

FeneTech, Inc.

FeneVision[®] Web User Manual



FeneVision® Web User Manual

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Overview

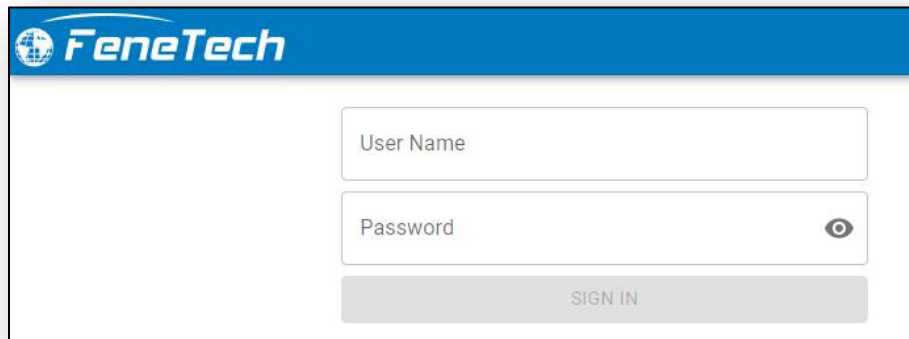
FeneVision Web is a completely integrated add-on module to FeneVision Core that allows user-friendly web order entry for Dealers and Contractors. Additionally, FeneVision Web users have the advantage of utilizing Dealer information tools, such as order status, order history, and delivery status. No additional configuration is required, and users can access the module from a link on an existing website, which is login and password protected.

Using Web

Once Dealers have been created, they will be able to enter quotes, upload quotes to the Manufacturer, track the status of open orders, and view their own order and purchase history. This section will outline and describe the steps to complete these functions.

Starting

1. Enter the FeneVision Web URL into the address toolbar of a browser window.
2. A login screen, similar to the one below, will be displayed.



The image shows a login interface for FeneTech. At the top, there is a blue header with the FeneTech logo. Below the header, there are two input fields: 'User Name' and 'Password'. The 'Password' field has a small eye icon to its right, indicating a toggle for password visibility. Below the input fields is a grey button labeled 'SIGN IN'.

3. Enter the assigned user name and password. The user may also check 'Remember Me'. This will place a cookie on the user's machine that remembers their login information, so they will not be forced to log into Web again.
4. Select 'Sign In'.

Dashboard

The 'Dashboard' dialog serves as the home page for FeneVision Web. This page provides an outline of the functions available to users. When utilizing 'Contractor Mode', the Dashboard designed for Dealers will differ slightly than the dashboard available to Contractors.

The image below represents a dashboard for a FeneVision Web user at the Dealer level.

Orders

Order	PO Number	Customer Ref	Total	Est Delivery Date	Status
413			\$1,741.37		In Process
411			\$16,191.16		Shipped
410			\$3,238.23		In Process
409			\$26,377,200.00		In Process
408			\$809.56		In Process
407			\$945.40		Received
406			\$809.56		Shipped
405			\$612.05		Received
404			\$2,814.27		In Process
403			\$647.19		Received

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Company Quotes

Quote	Customer	Date	PO Number	Customer Ref	Total	Expires
103	{ABC Windows}	10/21/2022			\$7,625.30	11/20/2022

Open Orders

The 'Open Orders' section of the Dashboard (Dealer level) shows *all orders* pending at the Manufacturer:

Orders

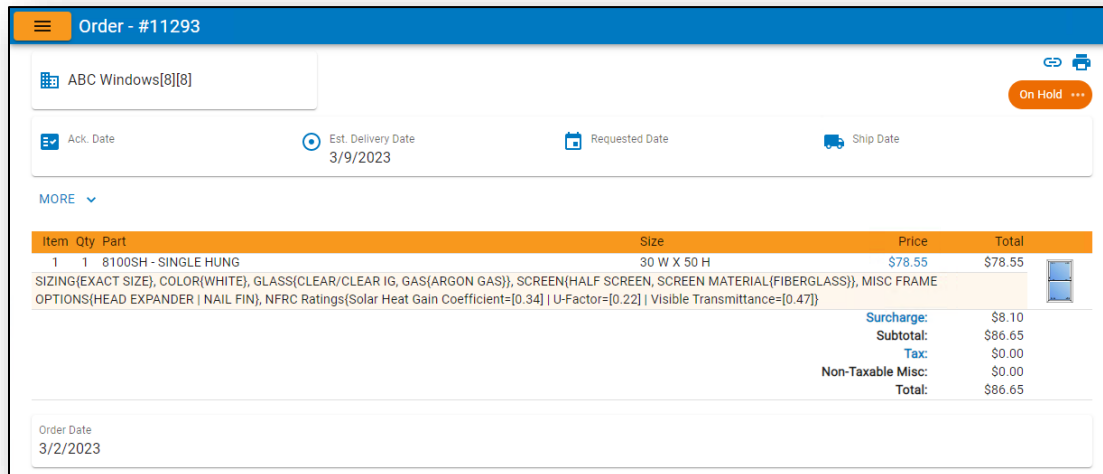
Order	PO Number	Customer Ref	Total	Est Delivery Date	Status
415			\$4,047.79		Shipped
414			\$776.40		Received
413			\$1,741.37		In Process
411			\$16,191.16		Shipped
410			\$3,238.23		In Process
409			\$26,377,200.00		In Process
408			\$809.56		In Process
407			\$945.40		Received
406			\$809.56		Shipped
405			\$612.05		Received

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The 'Orders' section displays open orders in FeneVision Core. The orders displayed have been uploaded from Web, Remote Order Entry, or originated in Core.

- **Order** – Order number assigned in Core. Selecting on the order number link will display the 'Order Status' page for the order.

- **PO Number** – Purchase order number for the order.
- **Customer Ref.** – Contractor job reference for the order.
- **Total** – Total cost to the Dealer including taxes and surcharges.
- **Est. Delivery Date** – Estimated date the order will be delivered to the customer. This column supports sorting to sequence the visible orders by the Estimated Delivery Date. This column header label is defaulted as ‘Est. Delivery Date’; however, the text can be customized by using a parameter. Contact FeneTech for additional information regarding this parameter.
- **Status** – Current status of the order in Core. Orders can have the following statuses:
 - **Received** – The order was received by the Manufacturer.
 - **On Hold** – The order has been placed ‘On Hold’. The image below illustrates the ‘Header Information’ of the ‘Order Status’ page of order 414 that has been placed ‘On Hold’:



- **In Process** – The order was acknowledged by the Manufacturer.
- **Shipped** – The order was shipped.
- **Partially Shipped** – The order was partially shipped.
- **Mfg Customer** – Manufacturer’s name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

If RMA (Return Merchandise Authorization) is enabled, ‘Pickups’ and ‘RMAs’ will become available in the order type drop down on the dashboard. By selecting these options, the top grid will update to show available items of the selected type with similar information as shown above for the ‘Open Orders’.

Quotes

The ‘Quotes’ section of the ‘Dashboard’ (bottom portion) lists all non-expired quotes currently pending in Web entered by the both the Dealer and Contractors. These quotes have not been uploaded to the Manufacturer.

When the Dealer is logged in, the quotes screen will show both Dealer quotes and Contractor quotes as shown below. Select the ‘Company Quotes’ from the quote type drop down to view ‘Company Quotes’. The image below illustrates the Dealer’s view of the ‘Company Quotes’ tab.

Company Quotes

Quote	Customer	Date	PO Number	Customer Ref	Total	Expires
114	{ABC Windows}	11/2/2022			\$226.65	12/2/2022
113	{ABC Windows}	11/2/2022			\$731.29	12/2/2022
112	{ABC Windows}	11/2/2022			\$1,931.70	12/2/2022
111	{ABC Windows}	11/2/2022			\$3,902.63	12/2/2022
110	{ABC Windows}	11/2/2022			\$226.65	12/2/2022
109	{ABC Windows}	11/2/2022			\$731.29	12/2/2022
103	{ABC Windows}	10/21/2022			\$7,625.30	11/20/2022

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The Dealer can also view Contractor’s quotes by selecting ‘Customer Quotes’ from the quote type drop down. When the Contractor is logged in, the quotes screen will show only those quotes that have been entered by Contractors. The image below illustrates the Dealer viewing ‘Customer Quotes’.

Customer Quotes

Quote	Customer	Date	PO Number	Customer Ref	Total	Submitted	Status	Expires
107	Contractor	11/2/2022			\$34,042.24	✓	Available	12/2/2022
106	Contractor	11/2/2022			\$139,160.10	✓	Available	12/2/2022
108	{Contractor}	11/2/2022			\$1,231.85		Available	12/2/2022

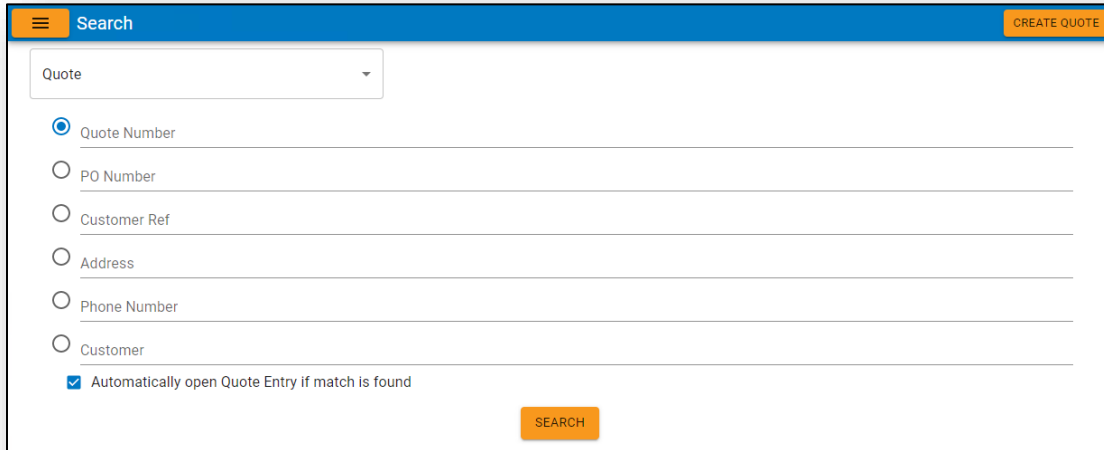
Rows Per Page 10 1 - 3 of 3

The ‘Quotes List’ displays the following information for a pending quote:

- **Quote** – Quote number. Selecting the quote number will display the ‘Quote Entry’ page for the quote.
- **Customer** – Contractor’s name.
- **Date** – Date the quote was entered.
- **PO Number** – Purchase order number for the quote.
- **Customer Ref** – Contractor job reference for the quote.
- **Total** – Total currency amount for the quote including taxes and surcharges.
- **Submitted** – Checkbox indicating that the customer quote has been submitted to the dealer.
- **Status** – Current status of the customer quote.
- **Expires** – Date the quote must turn into an order to preserve the pricing given at the time the quote was entered. The Manufacturer controls the number of days that quotes can exist before they expire through a setting in the FeneVision Web Admin site.
- **Mfg Customer** – Manufacturer’s name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

Search

The 'Search' dialog provides the user with search fields for both quotes and orders.



Select 'Quotes' or 'Orders' from the order type drop down. Fill in one of the following fields to search for either a quote or an order.

- **Quote Number / Order Number** – Identifier of the quote or the order. A quote is an order that has yet to be uploaded to the manufacturer ('Quotes' tab only). An order is a quote that has been uploaded to the Manufacturer from Web or an order entered by the Manufacturer.
- **PO Number** – Purchase order number
- **Customer Ref.** – Contractor job reference for an order or quote.
- **Address** – Contractor Address
- **Phone Number** – Contractor phone number.
- **Customer** – Contractor name ('Quotes' tab only).
- **Automatically open Quote Entry if match is found** – Check to immediately see the 'Quote Entry' screen if a match is found.

The Dealer's Experience

The following screens will help Contractors differentiate Dealer quotes from Contractor quotes.

The 'Company Quotes' grid lists all quotes for the Dealer. Below is an example of 'Company Quotes'. Note that there can be several distinct Contractors listed in the 'Company Quotes' grid.

Company Quotes						
Quote	Customer	Date	PO Number	Customer Ref	Total	Expires
114	{ABC Windows}	11/2/2022			\$226.65	12/2/2022
113	{ABC Windows}	11/2/2022			\$731.29	12/2/2022
112	{ABC Windows}	11/2/2022			\$1,931.70	12/2/2022
111	{ABC Windows}	11/2/2022			\$3,902.63	12/2/2022
110	{ABC Windows}	11/2/2022			\$226.65	12/2/2022
109	{ABC Windows}	11/2/2022			\$731.29	12/2/2022
103	{ABC Windows}	10/21/2022			\$7,625.30	11/20/2022

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Note: If a customer is showing in red, it indicates that the customer has been marked inactive in Web Customer Setup.



'Customer Quotes' are quotes listed by Contractor. The image below reflects a Contractor's use of FeneVision Web to enter his own quote. In order for this to happen, this Contractor must have been given permission by the Dealer. Only that Contractor's quotes are visible in this screen—no other Contractor quotes are visible, nor are any Dealer quotes visible.

Customer Quotes								
Quote	Customer	Date	PO Number	Customer Ref	Total	Submitted	Status	Expires
107	Contractor	11/2/2022			\$34,042.24	✓	Available	12/2/2022
106	Contractor	11/2/2022			\$139,160.10	✓	Available	12/2/2022
108	{Contractor}	11/2/2022			\$1,231.85		Available	12/2/2022

Rows Per Page 10 1 - 3 of 3

Permissions

Two permissions directly affect the ability of Dealers to view or edit Contractor-created quotes. These are 'View Quotes (Company)' and 'View Quotes (Customer)' permissions. Note that administrator Dealer users have both these permissions set automatically.

PERMISSIONS	VIEW QUOTES (CUSTOMER) CHECKED 	VIEW QUOTES (CUSTOMER) NOT CHECKED
VIEW QUOTES (COMPANY) CHECKED 	User can see all quotes and orders (including those entered in FeneVision® WEB or FeneVision® CORE)	User can view all quotes and orders created by Dealers.
VIEW QUOTES (COMPANY) NOT CHECKED	User can view <i>all</i> quotes and orders he/she has personally entered, or for which he/she is represented as the salesperson on the quote.	User can view <i>Dealer</i> quotes and orders he/she has personally entered, or for which he/she is represented as the salesperson on the quote.

User Setup

Dealers can create administrator logins for their Contractors. To view, create, edit, or delete Contractor logins, select the appropriate Contractor in the drop-down next to the 'Add User' button.

Customer Setup

When a Customer is selected from the list on the left side of the screen, a 'Customer Logins' button becomes visible. When this button is selected, it redirects the user to 'User Setup' and chooses the selected Customer in the drop-down filter (so the Dealer can create Contractor logins).

Customer Quotes

The 'Customer Quotes' section lists all non-expired quotes currently pending in FeneVision Web that have been entered by the Contractor. The Contractor quotes appear in this tab until either the Dealer uploads the quote to the Manufacturer, or the quote is deleted or expired.

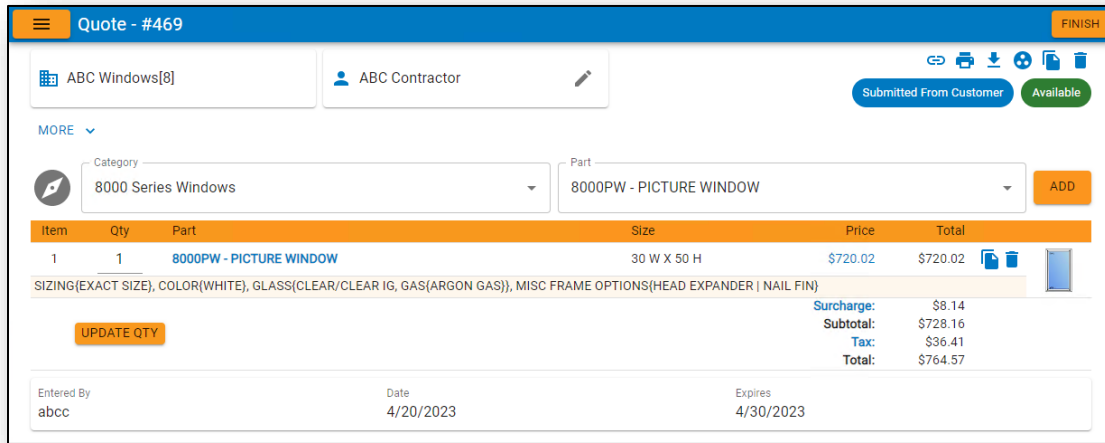
When the Dealer is logged in, the quotes screen will show *both* Dealer quotes and Contractor quotes as shown in the 'Company Quotes' section. When the Contractor is logged in, only Contractor quotes will be visible.

The 'Quotes List' displays the following information for a pending quote:

- **Quote** – Quote number. Selecting the quote number link will display the 'Quote Entry' page for the quote.
- **Customer** – Contractor.
- **Date** – Date the quote was entered.
- **PO Number** – PO number for the quote.
- **Customer Ref** – Contractor job reference for the quote.
- **Total** – Total currency amount for the quote including taxes and surcharges.
- **Submitted** – Checkmark indicating the quote has been submitted to the dealer.
- **Status** – Quote status.
- **Expires** – Date the quote must convert to an order so that the pricing given at the time the quote was entered is preserved. The Manufacturer controls the number of days that quotes can exist before they expire through a setting in the FeneVision Web Admin site.
- **Mfg Customer** – Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

All columns can be sorted by clicking on the column header.

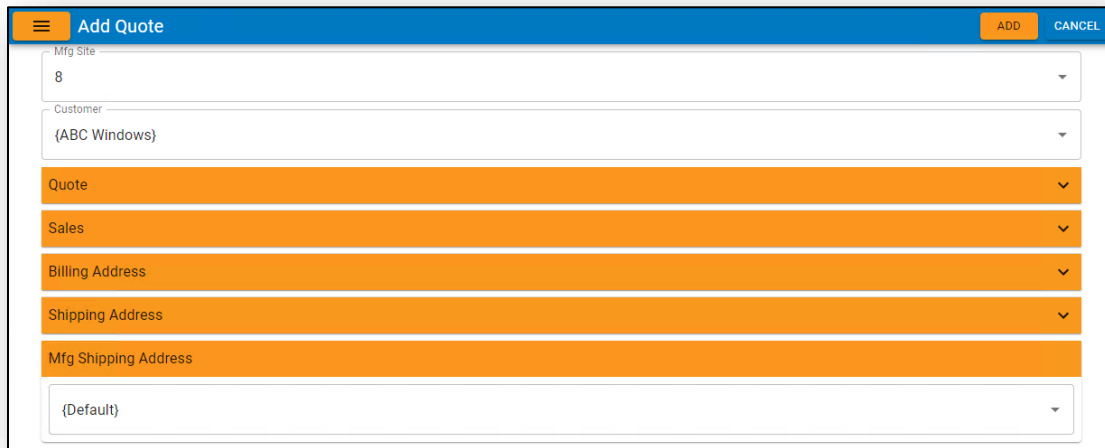
If the Dealer opens a Contractor quote by selecting the 'Customer Quote' tab and selecting the quote number link, the phrase 'Submitted From Customer' will be visible in red in the upper right-hand corner of the 'Quote Entry' screen.



Add Quote

Users logged in as Dealers can enter quotes for Contractors via the 'Add Quote' screen. To add a quote, select the 'Create Quote' button on the Dashboard or within Quote Maintenance. If required, select the user's site from the 'Mfg Site' dropdown. In the 'Customer' drop-down, select the Contractor for whom the quote is intended.

The 'Add Quote' screen is broken up into four sections as seen below. Each section can be viewed by selecting the header to expand each section.



- **Mfg Customer** – Manufacturer's name and site. This drop down is only visible to users assigned to multiple manufacturing sites for a single customer.
- **Customer** – Web customer (Contractor) assigned to the quote.

Note: If there are no existing customers setup, a quick quote customer will be created with the default settings from Web Admin. This customer will be dealer's name in {}. The pricing method for this quick customer defaults to Discount From List. However, that can change with a WEB parameter. See the WEB Admin user manual for additional information regarding this parameter.

- **Quote**

- **Measurement Type** – Imperial or Metric.
- **Status** – Status of the quote. The two status values to choose from are ‘Available’ and ‘On Hold’. Users can determine the default status in ‘Setup’ >> ‘Company’ >> ‘Settings’ >> ‘Default Quote Status’.
- **PO Number** – Purchase order number for this quote, not the Manufacturer’s PO Number.
- **Customer Ref** – Contractor job reference for this quote, not the Dealer’s Ref.
- **Quote Contact** – Person to contact regarding the quote.
- **Quote Comment** – Any comments regarding the quote.
- **Notes** – Any notes regarding the quote.

- **Sales**

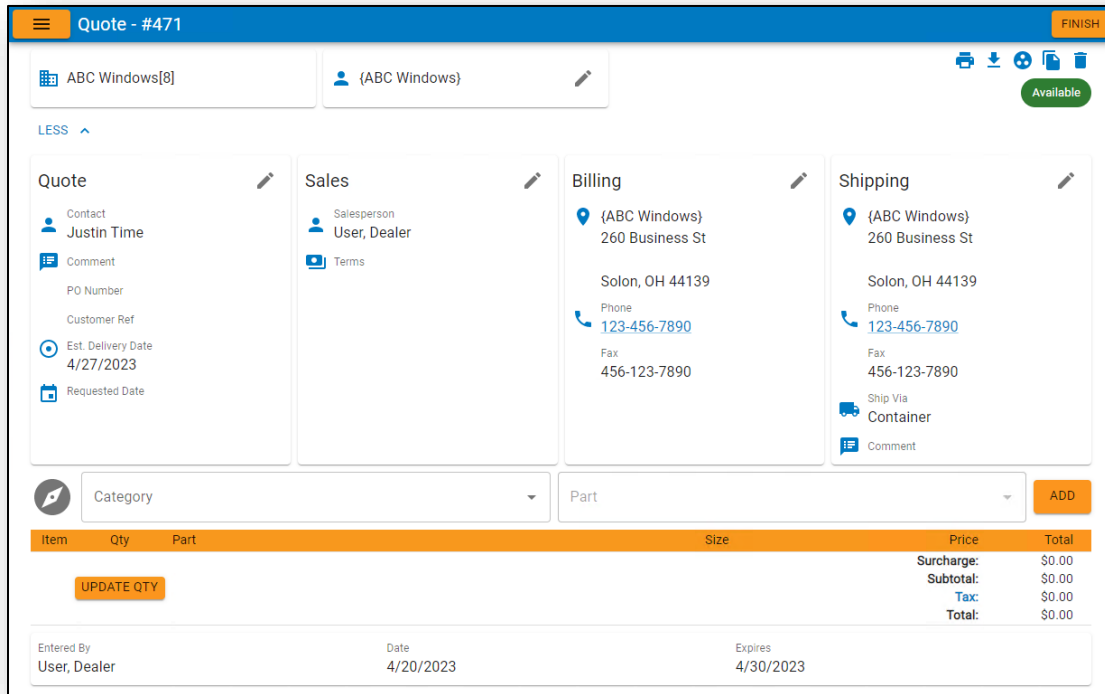
- **Salesperson** – Personnel in the Dealer’s company responsible for the sale.
 - **Terms** – Preconfigured in ‘Terms and Ship Via’.
 - **Markup Mult** - Percentage of markup from the Manufacturer’s price (If pricing is set based off ‘Discount from List’ or by ‘Gross Profit Margin’ then this field will change accordingly). When this field is changed after line items have been added to a quote, all pricing will be recalculated to reflect the new value even if the price has been overridden (excluding web-only charge parts).
- **Billing Address** – The address all financial information will go to. This information defaults to the information configured on the customer but can be edited here.

- Shipping Address** – Address to which the order will be shipped to. Marking ‘Same as bill address’ will use the same address entered for billing and will not be editable. This section will also allow for ship via to be selected, drop ship to be checked, and comments to be entered.

- Mfg Shipping Address** - Enabled if the manufacturing site had multiple ship to addresses configured through Core. Allows the user to select from the list of configured address. This is the address the manufacturer will ship the order to. Disabled if Drop Ship is checked.

Quote Entry




Quotes may be created and modified by Dealers in ‘Quote Entry’.

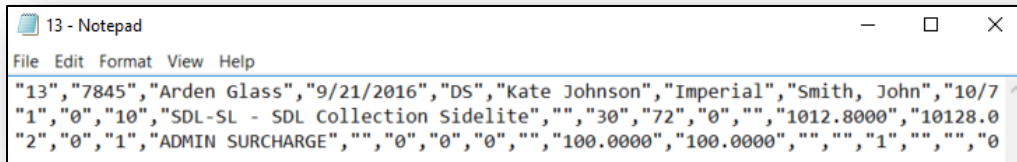


The 'Quote Entry' screen includes two sections: 'Quote Header' and 'Line Item Grid'. 'Quote Header' displays the details entered in the 'Add Quote' screen along with some additional functions. In the 'Line Item Grid', the user will add items to the quote.

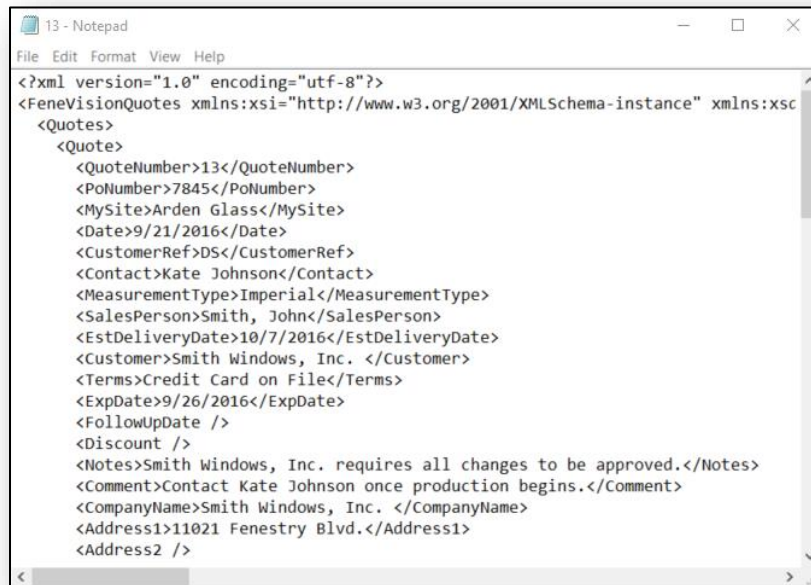
Quote Header

The 'Quote Header' contains the following:

- **Quote Information** – Displays important information regarding the quote. When the Quote Entry screen first opens, the quote information will be hidden but can be viewed by using the 'More' icon below the Customer Name. To edit the quote information, select the 'Pencil' icon located at the top right of each informational section. It will display the 'Edit Quote' page, which is like the 'Add Quote' page, with a section expanded based on which pencil icon was selected. When all information is entered, select the 'Save' button to save the information and return to the Quote Entry screen.
-  – The 'Finish' button closes the quote and displays the dashboard. Selecting this button will not prevent the quote from being modified in the future. The user can return to this dialog and edit the quote (including changing the customer) at any time until it expires or until it has been uploaded to the Manufacturer.
-  – The 'Print' button prints the selected quote report in PDF format. The following selections are all variations of the 'Quote' report that can be printed.
 - **Quote**
 - **Quote w/o Pricing** – Quote without line item pricing, item subtotal pricing, and total pricing.
 - **Quote w/o Line Item Pricing** – Quote with only subtotal and total pricing.
 - **Quote List** – Quote with list pricing.
 - **Quote Selling** – Quote with list and normal pricing.
 - **Quote Accounting** – Quote with list pricing, price book pricing, costs and margins.
-  – The 'Download' button allows the user to save the quote as a Word or Excel file as well as in a CSV and XML format.
 - **CSV** – Exports the quote information to a csv file format. The quote export file name will be {quotenumber}.csv.



- XML – Exports to xml file format. The quote file name will be {quotenumber}.xml.



- The file layout follows:
 - The first record of the file is the header record for the quote.
 - The following records are each line item for the quote.
 - Each file is wrapped in double quotes and separated by a comma.

For example: "109829", "", "123 Doors & Windows",
"1/7/2009"

- Any double quotes in a string field will have a double quote appended to it.

For example: original string="123 Doors & Windows"
output="123 Doors & Windows ""Double Quoted"""

- Any line feeds will stay the same.

