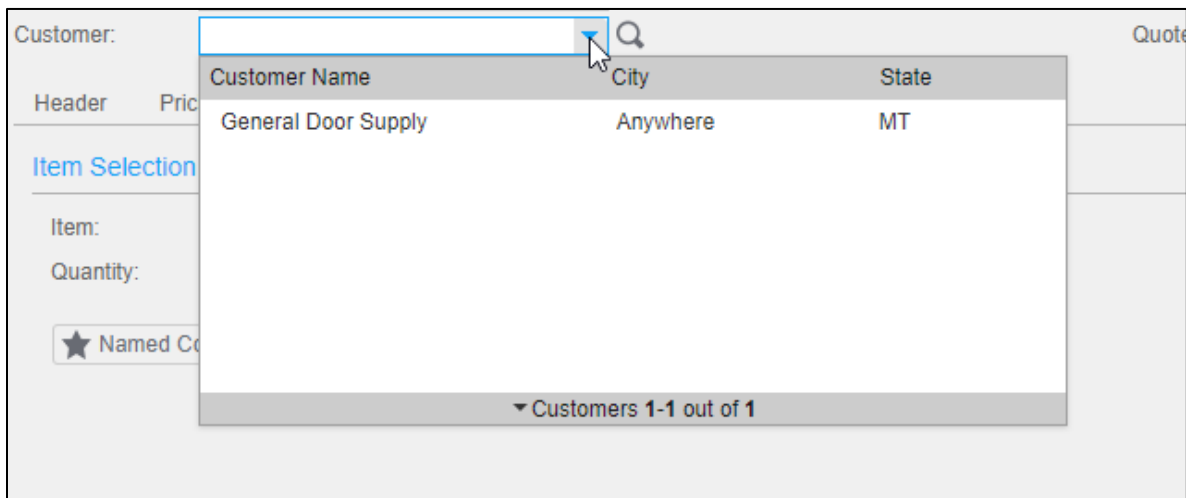
Notes: This example will include steps that, although not required, are recommended for the best experience.

New Quote

1. From any page in the Configurator, hover over Quotes and select "New".



2. Select a Customer (optional). All information for the customer, including pricing records, will be applied to the quote once chosen (see *Creating a Customer Record* on page 56 for more details).

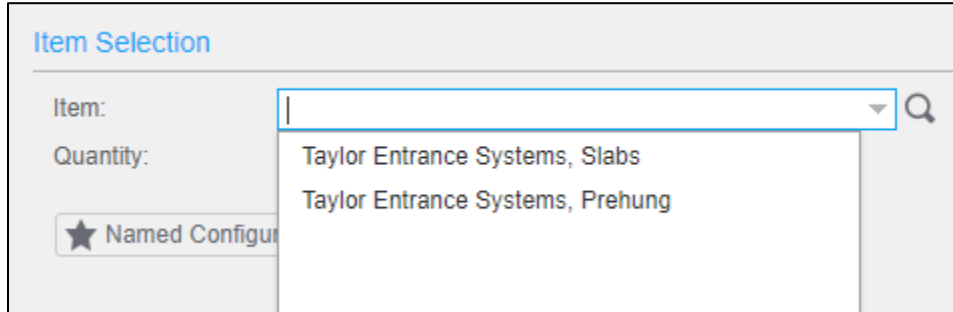


3. Apply Quote Name (optional). Tip: using a job name will make managing quotes easier.

Customer: General Door Supply
Quote Name: Epic Project

Building the Quote

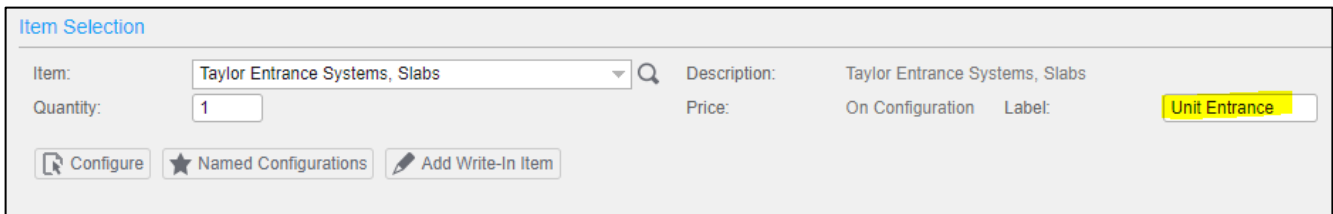
1. Select the item to be entered. (Slabs will be used in this example).



The screenshot shows the 'Item Selection' interface. On the left, there are labels for 'Item:' and 'Quantity:', and a button with a star icon labeled 'Named Configurations'. To the right, a dropdown menu is open, displaying two options: 'Taylor Entrance Systems, Slabs' and 'Taylor Entrance Systems, Prehung'. A search icon is visible to the right of the dropdown.

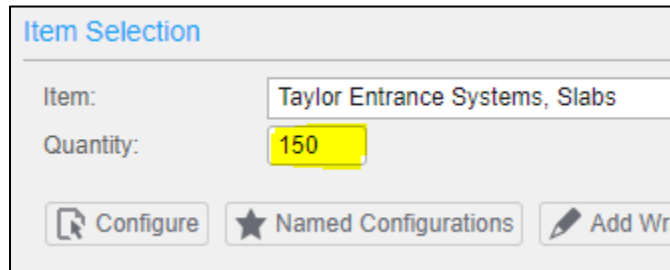
2. Apply Label for the line item (optional).

NOTE: The label will appear on all paperwork and on the product label when shipped. Using a label can make it easier to identify where a product belongs on a project.



The screenshot shows the complete 'Item Selection' form. The 'Item:' dropdown is set to 'Taylor Entrance Systems, Slabs'. The 'Quantity:' field contains the number '1'. To the right, the 'Description:' is 'Taylor Entrance Systems, Slabs', 'Price:' is 'On Configuration', and the 'Label:' field contains 'Unit Entrance' (highlighted in yellow). At the bottom, there are three buttons: 'Configure' (with a cursor icon), 'Named Configurations' (with a star icon), and 'Add Write-In Item' (with a pencil icon).

3. Set quantity required. The system will default to a quantity of 1.



The screenshot shows the 'Item Selection' form with the 'Quantity:' field set to '150' (highlighted in yellow). The 'Item:' dropdown remains 'Taylor Entrance Systems, Slabs'. The bottom buttons are 'Configure', 'Named Configurations', and 'Add Write-In Item'.

- Select "Configure" to begin selecting the details of your product.


Item Selection

Item:


Quantity:

- Each configuration includes a series of questions. The questions and available answers are filtered based on previous answers given, meaning that you should not receive options that are not available for your Configuration. Answer each question by selecting the answer images located immediately below the question.

Series *


 AH01 - 24 ga Smooth - Adj Hinge




 AH02 - 22 ga Smooth - Adj Hinge


 AH04 - 22 ga Stainable - Adj Hinge





 AH20 - 20 ga Smooth Steel (Westguard) - Adj Hinge

- After completing all questions on each tab, you will be prompted to select "Continue" to confirm the answers on the tab and move to the next.

Sweep retainer required?*

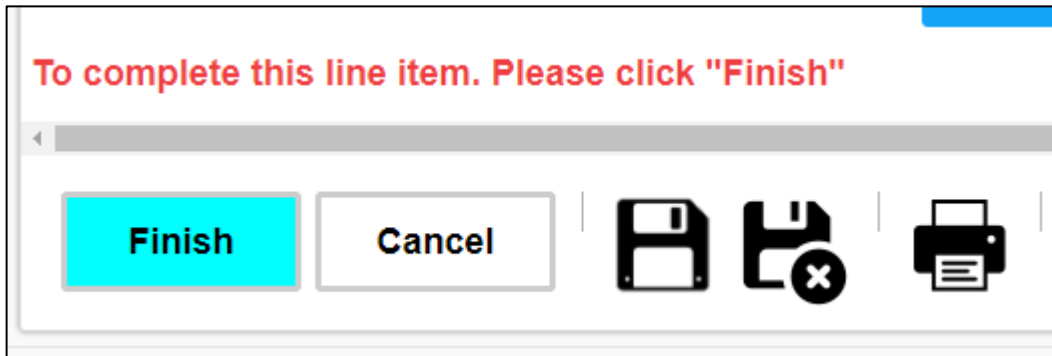



[Technical Resource Guide](#) i
 Please click Continue to proceed

Price: 221.00 USD

7. Upon completing all the questions for a complete configuration, you will be prompted to select "finish" to confirm all selections and complete the line.



Completing the Quote

Repeat previous steps for additional items needed on the quote.

Once all items have been entered, complete the quote by simply exiting the Configurator or navigating to another page. You do not need to save. See additional sections for pricing, printing, and e-mail options.

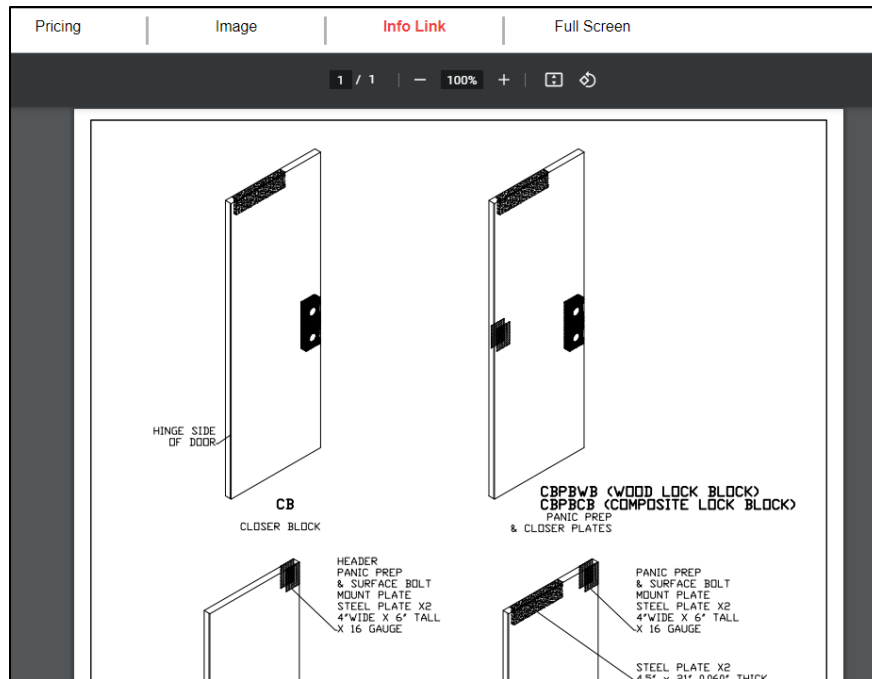
Information References

Infolink

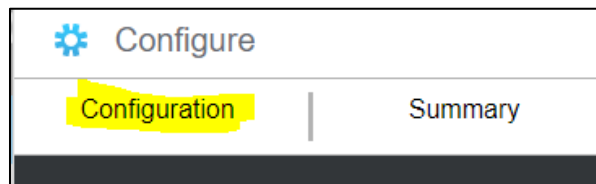
Infolinks are identified with the italicized "i" next to the selection.



Once you select the Infolink, additional information about the selection will show on your screen.



Return to your configuration details by clicking on "Configuration" in the top left corner.



Copying Lines or Quotes

Objective: Save time in quoting by copying lines, copying quotes, or creating multiple versions of a quote.

Copying Quote/Order Lines

When entering quotes or orders with multiple lines, it is possible to copy a line and make minor changes when the specifications are consistent from line to line.

1. Enter the first line of the quote.
2. To copy the first line to the second, select "Copy" in the line.

Quote Lines

☒ Validate All
 ☐ Expand All

Line	Label	Item
1	Unit Entrance	Taylor Entrance Systems, Slabs
Change Options Adjust Price		Copy More...
Taylor Entrance Systems, Slabs AN24S_3066_R00_6P_LTSP_P1_H Panel,3'-0" X6'-6",R00 1 - 1 x 2-1/4 L from the bottom,1/2" Peepsite Bore (

3. You will now have identical lines. You can make changes to the new line, including quantity or label. If line 2 requires changes in the details from the previous line, select "Change Options".

Quote Lines

☒ Validate All
 ☐ Expand All

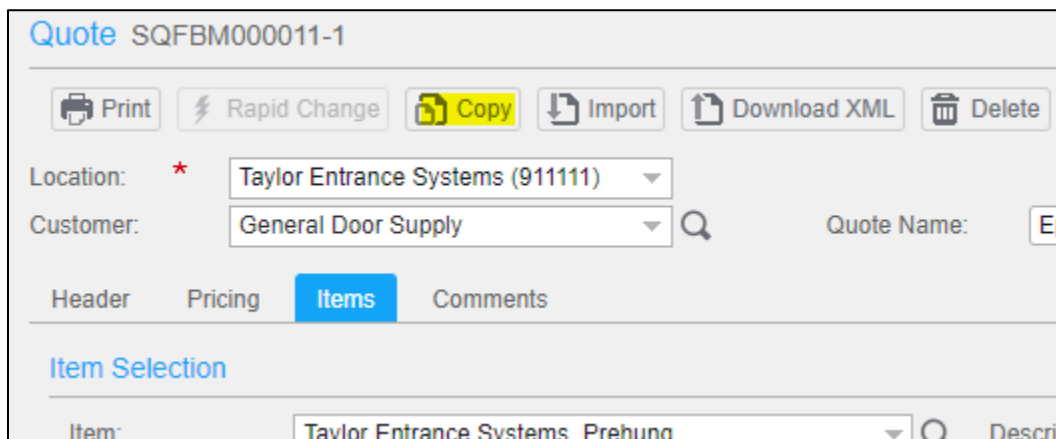
Line	Label	Item	Qty
1	Unit Entrance	Taylor Entrance Systems, Slabs	150
Change Options Adjust Price		Copy More...	Line Details
Taylor Entrance Systems, Slabs AN24S_3066_R00_6P_LTSP_P1_H AH01 - Smooth - Adj Hinge,24 Gauge Steel,6- Panel,3'-0" X6'-6",R00 1 - 1 x 2-1/4 Lock Prep,Special Lite Cutout (See Drawing), 57" Up from the bottom,1/2" Peepsite Bore (P1),Horizontal Packaging			
2	Unit Entrance	Taylor Entrance Systems, Slabs	150
Change Options Adjust Price		Copy More...	Line Details
Taylor Entrance Systems, Slabs AN24S_3066_R00_6P_LTSP_P1_H AH01 - Smooth - Adj Hinge,24 Gauge Steel,6- Panel,3'-0" X6'-6",R00 1 - 1 x 2-1/4 Lock Prep,Special Lite Cutout (See Drawing), 57" Up from the bottom,1/2" Peepsite Bore (P1),Horizontal Packaging			

4. Continue to copy as many times as needed or enter new lines if the specifications are not similar, until the quote is complete.

Copying a Quote/Order

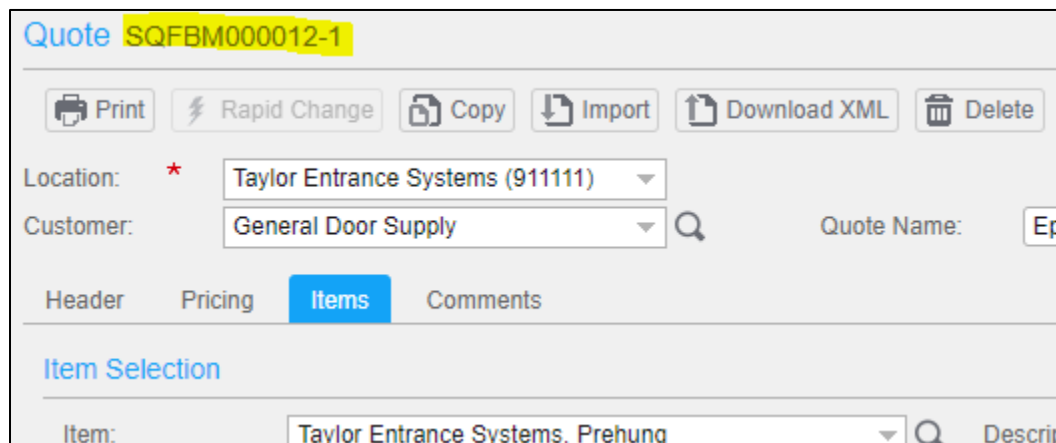
You can copy an existing quote or order to a new quote. This may be useful if you want to build another quote with the same or similar details as previous quote or order, or if you want to recreate the quote but with slightly different options.