For example: original string= 123 Doors & Windows
output = "123 Doors & Windows"


- If the user or site does not have necessary permissions for a field, then it will fill that field with a blank. If the user does not have permission to view pricing, then it will fill the field with "".
- The header record will contain the following columns:

Field	Requires Permission
-------	---------------------

OrderNumber	
PONumber	
Manufacturer SiteName	
OrderDate	
CustomerRef	
OrderContact	
MeasurementType	
SalespersonName	
ReqDate	
Discount /Markup/Margin Value	Yes
OrderNotes	
OrderComment	
Shipping CompanyName	
Shipping Address1	
Shipping Address2	
Shipping State	
Shipping ZipCode	
Shipping Phone	
Shipping Fax	
Shipping ShipVia	
Drop Ship	
Shipping Comments	
SubTotal	Yes
TaxTotal	Yes
Misc Total	Yes
Total	Yes



- The detail record will contain the following columns:

Field	Requires Permission
LineItem	
SubLineItem	
Quantity	
Part	
CallSize	
Width	
Height	
Thickness	
Cost	Yes
UnitPrice	Yes
ExtendedUnitPrice	Yes
SqFtPrice	Yes
OptionsDescription	
IsSurchargePart	
Comment	
Exception	

-  – Displays ‘Global Options Changes’ dialog. This allows the user to globally change options for all line items and alternate wizard selections on the quote.

In this image, the question selected from the ‘Question’ drop-down was COLOR. Under the ‘Old Option’ drop-down, WH - WHITE was selected; under the ‘New Option’ drop-down CH - CHERRY was chosen. Select ‘Change’. The following screen will appear, confirming and saving the change.

If the option selected supports option values, the ‘Old Value’ and ‘New Value’ dropdowns will show. The user will then be able to change the option values as well. Once changed, the new value can be adjusted by selecting the pencil icon and selecting a new value from the dropdown in the items before saving.

-  – Copies the entire quote to a new quote.
-  – Deletes the current quote.

Line Item Grid

The ‘Line Item Grid’ displays the list of items that are being ordered on the quote.

Item	Qty	Part	Size	Price	Total
1	1	8000PW - PICTURE WINDOW	30 W X 50 H	\$463.25	\$463.25

SIZING(EXACT SIZE), COLOR(WHITE), GLASS(CLEAR/CLEAR IG, GAS(ARGON GAS)), MISC FRAME OPTIONS(HEAD EXPANDER | NAIL FIN)

Surcharge:	\$8.14
Subtotal:	\$471.39
Tax:	\$0.00
Total:	\$471.39

Entered By: User, Dealer Date: 4/20/2023 Expires: 4/30/2023

The following information can be found in the 'Line Item Grid':

- **Item** – Numeric identifier for the sequence of the line item on the order.
- **Qty** – Quantity being ordered.
- **Part** – Part being ordered.
- **Size** – Ordered height, width, and thickness of the part.
- **Price** – Calculated price of a single part.
- **Total** – Total price of the line item give the part price and quantity.
- **Options** – Below each line item is a comma delimited list of the options selected for the part.
- **Surcharge** – Total amount being applied to the order by surcharges. Clicking the link will display a list for surcharges and the values associated with them.
- **Subtotal** – Summation of all line item totals and surcharge value.
- **Tax** – Total tax calculated for the order. Clicking the link will display a list of the taxes and percentages being applied to the quote.
- **Total** – Summation of the subtotal and tax on the quote.
- **Entered By** – User that created the quote.
- **Date** – Date the quote was created.
- **Expires** – Calculated date of when the quote is set to expire.

The currency the quote displays will be the 'Order Currency' of the customer in FeneVision CORE. The format of the values, including comma and decimal separators, will display based on the culture settings of the browser being used.

Entering a Line Item

Users can enter line items to a quote using two different methods.

Conventional Method

To enter line item information using the conventional mode, complete the following:

1. Select a category from the left drop-down list. This will filter the part list to only the parts that exist in the selected category.
2. Select a part from the right drop-down list.

3. Select 'Add' to view the 'Item Properties' screen. This screen allows the user to configured the line item quantity, sizing and comments.

Item Properties

Qty

Call Size

Width inches

Height inches

Thickness inches

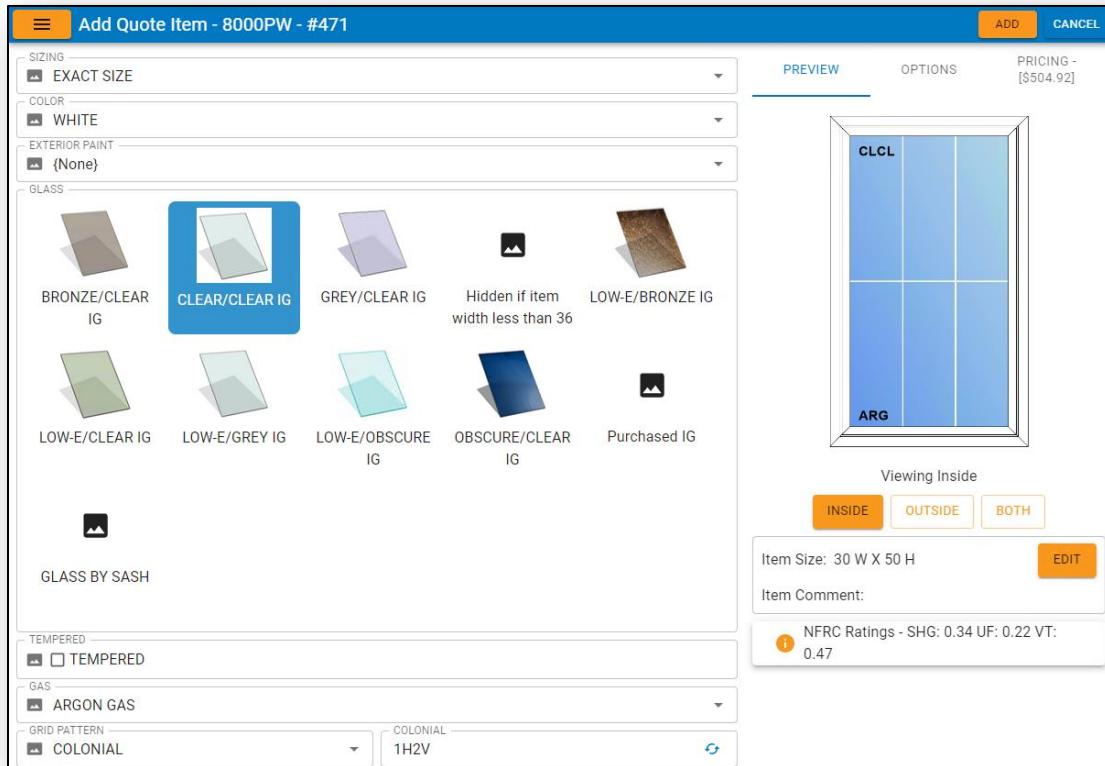
Line Item Comment

ADD CANCEL

Enter the required information in the following fields:

- **Quantity** – Line item quantity.
 - **Call Size** – Width and height of the ordered part in using the industry standard call size. The value entered in this field will be converted to the specified measurement type on the quote header and the converted value will be displayed in the Width and Height fields. The standard format of this field is FIFI where F = Feet and I = Inches.
 - **Width** – Width of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Height** – Height of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Thickness** – Thickness of the ordered part. Decimal or fraction values may be entered.
 - **Line Item Comment** – Field to enter any necessary comments regarding this specific line item.
4. Select 'Add' to view the 'Add Quote Item' page. This screen allows the user to select options for the line item. the line item quantity, sizing, options, and comments. The following image shows an example of an 'Add Quote Item' page for a single window.

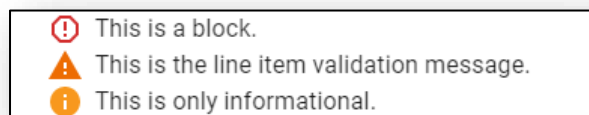
Note: The header at the top of the screen indicates the part number and quote number of the part being added. If an existing part is being edited, the line item number will be appended to the end of the header.



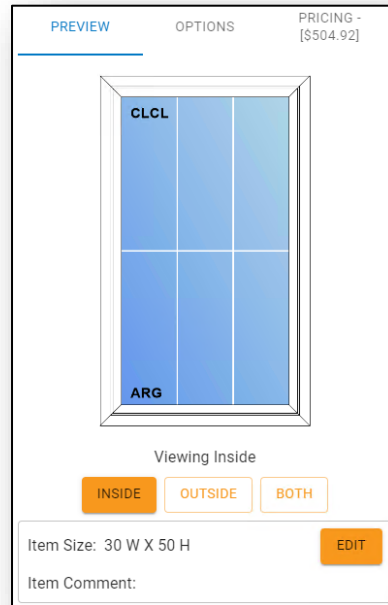
5. Configure Options. If an option is required, the user will not be able to make further selections until the required choice is made. This option selection process is much like the 'Options Wizard' found in 'Order Entry' in Core.

Note: 'Shape' and 'Muntin' managers are available through the FeneVision Web Options Wizard. When configured, an extra button will display in the input column that will take the user to either the 'Shape Manager' or 'Muntin Manager' web page. Additionally, any option with a default value such as grid pattern will display a 'Refresh' icon to the right of the input. This refresh button can be selected after updating the input to update the image located on the right side of the screen.

6. If validation exceptions occur, work to resolve the issue identified by each. Exceptions are generally a result of a poor combination of options and/or sizes, so making necessary changes to options can resolve the exception. Line item validation is configured in Core specifically for each part. There are three types of exceptions: Info, Line Item Exception, and Block.
 - **Block** – A block exception will display in the Option Wizard screen with a red brick icon. These exceptions will prevent the user from adding the line item to the quote. The user must resolve the exception before Option Wizard can be finished.
 - **Line Item Exception** – A line item exception will display in the Option Wizard screen with a yellow icon. These exceptions will cause the line item to turn read and will display in the line item exceptions and policies screen when attempting to acknowledge the order.
 - **Info** – An info exception will display information in the Option Wizard screen with a blue icon. These exceptions do not display in the line item exceptions screen on the quote; does not cause the line item to turn red.



- Users can see an image of the quoted item by choosing 'Preview'. The default view is from the outside. Select 'Inside' to change the image view from the inside. While viewing from the inside, the user can go back to the outside view by selecting 'Outside'. Alternatively, the user may select 'Both' to see the inside and outside view side-by-side. 'Both' is limited to products that do not have cross sections configured and do not use an alternate wizard.



- To see a summary of the item's options, select 'Options'.

Question	Option	Description	Input
SIZING	EX	EXACT SIZE	
COLOR	WH	WHITE	
GLASS	CLCL	CLEAR/CLEAR IG	
GAS	ARG	ARGON GAS	
GRID PATTERN	COL	COLONIAL	1H2V
GRID MATERIAL	FLAT	STD GRIDS	
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	
MISC FRAME OPTIONS	NF	NAIL FIN	

- To view the estimates price of the item and options selected, select 'Pricing'.

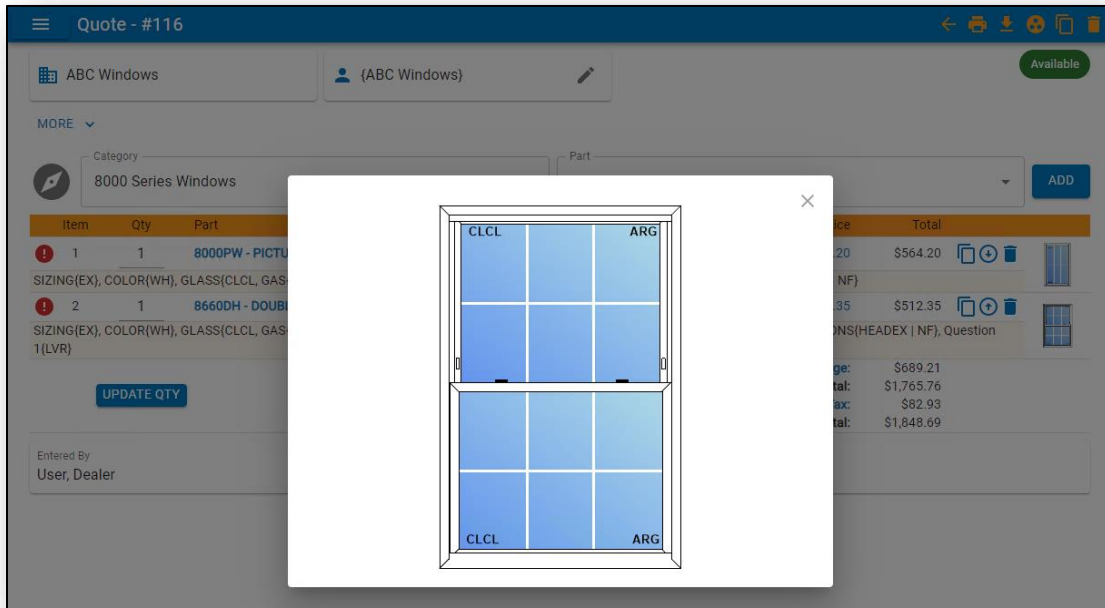
Note: User must have permission to "View Pricing" in order to see the Pricing tab.

PREVIEW	OPTIONS	PRICING - [\$504.92]	
		Price	
Part Price:		\$395.20	
Options:			
Question	Option	Description	Price
GAS	ARG	ARGON GAS	\$23.05
GRID PATTERN	COL	COLONIAL	\$41.67
MISC FRAME OPTIONS	NF	NAIL FIN	\$40.00
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	\$5.00
Options Price:		\$109.72	
Item Price:		\$504.92	

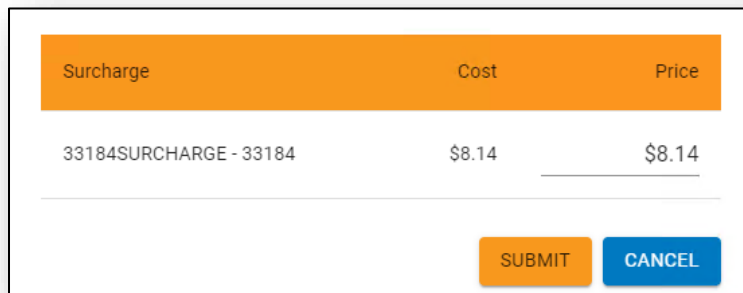
When all fields are completed and required options have been configured, 'Add' will appear. Select 'Add' to add the line item to the quote.

The screenshot shows a quote management interface for 'Quote - #471'. At the top, there are navigation icons and a 'FINISH' button. Below that, there are fields for 'ABC Windows[8]' and '{ABC Windows}' with an edit icon. A 'MORE' dropdown is visible. The main section shows a 'Category' dropdown set to '8000 Series Windows' and a 'Part' dropdown set to '8000PW - PICTURE WINDOW' with an 'ADD' button. Below this is a table with columns: Item, Qty, Part, Size, Price, and Total. The table contains one row: Item 1, Qty 1, Part '8000PW - PICTURE WINDOW', Size '30 W X 50 H', Price '\$463.25', and Total '\$463.25'. Below the table, there is a description of options: 'SIZING(EXACT SIZE), COLOR(WHITE), GLASS(CLEAR/CLEAR IG, GAS(ARGON GAS)), MISC FRAME OPTIONS(HEAD EXPANDER | NAIL FIN)'. To the right of the description is a thumbnail image of a window. Below the description is an 'UPDATE QTY' button. At the bottom right, there is a pricing summary: 'Surcharge: \$8.14', 'Subtotal: \$471.39', 'Tax: \$0.00', and 'Total: \$471.39'. At the bottom left, there are fields for 'Entered By: User, Dealer', 'Date: 4/20/2023', and 'Expires: 4/30/2023'.

10. To edit a line item, select the link in the 'Part' column, to display the 'Edit Quote Item' screen.
11. To view an image of the unit, select the thumbnail and a larger image will open for all standard option wizard parts. (Setup through Core GSP)



12. To view the surcharges, select the 'Surcharge' link.



13. To change the quantity of an item, enter the new amount in the provided field and select



14. To view a line item price breakdown, select the link in the price column.

Price Breakdown - #471-1 SAVE CANCEL

Quantity: 1 Item: 1: 8000PW - PICTURE WINDOW Size: 30 W X 50 H

Part Price: \$395.20

Option Prices: Discount Table: Discount SJ

Question	Description	Value	Price
SIZING	EXACT SIZE		\$0.00
COLOR	WHITE		\$0.00
GLASS	CLEAR/CLEAR IG		\$0.00
GAS	ARGON GAS		\$23.05
MISC FRAME OPTIONS	HEAD EXPANDER		\$5.00
MISC FRAME OPTIONS	NAIL FIN		\$40.00

Rows Per Page 10 1 - 6 of 6

Item Weight	Item Cost	\$463.25	Item Sq. Ft. Price	\$44.47	Item Price	\$463.25
Overall Weight	Overall Cost	\$463.25	Overall Sq. Ft. Price	\$44.47	Overall Price	\$463.25





The following fields exist in the 'Order Item Price Breakdown' dialog:

- **Part Price** – Price of the part.
- **Item Weight** – Weight of the item selected.
- **Overall Weight** – Weight of the ordered item and sub line items.
- **Item Cost** – Cost for the item. Will be the same as overall cost when the ordered part does not have sub line items. However, when the ordered item has sub line items (that have a cost), the overall cost will exceed the item cost.
- **Overall Cost** – Sum of all item costs on the ordered item and all sub line items.
- **Item Sq. Ft. Price** – Sum of the part and option prices for the item per square foot.
- **Overall Sq. Ft. Price** – Sum of all part and option prices on the ordered item and all sub line items per square foot.
- **Item Price** – Sum of the part and option prices for the item. Will be the same as overall price when the ordered part does not have sub line items. However, when the ordered item has sub line items (that are priced), the overall price will exceed the item price.
- **Overall Price** – Sum of all part and option prices on the ordered item and all sub line items.

Note: If a price is overridden, changing any manufactured-priced options will recalculate the overridden price.

15. To view the tax assigned to the order, select the tax link.

Taxes	
Tax	0.0000%
Tax 1	0.0000%
Tax 2	0.0000%
Tax 3	0.0000%
Tax 4	0.0000%

16. Use  to copy the current line item and paste it at the end of the quote.
17. Use  and  to re-order the line items.
18. Use  will delete the line item from the quote.

Shape Library

Web users can click the ellipsis button next to the shape option to bring up a tiled view of all the available shapes via the Shape Library. The Shape Library configurator in Web is the same as what is available in FeneVision Core.

Add Quote Item - MONO - #16

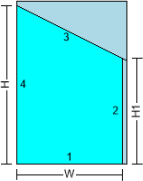
SHAPE

SHAPE NUMBER

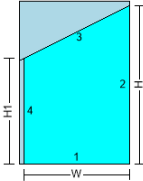
The user can then filter by number/description, number of straight sides, and number of curved sides.

Add Quote Item - MONO - #16

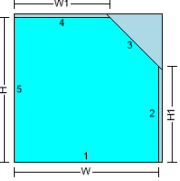
Search Straight Sides Curved Sides Results per page: 20 1-20 of 153



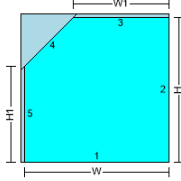
001SH - RAKE RH



002SH - RAKE LH

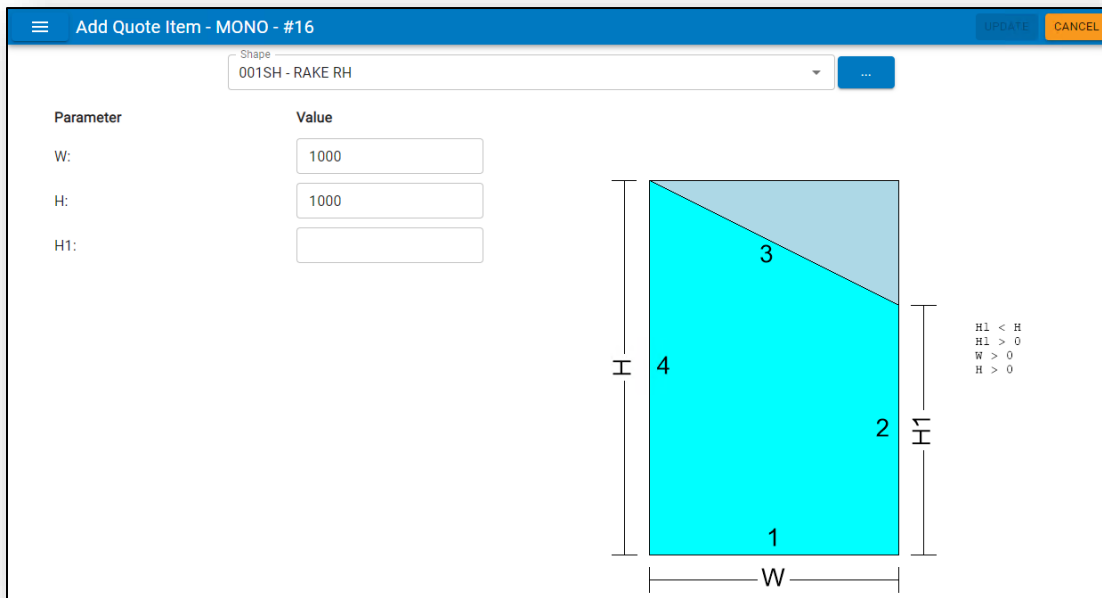


003SH - PENTAGON-IRREG



004SH - PENTAGON-IRREG

Open the 'Shape Editor' screen by selecting a shape to be used for the line item. In the 'Shape Editor', the parameters can be edited to match the exact desired shape.



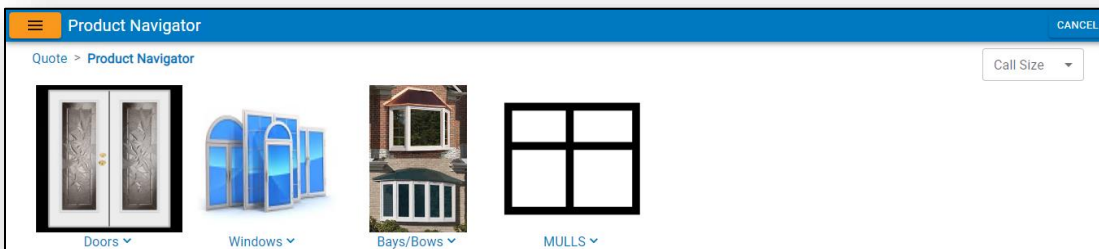
The 'Shape Library' can be re-accessed by selecting the ellipsis next to the 'Shape' dropdown. After the parameters are specified, selecting the 'Update' button will display the 'Options Wizard' with the shape selected.

Users can also use the Option Image view to show static images of the shapes, if the field is not in tiled layout. By selecting the icon next to the option drop-down, the user will see a tiled list of options with the option images.

Product Navigator

Users can also use 'Product Navigator' mode to enter items and sub line items.

To use the 'Product Navigator' feature to enter a line item, select  to the left of the quote entry fields to view product categories. Follow the navigator and select the image representing the part to be entered as a line item.



Select the desired category image to see the available products for that category. The example below illustrates what the user will see in the 'Windows' category.



Note: In order to use the 'Product Navigator' in FeneVision Web, users must have configured parts in FeneVision Core to be visible in 'Remote/Web' or 'Visible Everywhere'.

Contractor Quotes

'Quote Entry' can be accessed by selecting the quote number for the intended quote from the Dashboard or from Quote Maintenance. When viewing or editing a Contractor quote, a large red 'Customer Quote' label is displayed in the upper right corner of the screen. There is no special notification extended to the Contractor when a Contractor-created quote is edited by a Dealer, meaning that once a quote has been submitted, Dealers can modify the quote and the Contractor will not be notified of any changes. If a Contractor needs to be notified of changes, these notifications need to take place outside of the system (e.g., a phone call or email to the Contractor that occurs outside of FeneVision Web).

Quote Maintenance

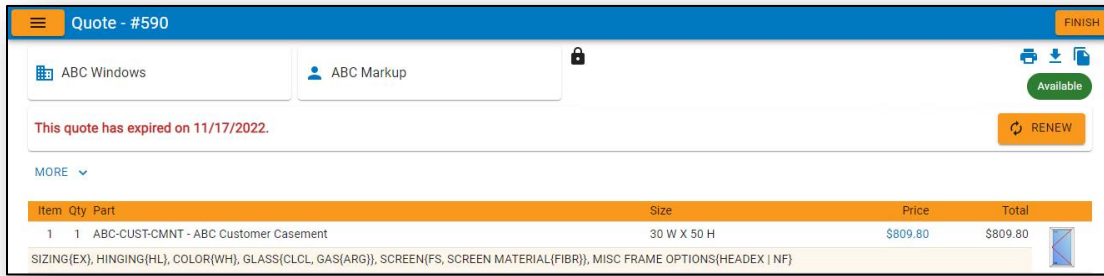
The 'Quote Maintenance' screen provides a centralized location in which quotes can be uploaded, edited, and / or deleted. To access the 'Quote Maintenance' screen, select 'Quotes Maintenance' from dropdown menu.

Quote	Date	Customer	Total	My PO Number	My Customer Ref	Est. Delivery Date	Expires	Mfg Customer
480	4/20/2023	ABC Contractor	\$1,444.48			4/27/2023	4/30/2023	ABC Windows[8]
478	4/20/2023	ABC Contractor	\$2,680.07			4/27/2023	4/30/2023	ABC Windows[8]
477	4/20/2023	ABC Contractor	\$764.57			4/27/2023	4/30/2023	ABC Windows[8]
476	4/20/2023	{ABC Windows}	\$942.78			4/27/2023	4/30/2023	ABC Windows[8]
475	4/20/2023	{ABC Windows}	\$942.78			4/27/2023	4/30/2023	ABC Windows[8]
474	4/20/2023	{ABC Windows}	\$1,375.70			4/27/2023	4/30/2023	ABC Windows[8]
473	4/20/2023	{ABC Windows}	\$1,375.70			4/27/2023	4/30/2023	ABC Windows[8]
472	4/20/2023	ABC Contractor	\$2,680.07			4/27/2023	4/30/2023	ABC Windows[8]
471	4/20/2023	{ABC Windows}	\$942.78			4/27/2023	4/30/2023	ABC Windows[8]
469	4/20/2023	ABC Contractor	\$764.57			4/27/2023	4/30/2023	ABC Windows[8]

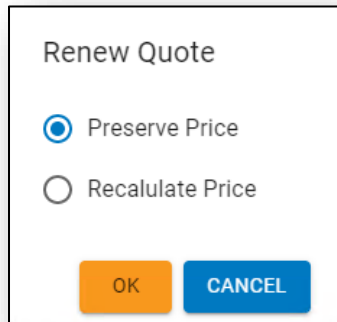
Note: The number of quotes that display per page defaults to 10; however, that value can be changed by using the 'Rows Per Page' drop down.

The drop-down contains the following quote classifications to manage quotes:

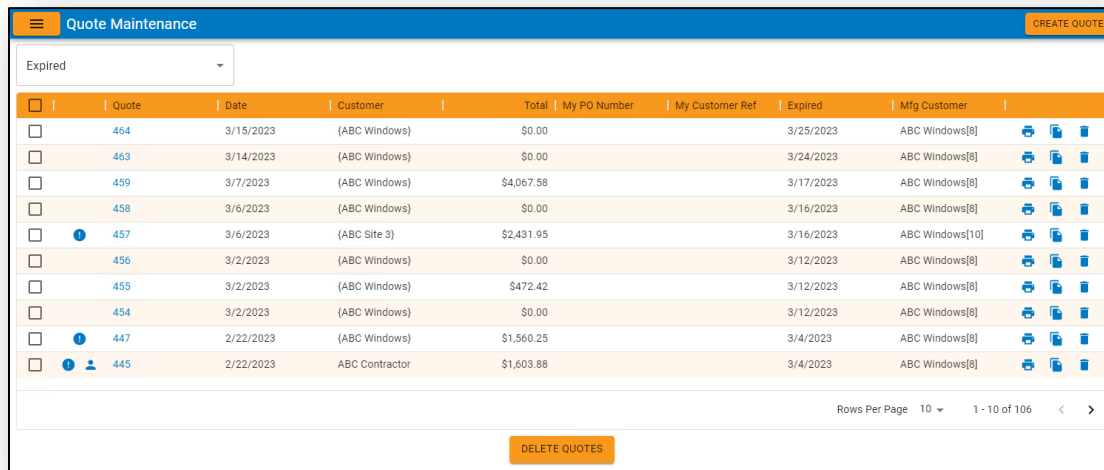
- **Available** – Quotes that have been entered except those with a status of 'On Hold'.
- **On Hold** – Quotes placed on hold. This occurs in the initial 'Add Quote' screen.
- **Uploaded** – Uploaded quotes.
- **Expired** – Expired quotes. When accessed through the drop-down, the user can select the quote number. This will take the user back to the 'Quote Entry' screen where the expiration date of the quote will appear in red.