1. Enter the first quote as desired or locate and open the existing quote/order that you want to copy.
2. Within the quote, select "Copy" from the ribbon.



The screenshot shows the 'Quote' window for SQFBM000011-1. The ribbon at the top contains buttons for Print, Rapid Change, Copy (highlighted in yellow), Import, Download XML, and Delete. Below the ribbon, the 'Location' is set to 'Taylor Entrance Systems (911111)' and the 'Customer' is 'General Door Supply'. The 'Items' tab is selected in the navigation bar. The 'Item Selection' section shows 'Taylor Entrance Systems. Prehung' selected in the 'Item' dropdown.

3. The Configurator will automatically create an identical quote and assign it a new quote number. The new number will be unique and does not correlate to the original quote.



The screenshot shows the 'Quote' window for a newly created quote, SQFBM000012-1, which is highlighted in yellow. The interface is identical to the previous screenshot, with the same 'Location', 'Customer', and 'Item' details. The 'Copy' button in the ribbon is no longer highlighted.



- Make necessary changes to the details of the quote including pricing, customer or quote name as needed.

Quote SQFBM000012-1

[Print](#)
[Rapid Change](#)
[Copy](#)
[Import](#)
[Download XML](#)
[Delete](#)
[Proofing Report](#)

Location: * Taylor Entrance Systems (911111)
 Customer: General Door Supply [Q](#) Quote Name: Epic Project Option 2

Header **Pricing** [Items](#) [Comments](#)

- Make necessary changes to each line by selecting "Change Options".

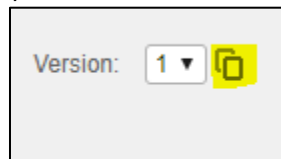
Quote Lines			
<input checked="" type="checkbox"/> Validate All <input type="checkbox"/> Expand All			
Line	Label	Item	Qty
1	Unit Entrance	Taylor Entrance Systems, Slabs	150
	Change Options Adjust Price	Copy More...	Line Details
	Taylor Entrance Systems, Slabs AN24S_3066_R00_6P_LTSP_P1_H AH01 - Smooth - Adj Hinge, 24 Gauge Steel, 6-Panel, 3'-0" X 6'-6", R00 1 - 1 x 2-1/4 Lock Prep, Special Lite Cutout (See Drawing), 57" Up from the bottom, 1/2" Peepsite Bore (P1), Horizontal Packaging		
2	Unit Entrance	Taylor Entrance Systems, Slabs	150
	Change Options Adjust Price	Copy More...	Line Details
	Taylor Entrance Systems, Slabs AN24S_3066_R00_6P_LTSP_P1_H AH01 - Smooth - Adj Hinge, 24 Gauge Steel, 6-Panel, 3'-0" X 6'-6", R00 1 - 1 x 2-1/4 Lock Prep, Special Lite Cutout (See Drawing), 57" Up from the bottom, 1/2" Peepsite Bore (P1), Horizontal Packaging		

- You now have 2 quotes that are similar but with changes as needed.

Creating Multiple Versions of a Quote

Another way to create multiple quotes with similar specifications is to create additional versions. The result is very similar to copying a quote but will result in quote numbers that correlate. This works well for offering multiple options for the same project.

1. Enter the first quote as desired or locate and open the existing quote for which you'd like to create a new version.
2. To the far right of the screen, select the icon to the right of the version number.

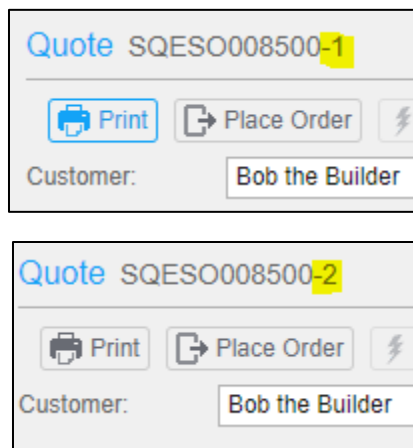


3. The Configurator will take you in to the newly created version of the quote.



4. The second version will retain the same quote number but will have a -2 suffix. You can create as many different versions as needed.

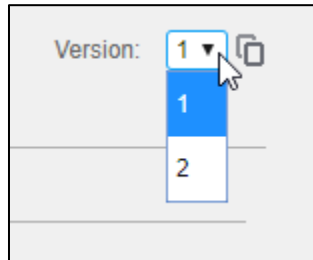
Examples of quote numbers with multiple versions.



5. Make all necessary changes the same as you would when copying a quote (see steps 4 and 5 in the previous section "Copying a Quote/Order").



6. Toggle between versions by selecting the drop down in the version box on the right of the screen.



7. When ready to order, select the version of the quote that you wish to order and follow the "Placing an Order" procedure.

Named Configurations

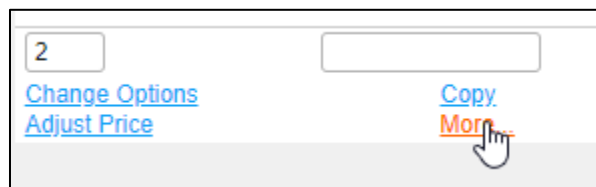
Objective: To save time in quoting by creating "Named Configurations", which allows you to easily repeat regularly ordered doors.

How Named Configurations Work

1. A Named Configuration is a way to quickly recreate a common set of specs without having to enter every option from the beginning.
2. Once a Named Configuration exists, it can be added to any quote/order with a few, simple clicks.
3. Once added to a new order, simple changes can be easily accomplished if necessary, for example, changing the hinge prep or adding a lite cut out.
4. Create as many Named Configurations as desired.

Creating a Named Configuration

1. Within a quote, enter a line to the specs desired for the Named Configuration.
2. Once the line is created, select "More..." in the Configurator line that is to be the Named Configuration.

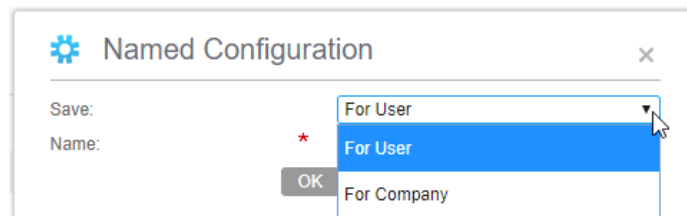


3. Select "Name Configuration".



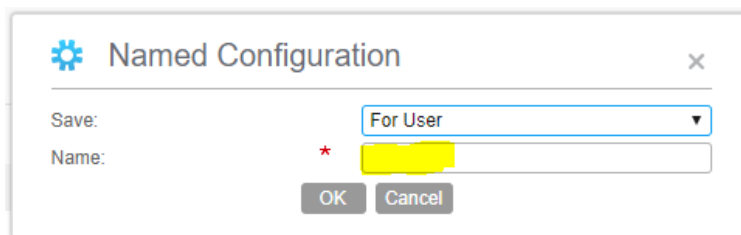
4. When prompted, select whether the Named Configuration will be available to the User or the Company.

Note: This will determine who can view and select the Named Configuration you're creating. If you choose Company or Location, others within your organization can also use the item you've created, however; it is easier to sort Named Configurations in your view if you make them For User. Either method is acceptable practice and is subject to user preference.



The screenshot shows a dialog box titled "Named Configuration" with a gear icon and a close button (X). It contains two labels: "Save:" and "Name:". The "Save:" label is followed by a dropdown menu that is currently open, showing two options: "For User" (highlighted in blue) and "For Company". A red asterisk is visible next to the "Name:" label. An "OK" button is located below the "Name:" label.

5. Enter the name of the Configuration. This field is free form and format is purely user preference. It is recommended to use a name that is short but clearly identifies the product it represents. i.e. 3/0 6-Panel Adj. Hinge

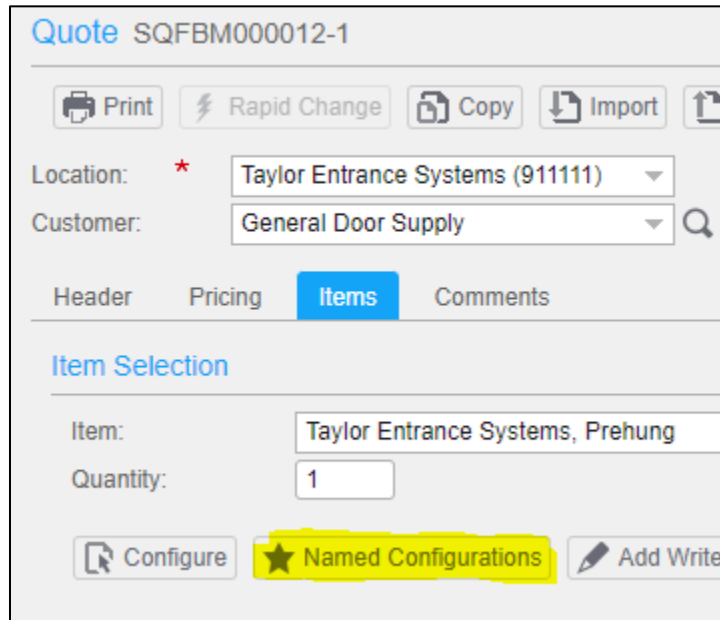


The screenshot shows the same "Named Configuration" dialog box. The "Save:" dropdown menu is now closed and shows "For User". The "Name:" label is followed by a text input field that is highlighted in yellow. A red asterisk is visible next to the "Name:" label. "OK" and "Cancel" buttons are located below the "Name:" label.

Using a Named Configuration

Now that a Named Configuration has been created, it can quickly and easily be added to any future quote.

1. In a new quote, select "Named Configurations".



Quote SQFBM000012-1

Location: * Taylor Entrance Systems (911111) ▼

Customer: General Door Supply ▼ 🔍

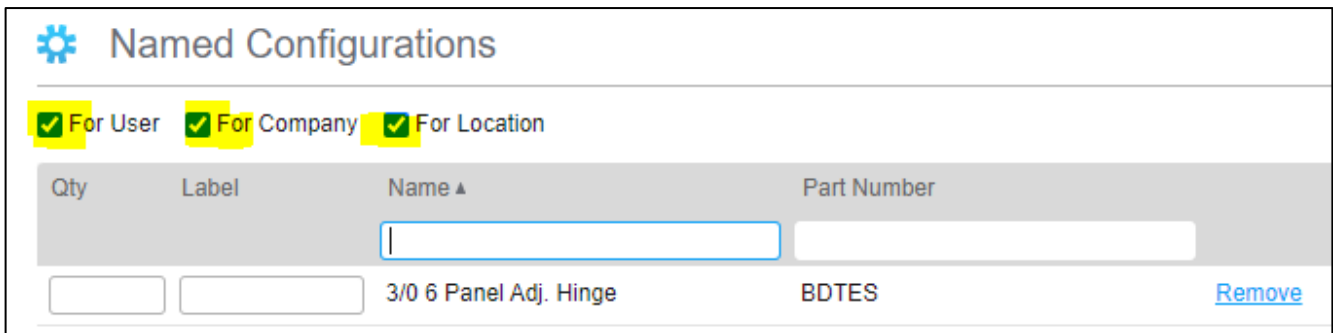
Header Pricing **Items** Comments

Item Selection

Item: Taylor Entrance Systems, Prehung

Quantity: 1

2. Locate the desired Named Configuration. You may check/uncheck the For User, For Company or For Location boxes to narrow the results available to you.




⚙️ Named Configurations

☒ For User
 ☒ For Company
 ☒ For Location

Qty	Label	Name ▲	Part Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
		3/0 6 Panel Adj. Hinge	BDTES	Remove


3. Enter the quantity of the item required.


Named Configurations

☒ For User
 ☒ For Company
 ☒ For Location

Qty	Label	Name ▲	Part Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	3/0 6 Panel Adj. Hinge	BDTES	Remove


4. If desired, enter a label for the quote line. (will show up on all paperwork and product label).


Named Configurations

☒ For User
 ☒ For Company
 ☒ For Location

Qty	Label	Name ▲	Part Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
<input type="text"/>	<input type="text"/>	3/0 6 Panel Adj. Hinge	BDTES	Remove

5. Select "Add" to include the Named Configuration in your quote.


Named Configurations
×

☒ For User
 ☒ For Company
 ☒ For Location

Qty	Label	Name ▲	Part Number	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
25	Stock	3/0 6 Panel Adj. Hinge	BDTES	Remove

Page 1 of 1
[Add](#)
[Close](#)

6. Select "Change Options" on the line and make changes (if necessary).



Setting Sell Price

Configurator produces a list price and will calculate your cost. There are two methods available to set margins or markups, additional discounts, tax, etc on the quote. These are only useful if you're ordering products as a direct pass through to the customer and not as a component in your bill of materials.

IMPORTANT NOTE: If you have not applied mark up/margin to your quote, it will reflect your cost when you print the quote as Selling Price. If you're providing a printed quote to your customer, you should ALWAYS set pricing through one of the methods offered or print the quote at MSRP/List Price to avoid exposing your cost.

Pricing at the Order Level

Adjusting price at the order level will affect all lines on the quote equally and allow changes to the bottom line details.

1. In the main screen of the quote select the Pricing tab.

The screenshot displays the 'Quote' interface for quote SQFBM000012-1. At the top, there is a toolbar with buttons for Print, Rapid Change, Copy, Import, Download XML, Delete, Proofing Report, and Attachments. Below this, the 'Location' is set to 'Taylor Entrance Systems (91111)' and the 'Customer' is 'General Door Supply'. The 'Quote Name' is 'Epic P'. The interface has three tabs: 'Header', 'Pricing' (which is highlighted in yellow), and 'Items'. Under the 'Pricing' tab, there is an 'Item Selection' section with a dropdown menu showing 'Taylor Entrance Systems, Prehung', a quantity of '1', and a description 'Taylor Entrance Systems, Pr'. Below this, there are buttons for 'Configure', 'Named Configurations', and 'Add Write-In Item'. At the bottom, there is a 'Quote Lines' section with buttons for 'Validate All' and 'Expand All'.



- If you've set Default Terms for your account or if you applied a Customer Record with Default Terms, they will automatically populate the pricing summary. If there are no default price records being used, the summary will only calculate cost.