Select 'Renew' button next to the expired date. The following screen will appear:





To renew the quote with the same price intact, indicate 'Preserve Price' and select 'OK'. To recalculate a new price, indicate 'Recalculate Price'. This will return the user to the 'Quote Entry' screen where the user can adjust the price by selecting the price.




When viewing the expired quotes in Quote Maintenance, a 'Delete Quotes' button will appear at the bottom of the screen. By selecting multiple quotes using the checkboxes in the grid, or the 'Check All' checkbox in the column headers, the 'Delete Quotes' button can be used to delete multiple expired quotes at the same time.


The following columns and action buttons exist in the 'Quote Maintenance' screen:

- Select checkbox. Check before uploading the quote
- Information** – Displays icons to provide additional information regarding the quote. The following icons may appear for each quote:

-  – Quote has at least one line-item with an exception. Clicking the icon will display a prompt with the exceptions that exist on the quote.
-  – Identifies quotes entered by the Contractor that have not yet been submitted. These cannot be uploaded, deleted, or copied by the Manufacturer’s customer.

- **Quote** – Quote number that contains a link to the quote entry dialog.
- **Date** – Date the quote was entered.
- **Customer** – Customer’s name.
- **Total** – Quote total. This value could change if the quote expires unless pricing is preserved.
- **My PO Number** – Unless the Dealer has indicated upon ‘Company’ setup that any ‘PO Number’ is to be overridden, this value will represent the ‘PO Number’ that was entered when the quote was entered. If the Dealer has indicated that a PO number must be entered, select .
- **My Customer Ref** – Unless the Manufacturer has indicated in Company setup that any ‘Customer Ref’ identifier is to be overridden, this will be the ‘Customer Ref’.

Note: My PO Number and My Customer Ref may be required based on policies via FeneVision Core. See the FeneVision Core User Manual for more information.

- **Est. Delivery Date** - Estimated date the order will be delivered after it has been uploaded. This field is read-only and updates daily until quote is uploaded to Core.
- **Requested Date** – Requested delivery date by the web customer. By default, this field is blank unless a contractor quote was submitted with a requested date. This field can be edited by using the edit icon (as seen below) on the row. A date can then be selected by using the date picker. If the date selected does not fall on a valid shipping date for the customer in Core, a message will appear indicating this along with the closest valid shipping dates both before and after the date selected. Once a quote is uploaded to Core, a message will appear indicating whether or not the ‘Required Date’ on the resulting order is changed to the ‘Requested Date’ submitted with the quote. Contact FeneTech for additional information regarding this functionality.
-  – Enter a ‘PO Number’ and ‘Customer Ref.’ These values will be uploaded to the Manufacturer as the ‘Mfg PO Number’ and ‘Mfg Customer Ref’ on the order. The default selections can be specified in the Dealer’s ‘Company’ setup dialog.

Edit Quote - 480

PO Number

Order

PO

Custom

Customer Ref




Customer

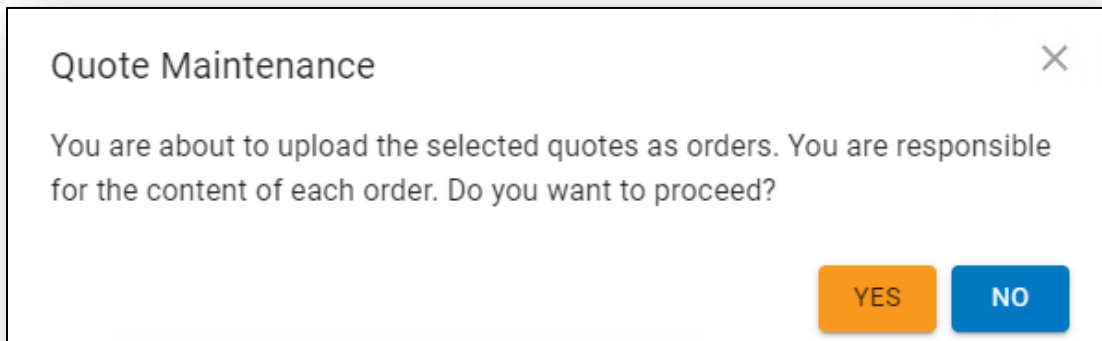
Order-Customer

Customer Ref

Custom

- **Expires** – Date the quote will expire.

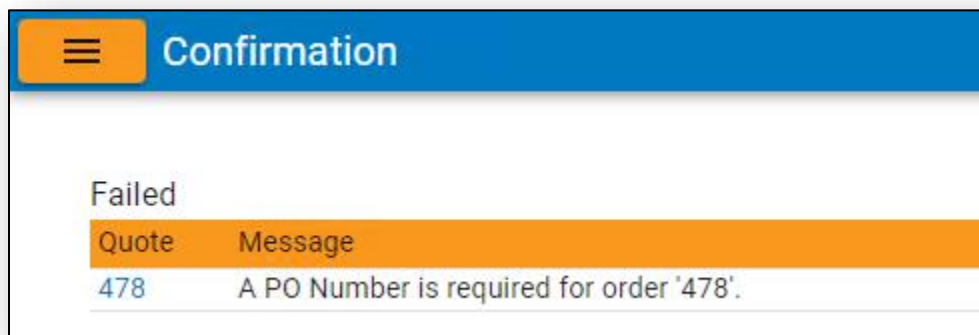
- **Mfg Customer** – Manufacturer’s name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.
-  – Converts the quote into a PDF formatted report that can be printed.
-  – Copy the quote to a new quote and automatically open ‘Quote Entry’ for the new quote.
-  – Select to upload quotes. The following message will appear:




1. Select ‘Yes’ to upload the quote(s).

Note: If Privacy Policy and Terms of Service are enabled, the user must select the checkbox agreeing to both before the OK button will be enabled.





2. While quotes are being uploaded, the screen will become disabled to prevent any unexpected changes while the quotes are actively being uploaded.
3. If the quote does not upload, a message will appear that will provide a reason for the failure to upload:





4. Select  and make the necessary corrections.
5. Repeat step 1.
6. Once the upload is complete, a confirmation screen will appear that lists all quotes successfully uploaded in addition to any messages that apply to the uploaded quote(s). The message column that appears after the completion of the quote upload will indicate if the quote was uploaded without any changes or if there was some change to the resulting order in Core. The upload message can be customized, please contact FeneTech for additional information regarding this functionality.

Confirmation		
Order	Quote	Message
11381	476	


After a quote has been uploaded to Core, those orders and quotes can then be viewed by changing the filter to 'Uploaded'. The number on the left of the screen is the Manufacturer's order number. All successfully uploaded orders will now display in the 'Open Orders' section of the Dashboard. Uploaded quotes can be displayed in 'Quote Maintenance' with the 'Uploaded' filter selected.

Quote Maintenance								CREATE QUOTE
Order	Quote	Date	Uploaded By	Total	Order PO Number	Order Customer Ref	Mfg Customer	
11381	476	4/20/2023	Dealer User	\$942.78			8	 
11324	462	3/15/2023		\$1,776.98			8	 
11293	452	3/2/2023		\$86.65			8	 
11245	450	2/24/2023		\$5,157.40			8	 
11246	451	2/24/2023		\$5,157.40			8	 
11244	449	2/24/2023		\$5,157.40			8	 
11235	446	2/23/2023		\$1,607.65			8	 
11234	448	2/23/2023		\$1,783.58			8	 
11230	442	2/22/2023		\$762.85			8	 
11231	443	2/22/2023		\$603.67			8	 

Rows Per Page 10 1 - 10 of 91

- **Order** – Alpha-numeric identifier for the converted order in FeneVision Core. Links to the order dialog.
- **Quote** – Alpha-numeric identifier for the quote. Links to the quote entry dialog.
- **Date** – Date the quote was entered.
- **Uploaded By** – Name of the user (dealer) who uploaded the quote to Core.
- **Total** – Quote total cost.
- **Order PO Number** – 'PO Number' entered by the dealer, now on the order in Core.
- **Order Customer Ref** – 'Customer Ref' entered by the dealer, now on the order in Core.
- **Mfg Customer** – Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.
-  – Converts the quote into a PDF formatted report that can be printed.
-  – Copy the quote to a new quote and automatically open 'Quote Entry' for the new quote.

Customer Quote Maintenance

'Quote Maintenance' displays submitted Contractor quotes. These quotes are identifiable by the  icon. Quotes entered by the Contractor that have not yet been submitted will not be displayed in 'Quote Maintenance'. Therefore, these quotes cannot be uploaded, deleted, or copied by the Dealer. Once the Contractor submits the quote, it will be displayed in 'Quote Maintenance' to the Dealers.

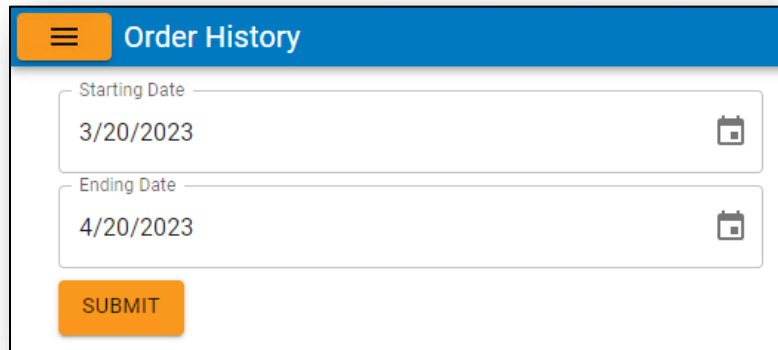
Note: Customer quotes are submitted for uploading. The Dealer uploads the quotes to the manufacturer.

Orders

Orders are uploaded quotes by the FeneVision Web user or are entered directly by the Manufacturer. The Dealer will be able to view both types of orders as they are processed by the Manufacturer. This section outlines the tools available to monitor orders.

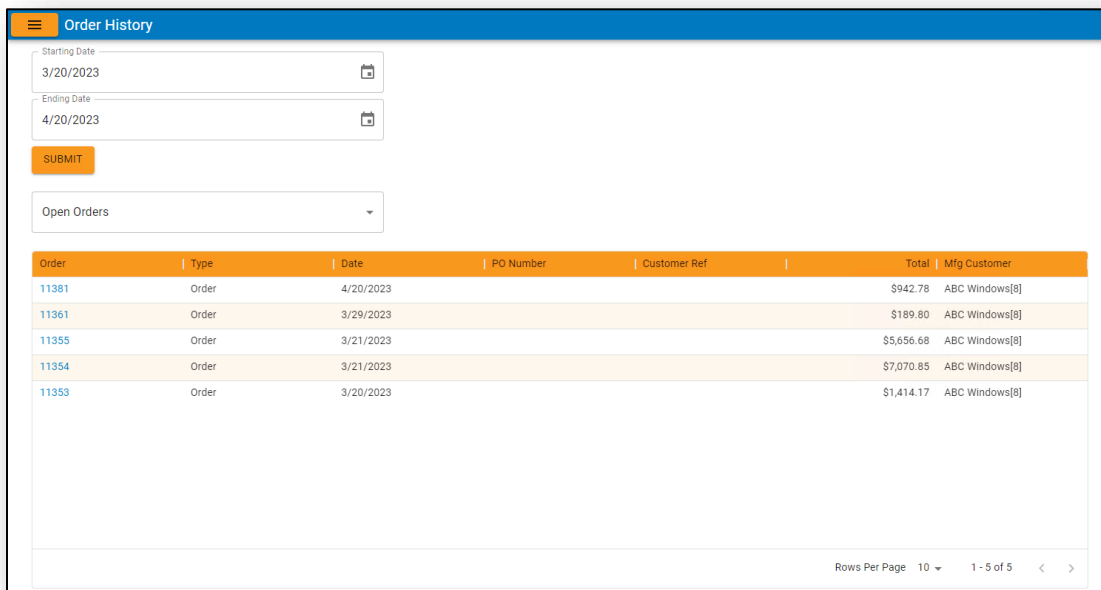
Order History

The 'Order History' screen gives the user a snapshot of the open and complete orders and quotes for a specified date range. To access the 'Order History' screen, select 'Orders' >>'Order History'.



The screenshot shows the 'Order History' form with a blue header. It contains two date selection fields: 'Starting Date' with the value '3/20/2023' and 'Ending Date' with the value '4/20/2023'. Each field has a calendar icon to its right. Below the date fields is an orange 'SUBMIT' button.

1. Once in the 'Order History' screen, specify a starting and ending date, and select 'Submit'.
2. Indicate the type of order to display by selecting 'Open Orders' or 'Complete Orders'. The columns in each tab are the same for both types of orders.



The screenshot shows the 'Order History' screen after submission. It features a dropdown menu set to 'Open Orders'. Below it is a table with the following data:

Order	Type	Date	PO Number	Customer Ref	Total	Mfg Customer
11381	Order	4/20/2023			\$942.78	ABC Windows[8]
11361	Order	3/29/2023			\$189.80	ABC Windows[8]
11355	Order	3/21/2023			\$5,656.68	ABC Windows[8]
11354	Order	3/21/2023			\$7,070.85	ABC Windows[8]
11353	Order	3/20/2023			\$1,414.17	ABC Windows[8]

At the bottom right of the table, there is a pagination control: 'Rows Per Page 10' and '1 - 5 of 5'.

The 'Order History' screen details the following information:

- **Order** – Alphanumeric identifier of the order.
- **Order Type** – Type of order— 'Order' or 'Manufacturing'.
- **Date** – Date the order was uploaded.
- **PO Number** – Purchase order number.
- **Customer Ref.** – Contractor job reference number.
- **Total** – Total amount of order including taxes and surcharges.
- **Mfg Customer** – Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

Select the order number on the left to view the order status page, shown below (read only).

Order - #11381

ABC Windows[0][0]

Ack. Date: 4/20/2023 Est. Delivery Date: 4/27/2023 Ship Date

LESS ^

Order

Contact: Justin Time

Comment: PO Number, Customer Ref

Sales

Salesperson

Billing

ABC Windows
1234 Oak Dr.
Financial Dept.
Cleveland, OH 44114

Phone

Shipping

ABC Windows
1234 Oak Dr.
Shipping Dept.
Cleveland, OH 44114
USA

Phone: 555-555-5555
Fax: 666-888-7412

Comment

General

ABC Windows
1234 Oak Dr.
Cleveland, OH 44114

Phone: (555)-555-1348
Fax: (555)-555-1349

Item	Qty	Part	Size	Price	Total
1	1	8000PW - PICTURE WINDOW	30 W X 50 H	\$463.25	\$463.25
SIZING(EXACT SIZE), COLOR(WHITE), GLASS(CLEAR/CLEAR IG, GAS(ARGON GAS)), MISC FRAME OPTIONS(HEAD EXPANDER I NAIL FIN)					
2	1	8000PW - PICTURE WINDOW	30 W X 50 H	\$463.25	\$463.25
SIZING(EXACT SIZE), COLOR(WHITE), GLASS(CLEAR/CLEAR IG, GAS(ARGON GAS)), MISC FRAME OPTIONS(HEAD EXPANDER I NAIL FIN)					
Surcharge:					\$16.28
Subtotal:					\$942.78
Tax:					\$0.00
Non-Taxable Misc:					\$0.00
Total:					\$942.78

Order Date: 4/20/2023

Purchase History

Selecting the 'Purchase History' menu reveals the dialog displaying the total invoiced sales for a specified date range, total overall sales, item quantity, and percentage of item sales. The user can display information by 'Orders', 'Parts', or 'Options' for designated starting and ending dates.

1. Select 'Customers'. This will summarize Contractor information for all orders during the designated time.

Purchase History

Starting Date: 3/20/2023

Ending Date: 4/20/2023

CUSTOMERS ORDERS PARTS OPTIONS

2 customers found between 3/20/2023 and 4/20/2023.

Customer	Quantity	Total Sales	Percentage
P O OR ABC Contractor	1	CAD626.00	33.33%
P O OR {ABC Windows}	2	CAD1,252.05	66.67%

Rows Per Page: 10 1 - 2 of 2

Total Quantity: 3 Total Sales: CAD1,878.05

- Select either 'Orders' or the 'OR' from the 'Customer' column. This will display the orders placed by the selected Contractor.

Purchase History

Starting Date: 3/20/2023

Ending Date: 4/20/2023

CUSTOMERS ORDERS PARTS OPTIONS

2 orders found between 3/20/2023 and 4/20/2023.

Order	PO Number	Quantity	Total Sales	Percentage
11381		2	CAD1,252.05	66.67%
11382		1	CAD626.00	33.33%

Rows Per Page 10 1 - 2 of 2

Total Quantity: 3 Total Sales: CAD1,878.05

- Select either 'Parts' or the 'P' from the 'Customer' column. This will display the parts ordered by the selected Contractor.

Purchase History

Starting Date: 3/20/2023

Ending Date: 4/20/2023

CUSTOMERS ORDERS PARTS OPTIONS

1 part found between 3/20/2023 and 4/20/2023.

Part	Quantity	Total Sales	Percentage
8000PW - PICTURE WINDOW	3	CAD1,878.05	100.00%

Rows Per Page 10 1 - 1 of 1

Total Quantity: 3 Total Sales: CAD1,878.05

- Select either 'Options' or the 'O' from the 'Customer' column. This will display the *options* associated with the parts ordered by the selected Contractor.

Purchase History

Starting Date: 3/20/2023
Ending Date: 4/20/2023

CUSTOMERS ORDERS PARTS **OPTIONS**

6 options found between 3/20/2023 and 4/20/2023.

Option	Quantity	Total Sales	Percentage
P NF - NAIL FIN	3	CAD162.15	58.78%
P ARG - ARGON GAS	3	CAD93.45	33.87%
P HEADEX - HEAD EXPANDER	3	CAD20.25	7.35%
P CLCL - CLEAR/CLEAR IG	3	CAD0.00	0.00%
P EX - EXACT SIZE	3	CAD0.00	0.00%
P WH - WHITE	3	CAD0.00	0.00%

Rows Per Page 10 1 - 6 of 6

Total Quantity: 18
Total Sales: CAD275.90

Order Holds

If an order has unapproved 'Web Visible' holds on it from the Manufacturer (these are set up in FeneVision Core), an 'On Hold' button appears next to the quote number in the top right corner. The button color indicates the type of hold:

- **Yellow** – Holds requiring web approval.
- **Red** – Other holds on the order.

'Order Holds' lists the hold policy descriptions of all current unapproved 'Web Visible' holds. The 'Approve' button is enabled if the user has the 'Approve Holds' permission enabled in the 'Users' setup screen. When the user selects on this button, all 'Web Approval' holds are approved and updated in Core immediately and an email notification is sent to the Manufacturer (this is set up in the FeneVision Web Admin site). The page then refreshes.

Order Holds Requiring Approval

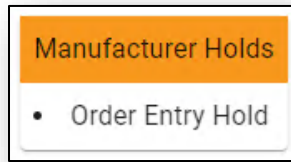
- Needs Web Approval

APPROVE

Manufacturer Holds

- Order Entry Hold

If there are still holds that cannot be approved, then the tab text changes to red, indicating that the Manufacturer still has holds. Once no holds exist, then the 'Holds' tab disappears.



The Contractor's Experience

The functionality available to *Contractors* is a scaled-down version of what is available to *Dealers*.

Contractor Mode

FeneVision Web includes additional functionality called 'Contractor Mode' that is *not* included with the base version of Web. 'Contractor Mode' enables Dealers to set up their Contractors to enter their own quotes.

On the Dealer's level, a FeneVision Web Admin login for the Contractor is created. This enables the Contractor to achieve the following:

1. Establish Extended Contractors.
2. Review quotes prior to submission to the Dealer.
3. Modify pricing.

After the Dealer achieves these three steps, Contractor Mode enables Contractors to upload quotes to the Dealer and view pricing and product configuration. However, Contractors will *not* be able to

1. Change pricing structures.
2. View other Contractors' quotes.
3. View the Manufacturers' pricing.
4. Upload directly to the Manufacturer.

Contractor Mode improves the Contractor's experience, helping both the Dealer and the Manufacturer increase business.

Note: Contact FeneTech for information on obtaining Contractor Mode.

Dashboard

In 'Contractor Mode', the dashboard includes two tabs for quotes. One tab represents Dealer quotes, and the other tab represents Contractor quotes. Contractor quotes can be edited by Dealers who have appropriate permissions. A *submitted* quote indicates a quote that the Contractor has completed, and after submission, the Contractor can no longer modify it. However, the Dealer can continue to modify the quote until it is uploaded to the Manufacturer. Contractor quotes will be displayed on the 'Customer Quotes' tab until they expire, are uploaded to the manufacturer, or are deleted.

Login

Contractors log in to FeneVision Web just as Dealers do. IP filtering does not affect Contractor logins (Contractors cannot be prevented from logging in based on their IP address). Contractors can be deactivated (revoking their ability to log in) by the Manufacturer or the Dealer using several methods:

- The Manufacturer can set a site to inactive in FeneVision Core.
- The Manufacturer can set a Dealer's site to inactive in FeneVision Web Admin.
- The Dealer can set a Contractor to inactive in FeneVision Web's 'Customers Setup'
- The Dealer can set individual administrator Contractor logins to inactive in Web's 'Users' setup (keep in mind that Dealers cannot see logins created by Contractors – they only have access to Contractor logins created by the Dealer).
- The Dealer can set all administrator Contractor logins to inactive in Web 'Users' setup. If a Dealer does this, it deactivates all logins for the Contractor, including those created by the Contractor.

User Setup

Contractors with administrator privileges can create additional Contractor logins through 'Setup' >> 'Users'. Additional administrator logins or standard users with more restrictions can be created. Standard user permissions include the ability to

- **Create / Modify Quotes**

- **Delete Quotes**
- **Submit Quotes**
- **View Pricing**
- **View Quotes (Customer)**
 - If checked, the user can view quotes entered by all users for an individual Contractor.
 - If unchecked, the user can only view quotes they personally entered.

Dashboard

Once logged in, the Contractor will be at the dashboard. The dashboard displays submitted quotes in the top grid and open quotes in the bottom grid. Submitted quotes will be displayed until the quote is uploaded and subsequently either closed by the Manufacturer or deleted by the Dealer.

The screenshot shows the FeneTech dashboard interface. At the top, there is a blue header with the FeneTech logo on the left, a 'CU' user indicator on the right, and a 'CREATE QUOTE' button. Below the header is a 'Dashboard' section with a hamburger menu icon. The main content area is divided into two sections: 'Submitted Quotes' and 'Customer Quotes'.

Submitted Quotes Table:

Quote	Date	PO Number	Customer Ref	Total	Expires	Status
480	4/20/2023			\$1,444.48	4/30/2023	Received
478	4/20/2023			\$2,680.07	4/30/2023	Received
477	4/20/2023			\$764.57	4/30/2023	Received
472	4/20/2023			\$2,680.07	4/30/2023	Received
469	4/20/2023			\$764.57	4/30/2023	In Process

Below the Submitted Quotes table, there is a pagination control showing 'Rows Per Page 10' and '1 - 5 of 5'.

Customer Quotes Table:

Quote	Customer	Date	PO Number	Customer Ref	Total	Submitted	Status	Expires
481	{ABC Contractor}	4/20/2023			\$728.16		Available	4/30/2023

The following information can be found in the 'Submitted Quotes' grid:

- **Quote** – Quote number. Selecting the quote number will display the 'Quote Entry' page for the quote.
- **Date** – Date the quote was entered.
- **PO Number** – Purchase order number for the quote.
- **Customer Ref** – Contractor job reference for the quote.
- **Total** – Total currency amount for the quote including taxes and surcharges.
- **Expires** – Date the quote must turn into an order to preserve the pricing given at the time the quote was entered. The Manufacturer controls the number of days that quotes can exist before they expire through a setting in the FeneVision Web Admin site.
- **Status** – Current status of the customer quote. Submitted quotes can have the following statuses:
 - **Received** – Indicates the quote has been submitted and is under review by the Dealer.
 - **On Hold** – Indicates the Dealer has placed the quote on hold and presumably needs to discuss the quote with the Contractor prior to uploading the quote to the Manufacturer.
 - **In Process** – Indicates the quote has been uploaded by the Dealer to the Manufacturer.

Note: Quotes entered by the Dealer are not visible to the Contractor in the 'Submitted Quotes' grid. Only quotes entered by the Contractor are displayed.

The 'Customer Quotes' grid displays all non-expired quotes that have yet to be submitted to the Dealer. Additionally, advertisements can be created to notify Dealers of deals from the Manufacturer. These advertisements are not displayed to Contractors.

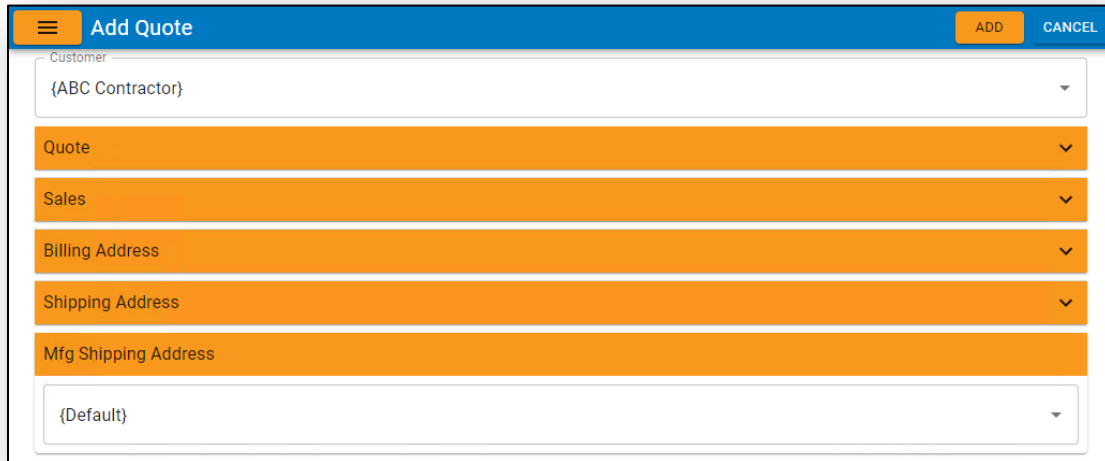
Search

Contractors can perform searches on quotes they have entered.

Add Quote

To add a quote, select the 'Create Quote' button on the Dashboard or within Quote Maintenance.

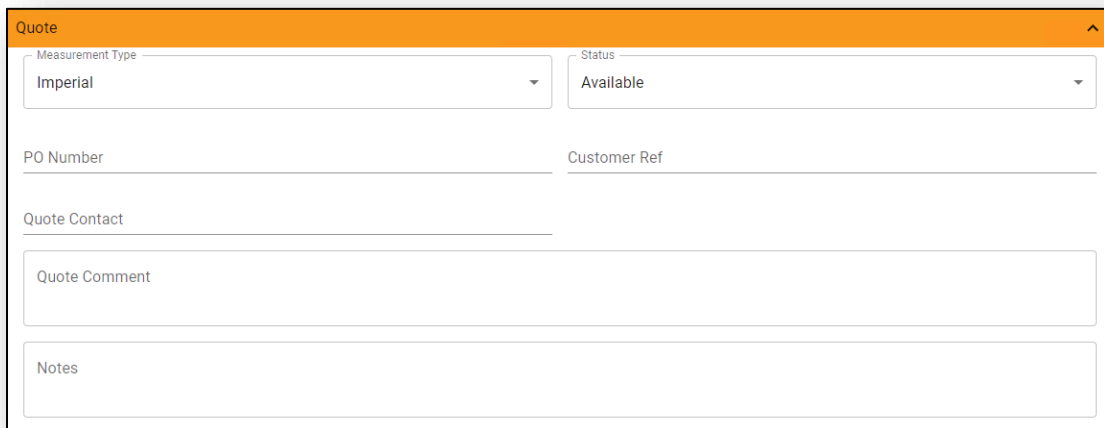
The 'Add Quote' screen is broken up into four sections as seen below. Each section can be viewed by selecting the header to expand each section.