Default Pricing In Use:

Header Pricing Items Comments				
Pricing Summary				
Discount by:	% Off List	Price by:	Markup %	Pricing Display Options: Discount & Markup
Price Adjustments				
Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			5,550.00	
Manufacturer's Discount (% Off List):	0 %	47 %	(2,608.50)	2,941.50
My Cost:			2,941.50	
My Upcharge (Markup %):	35 %	35 %	1,029.53	3,971.03
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	3,971.03
Quote Subtotal (List Price):			3,971.03	
Additional Discount (% Off List):	0 %	0 %	0.00	3,971.03
Adjusted Subtotal (Discounted):			3,971.03	
Tax:	8 %		317.68	4,288.71
Labor Tax:	0 %		0.00	4,288.71
Shipping and Handling:	0.00 USD		0.00	4,288.71
Other Charges (Specify):	0.00 USD		0.00	4,288.71
Total Amount - Final Customer Price in USD:				4,288.71

No Default Pricing In Use:

Header Pricing Items Comments				
Pricing Summary				
Discount by:	% Off List	Price by:	Markup %	Pricing Display Options: Discount & Markup
Price Adjustments				
Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			5,550.00	
Manufacturer's Discount (% Off List):	0 %	47 %	(2,608.50)	2,941.50
My Cost:			2,941.50	
My Upcharge (Markup %):	0 %	0 %	0.00	2,941.50
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	2,941.50
Quote Subtotal (List Price):			2,941.50	
Additional Discount (% Off List):	0 %	0 %	0.00	2,941.50
Adjusted Subtotal (Discounted):			2,941.50	
Tax:	0 %		0.00	2,941.50
Labor Tax:	0 %		0.00	2,941.50
Shipping and Handling:	0.00 USD		0.00	2,941.50
Other Charges (Specify):	0.00 USD		0.00	2,941.50
Total Amount - Final Customer Price in USD:				2,941.50

- You can decide how you want to set your pricing, whether it be margin, markup, etc. The method you use is determined by your personal preference.

Note: The cost multiplier will not populate until you have configured an item.

Pricing Summary

Discount by: Price by: Pricing Display Options:

Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			5,550.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(2,608.50)	2,941.50
My Cost:			2,941.50	
My Upcharge (Markup %):	<input type="text" value="0"/> %	0 %	0.00	2,941.50
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	2,941.50

- After selecting the preferred method, the Pricing Summary will adjust the options to reflect your preference.

My Cost:

My Upcharge (Margin %):

My Items Subtotal:

Write-In Items Subtotal:

- You can now populate all fields that you want to employ in your quote. Most common items are margin/markup and any applicable tax rate.

Pricing Summary

Discount by: Price by: Pricing Display Options:

Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			5,550.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(2,608.50)	2,941.50
My Cost:			2,941.50	
My Upcharge (Margin %):	<input type="text" value="25"/> %	25 %	980.50	3,922.00
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	3,922.00
Quote Subtotal (List Price):			3,922.00	
Additional Discount (% Off List):	<input type="text" value="0"/> %	0 %	0.00	3,922.00
Adjusted Subtotal (Discounted):			3,922.00	
Tax:	<input type="text" value="8"/> %		313.76	4,235.76
Labor Tax:	<input type="text" value="0"/> %		0.00	4,235.76
Shipping and Handling:	<input type="text" value="0.00"/> USD		0.00	4,235.76
Other Charges (Specify): <input type="text"/>	<input type="text" value="0.00"/> USD		0.00	4,235.76
Total Amount - Final Customer Price in USD:				4,235.76



6. Additional items that you may wish to use include Shipping and Handling or Other Charges. These items are optional and subject to personal preference.

Adjusted Subtotal (Discounted):		872.03	
Tax:	<input type="text" value="6"/> %	52.32	924.35
Labor Tax:	<input type="text" value="0"/> %	0.00	924.35
Shipping and Handling:	<input type="text" value="25.00"/> USD	25.00	949.35
Other Charges (Specify): Fuel Surcharge	<input type="text" value="5.00"/> USD	5.00	954.35
Total Amount - Final Customer Price in USD:			954.35

7. As you make your changes, you will see the complete breakdown calculation on the right side of the screen. In this case, the line will reflect a price of \$2941.50. The bottom of the quote will detail the \$313.76 for tax, \$25.00 for Shipping and Handling and the \$5.00 Fuel Surcharge for a bottom line total of \$4265.76.

Pricing Summary				
Discount by:	<input type="text" value="% Off List"/>	Price by:	<input type="text" value="Margin %"/>	Pricing Display Options: <input type="text" value="Discount & Markup"/>
				<input type="button" value="Price Adjustments"/>
Description	Header Level	Effective	Values of Interest	Totals
Items Subtotal (MSRP):			5,550.00	
Manufacturer's Discount (% Off List):	<input type="text" value="0"/> %	47 %	(2,608.50)	2,941.50
My Cost:			2,941.50	
My Upcharge (Margin %):	<input type="text" value="25"/> %	25 %	980.50	3,922.00
My Items Subtotal:			0.00	
Write-In Items Subtotal:			0.00	3,922.00
Quote Subtotal (List Price):			3,922.00	
Additional Discount (% Off List):	<input type="text" value="0"/> %	0 %	0.00	3,922.00
Adjusted Subtotal (Discounted):			3,922.00	
Tax:	<input type="text" value="8"/> %		313.76	4,235.76
Labor Tax:	<input type="text" value="0"/> %		0.00	4,235.76
Shipping and Handling:	<input type="text" value="25.00"/> USD		25.00	4,260.76
Other Charges (Specify): Fuel Surcharge	<input type="text" value="5.00"/> USD		5.00	4,265.76
Total Amount - Final Customer Price in USD:				4,265.76

8. See the section on Printing Quotes for options for how pricing items will appear on the quote.

Pricing at the Line Level

Adjusting price at the line level will affect only the line that you're changing and does not include bottom line details. Line level pricing will override the order level pricing based on the print function selected.

1. After creating a line, select the "Adjust Price" option on that line.

Quote Lines

☒ Validate All ☐ Expand All Total Price: 5,550.00

Line	Label	Item	Qty	UOM	Price	Total
1		Taylor Entrance Systems, Slabs	25		222.00	5,550.00

[Change Options](#) [Copy](#) [Adjust Price](#) [More...](#) [Line Details](#) [Remove](#)

Taylor Entrance Systems, Slabs
AN24S_2668_R46_4PBTNF_H AH01 - Smooth - Adj Hinge, 24 Gauge Steel, 4-Panel Blank Top (Narrow Format), 2'-6" X 6'-8", R46 2 - 1 x 2-1/4 LFB 2-1/8 DB 2-1/8 BS 2-3/4 CTC 4 Lock Prep, No Fire Label Applied(NO), Horizontal Packaging

2. Your discount from list and any order level pricing that is in place on the quote will be reflected in the Adjust Price window.

Adjust Price ×

	Header Values	Price Adjustments
Manufacturer's Discount (% Off List)	0 %	<input type="text" value="47"/> %
My Upcharge (Margin %)	25 %	<input type="text" value="25"/> %
Additional Discount	0 %	<input type="text" value="0"/> %

3. Make any additional adjustments that you wish to make only to the line. In this case, we will offer the customer an additional 5% off of this line only.

Adjust Price ×

	Header Values	Price Adjustments
Manufacturer's Discount (% Off List)	0 %	<input type="text" value="47"/> %
My Upcharge (Margin %)	25 %	<input type="text" value="25"/> %
Additional Discount	0 %	<input type="text" value="5"/> %

Expired Quotes

Why is my quote expired?

1. All quotes in the Configurator expire 30 days from when the quote was entered.
2. An expired quote can be copied to a new quote so the information is not lost.

Identifying an Expired Quote

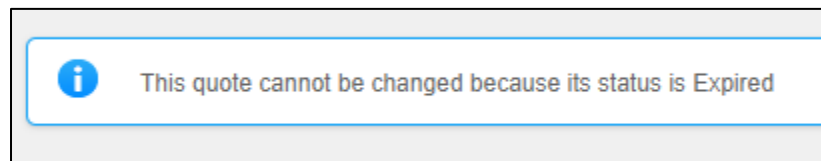
1. When a quote has expired, it will show a status of Expired in the Quote screen.

Customer	Name	PO#	ID	Last Modified by	Modified on	Status
			SQESO008343-1	Dealer, Test	5/8/2018	Expired

Status

Expired

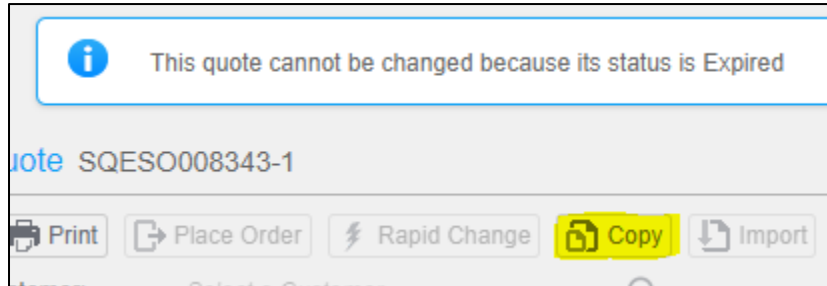
2. Once selected, there will also be a banner within the quote to indicate that the quote has expired.



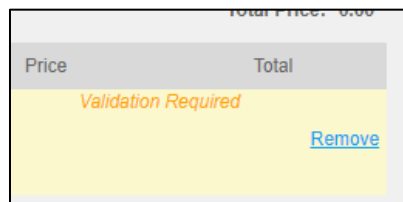
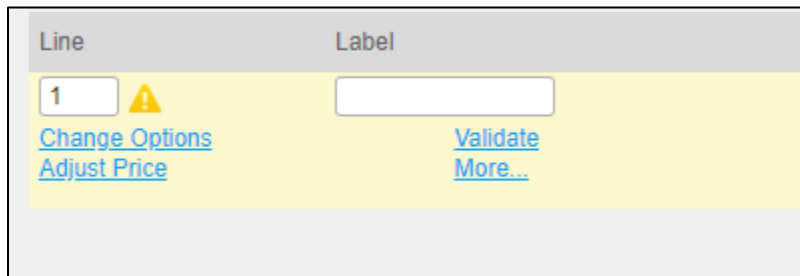
All options to place the order or change the details will be unavailable on an expired quote. You may still print the quote, however; it will indicate that it has expired and the pricing is not guaranteed to be accurate.

Recovering an Expired Quote

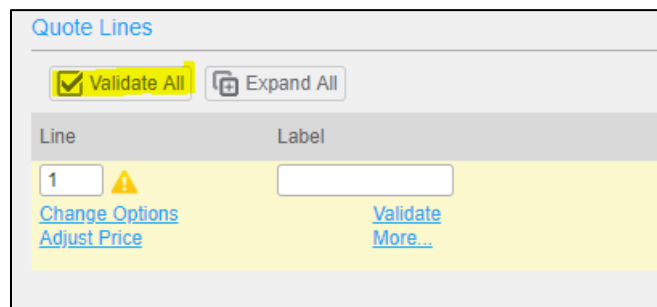
1. While in the expired quote, select "Copy".



2. After selecting Copy, you will notice that the lines will be highlighted and noted with a warning sign. The pricing will indicate "Validation Required".



3. Select "Validate All" to allow the system to rerun the options and calculate current price.



4. The copy will be given a new quote number and will be valid for 30 days from the date it was created.

View/Print/Share Quotes

Objective: View, print and/or share a quote with a customer.

View/Print/Share Quotes

1. While in a completed quote, select the "Print" button at the top right of the screen.

Quote SQESO008471-1

Print Place Order Rapid Change Copy

Customer: Bob the Builder

Header Pricing **Items** Comments

2. Make selections for how you want the quote to appear.

Print

Preview Print Close E-mail

Print Options

<p>Images</p> <p><input type="radio"/> Hide Additional</p> <p><input checked="" type="radio"/> Show Additional</p> <p>Image Size</p> <p><input type="radio"/> Small</p> <p><input type="radio"/> Medium</p> <p><input checked="" type="radio"/> Large</p> <p>Watermark</p> <p><input checked="" type="radio"/> None</p> <p><input type="radio"/> Always</p> <p><input type="radio"/> Always, Except Selling</p>	<p>Prices</p> <p><input type="radio"/> None</p> <p><input type="radio"/> Dealer Cost</p> <p><input checked="" type="radio"/> MSRP / List Pricing</p> <p><input type="radio"/> Selling (Line Level)</p> <p><input type="radio"/> Selling (Order Level)</p> <p><input type="radio"/> Selling (Totals Only)</p> <p><input type="radio"/> Selling (MSRP)</p> <p>Options</p> <p><input type="radio"/> None</p> <p><input checked="" type="radio"/> Summary</p> <p>Option Display</p> <p><input checked="" type="radio"/> RtfSummaryDetailFormat</p> <p><input type="radio"/> Paragraph, Captions and Values</p> <p><input type="radio"/> Paragraph, Values Only</p> <p><input type="radio"/> Tabular</p> <p>Sublines</p> <p><input type="radio"/> Hide Lines</p> <p><input checked="" type="radio"/> Show Lines</p>	<p>Sort By</p> <p><input checked="" type="radio"/> Line Number</p> <p><input type="radio"/> Label</p> <p>Order</p> <p><input checked="" type="radio"/> Ascending</p> <p><input type="radio"/> Descending</p> <p>Comments</p> <p><input type="checkbox"/> Header</p> <p><input type="checkbox"/> Terms (4 lines max)</p> <p><input type="checkbox"/> Pricing (4 lines max)</p> <p><input type="checkbox"/> Line</p> <p>Line Breaks</p> <p><input type="checkbox"/> Line Breaks</p>
--	--	---



3. While the selections are subject to user preference, it is particularly important to select the correct price option to ensure you are sharing the appropriate information.

IMPORTANT – Anytime there are no markup/margins set at any level, the quote will show dealer cost when selling price is selected. Always include a customer, order or line level price set up when providing a quote to a customer.

None – No pricing will appear on the quote.

Dealer Cost – Will show dealer cost.

MSRP – Will show full list price with no mark up or discount applied.

Selling (Line Level) – Will show dealer sell price, including all mark ups or discounts applied to the line. If nothing applied at the line level, it would use order level pricing. If no order level pricing applied, it will show customer record pricing.

Selling (Order Level) – Will show order level pricing. If no order level pricing applied, will show customer record pricing.

Selling (Totals Only) – Uses lowest level pricing and only shows order total (no individual line totals).

Selling (MSRP) – Uses full list price as basis and includes lowest level discount to arrive at a final sell price.

Prices

☐ None

☐ Dealer Cost

☒ MSRP / List Pricing

☐ Selling (Line Level)

☐ Selling (Order Level)

☐ Selling (Totals Only)

☐ Selling (MSRP)

4. If any Header, Terms, Pricing or Line notes were included on the quote, select the appropriate boxes to allow the notes to appear on the quote as desired.

Comments

☐ Header

☐ Terms (4 lines max)

☐ Pricing (4 lines max)

☐ Line

View Quote

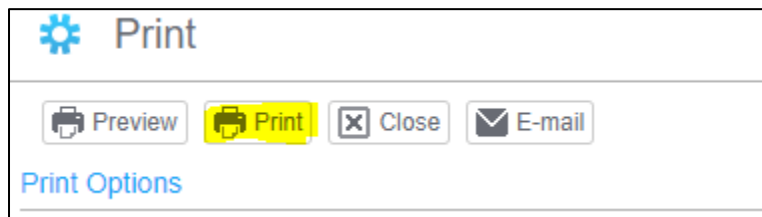
1. To view only, once the appropriate "Print Options" are selected, click on "Preview" to view the quote on PDF.



2. Once in PDF format, the quote can be saved in PDF for printing or e-mailing. Direct print and e-mail options to follow.

Print Quote

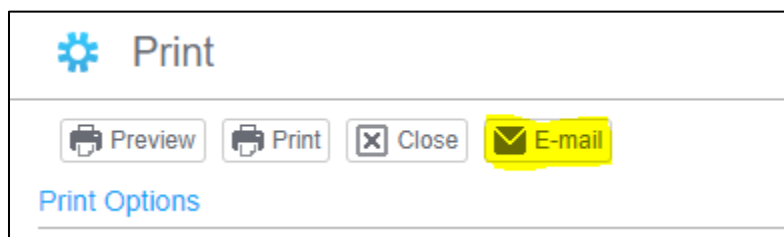
1. To send directly to a printer, once the appropriate "Print Options" are selected, click on "Print" to bring up printer options.