- **Customer** – Web customer (Contractor) that the quote will be for.

Note: If there are no existing end customers setup, a quick quote customer will be created with the default settings from Web Admin. This customer will be dealer's name in {}. The pricing method for this quick customer defaults to Discount From List. However, that can change with a WEB parameter. See the WEB Admin user manual for additional information regarding this parameter.

- **Quote**



- **Measurement Type** – Imperial or Metric.

- **Status** – Status of the quote. The two status values to choose from are ‘Available’ and ‘On Hold’. Users can determine the default status in ‘Setup’ >> ‘Company’ >> ‘Settings’ >> ‘Default Quote Status’.
- **PO Number** – Purchase order number for this quote, not the Manufacturer’s PO Number.
- **Customer Ref** – Contractor job reference for this quote, not the Dealer’s Ref.
- **Quote Contact** – Person to contact regarding the quote.
- **Quote Comment** – Any comments regarding the quote.
- **Notes** – Any notes regarding the quote.

- **Sales**

The screenshot shows a form titled "Sales" with an orange header. It contains three main input areas: a dropdown menu for "Salesperson" with the text "User, Contractor", a dropdown menu for "Terms", and a text input field for "Markup Mult.".

- **Salesperson** – Personnel in the Dealer’s company responsible for the sale.
 - **Terms** – Preconfigured in ‘Terms and Ship Via’.
 - **Markup Mult** - Percentage of markup from the Dealer’s price (If pricing is set based off ‘Discount from List’ or by ‘Gross Profit Margin’ then this field will change accordingly). When this field is changed after line items have been added to a quote, all pricing will be recalculated to reflect the new value even if the price has been overridden (excluding web-only charge parts).
- **Billing Address** – The address all financial information will go to. This information defaults to the information configured on the customer but can be edited here.

The screenshot shows a form titled "Billing Address" with an orange header. It contains several input fields: "Name" (with a placeholder "{Contractor}"), "Address 1", "Address 2", "City", "State", "Zip Code", "Phone", and "Fax".

- **Shipping Address** – Address to which the order will be shipped to. Marking ‘Same as bill address’ will use the same address entered for billing and will not be editable. This section will also allow for ship via to be selected, drop ship to be checked, and comments to be entered.

Shipping Address
^

Same as billing address

Name
(Contractor)

Address 1

Address 2

City

State

Zip Code

Phone

Fax

Ship Via

Shipping Comment

When all information is entered, select 'Add' to save or 'Cancel' to cancel changes.

Quote Entry

Quotes may be created and modified by Contractors in 'Quote Entry'. Only a subset of data can be modified by Contractors on the header. The 'Customer', 'Shipping Information', 'Terms', and 'Salesperson' have all been locked down and cannot be edited by Contractors. This information will default to the values defined in Web's 'Customers' setup (which is set up by the Dealer). If any of this information needs to be modified, this modification must be performed by users on the Dealer level.

Quote - #482
FINISH

(ABC Contractor)
✎

Available

LESS ^

Quote ✎

Contact
Justine Time

Comment

PO Number

Customer Ref

Est. Delivery Date
4/27/2023

Sales ✎

Salesperson
User, Contractor

Terms

Billing ✎

{ABC Contractor}
1800 State St

Solon, OH 44139

Phone
[123-456-7890](tel:123-456-7890)

Fax
258-369-1470

Shipping ✎

{ABC Contractor}
1800 State St

Solon, OH 44139

Phone
[123-456-7890](tel:123-456-7890)

Fax
258-369-1470

Ship Via

Comment

Category
v

Part
v

ADD

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

Entered By
User, Contractor

Date
4/20/2023

Expires
4/30/2023

The pricing that is displayed is the pricing set for the Contractor by the Dealer. Since Contractors are not permitted to see Manufacturer pricing information, the 'Quote List', 'Quote Selling', and 'Quote Accounting' reports are not available.




The 'Quote Entry' screen includes two sections: 'Quote Header' and 'Line Item Grid'. 'Quote Header' displays the details entered in the 'Add Quote' screen along with some additional functions. In the 'Line Item Grid', the user will add items to the quote.

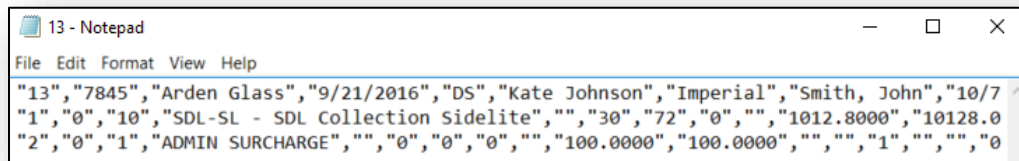
Quote Header

The 'Quote Header' contains the following:

- **Quote Information** – Displays important information regarding the quote. When the Quote Entry screen first opens, the quote information will be hidden but can be viewed by using the 'More' icon below the Customer Name. To edit the quote information, select the 'Pencil' icon located at the top right of each informational section. It will display the 'Edit Quote' page, which is like the 'Add Quote' page, with a section expanded based on which pencil icon was selected. When all information is entered, select the 'Save' button to save the information and return to the Quote Entry screen.

Note: The contractor name can be changed on the quote if no line items exist.

-  – The 'Finish' button closes the quote and displays the dashboard. Selecting this button will not prevent the quote from being modified in the future. The user can return to this dialog and edit the quote (including changing the customer) at any time until it expires or until it has been submitted to the dealer.
-  – The 'Print' button prints the selected quote report in PDF format. The following selections are all variations of the 'Quote' report that can be printed.
 - **Quote**
 - **Quote w/o Pricing** – Quote without line item pricing, item subtotal pricing, and total pricing.
 - **Quote w/o Line Item Pricing** – Quote with only subtotal and total pricing.
 - **Quote List** – Quote with list pricing.
 - **Quote Selling** – Quote with list and normal pricing.
 - **Quote Accounting** – Quote with list pricing, price book pricing, costs and margins.
-  – The 'Download' button allows the user to save the quote as a Word or Excel file as well as in a CSV and XML format.
 - **CSV** – Exports the quote information to a csv file format. The quote export file name will be {quotenumber}.csv.



- **XML** – Exports to xml file format. The quote file name will be {quotenumber}.xml.

```

13 - Notepad
File Edit Format View Help
<?xml version="1.0" encoding="utf-8">
<FeneVisionQuotes xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xmlns:xsc
  <Quotes>
    <Quote>
      <QuoteNumber>13</QuoteNumber>
      <PoNumber>7845</PoNumber>
      <MySite>Arden Glass</MySite>
      <Date>9/21/2016</Date>
      <CustomerRef>DS</CustomerRef>
      <Contact>Kate Johnson</Contact>
      <MeasurementType>Imperial</MeasurementType>
      <SalesPerson>Smith, John</SalesPerson>
      <EstDeliveryDate>10/7/2016</EstDeliveryDate>
      <Customer>Smith Windows, Inc. </Customer>
      <Terms>Credit Card on File</Terms>
      <ExpDate>9/26/2016</ExpDate>
      <FollowUpDate />
      <Discount />
      <Notes>Smith Windows, Inc. requires all changes to be approved.</Notes>
      <Comment>Contact Kate Johnson once production begins.</Comment>
      <CompanyName>Smith Windows, Inc. </CompanyName>
      <Address1>11021 Fenestry Blvd.</Address1>
      <Address2 />

```

- The file layout follows:
 - The first record of the file is the header record for the quote.
 - The following records are each line item for the quote.
 - Each file is wrapped in double quotes and separated by a comma.

For example: "109829","","123 Doors & Windows",
"1/7/2009"

- Any double quotes in a string field will have a double quote appended to it.

For example: original string="123 Doors & Windows"Double
Quoted"
output="123 Doors & Windows ""Double Quoted"""

- Any line feeds will stay the same.

For example: original string= 123 Doors & Windows
output = "123 Doors & Windows"


- If the user or site does not have necessary permissions for a field, then it will fill that field with a blank. If the user does not have permission to view pricing, then it will fill the field with "".
- The header record will contain the following columns:

Field	Requires Permission
OrderNumber	
PONumber	
Manufacturer SiteName	
OrderDate	
CustomerRef	
OrderContact	
MeasurementType	
SalespersonName	
ReqDate	

Discount /Markup/Margin Value	Yes
OrderNotes	
OrderComment	
Shipping CompanyName	
Shipping Address1	
Shipping Address2	
Shipping State	
Shipping ZipCode	
Shipping Phone	
Shipping Fax	
Shipping ShipVia	
Drop Ship	
Shipping Comments	
SubTotal	Yes
TaxTotal	Yes
Misc Total	Yes
Total	Yes

- The detail record will contain the following columns:


Field	Requires Permission
LineItem	
SubLineItem	
Quantity	
Part	
CallSize	
Width	
Height	
Thickness	
Cost	Yes
UnitPrice	Yes
ExtendedUnitPrice	Yes
SqFtPrice	Yes
OptionsDescription	
IsSurchargePart	
Comment	
Exception	



-  – Displays ‘Global Options Changes’ dialog. This allows the user to globally change options for all line items and alternate wizard selections on the quote.

In this image, the question selected from the 'Question' drop-down was COLOR. Under the 'Old Option' drop-down, WH - WHITE was selected; under the 'New Option' drop-down CH - CHERRY was chosen. Select 'Change'. The following screen will appear, confirming and saving the change.

Question {None}	Old Option {Any}	New Option {None}	CHANGE			
These items will be saved						
Item	Part	Question	Old Option	Old Value	New Option	New Value
<input checked="" type="checkbox"/>	1	8000PW - PICTURE WINDOW	COLOR	WH - WHITE	CH - CHERRY	
These issues must be resolved before the items will be saved						
Item	Part	Question	Old Option	Old Value	New Option	New Value

If the option selected supports option values, the 'Old Value' and 'New Value' dropdowns will show. The user will then be able to change the option values as well. Once changed, the new value can be adjusted by selecting the pencil icon and selecting a new value from the dropdown in the items before saving.

Question {None}	Old Option {Any}	New Option {None}	CHANGE			
These items will be saved						
Item	Part	Question	Old Option	Old Value	New Option	New Value
<input checked="" type="checkbox"/>	1	8000PW - PICTURE WINDOW	GRID PATTERN	COL - COLONIAL	1H2V	COL - COLONIAL 3H2V 
These issues must be resolved before the items will be saved						
Item	Part	Question	Old Option	Old Value	New Option	New Value

-  – Copies the entire quote to a new quote.
-  – Deletes the current quote.

Line Item Grid

The 'Line Item Grid' displays the list of items that are being ordered on the quote.

Category 8000 Series Windows		Part 8000PW - PICTURE WINDOW		ADD	
Item	Qty	Part	Size	Price	Total
1	1	8000PW - PICTURE WINDOW	30 W X 50 H	\$720.02	\$720.02
SIZING(EXACT SIZE), COLOR(WHITE), GLASS(CLEAR/CLEAR IG, GAS(ARGON GAS)), MISC FRAME OPTIONS(HEAD EXPANDER NAIL FIN)					
UPDATE QTY				Surcharge:	\$8.14
				Subtotal:	\$728.16
				Tax:	\$0.00
				Total:	\$728.16
Entered By User, Contractor		Date 4/20/2023		Expires 4/30/2023	

The following information can be found in the 'Line Item Grid':

- Item** – Numeric identifier for the sequence of the line item on the order.
- Qty** – Quantity being ordered.
- Part** – Part being ordered.
- Size** – Ordered height, width, and thickness of the part.
- Price** – Calculated price of a single part.
- Total** – Total price of the line item give the part price and quantity.
- Options** – Below each line item is a comma delimited list of the options selected for the part.
- Surcharge** – Total amount being applied to the order by surcharges. Clicking the link will display a list for surcharges and the values associated with them.
- Subtotal** – Summation of all line item totals and surcharge value.

- **Tax** – Total tax calculated for the order. Clicking the link will display a list of the taxes and percentages being applied to the quote.
- **Total** – Summation of the subtotal and tax on the quote.
- **Entered By** – User that created the quote.
- **Date** – Date the quote was created.
- **Expires** – Calculated date of when the quote is set to expire.

The currency the quote displays will be the 'Order Currency' of the customer in FeneVision CORE. The format of the values, including comma and decimal separators, will display based on the culture settings of the browser being used.

Entering a Line Item

Users can enter line items to a quote using two different methods.

Conventional Method

To enter line item information using the conventional mode, complete the following:

1. Select a category from the left drop-down list. This will filter the part list to only the parts that exist in the selected category.
2. Select a part from the right drop-down list.

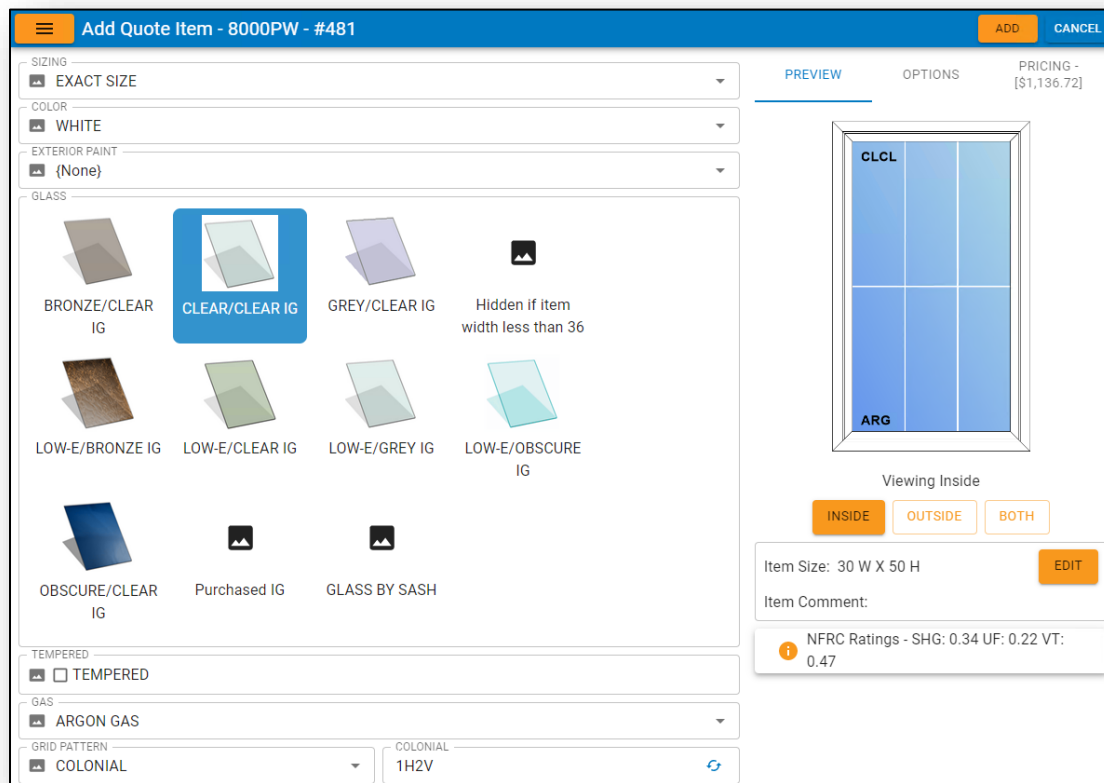
3. Select 'Add' to view the 'Item Properties' screen. This screen allows the user to configured the line item quantity, sizing and comments.

Enter the required information in the following fields:

- **Quantity** – Line item quantity.
- **Call Size** – Width and height of the ordered part in using the industry standard call size. The value entered in this field will be converted to the specified measurement type on the quote header and the converted value will be displayed in the Width and Height fields. The standard format of this field is FIFI where F = Feet and I = Inches.

- **Width** – Width of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Height** – Height of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Thickness** – Thickness of the ordered part. Decimal or fraction values may be entered.
4. Select 'Add' to view the 'Add Quote Item' page. This screen allows the user to select options for the line item. the line item quantity, sizing, options, and comments. The following image shows an example of an 'Add Quote Item' page for a single window.

Note: The header at the top of the screen indicates the part number and quote number of the part being added. If an existing part is being edited, the line item number will be appended to the end of the header.

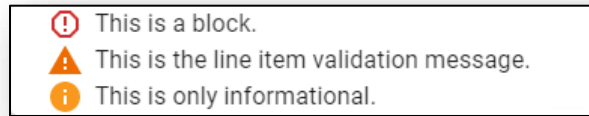


5. Configure Options. If an option is required, the user will not be able to make further selections until the required choice is made. This option selection process is much like the 'Options Wizard' found in 'Order Entry' in Core.

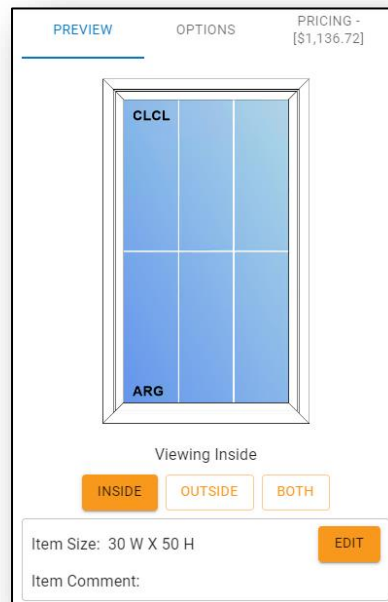
Note: 'Shape' and 'Muntin' managers are available through the FeneVision Web Options Wizard. When configured, an extra button will display in the input column that will take the user to either the 'Shape Manager' or 'Muntin Manager' web page. Additionally, any option with a default value such as grid pattern will display a 'Refresh' icon to the right of the input. This refresh button can be selected after updating the input to update the image located on the right side of the screen.

6. If validation exceptions occur, work to resolve the issue identified by each. Exceptions are generally a result of a poor combination of options and/or sizes, so making necessary changes to options can resolve the exception. Line item validation is configured in Core specifically for each part. There are three types of exceptions: Info, Line Item Exception, and Block.
- **Block** – A block exception will display in the Option Wizard screen with a red brick icon. These exceptions will prevent the user from adding the line item to the quote. The user must resolve the exception before Option Wizard can be finished.

- **Line Item Exception** – A line item exception will display in the Option Wizard screen with a yellow icon. These exceptions will cause the line item to turn read and will display in the line item exceptions and policies screen when attempting to acknowledge the order.
- **Info** – An info exception will display information in the Option Wizard screen with a blue icon. These exceptions do not display in the line item exceptions screen on the quote; does not cause the line item to turn red.



7. Users can see an image of the quoted item by choosing 'Preview'. The default view is from the outside. Select 'Inside' to change the image view from the inside. While viewing from the inside, the user can go back to the outside view by selecting 'Outside'. Alternatively, the user may select 'Both' to see the inside and outside view side-by-side. 'Both' is limited to products that do not have cross sections configured and do not use an alternate wizard.



8. To see a summary of the item's options, select 'Options'.

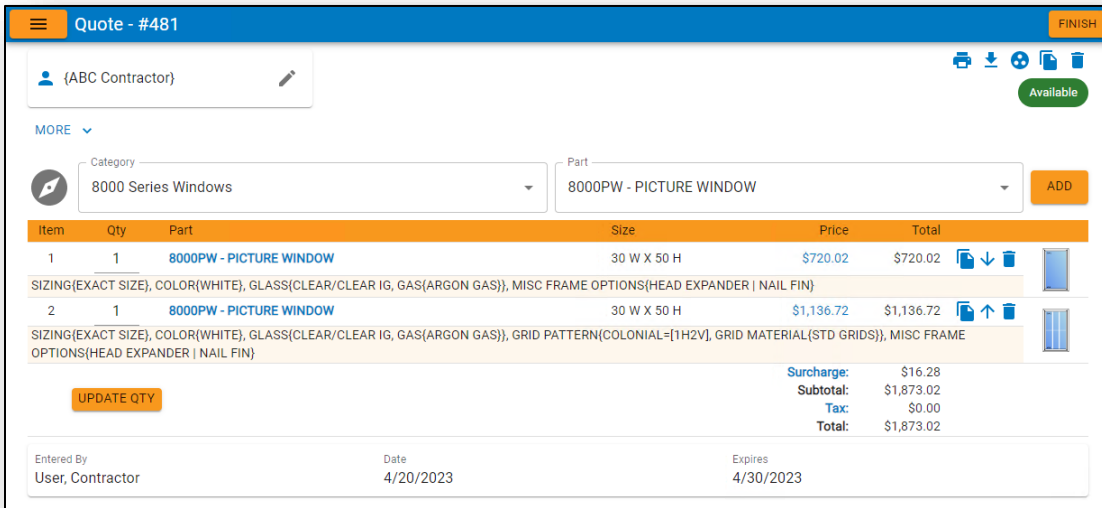
PREVIEW	OPTIONS	PRICING - [\$1,136.72]	
Question	Option	Description	Input
SIZING	EX	EXACT SIZE	
COLOR	WH	WHITE	
GLASS	CLCL	CLEAR/CLEAR IG	
GAS	ARG	ARGON GAS	
GRID PATTERN	COL	COLONIAL	1H2V
GRID MATERIAL	FLAT	STD GRIDS	
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	
MISC FRAME OPTIONS	NF	NAIL FIN	

9. To view the estimates price of the item and options selected, select 'Pricing'.

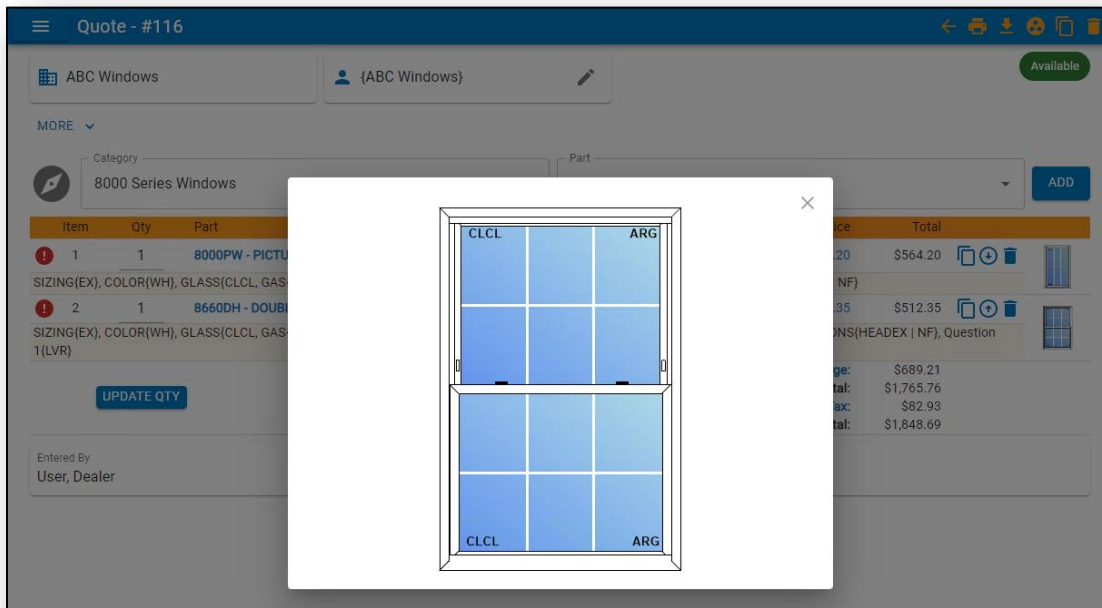
Note: User must have permission to "View Pricing" in order to see the Pricing tab.

PREVIEW	OPTIONS	PRICING - [\$1,136.72]	
		Price	
Part Price:		\$39.52	
Options:			
Question	Option	Description	Price
GAS	ARG	ARGON GAS	\$230.50
GRID PATTERN	COL	COLONIAL	\$416.70
MISC FRAME OPTIONS	NF	NAIL FIN	\$400.00
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	\$50.00
Options Price:		\$1,097.20	
Item Price:		\$1,136.72	

When all fields are completed and required options have been configured, 'Add' will appear. Select 'Add' to add the line item to the quote.



10. To edit a line item, select the link in the 'Part' column, to display the 'Edit Quote Item' screen.
11. To view an image of the unit, select the thumbnail and a larger image will open for all standard option wizard parts. (Setup through Core GSP)



12. To view the surcharges, select the 'Surcharge' link.

Surcharge	Cost	Price
33184SURCHARGE - 33184	\$16.28	\$16.28

13. To change the quantity of an item, enter the new amount in the provided field and select
14. To view a line item price breakdown, select the link in the price column.

UPDATE QTY

☰ Price Breakdown - #481-2
SAVE CANCEL

Quantity 1	Item 2: 8000PW - PICTURE WINDOW	Size 30 W X 50 H
		Part Price \$39.52

Option Prices: Discount Table: Discount SJ

Question	Description	Value	Price	
SIZING	EXACT SIZE		\$0.00	✎
COLOR	WHITE		\$0.00	✎
GLASS	CLEAR/CLEAR IG		\$0.00	✎
GAS	ARGON GAS		\$230.50	✎
GRID PATTERN	COLONIAL	1H2V	\$416.70	✎
GRID MATERIAL	STD GRIDS		\$0.00	✎
MISC FRAME OPTIONS	HEAD EXPANDER		\$50.00	✎
MISC FRAME OPTIONS	NAIL FIN		\$400.00	✎

Rows Per Page 10 1 - 8 of 8 < >

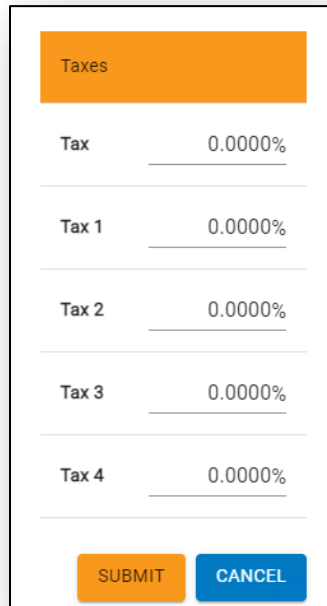
Item Weight	Item Cost \$1,136.72	Item Sq. Ft. Price \$109.13	Item Price \$1,136.72
Overall Weight	Overall Cost \$1,136.72	Overall Sq. Ft. Price \$109.13	Overall Price \$1,136.72

The following fields exist in the 'Order Item Price Breakdown' dialog:


- **Part Price** – Price of the part.
- **Item Weight** – Weight of the item selected.
- **Overall Weight** – Weight of the ordered item and sub line items.
- **Item Cost** – Cost for the item. Will be the same as overall cost when the ordered part does not have sub line items. However, when the ordered item has sub line items (that have a cost), the overall cost will exceed the item cost.
- **Overall Cost** – Sum of all item costs on the ordered item and all sub line items.
- **Item Sq. Ft. Price** – Sum of the part and option prices for the item per square foot.
- **Overall Sq. Ft. Price** – Sum of all part and option prices on the ordered item and all sub line items per square foot.
- **Item Price** – Sum of the part and option prices for the item. Will be the same as overall price when the ordered part does not have sub line items. However, when the ordered item has sub line items (that are priced), the overall price will exceed the item price.
- **Overall Price** – Sum of all part and option prices on the ordered item and all sub line items.

Note: If a price is overridden, changing any manufactured-priced options will recalculate the overridden price.


15. To view the tax assigned to the order, select the tax link.



The screenshot shows a 'Taxes' dialog box with an orange header. Below the header, there are five rows, each representing a tax entry. Each row has a label (Tax, Tax 1, Tax 2, Tax 3, Tax 4) and a corresponding value of 0.0000%. At the bottom of the dialog, there are two buttons: 'SUBMIT' (orange) and 'CANCEL' (blue).

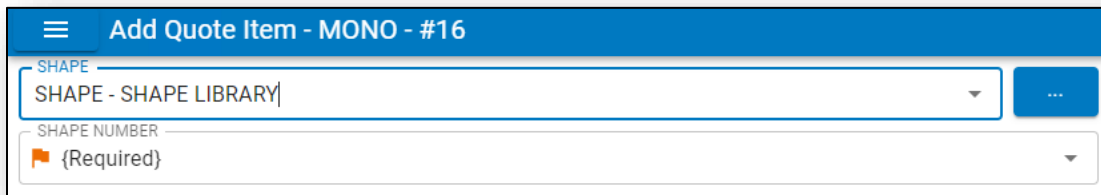
16. Use  to copy the current line item and paste it at the end of the quote.

17. Use  and  to re-order the line items.

18. Use  will delete the line item from the quote.

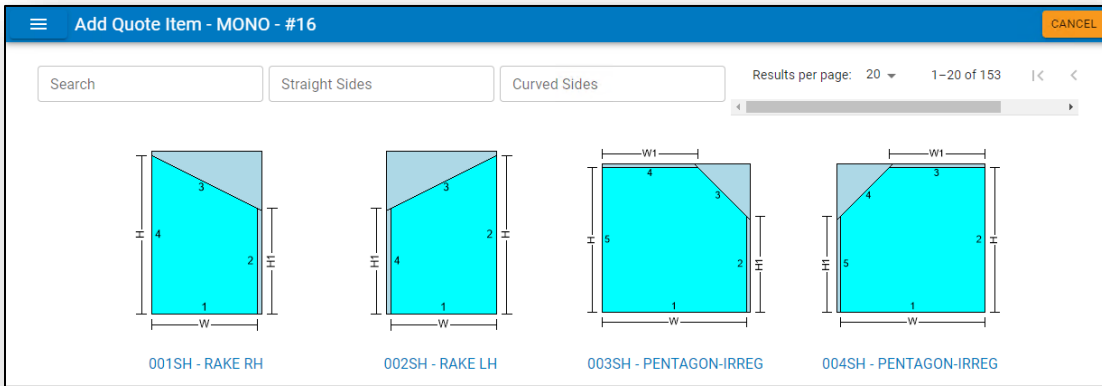
Shape Library

Web users can click the ellipsis button next to the shape option to bring up a tiled view of all the available shapes via the Shape Library. The Shape Library configurator in Web is the same as what is available in FeneVision Core.

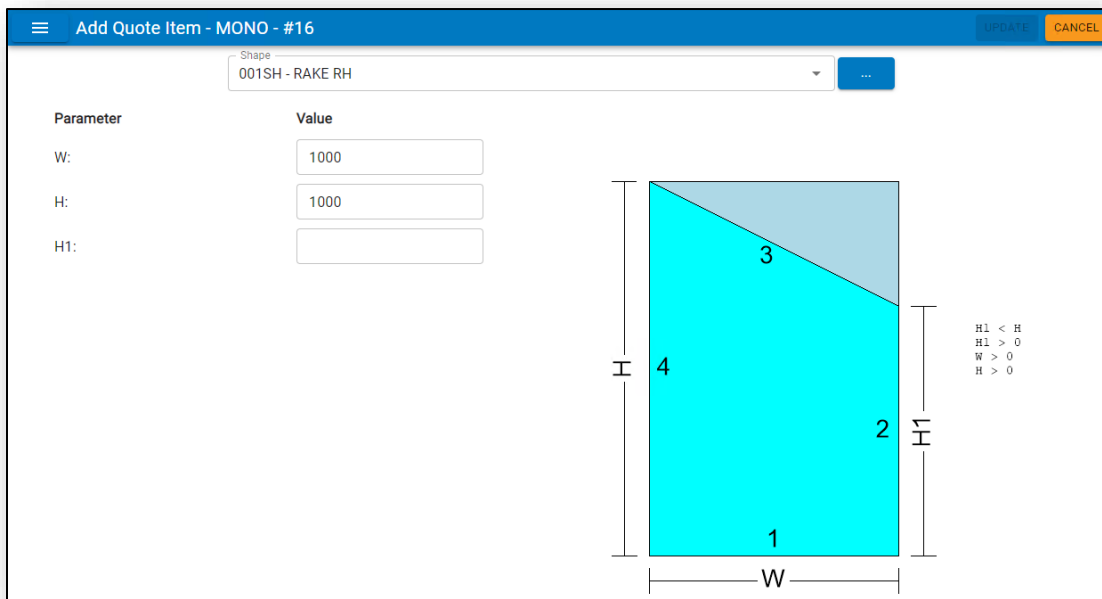


The screenshot shows a dialog box titled 'Add Quote Item - MONO - #16'. It has a blue header with a menu icon on the left. Below the header, there are two dropdown menus. The first is labeled 'SHAPE' and has 'SHAPE - SHAPE LIBRARY' selected. To the right of this dropdown is a blue button with three dots. The second dropdown is labeled 'SHAPE NUMBER' and has '{Required}' selected.

The user can then filter by number/description, number of straight sides, and number of curved sides.



Open the 'Shape Editor' screen by selecting a shape to be used for the line item. In the 'Shape Editor', the parameters can be edited to match the exact desired shape.



The 'Shape Library' can be re-accessed by selecting the ellipsis next to the 'Shape' dropdown. After the parameters are specified, selecting the 'Update' button will display the 'Options Wizard' with the shape selected.

Users can also use the Option Image view to show static images of the shapes, if the field is not in tiled layout. By selecting the icon next to the option drop-down, the user will see a tiled list of options with the option images.

Product Navigator

Users can also use 'Product Navigator' mode to enter items and sub line items.



To use the 'Product Navigator' feature to enter a line item, select the icon to the left of the quote entry fields to view product categories. Follow the navigator and select the image representing the part to be entered as a line item.



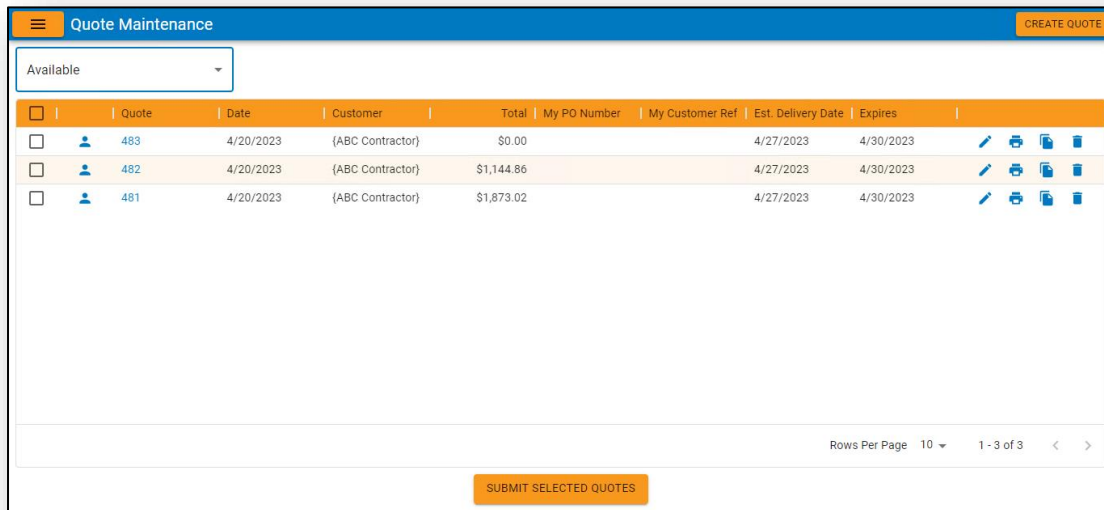
Select the desired category image to see the available products for that category. The example below illustrates what the user will see in the 'Windows' category.



Note: In order to use the 'Product Navigator' in FeneVision Web, users must have configured parts in FeneVision Core to be visible in 'Remote/Web' or 'Visible Everywhere'.

Quote Maintenance

'Quote Maintenance' allows Contractors to see all 'Available', 'On Hold', 'Submitted' and 'Expired' quotes. Non-submitted quotes can be deleted in 'Quote Maintenance', and all quotes can be copied and printed. Once a Contractor is satisfied with a quote, the quote can be submitted to the Dealer when 'Available' is selected in the 'Quote Maintenance' drop-down.



To submit a quote, complete the following:

1. Select the checkbox beside the number of the quote(s) to be submitted.
2. Select 'Submit Selected Quotes'.
3. Whiles quotes are being submitted, the screen will become disable to prevent any unexpected changes while the quotes are actively being uploaded.

- Once a quote has successfully been submitted, it will disappear from the 'Available' or 'On Hold' filter and become visible under the 'Submitted' filter.

After a quote is submitted, it is locked and cannot be edited by Contractors, though it can continue to be modified by the Dealer until the quote is uploaded to the Manufacturer.

As a Contractor Quote is submitted, another Dealer quote is created that will then be processed by the Dealer and the originally submitted quote is now considered a 'Customer Quote'. To the Contractor, Dealer quotes are completely read only, however, the 'Customer Quote' can be copied.

Note: The message displayed once the 'Submit Quotes' button is activated can be modified by the Manufacturer.

When viewing the expired quotes in Quote Maintenance, a 'Delete Quotes' button will appear at the bottom of the screen.

<input type="checkbox"/>	Quote	Date	Customer	Total	My PO Number	My Customer Ref	Expired	
<input type="checkbox"/>	76	11/17/2021	{ABC Windows}	\$3,053.58			12/17/2021	
<input type="checkbox"/>	75	11/17/2021	{ABC Windows}	\$520.09			12/17/2021	
<input type="checkbox"/>	74	11/17/2021	{ABC Windows}	\$2,051.00			12/17/2021	
<input type="checkbox"/>	73	11/17/2021	{ABC Windows}	\$4,056.16			12/17/2021	
<input type="checkbox"/>	72	11/17/2021	{ABC Windows}	\$520.09			12/17/2021	
<input type="checkbox"/>	71	11/17/2021	{ABC Windows}	\$3,242.00			12/17/2021	
<input type="checkbox"/>	70	11/17/2021	{ABC Windows}	\$0.00			12/17/2021	
<input type="checkbox"/>	69	11/17/2021	{ABC Windows}	\$0.00			12/17/2021	
<input type="checkbox"/>	68	11/17/2021	{ABC Windows}	\$567.93			12/17/2021	
<input type="checkbox"/>	67	11/17/2021	{ABC Windows}	\$520.09			12/17/2021	

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DELETE QUOTES

By selecting multiple question using the checkboxes in the grid, or the 'Check All' checkbox in the column headers, the 'Delete Quotes' button can be used to delete multiple expired quotes at the same time.

The CSR's Experience

Web CSR mode is used by Customer Service Representatives to add / edit quotes on behalf of their customers (dealers) who use Web. This mode can be accessed through <http://<servername>/WC/CSRLogin>.

Note: CSR Mode is enabled with the purchase of the CRM module for FeneVision.

Logging In

Users wishing to access Web CSR mode must have the correct login type via Employee Setup and must be a member of a Sales Group via the Sales Group setup screen in FeneVision Core. Users will use the same login information they use when accessing FeneVision Core or FeneVision CSR mode.

WEB CSR Sign In

Authentication Type

FeneTech Authentication

User Name

Password 👁

SIGN IN

Quote Maintenance

The 'Quote Maintenance' screen acts as the dashboard for CSR mode. From here users can select a quote to edit or create a new quote. Non-uploaded quotes can be deleted in 'Quote Maintenance', and all quotes can be copied and printed.

Quote Maintenance											CREATE QUOTE	
Available	{All}	{All}										
Quote	Date	Customer	Total	My PO Number	My Customer Ref	Est. Delivery Date	Expires	Mfg Customer				
480	4/20/2023	ABC Contractor	\$1,444.48			4/27/2023	4/30/2023	ABC Windows[8]				
478	4/20/2023	ABC Contractor	\$2,680.07			4/27/2023	4/30/2023	ABC Windows[8]				
477	4/20/2023	ABC Contractor	\$764.57			4/27/2023	4/30/2023	ABC Windows[8]				
475	4/20/2023	{ABC Windows}	\$942.78			4/27/2023	4/30/2023	ABC Windows[8]				
474	4/20/2023	{ABC Windows}	\$1,375.70			4/27/2023	4/30/2023	ABC Windows[8]				
473	4/20/2023	{ABC Windows}	\$1,375.70			4/27/2023	4/30/2023	ABC Windows[8]				
472	4/20/2023	ABC Contractor	\$2,680.07			4/27/2023	4/30/2023	ABC Windows[8]				
471	4/20/2023	{ABC Windows}	\$942.78			4/27/2023	4/30/2023	ABC Windows[8]				
470	4/20/2023	{ABC Windows}	\$0.00			4/27/2023	4/30/2023	ABC Windows[8]				

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The following statuses can be selected:

- **Recent** – Shows all quotes created or viewed for the current user from the last 5 days.
- **Available** – Shows all available, non-expired, non-uploaded quotes the user is able to access.
- **On-Hold** – Shows all quotes the user has access to that are currently on-hold.
- **Uploaded** – Shows all quotes the user has access to that have been uploaded via the standard Web mode.

Note: Similar to standard Web, uploaded quotes cannot be edited through CSR Web.

- **Expired** – Shows all quotes the user has access to that have expired and must be renewed.

Quote	Date	Customer	Total	My PO Number	My Customer Ref	Expired	Mfg Customer
465	3/15/2023	Design Zone	CAD0.00			4/14/2023	Design Zone[33]
464	3/15/2023	{ABC Windows}	\$0.00			3/25/2023	ABC Windows[8]
463	3/14/2023	{ABC Windows}	\$0.00			3/24/2023	ABC Windows[8]
460	3/9/2023	Design Zone	CAD743.80			4/8/2023	Design Zone[33]
459	3/7/2023	{ABC Windows}	\$4,067.58			3/17/2023	ABC Windows[8]
458	3/6/2023	{ABC Windows}	\$0.00			3/16/2023	ABC Windows[8]
456	3/2/2023	{ABC Windows}	\$0.00			3/12/2023	ABC Windows[8]
455	3/2/2023	{ABC Windows}	\$472.42			3/12/2023	ABC Windows[8]
454	3/2/2023	{ABC Windows}	\$0.00			3/12/2023	ABC Windows[8]
453	2/28/2023	Design Zone	CAD761.20			3/10/2023	Design Zone[33]

When viewing the expired quotes in Quote Maintenance, a 'Delete Quotes' button will appear at the bottom of the screen. By selecting multiple question using the checkboxes in the grid, or the 'Check All' checkbox in the column headers, the 'Delete Quotes' button can be used to delete multiple expired quotes at the same time.

- **Mfg Customer** – Manufacturer's name and site. This column is only visible to users assigned to multiple manufacturing sites for a single customer.

Along with selecting the status of the quote, users may filter this screen via the Customer and Site respectively.

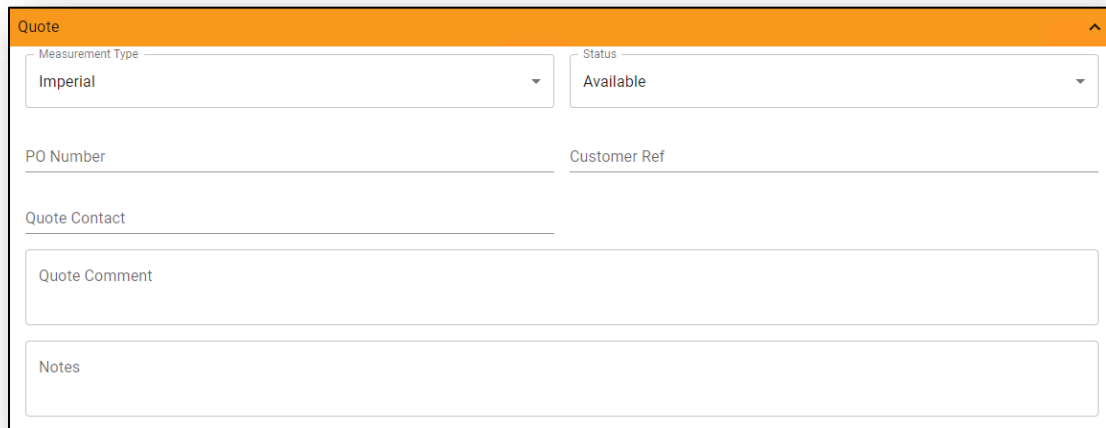
Add Quote

Users logged in as CSRs can enter quotes for customers via the 'Add Quote' screen. To add a quote, select the 'Create Quote' button within Quote Maintenance. Select the Mfg Customer, Mfg Site, and Customer to begin the quote process.

- **Mfg Customer** – Manufacturer's name and site.
- **Customer** – Web customer (Contractor) assigned to the quote.

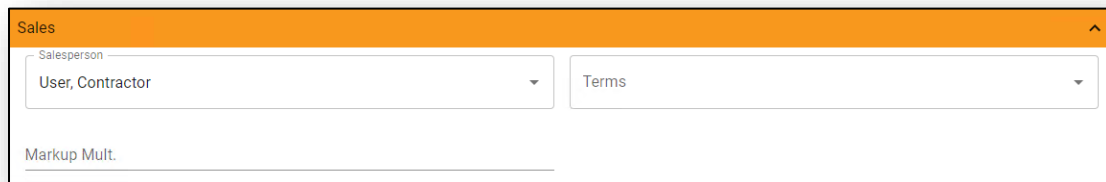
Note: If there are no existing end customers setup, a quick quote customer will be created with the default settings from Web Admin. This customer will be dealer's name in {}. The pricing method for this quick customer defaults to Discount From List. However, that can change with a WEB parameter. See the WEB Admin user manual for additional information regarding this parameter.

- **Quote**



- **Measurement Type** – Imperial or Metric.
- **Status** – Status of the quote. The two status values to choose from are 'Available' and 'On Hold'. Users can determine the default status in 'Setup' >> 'Company' >> 'Settings' >> 'Default Quote Status'.
- **PO Number** – Purchase order number for this quote, not the Manufacturer's PO Number.
- **Customer Ref** – Contractor job reference for this quote, not the Dealer's Ref.
- **Quote Contact** – Person to contact regarding the quote.
- **Quote Comment** – Any comments regarding the quote.
- **Notes** – Any notes regarding the quote.

- **Sales**



- **Salesperson** – Personnel in the Dealer's company responsible for the sale.
- **Terms** – Preconfigured in 'Terms and Ship Via'.
- **Markup Mult** - Percentage of markup from the Manufacturer's price (If pricing is set based off 'Discount from List' or by 'Gross Profit Margin' then this field will change accordingly). When this field is changed after line items have been added to a quote, all pricing will be recalculated to reflect the new value even if the price has been overridden (excluding web-only charge parts).
- **Billing Address** – The address all financial information will go to. This information defaults to the information configured on the customer but can be edited here.

- Shipping Address** – Address to which the order will be shipped to. Marking ‘Same as bill address’ will use the same address entered for billing and will not be editable. This section will also allow for ship via to be selected, drop ship to be checked, and comments to be entered.

When all information is entered, select ‘Add’ to save or ‘Cancel’ to cancel changes.

Quote Entry




Quotes may be created and modified by CSRs in ‘Quote Entry’.

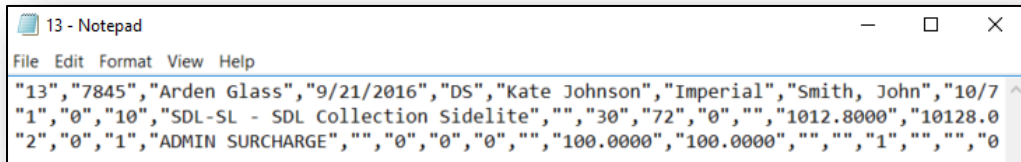
The pricing that is displayed is the pricing set for the end customer by the contractor. Since end customers are not permitted to see dealer pricing information, the 'Quote List', 'Quote Selling', and 'Quote Accounting' reports are not available.

The 'Quote Entry' screen includes two sections: 'Quote Header' and 'Line Item Grid'. 'Quote Header' displays the details entered in the 'Add Quote' screen along with some additional functions. In the 'Line Item Grid', the user will add items to the quote.

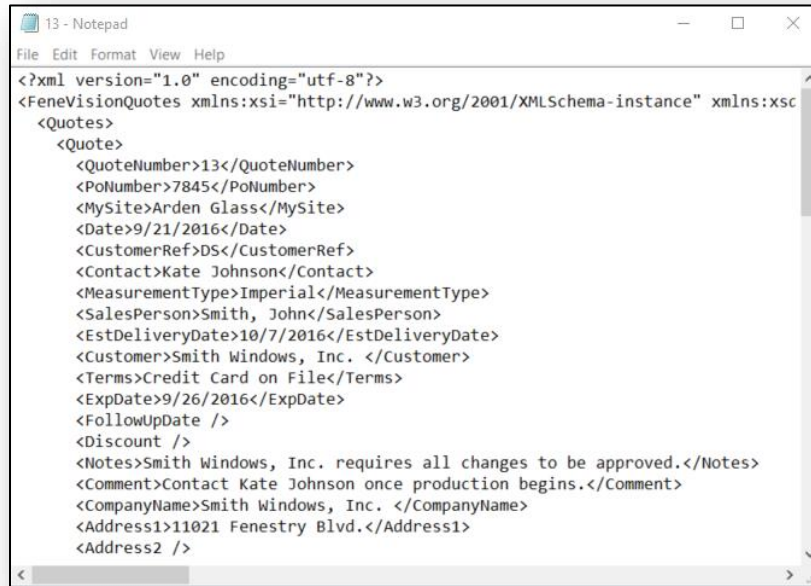
Quote Header

The 'Quote Header' contains the following:

- **Quote Information** – Displays important information regarding the quote. When the Quote Entry screen first opens, the quote information will be hidden but can be viewed by using the 'More' icon below the Customer Name. To edit the quote information, select the 'Pencil' icon located at the top right of each informational section. It will display the 'Edit Quote' page, which is like the 'Add Quote' page, with a section expanded based on which pencil icon was selected. When all information is entered, select the 'Save' button to save the information and return to the Quote Entry screen.
-  – The 'Finish' button closes the quote and displays the dashboard. Selecting this button will not prevent the quote from being modified in the future. The user can return to this dialog and edit the quote (including changing the customer) at any time until it expires or until it has been submitted to the dealer.
-  – The 'Print' button prints the selected quote report in PDF format. The following selections are all variations of the 'Quote' report that can be printed.
 - **Quote**
 - **Quote w/o Pricing** – Quote without line item pricing, item subtotal pricing, and total pricing.
 - **Quote w/o Line Item Pricing** – Quote with only subtotal and total pricing.
 - **Quote List** – Quote with list pricing.
 - **Quote Selling** – Quote with list and normal pricing.
 - **Quote Accounting** – Quote with list pricing, price book pricing, costs and margins.
-  - The 'Download' button allows the user to save the quote as a Word or Excel file as well as in a CSV and XML format.
 - **CSV** – Exports the quote information to a csv file format. The quote export file name will be {quotenumber}.csv.



- XML – Exports to xml file format. The quote file name will be {quotenumber}.xml.



- The file layout follows:
 - The first record of the file is the header record for the quote.
 - The following records are each line item for the quote.
 - Each file is wrapped in double quotes and separated by a comma.

For example: "109829", "", "123 Doors & Windows",
"1/7/2009"

- Any double quotes in a string field will have a double quote appended to it.

For example: original string="123 Doors & Windows" Double
Quoted"
output="123 Doors & Windows ""Double Quoted"""

- Any line feeds will stay the same.

For example: original string= 123 Doors & Windows
output = "123 Doors & Windows"


- If the user or site does not have necessary permissions for a field, then it will fill that field with a blank. If the user does not have permission to view pricing, then it will fill the field with "".
- The header record will contain the following columns:

Field	Requires Permission
-------	---------------------

OrderNumber	
PONumber	
Manufacturer SiteName	
OrderDate	
CustomerRef	
OrderContact	
MeasurementType	
SalespersonName	
ReqDate	
Discount /Markup/Margin Value	Yes
OrderNotes	
OrderComment	
Shipping CompanyName	
Shipping Address1	
Shipping Address2	
Shipping State	
Shipping ZipCode	
Shipping Phone	
Shipping Fax	
Shipping ShipVia	
Drop Ship	
Shipping Comments	
SubTotal	Yes
TaxTotal	Yes
Misc Total	Yes
Total	Yes

- The detail record will contain the following columns:

Field	Requires Permission
LineItem	
SubLineItem	
Quantity	
Part	
CallSize	
Width	
Height	
Thickness	
Cost	Yes
UnitPrice	Yes
ExtendedUnitPrice	Yes
SqFtPrice	Yes
OptionsDescription	
IsSurchargePart	
Comment	
Exception	

-  – Displays ‘Global Options Changes’ dialog. This allows the user to globally change options for all line items and alternate wizard selections on the quote.

Global Option Changes - #116

Question: COLOR | Old Option: WH - WHITE | New Option: CH - CHERRY | CHANGE

These Items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

These issues must be resolved before the items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

In this image, the question selected from the 'Question' drop-down was COLOR. Under the 'Old Option' drop-down, WH - WHITE was selected; under the 'New Option' drop-down CH - CHERRY was chosen. Select 'Change'. The following screen will appear, confirming and saving the change.


Question: {None} | Old Option: {Any} | New Option: {None} | CHANGE

These Items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value
<input checked="" type="checkbox"/>	1	8000PW - PICTURE WINDOW	COLOR	WH - WHITE	CH - CHERRY	


These issues must be resolved before the items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

If the option selected supports option values, the 'Old Value' and 'New Value' dropdowns will show. The user will then be able to change the option values as well. Once changed, the new value can be adjusted by selecting the  and selecting a new value from the dropdown in the items before saving.



Question: {None} | Old Option: {Any} | New Option: {None} | CHANGE

These items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value
<input checked="" type="checkbox"/>	1	8000PW - PICTURE WINDOW	GRID PATTERN	COL - COLONIAL	1H2V	COL - COLONIAL 3H2V 


These issues must be resolved before the items will be saved

Item	Part	Question	Old Option	Old Value	New Option	New Value

-  – Copies the entire quote to a new quote.
-  – Opens the transaction log for the quote. The log will show all changes made to the quote including the type of change, date / time of change, the user who made the change, the order number and line item number, and the question and code. *(Only enabled if quote locking is enabled.)*


Type	Date	User	Quote Number	Line Item	Question	Code	Details
Line Item	4/20/2023, 3:16:38 PM	Zurcher, Dylan	484	1			...
Line Item	4/20/2023, 3:16:38 PM	Zurcher, Dylan	484	2			...
Quote	4/20/2023, 3:16:38 PM	Zurcher, Dylan	484				...
Line Item	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	2			...
Line Item	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1			...
Line Item Option	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1	COLOR	WH	...
Line Item Option	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1	GAS	ARG	...
Line Item Option	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1	GLASS	GYCL	...
Line Item Option	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1	GRID MATERIAL	FLAT	...
Line Item Option	4/20/2023, 3:16:37 PM	Zurcher, Dylan	484	1	GRID PATTERN	COL	...

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-  – Displays detail of each change made including the old and new values.

Column	Old Value	New Value
PlanDate		11/9/2022 12:00:00 AM

- Use the 'Ok' button to leave the transaction log screen and return to the quote entry screen.

-  – Deletes the current quote.

Line Item Grid

The 'Line Item Grid' displays the list of items that are being ordered on the quote.

Item	Qty	Part	Size	Price	Total
1	1	8000PW - PICTURE WINDOW	30 W X 50 H	\$540.92	\$540.92
SIZING(EXACT SIZE), COLOR(WHITE), GLASS(GREY/CLEAR IG, GAS(ARGON GAS)), GRID PATTERN(COLONIAL=[1H2V], GRID MATERIAL(STD GRIDS)), MISC FRAME OPTIONS(HEAD EXPANDER NAIL FIN)				Surcharge:	\$8.14
				Subtotal:	\$549.06
				Tax:	\$0.00
				Total:	\$549.06
Entered By	Date	Expires			
	4/20/2023	4/30/2023			

The following information can be found in the 'Line Item Grid':

- **Item** – Numeric identifier for the sequence of the line item on the order.
- **Qty** – Quantity being ordered.
- **Part** – Part being ordered.
- **Size** – Ordered height, width, and thickness of the part.
- **Price** – Calculated price of a single part.
- **Total** – Total price of the line item give the part price and quantity.
- **Options** – Below each line item is a comma delimited list of the options selected for the part.

- **Surcharge** – Total amount being applied to the order by surcharges. Clicking the link will display a list for surcharges and the values associated with them.
- **Subtotal** – Summation of all line item totals and surcharge value.
- **Tax** – Total tax calculated for the order. Clicking the link will display a list of the taxes and percentages being applied to the quote.
- **Total** – Summation of the subtotal and tax on the quote.
- **Entered By** – User that created the quote.
- **Date** – Date the quote was created.
- **Expires** – Calculated date of when the quote is set to expire.

The currency the quote displays will be the 'Order Currency' of the customer in FeneVision CORE. The format of the values, including comma and decimal separators, will display based on the culture settings of the browser being used.

Entering a Line Item

Users can enter line items to a quote using two different methods.