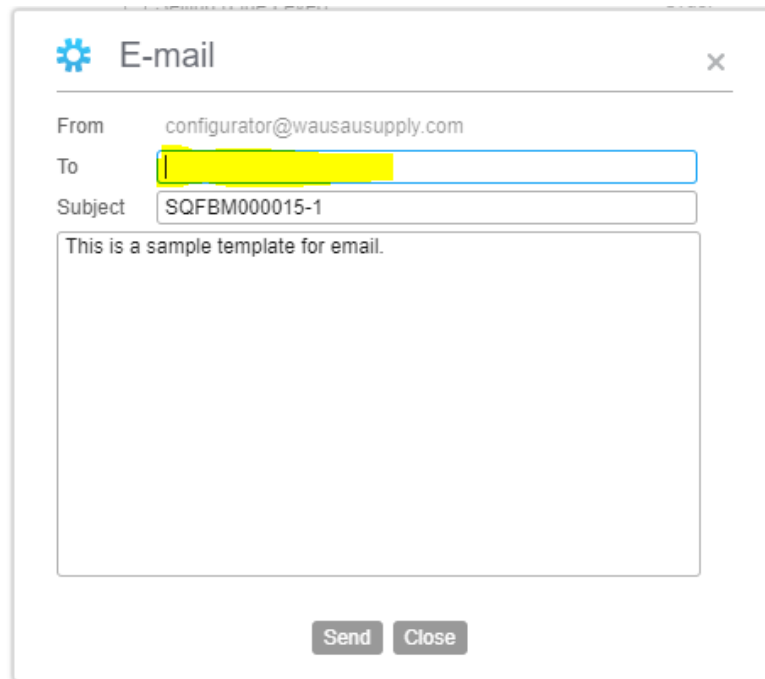
2. Depending on your system, this may take you directly to your printer or may go to PDF format. Check with your system administrator for details.

E-Mail Quote

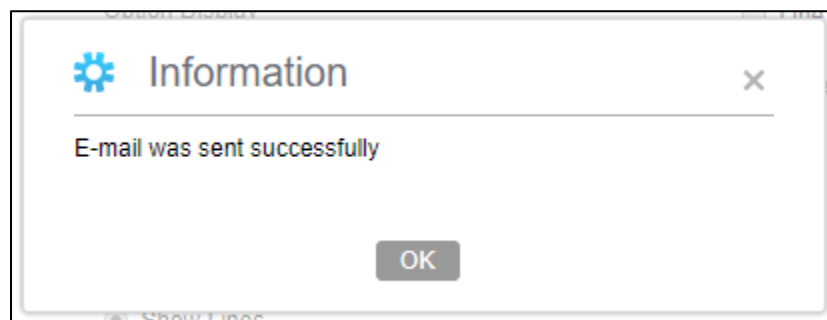
1. To e-mail directly from Configurator, once the appropriate "Print Options" are selected, click on "E-Mail".



2. Enter the e-mail address of the recipient.



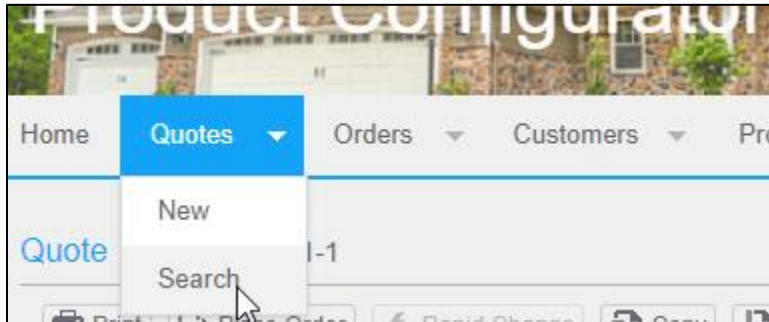
3. The return address defaults to configurator@wausausupply.com. It is recommended to send the quote to yourself and forward it to your customer or save as a PDF and attach it to a new e-mail message.
4. Subject line will default to the quote number, however; user can change this as desired.
5. User can also type a message to accompany the quote.
6. Once all items are ready, select "Send" to release the e-mail. A message will appear confirming that the e-mail was sent successfully.



Placing an Order

Existing Quote

1. From anywhere in the Configurator, hover over Quotes and select "Search".



2. Locate the quote you're looking for.

Quote Search

[New Quote](#)

Customer	Name	PO#	ID
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
			SQFBM000005-1
			SQFBM000009-1
General Door Supply			SQFBM000015-1

3. You may also use "Customer" or "Name" fields to narrow your search if you entered a customer record and/or quote name on the quote.

Quote Search

[New Quote](#)

Customer	Name	PO#	ID
Gener	Epi	<input type="text"/>	<input type="text"/>
General Door Supply	Epic Project		SQFBM000011-1
General Door Supply	Epic Project Option 2		SQFBM000012-1

4. Once you've located the quote to be ordered, double click on the quote to open it.

5. Once in the quote to be ordered, begin the process of placing the order by selecting "Place Order" at the top left of the page.

6. The *Place Order* box will open. At this time, you are required to enter a valid PO number for the order.

7. You may also enter notes to the right of the PO with any special instructions for the Customer Service Representative to review when confirming your order.

8. When ready, select "Place Order" to transmit your order to Taylor.

Ordering with No Existing Quote

1. If no quote exists for the items to be ordered, follow the steps on the section labelled "Entering a Quote" to build the items required.
2. After completing the quote, follow steps 5-8 above to place the order with Taylor.

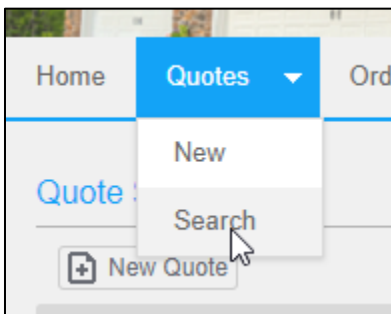
Managing Quotes/Orders

Objective: Manage existing quotes or orders.

Note: Including a customer and quote name makes managing quotes and orders much easier using the search function. While using a customer and/or quote name is not required, it is recommended.

Managing Quotes

1. Upon logging into the Configurator, you will be automatically directed to the Quote Search page. You can also navigate to this page from anywhere in the Configurator by hovering over or clicking on "Quotes" and selecting "Search".



2. You will see all quotes that have been entered for your company. Information includes the quote number, name of who last modified the quote, the date it was last modified and the status of the quote (Open, Ordered or Expired). If you selected a customer or included a Quote Name, this information will also appear.

Quote Search

New Quote

Customer	Name	PO#	ID	Last Modified by	Modified on	Status ▲
<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>	<div></div>
			SQFBM000003-1	User, Admin	10/10/2018	Expired
			SQFBM000005-1		3/13/2019	Expired
General Door Supply	Epic Project		SQFBM000011-1	Test, Dealer	10/27/2021	Open
			SQFBM000008-1	Test, Dealer	8/12/2021	Expired
			SQFBM000009-1	Test, Dealer	10/27/2021	Open
General Door Supply			SQFBM000015-1	Test, Dealer	10/27/2021	Open
			SQFBM000002-1	User, Admin	3/1/2017	Expired
			SQFBM000004-1		3/13/2019	Expired
			SQFBM000010-1	Test, Dealer	10/27/2021	Open
			SQFBM000007-1	Test, Dealer	10/8/2020	Expired
			SQFBM000006-1		5/23/2019	Expired
General Door Supply	Epic Project Option 2		SQFBM000012-1	Test, Dealer	10/27/2021	Open

Page 1 of 1

Viewing 1 - 12 of 12

3. To open an existing quote, double click on the row containing the quote you wish to open.
4. To simplify the process of locating a specific quote, you can search by the customer, quote name or quote ID.
5. To search by customer, type in the customer name, or first few letters of the customer name.