Conventional Method

To enter line item information using the conventional mode, complete the following:

1. Select a category from the left drop-down list. This will filter the part list to only the parts that exist in the selected category.
2. Select a part from the right drop-down list.

The screenshot shows a horizontal selection bar. On the left, there is a category dropdown menu with a magnifying glass icon and the text '8000 Series Windows'. On the right, there is a part dropdown menu with the text '8000PW - PICTURE WINDOW'. To the right of the part dropdown is an orange 'ADD' button.

3. Select 'Add' to view the 'Item Properties' screen. This screen allows the user to configured the line item quantity, sizing and comments.

The 'Item Properties' form is a vertical container. At the top, it has a title 'Item Properties'. Below the title are several input fields:

- Qty**: A text input field with a blue border and a blue '1' inside.
- Call Size**: A text input field.
- Width**: A text input field with '0' and 'inches' to its right.
- Height**: A text input field with '0' and 'inches' to its right.
- Thickness**: A text input field with '0' and 'inches' to its right.
- Line Item Comment**: A larger text area for comments.

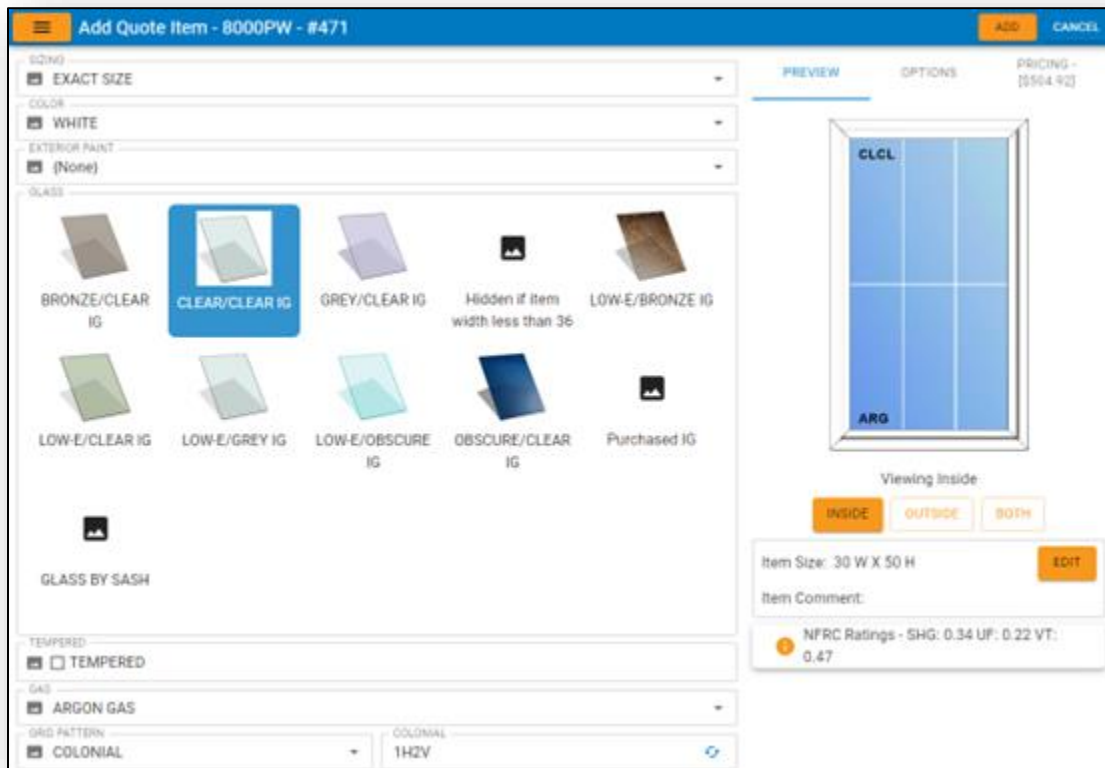
 At the bottom of the form are two buttons: an orange 'ADD' button and a blue 'CANCEL' button.

Enter the required information in the following fields:

- **Quantity** – Line item quantity.

- **Call Size** – Width and height of the ordered part in using the industry standard call size. The value entered in this field will be converted to the specified measurement type on the quote header and the converted value will be displayed in the Width and Height fields. The standard format of this field is FIFI where F = Feet and I = Inches.
 - **Width** – Width of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Height** – Height of the ordered part. Decimal or fraction values may be entered (disabled when a call size is selected).
 - **Thickness** – Thickness of the ordered part. Decimal or fraction values may be entered.
4. Select 'Add' to view the 'Add Quote Item' page. This screen allows the user to select options for the line item. the line item quantity, sizing, options, and comments. The following image shows an example of an 'Add Quote Item' page for a single window.

Note: The header at the top of the screen indicates the part number and quote number of the part being added. If an existing part is being edited, the line item number will be appended to the end of the header.

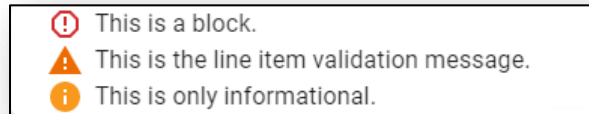


5. Configure Options. If an option is required, the user will not be able to make further selections until the required choice is made. This option selection process is much like the 'Options Wizard' found in 'Order Entry' in Core.

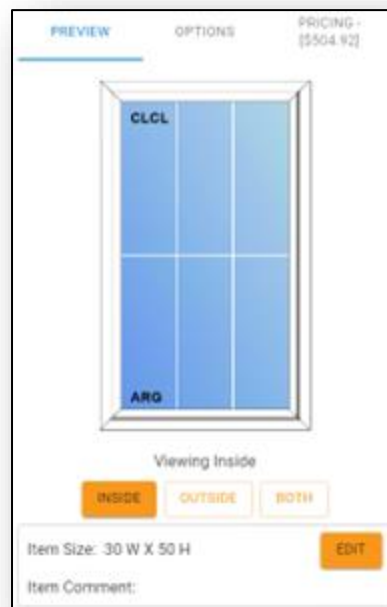
Note: 'Shape' and 'Muntin' managers are available through the FeneVision Web Options Wizard. When configured, an extra button will display in the input column that will take the user to either the 'Shape Manager' or 'Muntin Manager' web page. Additionally, any option with a default value such as grid pattern will display a 'Refresh' icon to the right of the input. This refresh button can be selected after updating the input to update the image located on the right side of the screen.

6. If validation exceptions occur, work to resolve the issue identified by each. Exceptions are generally a result of a poor combination of options and/or sizes, so making necessary changes to options can resolve the exception. Line item validation is configured in Core specifically for each part. There are three types of exceptions: Info, Line Item Exception, and Block.

- **Block** – A block exception will display in the Option Wizard screen with a red brick icon. These exceptions will prevent the user from adding the line item to the quote. The user must resolve the exception before Option Wizard can be finished.
- **Line Item Exception** – A line item exception will display in the Option Wizard screen with a yellow icon. These exceptions will cause the line item to turn read and will display in the line item exceptions and policies screen when attempting to acknowledge the order.
- **Info** – An info exception will display information in the Option Wizard screen with a blue icon. These exceptions do not display in the line item exceptions screen on the quote; does not cause the line item to turn red.



7. Users can see an image of the quoted item by choosing 'Preview'. The default view is from the outside. Select 'Inside' to change the image view from the inside. While viewing from the inside, the user can go back to the outside view by selecting 'Outside'. Alternatively, the user may select 'Both' to see the inside and outside view side-by-side. 'Both' is limited to products that do not have cross sections configured and do not use an alternate wizard.



8. To see a summary of the item's options, select 'Options'.

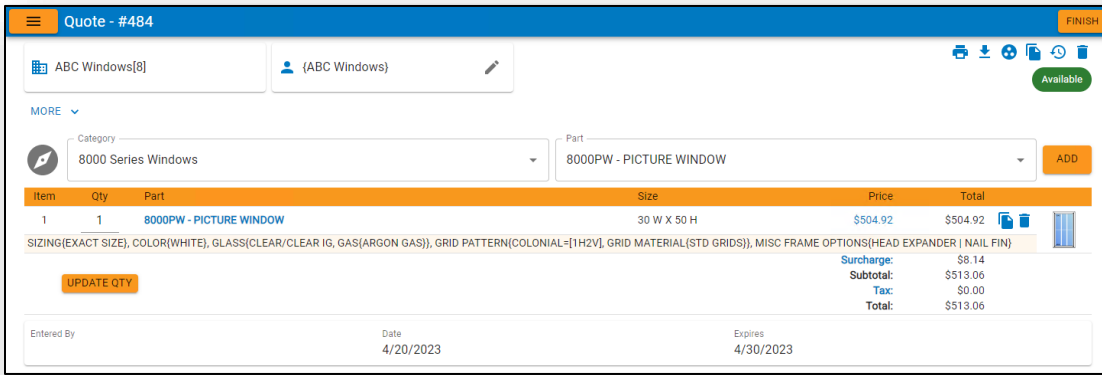
PREVIEW	OPTIONS	PRICING - [\$504.92]	
Question	Option	Description	Input
SIZING	EX	EXACT SIZE	
COLOR	WH	WHITE	
GLASS	CLCL	CLEAR/CLEAR IG	
GAS	ARG	ARGON GAS	
GRID PATTERN	COL	COLONIAL	1H2V
GRID MATERIAL	FLAT	STD GRIDS	
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	
MISC FRAME OPTIONS	NF	NAIL FIN	

9. To view the estimates price of the item and options selected, select 'Pricing'.

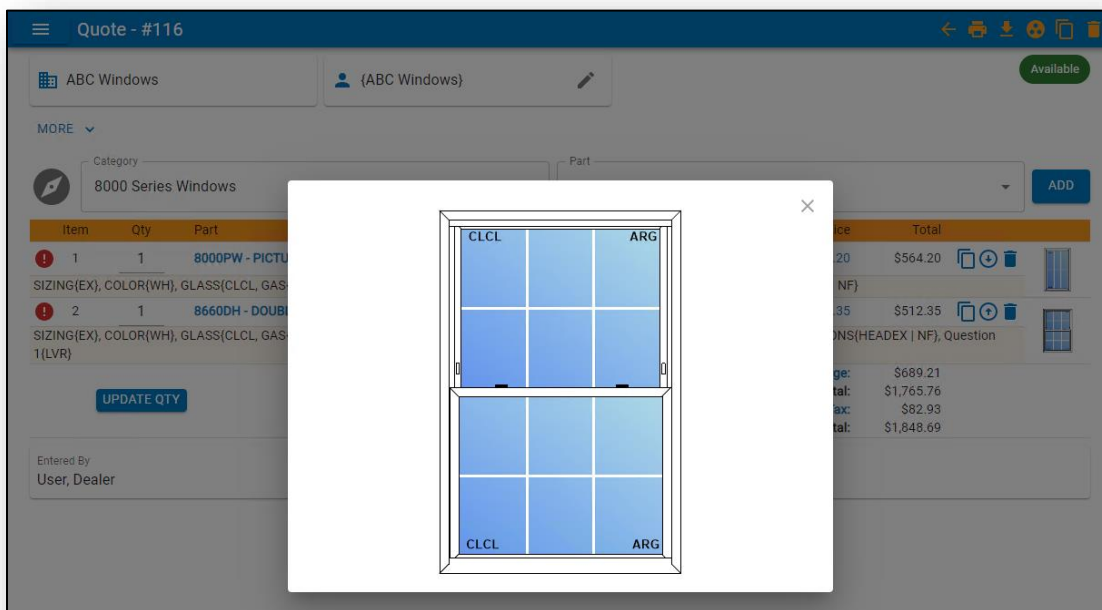
Note: User must have permission to "View Pricing" in order to see the Pricing tab.

PREVIEW	OPTIONS	PRICING - [\$504.92]	
		Price	
Part Price:		\$395.20	
Options:			
Question	Option	Description	Price
GAS	ARG	ARGON GAS	\$23.05
GRID PATTERN	COL	COLONIAL	\$41.67
MISC FRAME OPTIONS	NF	NAIL FIN	\$40.00
MISC FRAME OPTIONS	HEADEX	HEAD EXPANDER	\$5.00
Options Price:		\$109.72	
Item Price:		\$504.92	

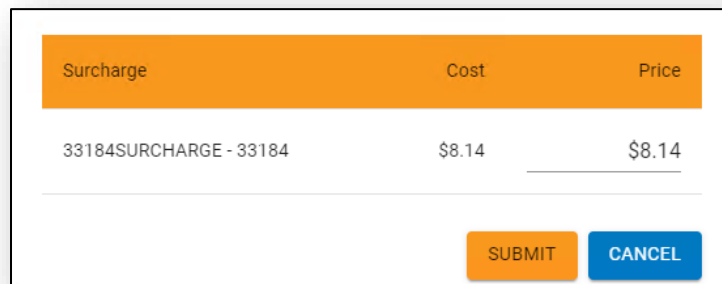
When all fields are completed and required options have been configured, 'Add' will appear. Select 'Add' to add the line item to the quote.



- To edit a line item, select the link in the 'Part' column, to display the 'Edit Quote Item' screen.
- To view an image of the unit, select the thumbnail and a larger image will open for all standard option wizard parts. (Setup through Core GSP)



- To view the surcharges, select the 'Surcharge' link.



- To change the quantity of an item, enter the new amount in the provided field and select **UPDATE QTY**.
- To view a line item price breakdown, select the link in the price column.

Price Breakdown - #484-1 SAVE CANCEL

Quantity: 1 Item: 1: 8000PW - PICTURE WINDOW Size: 30 W X 50 H
 Part Price: \$395.20

Option Prices: Discount Table: Discount SJ

Question	Description	Value	Price
SIZING	EXACT SIZE		\$0.00
COLOR	WHITE		\$0.00
GLASS	CLEAR/CLEAR IG		\$0.00
GAS	ARGON GAS		\$23.05
GRID PATTERN	COLONIAL	1H2V	\$41.67
GRID MATERIAL	STD GRIDS		\$0.00
MISC FRAME OPTIONS	HEAD EXPANDER		\$5.00
MISC FRAME OPTIONS	NAIL FIN		\$40.00

Rows Per Page: 10 1 - 8 of 8

Item Weight	Item Cost	\$504.92	Item Sq. Ft. Price	\$48.47	Item Price	\$504.92
Overall Weight	Overall Cost	\$504.92	Overall Sq. Ft. Price	\$48.47	Overall Price	\$504.92

The following fields exist in the 'Order Item Price Breakdown' dialog:





- **Part Price** – Price of the part.
- **Item Weight** – Weight of the item selected.
- **Overall Weight** – Weight of the ordered item and sub line items.
- **Item Cost** – Cost for the item. Will be the same as overall cost when the ordered part does not have sub line items. However, when the ordered item has sub line items (that have a cost), the overall cost will exceed the item cost.
- **Overall Cost** – Sum of all item costs on the ordered item and all sub line items.
- **Item Sq. Ft. Price** – Sum of the part and option prices for the item per square foot.
- **Overall Sq. Ft. Price** – Sum of all part and option prices on the ordered item and all sub line items per square foot.
- **Item Price** – Sum of the part and option prices for the item. Will be the same as overall price when the ordered part does not have sub line items. However, when the ordered item has sub line items (that are priced), the overall price will exceed the item price.
- **Overall Price** – Sum of all part and option prices on the ordered item and all sub line items.

Note: If a price is overridden, changing any manufactured-priced options will recalculate the overridden price.

15. To view the tax assigned to the order, select the tax link.

Taxes	
Tax	7.5000%
Tax 1	0.0000%
Tax 2	0.0000%
Tax 3	0.0000%
Tax 4	0.0000%

[SUBMIT](#) [CANCEL](#)

16. Use  to copy the current line item and paste it at the end of the quote.
17. Use  and  to re-order the line items.
18. Use  will delete the line item from the quote.

Shape Library

Web users can click the ellipsis button next to the shape option to bring up a tiled view of all the available shapes via the Shape Library. The Shape Library configurator in Web is the same as what is available in FeneVision Core.

☰
Add Quote Item - MONO - #16

SHAPE

⋮

SHAPE NUMBER
🚩 {Required}
⋮

The user can then filter by number/description, number of straight sides, and number of curved sides.

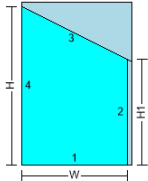
☰
Add Quote Item - MONO - #16
CANCEL

Search

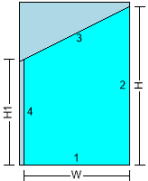
Straight Sides

Curved Sides

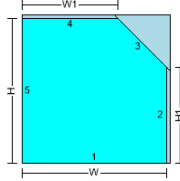
Results per page: 20 ▾
 1-20 of 153 |< >



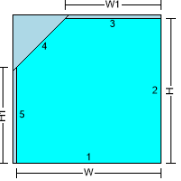
001SH - RAKE RH



002SH - RAKE LH

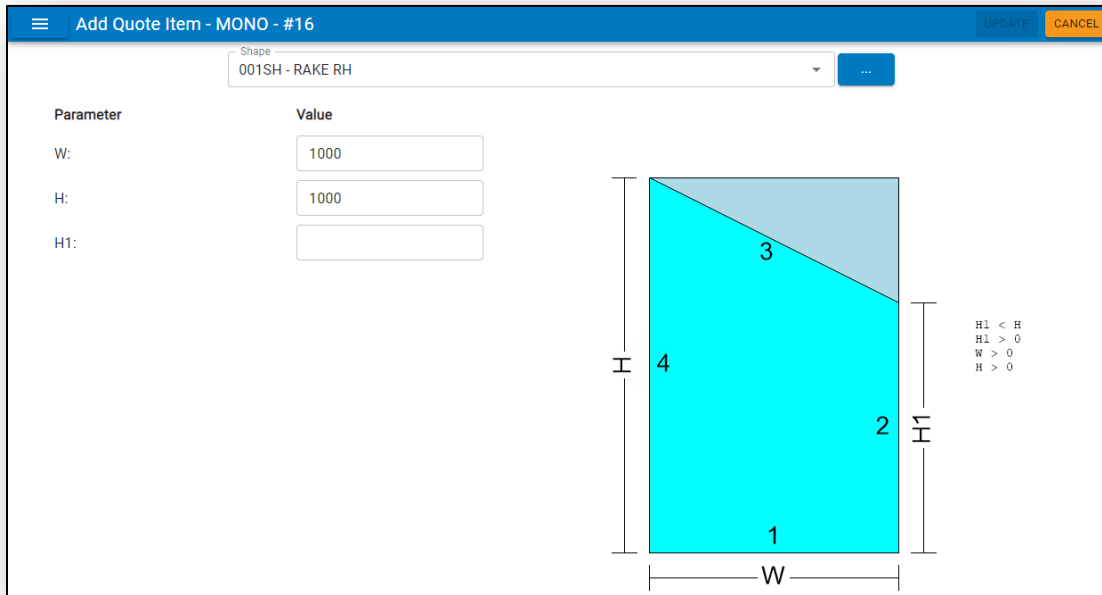


003SH - PENTAGON-IRREG



004SH - PENTAGON-IRREG

The Shape Library is also available from within Shape Editor, by selecting the icon next to the shape number drop down.




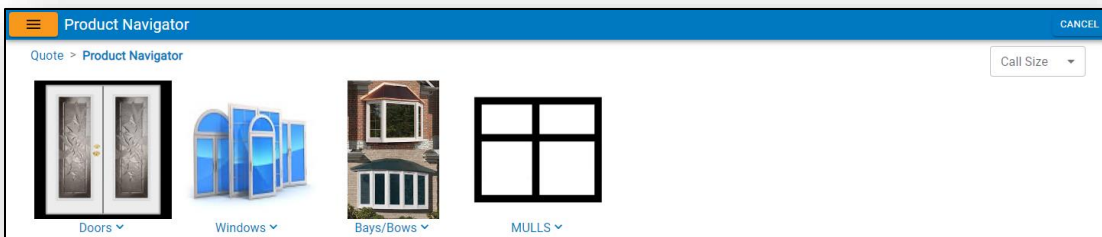
Users can also use the Option Image view to show static images of the shapes, if the field is not in tiled layout. By selecting the icon next to the option drop-down, the user will see a tiled list of options with the option images.

Product Navigator

Users can also use 'Product Navigator' mode to enter items and sub line items.



To use the 'Product Navigator' feature to enter a line item, select  to the left of the quote entry fields to view product categories. Follow the navigator and select the image representing the part to be entered as a line item.



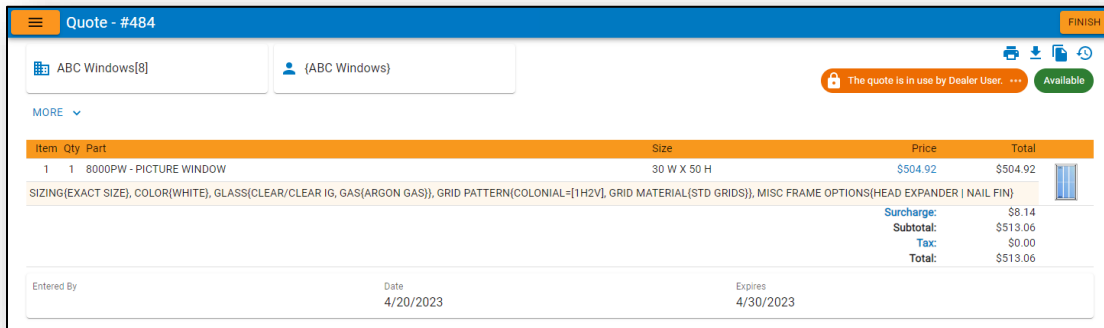
Select the desired category image to see the available products for that category. The example below illustrates what the user will see in the 'Windows' category.



Note: In order to use the 'Product Navigator' in FeneVision Web, users must have configured parts in FeneVision Core to be visible in 'Remote/Web' or 'Visible Everywhere'.

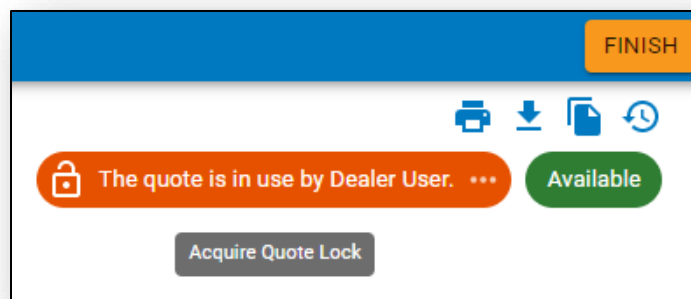
Quote Locking

Quotes can also be locked when using CSR mode. This requires the locking GSP to be enabled via Web Admin. When enabled, the locking mechanism prevents more than one user from editing a quote simultaneously. The first user in the quote may edit like normal. Any additional users who open the quote will see a lock icon and message at the top of the quote indicating that the quote is in use by another user.



As a CSR, a user may obtain the lock by clicking the lock icon. This helps a CSR take control of a quote to quickly assist a customer.

Note: It is advised to use caution when obtaining a lock, as the previous user's work may be lost.



Additionally, locks can be cleared in the following ways:

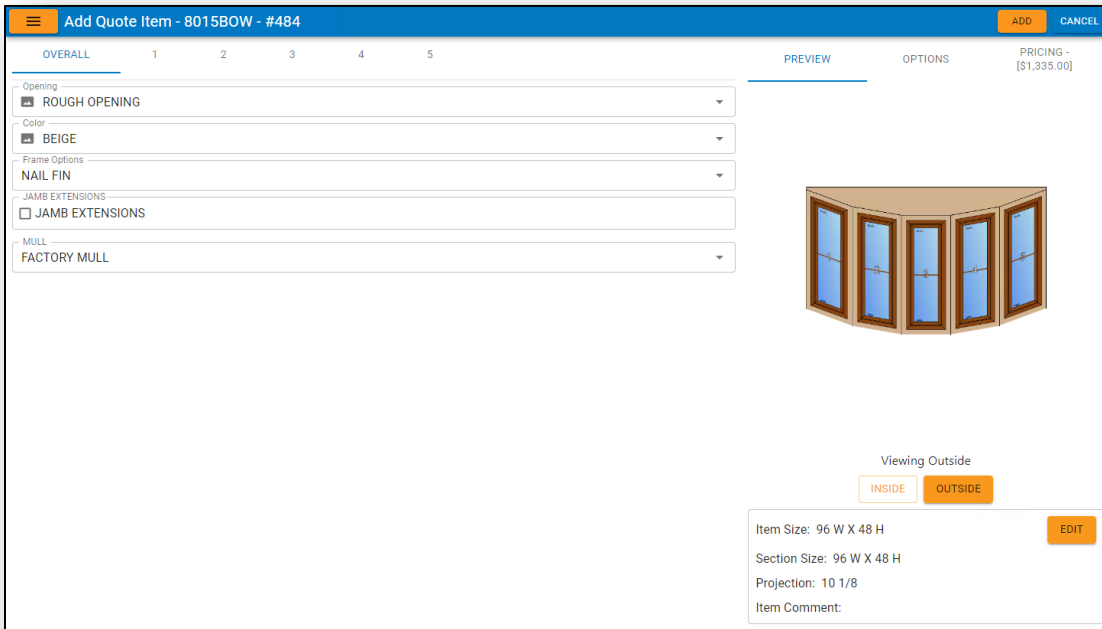
- The user clicks "Finish" on the quote.
- The user logs out.
- Web Publish/Sync occurs.

Bay & Bow and Opening Designer Options

Users can order Bay & Bow and Opening Designer units with preconfigured templates *without* having to download and install the 'Alternate Wizard'. These designs can be customized in FeneVision Web without having to leave the 'Options' screen.

Bay & Bow

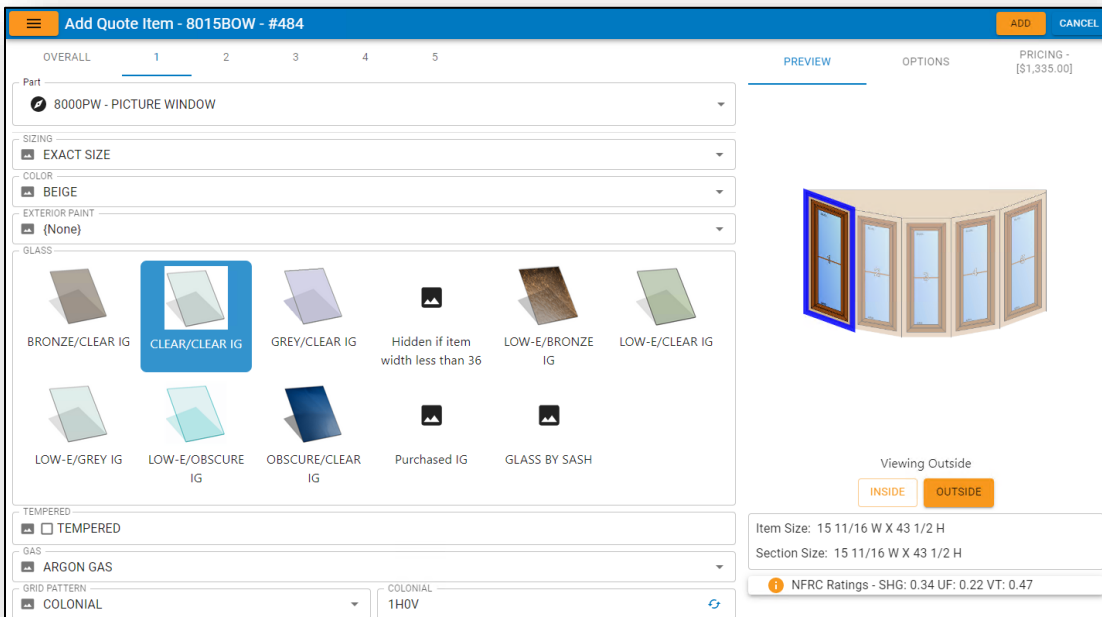
Bay and Bow items with preconfigured templates can be customized.