Quote Search

[New Quote](#)

Customer	Name	PO#	ID	Last Modified by	Modified on	Status ▲
General						
General Door Supply	Epic Project		SQFBM000011-1	Test, Dealer	10/27/2021	Open
General Door Supply	Epic Project Option 2		SQFBM000012-1	Test, Dealer	10/27/2021	Open
General Door Supply			SQFBM000015-1	Test, Dealer	10/27/2021	Open

Page 1 of 1 Viewing 1 - 3 of 3

6. To search by quote name, type in the name or the first few letters of the quote name and press enter.

Quote Search

[New Quote](#)

Customer	Name	PO#	ID	Last Modified by	Modified on	Status ▲
	Epic					
General Door Supply	Epic Project		SQFBM000011-1	Test, Dealer	10/27/2021	Open
General Door Supply	Epic Project Option 2		SQFBM000012-1	Test, Dealer	10/27/2021	Open

Page 1 of 1 Viewing 1 - 2 of 2

7. To search by quote ID, type in the alphanumeric quote ID and press enter.

Quote Search

[New Quote](#)

Customer	Name	PO#	ID	Last Modified by	Modified on	Status ▲
			SQFBM000011			
General Door Supply	Epic Project		SQFBM000011-1	Test, Dealer	10/27/2021	Open

Page 1 of 1 Viewing 1 - 1 of 1

8. The status of the quote will be Open, Ordered or Expired. Quotes remain in the open period for 30 days after entering. If the quote you wish to access is Expired, see the section on Expired Quotes to copy to a new quote.

If the quote has been placed as an order, it is still available to view.

9. If a quote is no longer needed and you wish to delete it, you can do so by opening the quote and selecting delete in the ribbon.

Home
Quotes
Orders
Customers
Projects
My Items
Account Inf

Quote SQFBM000011-1

Print
Place Order
Rapid Change
Copy
Import
Download XML
Delete

Location: * Taylor Entrance Systems (911111)
Customer: General Door Supply
Quote Name: Epic Project

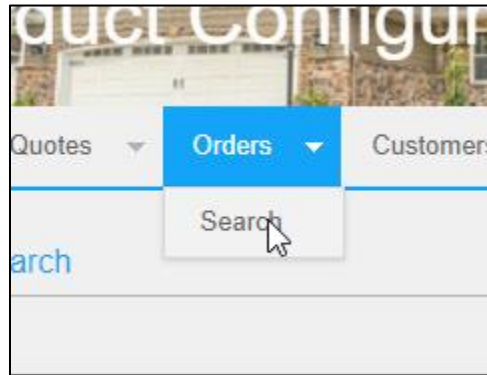
Header
Pricing
Items
Comments

Item Selection

Item: Taylor Entrance Systems, Prehung
Quantity: 1
Description: Taylor
Price: On Co

Managing Orders

1. Navigate to the "Order Search" page by hovering over or clicking on "Orders" in the ribbon and selecting "Search".



2. You will see all orders that have been submitted as an order. Information includes the PO number provided with the order, Configurator order number, name of who submitted the order, and the date it was submitted. If you selected a customer or included a Quote Name, this information will also appear.
3. You can select an order by clicking on the row it is in. This will allow you to view, print or e-mail a copy of the order. You will not be allowed to make changes in the Configurator once the order is placed.

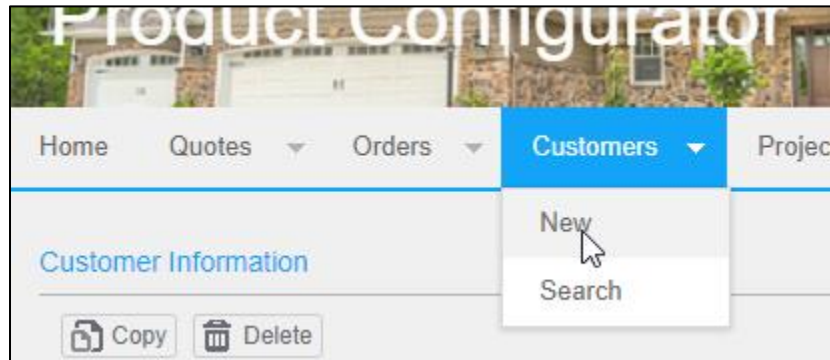
Creating a Customer Record

Objective: Create a customer record to be applied to quotes.

Notes: A customer record can include pricing records for consistent quoting and can be used to manage quotes for that customer. Although use of customer records is not required, they are recommended for ease of use. Using customer record also makes a quote more detailed and personal when provided to the customer.

New Customer

1. Within the Configurator, navigate to the Customer tab and select "New".



2. Fill blanks with information about the customer. Only a name is required, however; the more information entered the more complete a quote will be once entered

Customer ID:	CTFBM000001	Status:	* Active
Name:	* General Door Supply	Type:	
Address 1:	123 Main Street	Phone 1:	123-456-1234
Address 2:		Phone 2:	
Address 3:		Fax:	
City:	Anywhere	Default Contact:	
State:	Montana	Default Ship-to Address:	
Zip:	12345	Enabled in All Locations:	<input type="checkbox"/>
Country:	United States		

Ship-To Addresses

If the customer has more than one address, create additional ship-to addresses within the customer record.

1. Select the "Ship-to Addresses" tab within the customer record and click on "New Ship-to Address".

The screenshot shows a web interface with three tabs: "Ship-to Addresses" (selected), "Default Terms", and "Contacts". Below the tabs is a "Ship-to Address Search" section. A yellow box highlights a button with a plus icon and the text "New Ship-to Address". Below this is a table with three columns: "Name", "Address", and "City". The table has one row with empty input fields. To the left of the table is a magnifying glass icon and a refresh icon.

2. Complete as much information as desired for the additional ship-to record.

The screenshot shows a "Ship-to Address" form. It has a title bar with a gear icon and a close button. The form contains the following fields:

- Active: ☒
- Name:
- Address 1:
- Address 2:
- Address 3:
- City:
- State:
- Zip:
- Country:

At the bottom are "OK" and "Close" buttons.

3. Repeat for as many ship-to addresses as required.

Creating Default Terms for a Customer

1. Select the "Default Terms" tab within the customer record.

Ship-to Addresses
Default Terms
Contacts

2. Determine if you will price by markup, margin, or multiplier to achieve the customer's purchase price. Make the selection prior to setting the percent of markup, margin, or multiplier for best results.

Pricing Terms

Discount by: % Off List

Price by:

Markup %

Markup %

Margin %

Multiplier

Multiplier %

Business Terms

Additional Discount (% Off List): 0 %

Tax: 5.5 %

Labor Tax: 0 %

Upcharge (Markup %): 49.25 %

Payment Method:

Payment Terms:

Comments:

[Shipping Terms](#)

3. Apply as much term information as desired. The more that is included, the more complete the quote will be when the customer is used. Pricing will be applied to any quote the customer record is applied to.

Business Terms

Additional Discount (% Off List): 0 %

Tax: 5.5 %

Labor Tax: 0 %

Upcharge (Margin %): 25 %

Payment Method: On Account

Payment Terms: Net 10

Comments:

Creating Contacts for a Customer

Additional contacts can be created for each customer record.

4. Select the "Contacts" tab within the customer record and select "New Contact".

The screenshot shows a web application interface with three tabs: 'Ship-to Addresses', 'Default Terms', and 'Contacts'. The 'Contacts' tab is active. Below the tabs is a 'Contact Search' section with a 'New Contact' button highlighted in yellow. Underneath are four input fields labeled 'Name', 'E-mail', 'Phone', and 'Mobile'. At the bottom right, a pagination bar shows 'Page 1 of 1'.

5. Complete as much contact information as desired. Select "OK" when completed.

The screenshot shows a 'Contact' modal window. It has a title bar with a gear icon and a close button. The form contains the following fields and values:

- Contact ID: NEW
- Customer ID: CTFBM000001
- Customer Name: General Door Supply
- First Name: (empty field with a red asterisk)
- Last Name: (empty field with a red asterisk)
- E-mail: (empty field)
- Phone: (empty field)
- Mobile: (empty field)
- Fax: (empty field)
- Comments: (empty text area)

At the bottom are 'OK' and 'Close' buttons.

6. Repeat for additional contacts as desired/necessary.