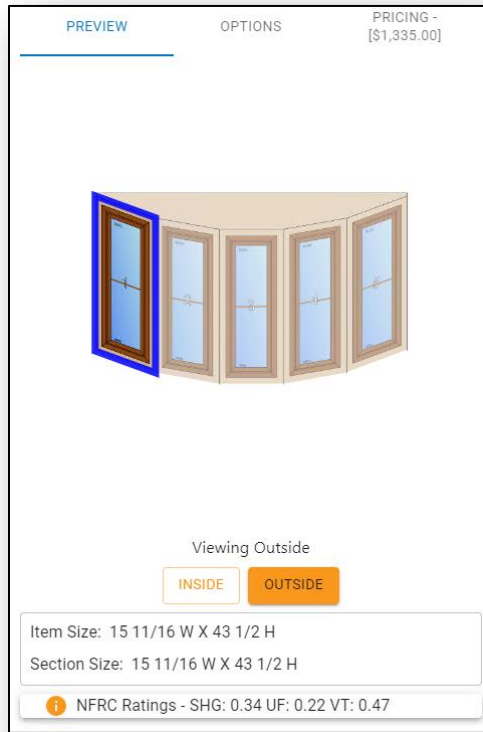
The image above represents a 5-Lite Bow window. The flag icons at the top of the screen allow the user to customize each of the window's lites. Once each sub line item is customized, that customization will display as highlighted so that the user can see each customization in its proper context.

To customize the existing design, complete the following:

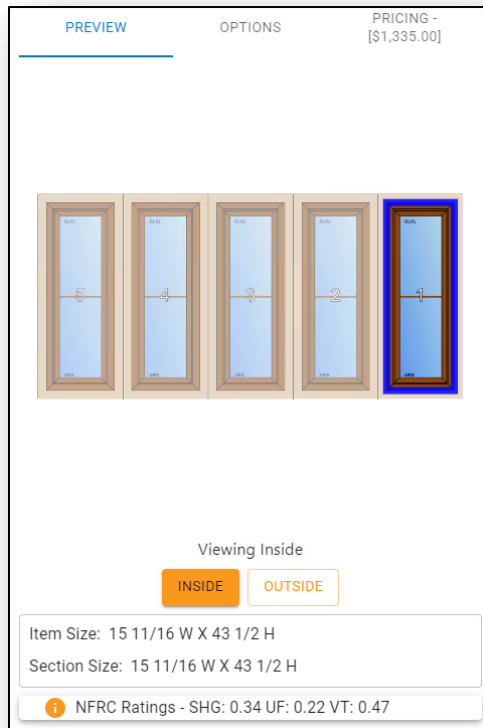
1. Select which lite of the bow window to customize by choosing one of the numbered tabs that represent each lite, or by clicking on the lite within the displayed image to the right of the options.




The default view of the image is from the outside. If the user chooses flag icon 1 and is viewing from the outside perspective of the image, the first lite to be customized will be the lite farthest to the left, which is highlighted. Subsequent lites will follow left to right.



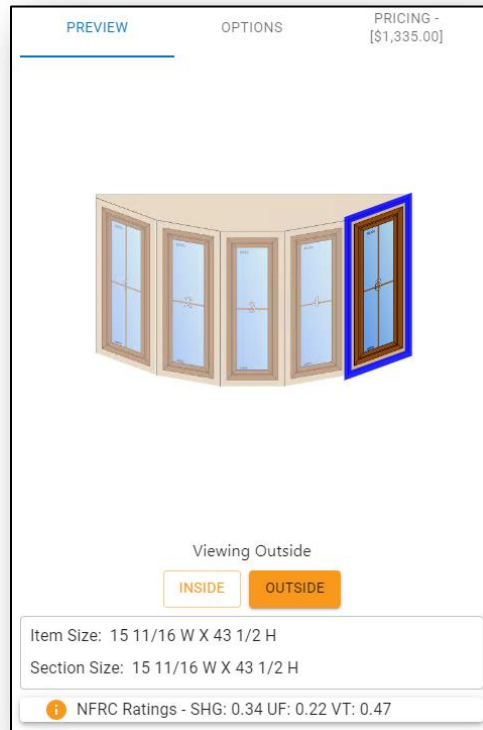
If the viewer chooses to see the inside perspective of the image, selecting 1 will select the lite farthest to the right, which is highlighted. Subsequent lites will follow from right to left.



2. Choose a part from the 'Part' drop-down. Each one of these parts can be exchanged for the default part.

3. Quantity, size, and thickness are read only. Options that are locked will be preceded by . Enter all other option information for the lite. The section that is being modified will be highlighted, and any changes to the lite, e.g., the addition of grids, will be reflected in the section's image once the change is committed.
4. Continue to customize the remaining sub line items desired following steps 1 through 3.
5. Select 'Add' to commit the part. To cancel, select 'Cancel'.

In the image below, only the portions represented by tab 1 and tab 5 were modified from the original design. Once the user has completed the modification of the original design, its image will appear on the right side of the 'Quote Entry' screen.



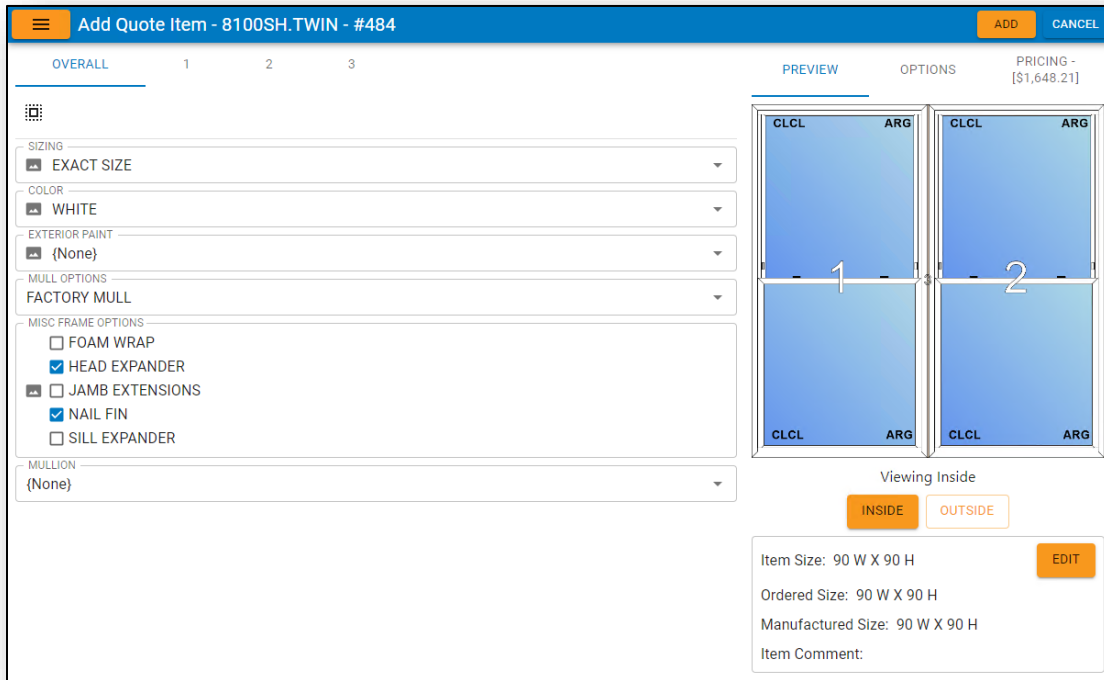
Item	Qty	Part	Size	Price	Total	
1	1	8015BOW - 5-LITE BOW	96 W X 48 H	\$1,335.00	\$1,335.00	  
Opening(ROUGH OPENING), Color(BEIGE), Frame Options(NAIL FIN), MULL(FACTORY MULL)						

Opening Designer

Similarly, 'Opening Designer' items with can be customized.

Configured Templates

'Opening Designer' parts with configured templates can be added and modified in 'Quote Entry'.

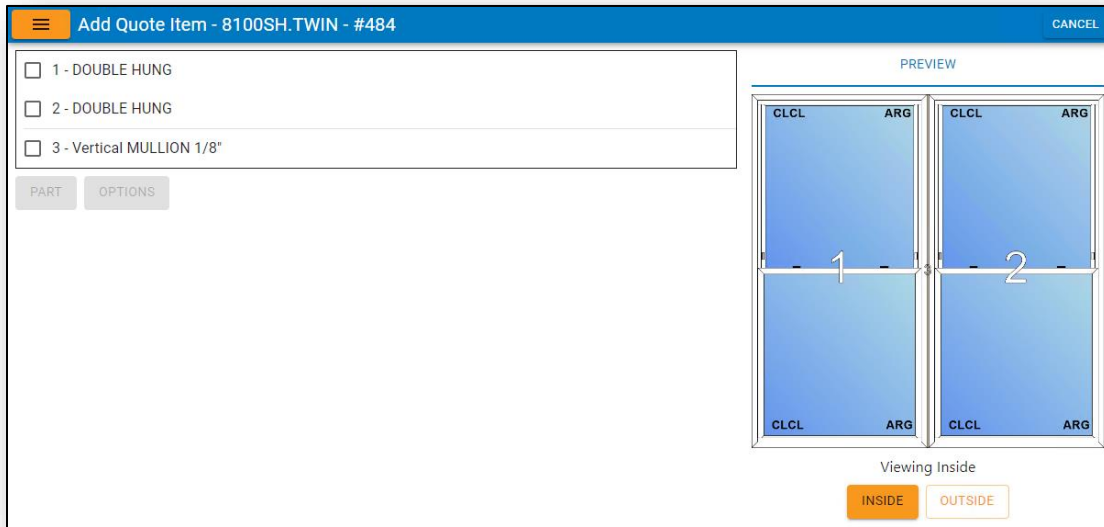


The image above represents an 'Opening Designer' item featuring an existing template. The user can add an item by following these steps:

1. Choose an 'Opening Designer' part with a template and select 'Add'.
2. Enter the desired quantity and size of the item for the opening.
3. Enter the required options for the opening part and select 'Next'.
4. Select required options for the subline item parts. Select 'Next' to either select options for the next section part or finish selecting options.

Note: If more than one section contains the same part, selecting an option for one of will apply that option to the others when first selecting options. After the options have initially been entered, they can be changed on an individual section and will not affect the other sections with the same part.

Once all of the options have been initially selected for the opening and all subline items, an overview of the opening will display. To modify specific options for a specific subline item, select the section number that corresponds with the part on the display object on the right or click the section within the image. If options must be changed for two sections at once, users can utilize the Multi Select functionality by selecting the button just below the 'Overview' tab at the top left of the screen.



Within the above screen, the user can choose two of the same parts and choose 'Options'. Options wizard will display for the part selected and any change made will be made for each of the section parts selected in this window.

Note: Part will be disabled when working with template parts as the user should not be allowed to change the part that is placed in the template. Primarily used for custom openings.

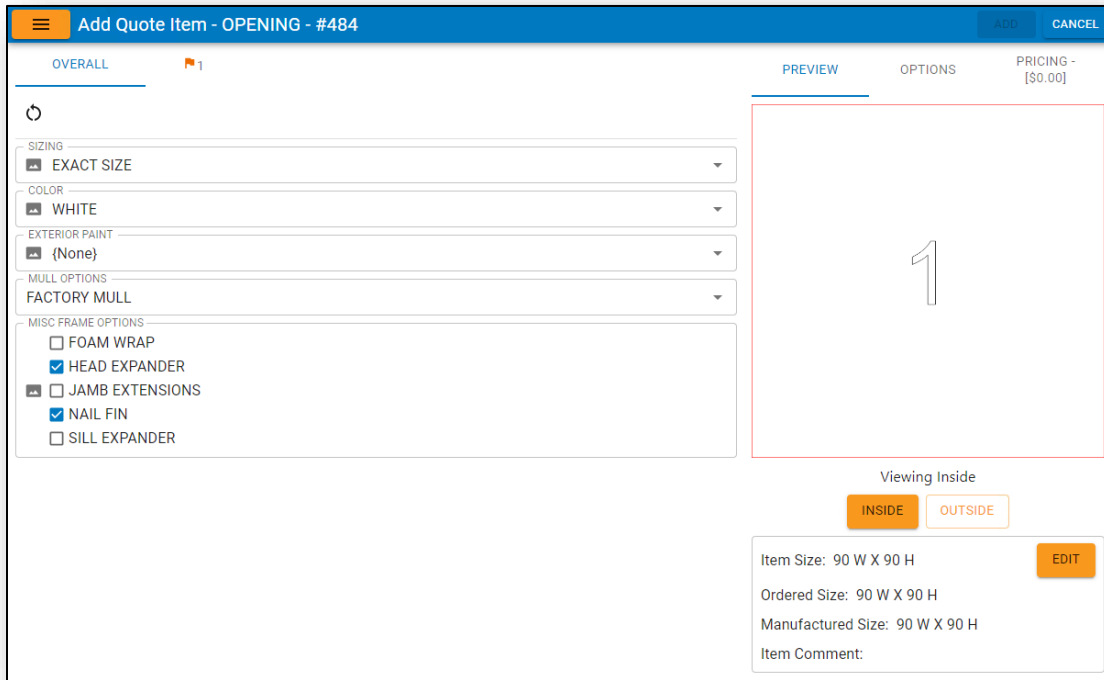
When modification of the original design is finished, this design will appear on the right of the 'Add Quote Item' screen. Once the user is satisfied with the image, the user can view a summary of the item and its options by selecting 'Summary'.

Templates may also have empty opening sections within them. In this case, the user will go through all of the options for the overall opening and any assigned parts before selecting parts for the sections that do not have parts pre-assigned to them. The user will then be taken to the Multi Select screen to select the section(s) to add a part to.

Note: If the selected section has a pre-configured part in it, the user may only change options. If the selected section has no part in it, the user may only select part.

Custom Opening

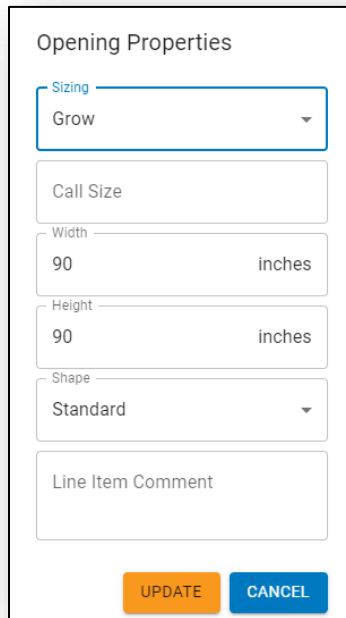
'Opening Designer' parts that *do not* contain templates can be added and modified in quote entry.



The image above represents an 'Opening Designer' item that *does not* contain a template. The user can add the item by following these steps:

1. Choose an 'Opening Designer' part with no template and select 'Add'.
2. Specify quantity, dimensions, and any necessary 'Line Item Comments'. Choosing 'Add' will apply changes made.
3. Enter the required options for the opening part and select 'Next'. This will bring the user to the 'Add Quote Item' screen.

To edit, select the 'Edit' button in the lower right-hand corner while the 'Overall' part is selected. Update sizing, dimensions, shape, and any necessary 'Line Item Comments'. Choosing 'Update' will apply changes made.

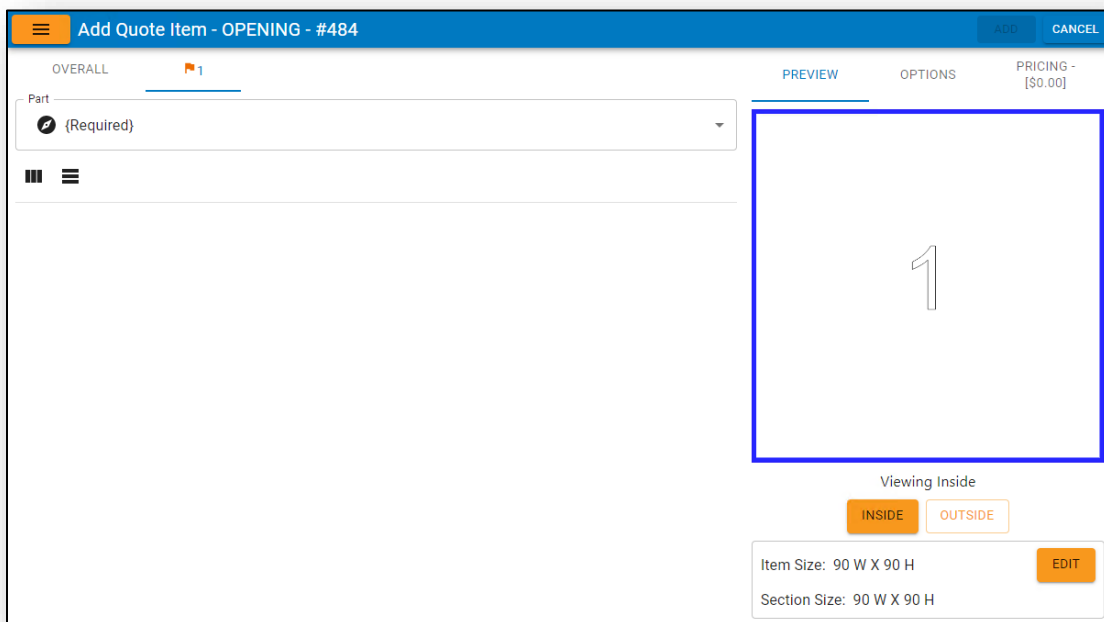


In this menu, the user can specify the following options:

- **Sizing**
 - **Fixed** – The opening’s dimensions are fixed based on the Height and Width entered here.
 - **Grow** – The opening’s dimensions are set based on the dimensions of the windows inserted into the sections.
- **Call Size**
- **Width**
- **Height**
- **Shape**
 - **Standard**
 - **Rake**
 - **Gable**
 - **Arc**
- **Comment** – Comment assigned to opening as line-item comment.

Note: Use the rotated arrows under the ‘Opening Properties’ to reset the opening and begin a clean opening.

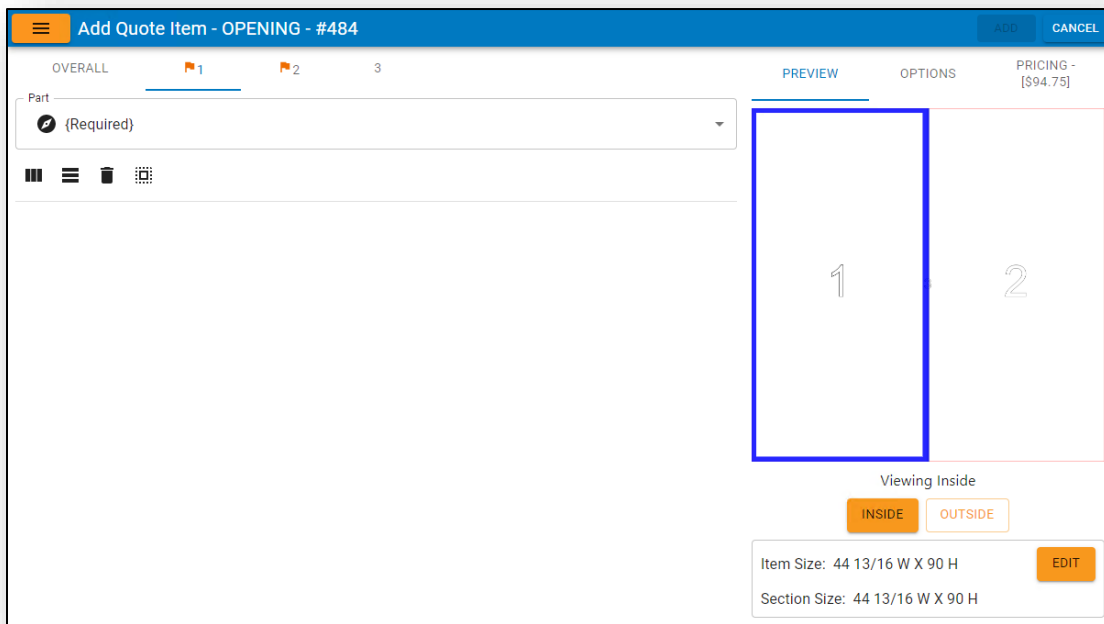
4. The first section will appear with a flag to indicate that no part has been specified. Select the first section to see the image below.



5. Specify ‘Side By Side Split’ or ‘Stack Split’ by selecting the buttons below the part dropdown. Specify the number of sections to split the section as well as the part to be inserted into the split.

The dialog box is titled "Side By Side Split". It contains two input fields: "Evenly Into" with the value "2" and the label "Sections", and "Split Part" with the value "MULL-VM - Vertical MULLION 1/8\"

Once sections are added, blank sections will appear.



Using the control buttons under the part drop down, the user can do one of the following:

- **Side By Side Split** – Creates a side by side split with vertical mull part.
- **Stack Split** – Creates a stack split with horizontal mull part.
- **Delete Section** – Removes the section from the opening which keeps the user from entering a part in that area.
- **Multi Select** – Opens the 'Multi Select' screen that allows the user to add a single part to multiple sections at once, as well as update options for a single part in multiple sections at once.

It is possible for the user to update the section properties by selecting the 'Edit' button.

Section Sizing

Call Size

Width 44 13/16 inches	Width % 49.7917 %
Height 90 inches	Height % 100 %

Width Adjustment Direction

Both Left Right

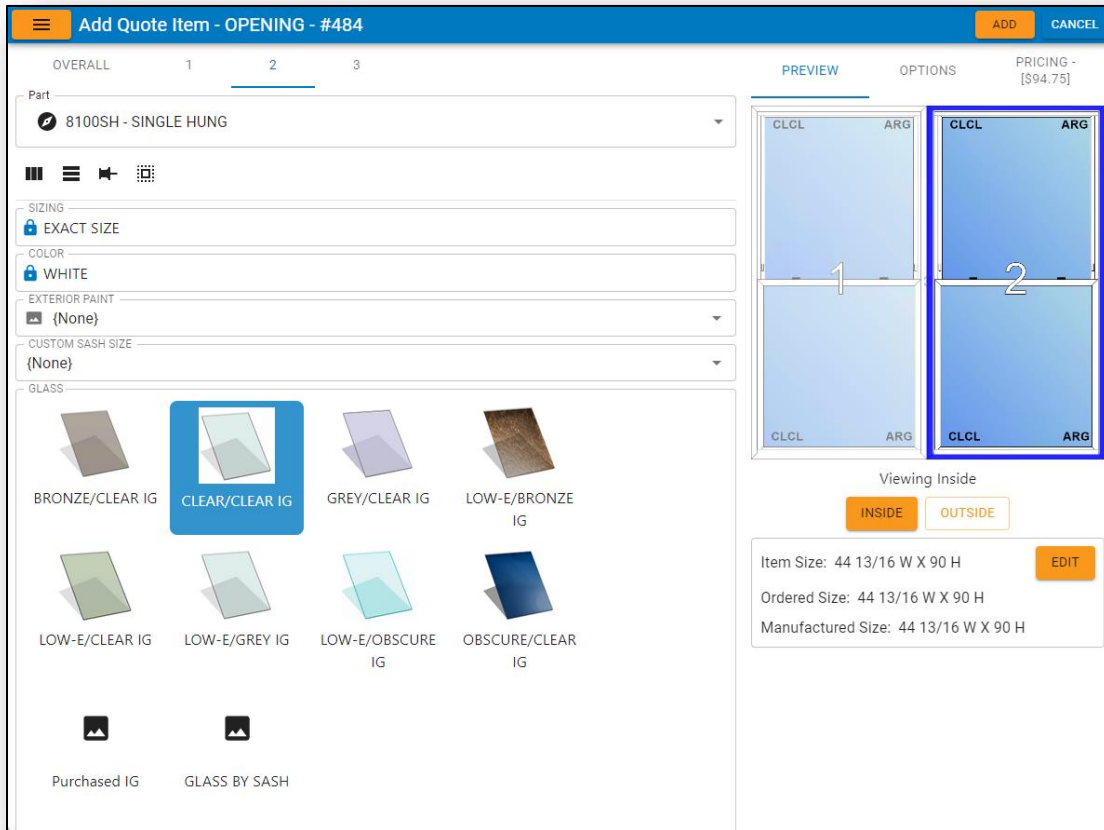
Height Adjustment Direction

Both Top Bottom

UPDATE
CANCEL

In this menu, the user can specify the following options:

- **Pinned** – When a section is pinned, the dimensions will not be affected by changing dimensions of other sections.
 - Change Size
 - **Call Size** – Configured size code that assigns width and height dimensions.
 - **Width**
 - **Height**
 - **Width Adjustment Direction** – Determines the direction in which changes to the width adjustment will be applied.
 - **Height Adjustment Direction** – Determines the direction in which changes to the height adjustment will be applied.
6. Select a part from the 'Part' drop-down to be applied to the section. Sections also support Product Navigator to insert parts into sections.
 7. Answer all required questions for the section parts.



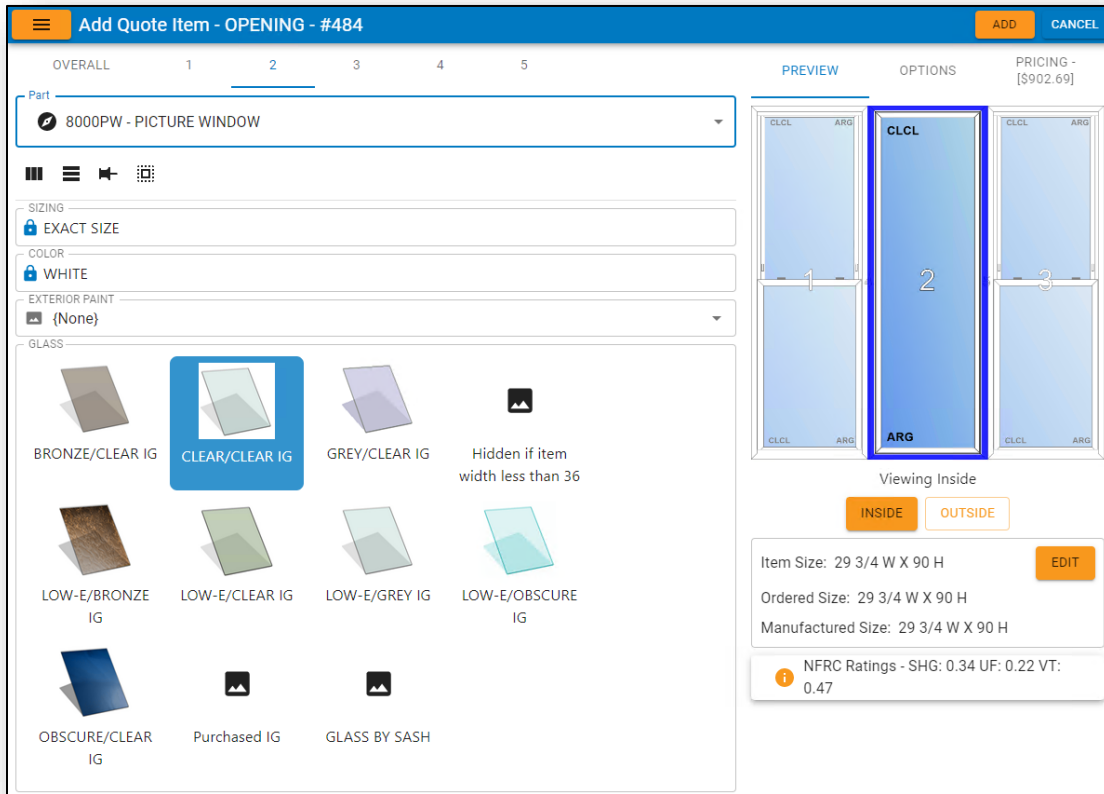
Once a part is assigned to a section, using the control buttons under the part drop down, the user can do one of the following:

- **Side By Side Split** – Creates a side by side split with vertical mull part. The part currently assigned to the section being split will be assigned to both newly created sections.
- **Stack Split** – Creates a stack split with horizontal mull part. The part currently assigned to the section being split will be assigned to both newly created sections.
- **Pin Section** – Pins the section which prevents the section from being able to be resized as a result of another section hanging size.
- **Multi Select** – Opens the 'Multi Select' screen that allows the user to update options for a single part in multiple sections at once, as well as reassign a single part to multiple sections at once.

8. Choose 'Add' when all sections are created, are assigned parts, and all required questions have been answered.

Note: Grids will auto-align after the grid options are answered but cannot be aligned manually.

Users may select a part at any time by selecting the numbered tab associated with the section of the opening, or by clicking the desired section within the opening image. This gives the user to opportunity to make changes to the particular section, its part, and its options. The selected section will be highlighted in the opening image, while other sections will show slightly opaque.

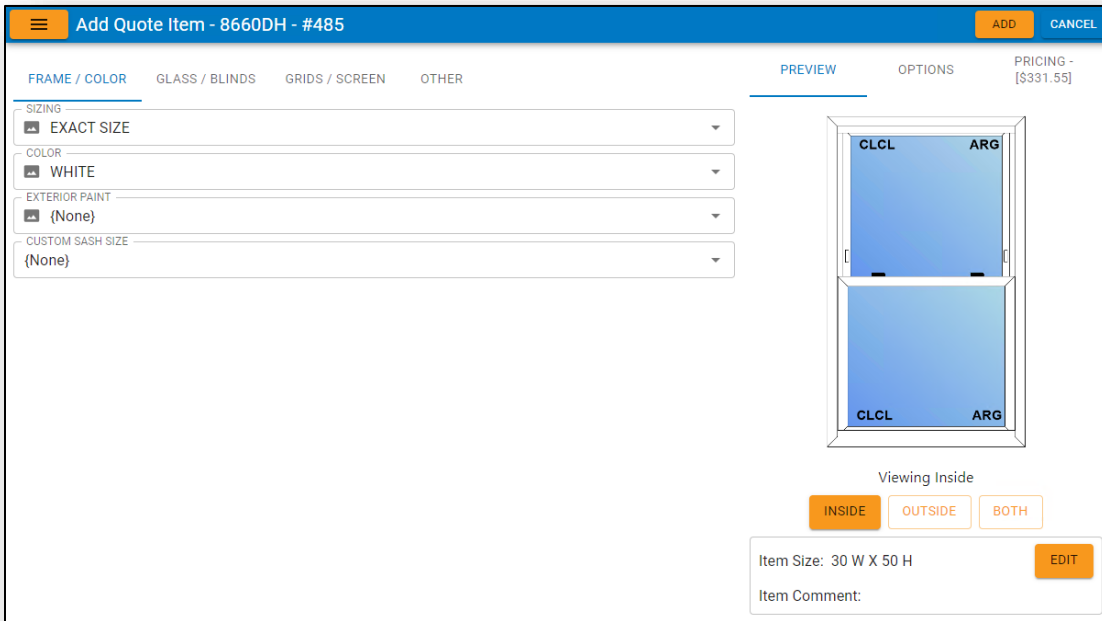


Grouped Options

In FeneVision Web, it is possible to group option questions into different tabs or different collapsible sections using 'Question Groups'. When root questions are configured into groups, their options will display on tabs or within collapsible sections that are labeled with the groups configured in this window. The tab type of configuration is ideal for a Web user operating on a tablet.

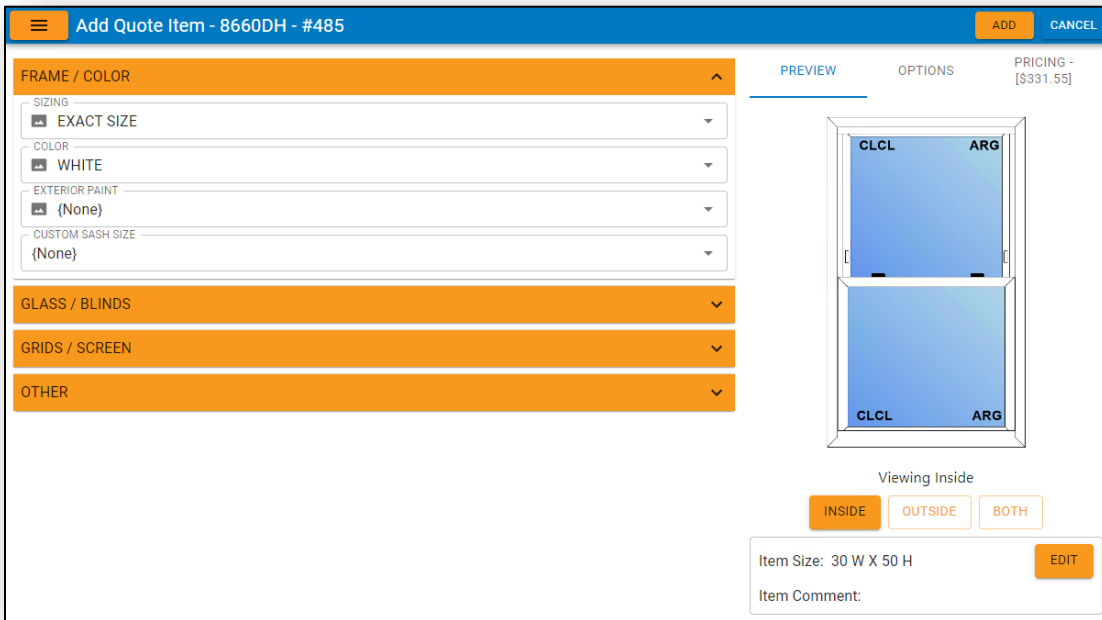
Note: Users may toggle between tabbed or sectioned groups in the settings section by selecting Tabs or Expanders in the Option Groups field. See the My Login section below for more information.

The following image represents the 'Options Wizard' dialog in FeneVision Web that uses grouped options.



Use the tabs to indicate which group’s questions to address. If there are required questions, a red flag will display next to the title of the tab to indicate that a required question with no option selected can be found in that tab. When a required question is not yet answered, any tabs that follow the tab containing that question will not be visible until the required question is answered.


Below is a look at the same unit with the collapsible sections.

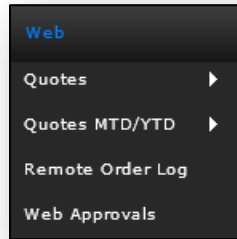


Images are set up against option *values* in addition to option *codes*. See the FeneVision Core User Manual, ‘Setup’ >> ‘Parts’ >> ‘Options Tab’ >> ‘Grouped Options’ for more information regarding this functionality.

BI Reports

Aside from the reports available to users in FeneVision Web, users on the Manufacturer level with access to Business Intelligence (BI) have additional reports in the BI section of FeneVision Core. To access BI reports, open FeneVision Core.

1. Navigate to the menu of icons on the far left side of the FeneVision screen.
2. Select . This takes you to the 'Home' page for BI.
3. These reports will appear under the 'Web' menu on the 'BI' site in FeneVision Core.



Production Status

The Manufacturer may elect to allow the FeneVision Web users to see 'Production Status' for orders. If this is the case, a link to 'Production Status' will be displayed between the order header and the line items on the order.

Order - #8707

Order Shipping Invoicing General Quote: 10 Order

Order Number: 8707 Order Date: 1/24/2019 PO Number:
 Order Type: Order Ack. Date: 1/24/2019 Customer Ref:
 Mfg Customer: FeneTech[Campus] Est. Delivery Date: 1/30/2019 Salesperson:
 Ship Date:
 Invoice Date:

Comment:
[Production Status](#)

Item	Qty	Part	Size	Price	Total
1	1	8100SH - SINGLE HUNG	3050	\$494.05	\$494.05
SIZING(EX), COLOR(WH), GLASS(CLCL, GAS(ARG)), SCREEN(HS, SCREEN MATERIAL(FIBR))					
2	1	8520AW - AWNING	2030	\$740.60	\$740.60
SIZING(EX), COLOR(WH), GLASS(CLCL, GAS(ARG)), SCREEN(FS, SCREEN MATERIAL(FIBR))					
3	1	8013BAY - 3-LITE BAY	72 W X 48 H	\$890.00	\$890.00
Opening(RO), Degrees(BB30DG, Flankers(BB17FK)), Color(WH), Frame Options(NF)					
				Surcharge:	\$0.00
				Subtotal:	\$2,124.65
				Tax:	\$159.35
				Non-Taxable Misc:	\$0.00
				Total:	\$2,284.00

Selecting the link takes the user to the 'Order Production Status' report.

Order Production Status

Order	Shipping	Invoicing	General	Quote: 4 Order	
Order Number:	O-M226CONT	Order Date:	9/20/2016	PO Number:	8754
Order Type:	Order	Ack. Date:	9/21/2016	Customer Ref:	BNT
Mfg Customer:	Arden Glass	Est. Delivery Date:	10/7/2016	Salesperson:	Springer, Kelly
Comment:		Ship Date:		Invoice Date:	

Schedule	Batch	Unit	Bin	Item/Order	Part	Station	Date/Time	Status	Container
9246	1	1	1	1/1	6800-Bristol-SglDoor - 6800 Bristol Collection Single Door		9/21/2016 4:49:29 PM	Released	
9246	1	1	1	1/1	EXT-DOOR-HDWR - Single Door Hardware		9/21/2016 4:49:29 PM	Released	
9246	1	1	1	1/1	EXT-DOOR-LOCKSETS - EXT. DOOR LOCKSETS		9/21/2016 4:49:29 PM	Released	
9246	1	2	2	1/2	6800-Bristol-SglDoor - 6800 Bristol Collection Single Door		9/21/2016 4:49:29 PM	Released	
9246	1	2	2	1/2	EXT-DOOR-HDWR - Single Door Hardware		9/21/2016 4:49:29 PM	Released	
9246	1	2	2	1/2	EXT-DOOR-LOCKSETS - EXT. DOOR LOCKSETS		9/21/2016 4:49:29 PM	Released	
9246	1	3	3	1/3	6800-Bristol-SglDoor - 6800 Bristol Collection Single Door		9/21/2016 4:49:29 PM	Released	
9246	1	3	3	1/3	EXT-DOOR-HDWR - Single Door Hardware		9/21/2016 4:49:29 PM	Released	
9246	1	3	3	1/3	EXT-DOOR-LOCKSETS - EXT. DOOR LOCKSETS		9/21/2016 4:49:29 PM	Released	

The 'Order Production Status Report' outlines the production information of the order, including

- **Schedule** – Schedule to which the order belongs. The schedule number is generated during 'Production Scheduling' and available after the schedule is released.
- **Batch** – Specifies what batch the item was assigned to during 'Production Scheduling'.
- **Unit** – The unit ID for the item.

Note: The 'Unit' number may not always begin with '1'.

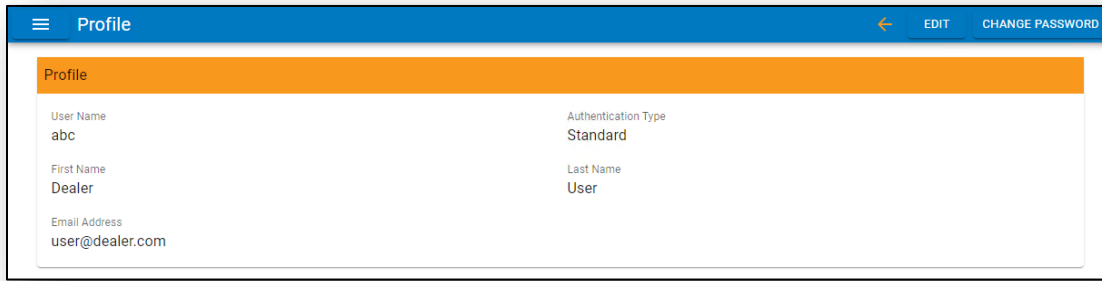
- **Bin** – Identifies the production bin where the order can be found.
- **Item-Order** – Identifies the number of the item in the order and the order itself. For example, 'Item / Order' 1 / 1 is the first line item of the first order.
- **Part** – The name and description of the part.
- **Station** – The station ID where the unit was last scanned.
- **Date and Time** – The date and time the unit was scanned at the most recent station.
- **Status** – Status of the unit.
 - **On Hold** – Unit is on hold. Holds must be removed before the unit can be shipped.
 - **Released** – Unit is released to production.
 - **Complete** – Production of unit is complete, but order has not been closed.
 - **Closed** – Unit has been completed and closed.
 - **Vendor - Loaded** – Unit has been loaded on a truck heading to a vendor for external processing.
 - **Vendor - Unloaded** – Unit has been unloaded for a truck heading to a vendor for external processing.
 - **Vendor - Shipped** – Unit has been shipped to a vendor for external processing.
- **Container** – If the unit has been scanned onto a container, the identifier that tells the user onto which container the unit will be placed.

Documents

When 'Documents' are added to the user's web server, this page becomes visible and allows the user to download documents and files from the Manufacturer and may be downloaded by all Manufacturer and Dealer users. The page will not be visible for Contractors.

My Login

Select 'Settings' in the upper right corner of the screen to go to the 'My Login' screen. This screen allows the user to reset their password, update their first and last name and email address, and set option wizard preferences.



The Options Wizard section within Preferences allows the user to identify if options should be displayed in a tiles layout; as well as, allows the user to identify if the groups should be displayed on separate tabs or on one page with expanders.

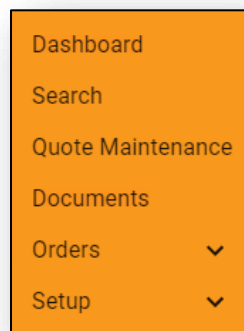
Exiting

Select 'Sign Out' in the upper right corner of the screen to end the session in FeneVision Web.

Setup

There are required and optional features to be set up before using FeneVision Web. This section of the FeneVision Web manual will take the user through the procedures for setting up the application.

The top portion of the 'Dashboard' contains navigation menus and links described below:



The above navigation menu includes the following items:

- **Dashboard** – Home page for FeneVision Web.
- **Search** – Displays the search screen.
- **Quotes Maintenance** – Directs the user to 'Quote Maintenance'.
- **Orders** – Directs the Dealer-level user to 'Order History' and 'Purchase History'. This tab does not exist for the Contractor-level user.
- **Documents** – Only shown if 'Documents' are added to the user's web server. This selection is only visible with the necessary setup parameter. See the FeneVision Web admin manual for more detail regarding 'Documents'.
- **Setup** – Directs the Dealer-level user to a menu of links to set up the application, including links to set up a Contractor, payment terms, shipping methods, pricing tables, and Dealer information. For the Contractor, this section simply explains the Contractor-level user setup.

System Requirements

The FeneVision Web application has specific hardware and software requirements. Reference the FeneVision Hardware & Software Requirements document for more information.

Definitions

Regarding terminology, the user is regarded as the **Manufacturer** who sells to the **Dealer** who sells to the **Contractor** who, in turn, sells to the **Extended Contractor (Builder)**.

For example, the Manufacturer, Arden Manufacturing, sells to their Dealer, the company Home Depot, who then sells to a Contractor, Shamrock Homes, who is their customer, who can then sell to their Customer, Homes Construction.

Manufacturer

The first in the FeneVision Web sequence of users is the Manufacturer. The Manufacturer sets up FeneVision Web for the Dealers with whom they conduct business.

Dealer

The Dealer is the Manufacturer's customer and is the second connection in the FeneVision Web sequence of users. The Dealer can be set up to enter quotes and upload those quotes to orders. The Dealer can also set up *their* customers (Contractors) to enter quotes on their own behalf. The user at the Dealer level can add, delete, edit, make active or inactive, and manage the logins of their customers (Contractors).

Contractor

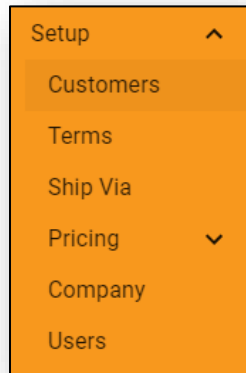
The Contractor is the third, and sometimes last, link in the FeneVision Web sequence of users. By utilizing FeneVision Web's Contractor Mode, Contractors can be set up by the Dealers with whom they do business to enter quotes and submit those quotes on their own behalf. Contractors can only see their own information, not the information (quotes, orders, price structures) of other Contractors.

Extended Contractor

The Extended Contractor is the last link in the FeneVision Web sequence of users. By utilizing FeneVision Web's Contractor Mode, Extended Contractors can be set up by the Contractor with whom they do business. Extended Contractors do not have access to FeneVision Web, so only their Contractor can enter quotes and submit those quotes to their Dealer. Extended Contractors can only see their own information, not the information (quotes, orders, price structures) of other Builders that may be in business with their Contractor.



Customers

Customers can be created for both Dealers and Customers. Customers created for Dealers are considered Contractors. Customers created by Contractors are considered Extended Contractors (Builders). When customers are created, customer specific information and pricing can be configured. These customers will be available to be selected when creating a quote.



Name	Mfg Site	Address	City	State	Zip Code	Salesperson
(11)	11					Magraw, Marie
(ABC Site 2)	9					
(ABC Site 3)	10					
(ABC Windows)	8					
ABC Contractor	8					Test, Dealer
Casey's Contracting	8					Test, Dealer
Contractor	8					Contractor, Bob
Discount	8					Test, Dealer
Discount SJ	11	12345	Cleveland	Ohio	44114	test, swapnil
Gross	8					Test, Dealer

The 'Name' column has visual indications for the status of the customer:

- **Default** – The default customer is indicated with the icon . The default customer is used to pre-configure customer information to new customers.
- **Inactive** – Inactive customers appear with red text with the icon .

Create Customer

To set up an account complete the following:

1. Select 'Setup' >> 'Customers'. Contractors are added on the left side of the screen. The right side of the screen lists details for the selected Contractor.
2. Select 'Add Customer', producing a new template for adding Contractor information.
3. Select the 'Mfg Site' if necessary.
4. Enter a name for the customer.
5. Select 'Add' to begin editing the customer information.
6. Enter the Contractor information under the 'General' section.

General


Name
Contractor

Inactive Default

Notes
Customer requires notification of any changes to quotes.

Measurement Type
Imperial

The following fields can be found in the 'General' section:

- **Name** – Contractor's name (required).
- **Notes** – Notes regarding the Contractor. When entering a quote, the  icon will appear next to a Contractor who has associated notes. Select the icon to see the notes (optional).

Customer Notes
✕

Customer requires notification of any changes to quotes.

- **Inactive** – Set a Contractor as inactive. These Contractor names will not appear in the ‘Customer’ drop-down in the ‘Add Quote’ screen; therefore, quotes cannot be added for inactive Contractors.
- **Default** – Default Contractor information used to pre-populate information when adding new Contractors. Only one default Contractor can be set up.
- **Measurement Type** – Default measurement type.

Financial
^

Pricing Method
Markup From Cost

Category	Markup Mult.	Table
3000 Series Windows	35.0000	<input type="text"/>
8000 Series Windows	35.0000	<input type="text"/>
Bay/Bow	1.0000	<input type="text"/>
Doors - Double	23.0000	<input type="text"/>
Doors - Patio	23.0000	<input type="text"/>
Doors - Sidelite	23.0000	<input type="text"/>
Doors - Single	23.0000	<input type="text"/>
Doors - Single w/ Left Sidelite	23.0000	<input type="text"/>
Doors - Single w/ Right Sidelite	25.0000	<input type="text"/>
Doors - Single w/ Twin Sidelite	25.0000	<input type="text"/>
Doors - Storm Double	25.0000	<input type="text"/>
Doors - Storm Single	25.0000	<input type="text"/>
Metal Doors	45.0000	<input type="text"/>
Misc Building Materials	1.0000	<input type="text"/>
Protrusion	1.0000	<input type="text"/>
Stacks & Mulls	1.0000	<input type="text"/>

Terms
Net 30

Tax
0.0000 %

Tax 1
0.0000 %

Tax 2
0.0000 %

Tax 3
0.0000 %

Tax 4
0.0000 %

Salesperson
Contractor, Bob

Tax Title

Tax Title 1

Tax Title 2

Tax Title 3

Tax Title 4

4. Enter information into the ‘Financial’ section. The user can enter information into the following fields:
- **Pricing Method** – Drop-down containing Contractor pricing calculation method. The user must select one of these three options from the drop-down list (*required*):
 - **Markup from Cost** – Increase from cost (Manufacturer’s price to the FeneVision Web Dealer level user). For example, if the Manufacturer’s price to the FeneVision Web user is \$100.00 and the markup is 10%, the price to the Contractor will be \$110.00.

- **Discount from List** – Reduction from Manufacturer’s list price. For example, if the Manufacturer list price for a window is \$100.00 and the discount is 10%, the price to the Contractor will be \$90.00.
 - **Gross Margin** – Dealer pricing to the Contactor where the Dealer determines a margin % and the price to the Contractor is adjusted so that the Dealer receives that margin. For example, if the Manufacturer’s price to the FeneVision Web Dealer level user is \$100.00, and the margin is to be at 20%, the price for the Contractor will be \$125.00. $Gross\ Margin\ \% = Profit / Price$.
- **Categories** – Pre-assigned by the Manufacturer. Categories contain their own orderable parts and discount tables (*optional*).
 - **Markup %** – This pricing option is enabled when Markup from Cost is selected for the pricing method. Each product category can have a markup (percent or multiplier based upon manufacturer settings). The price to the Contractor will apply the specified value to the part and each option if a table is not defined.
 - **Discount %** – This pricing option is enabled when Discount from List is selected for the pricing method. Each product category can have a discount (percent or multiplier based upon manufacturer settings). The price to the Contractor will apply the specified value to the part and each option if a table is not defined.
 - **Gross Margin** – This pricing option is enabled when Gross Margin is selected for the pricing method. Each product category can have a specified Gross Margin. The price to the Contractor will apply the specified value to the part and each option if a table is not defined.

Note: The Markup and Margin values can be defaulted by the manufacturer using the WebCenterDefaultMarkupPercent and WebCenterDefaultMarginPercent general setup parameters respectively. Contact FeneTech to assist in the configuration of these parameters.

- **Table** – Each product category can have a ‘Markup’ / ‘Margin’ / ‘Discount’ table assigned, depending on the ‘Pricing Method’ specified for the Contractor
- **Terms** – Default payment terms selected via the ‘Terms’ drop-down list. The selected terms will appear on the quote report that can be printed from ‘Quote Entry’. This field is also visible to the Contractor (*optional*).
- **Salesperson** – Identifies the default salesperson for the Contractor through the drop-down list (*optional*).
- **Tax Percent** – Contractor tax rates (*optional*).
- **Tax Title** – The title for each tax rate (*optional*).

Billing Address ^

Address 1	Address 2	
City	State	Zip Code
Phone	Fax	
Email		

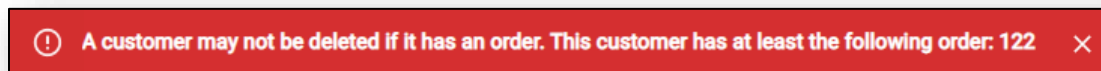
5. Enter address information into the 'Billing Address' and 'Shipping Address' sections. In the billing address section, the user can enter the billing information for the new Contractor. If the shipping address is the same as the billing, select the 'Same as billing address' checkbox.
6. Whether the 'Same as billing address' checkbox is selected or not, the 'Ship Via' will need to be specified. Select the appropriate method using the 'Ship Via' drop-down list.
7. Select 'Save' to apply the changes or 'Cancel' to remove the changes. The customer will be displayed in a read-only view to review the current customer information. Use the 'Back' arrow to return to the list of customers in Customer Setup.

Delete Customer

To delete a Contractor from the existing Contractor list, complete the following:

1. Select 'Setup' >> 'Customers'. Find the Contractor to be deleted in the list on the left side of the 'Customers' setup screen.
2. Select the 'X' next to the Contractor.

Note: Once a Contractor has placed an order, that Contractor cannot be deleted. If the user attempts to delete a Contractor, the following message will appear:



Edit Customer

To edit a Contractor, complete the following:

1. Select 'Setup' >> 'Customers'.
2. Select 'Edit' icon represented by the image of a pencil.
3. Make all necessary changes.
4. Select 'Save' to save the changes or 'Cancel' to cancel the changes. Use the 'Back' arrow to return to the list of customers in Customer Setup.

Contractor Logins

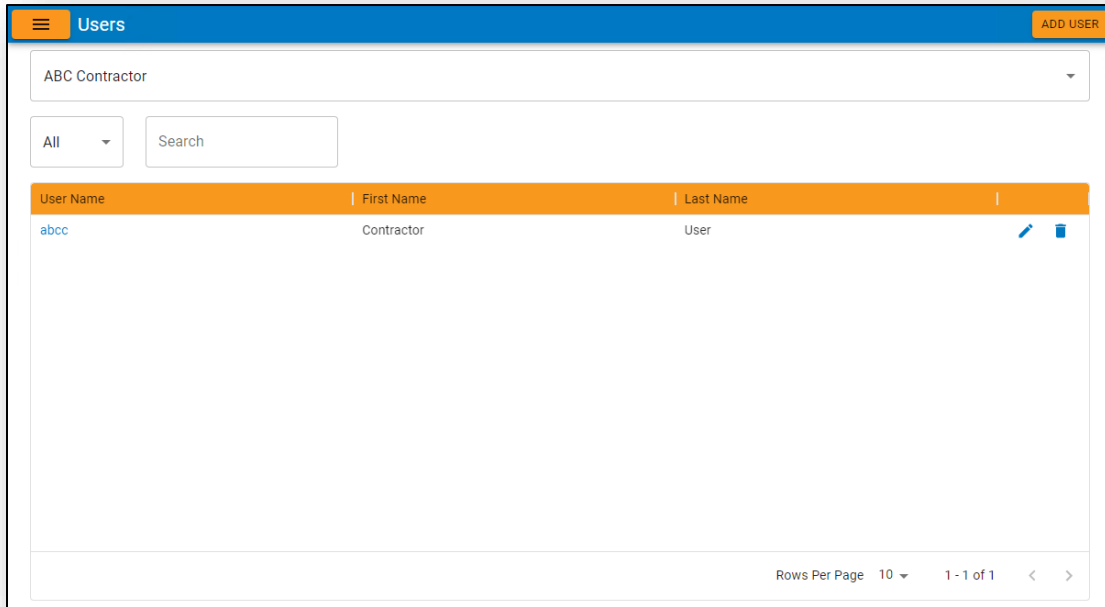
Once a Contractor is created in FeneVision Web 'Customers' setup, Contractor logins can be created.

Note: The Dealer must have administrative privileges to create additional Contractor logins. Permissions are set up through FeneVision Web Admin. Additionally, the Dealer is only able to see logins created by the Dealer. The Dealer, given permission, can create Contractor logins only visible to the Contractor.

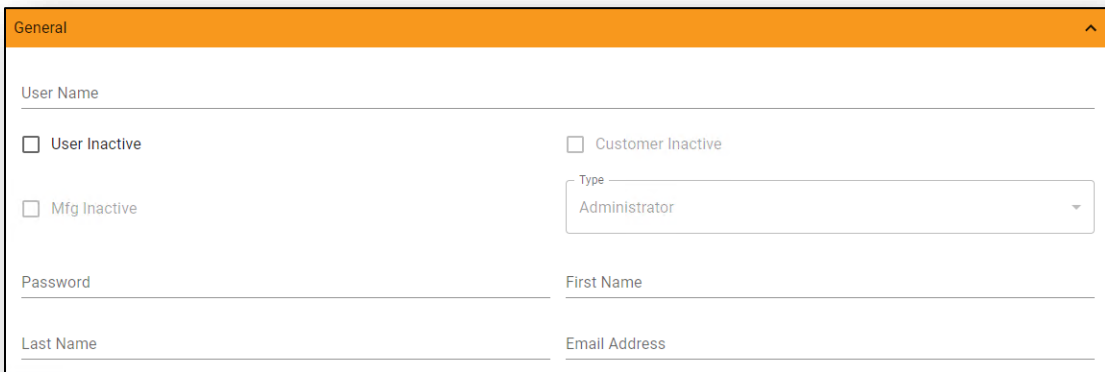
To add a Contractor login, complete the following:

1. Select 'Setup' >> 'Customers'.

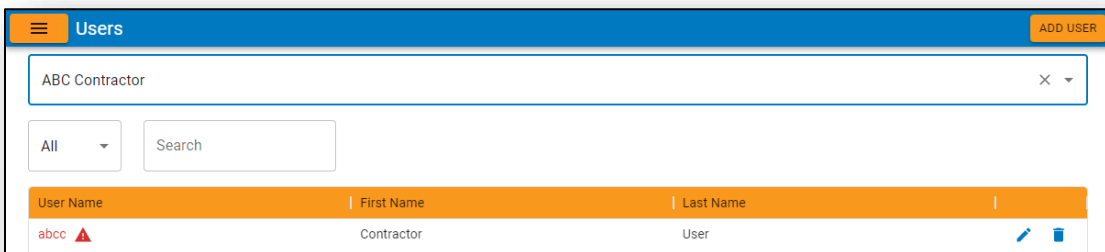
2. Select the Contractor's name on the left side of the screen. On the right side of the screen, select 'Customer Logins'. The following dialog will appear.



3. Select 'Add User'. The 'General' section of the 'Users – New User' dialog will appear on the right side of the screen.
4. Fill in the fields in the 'General' section.



To make a user inactive, check 'User inactive'. Once a user is designated as 'Inactive', the name appears under the customer drop-down in red.

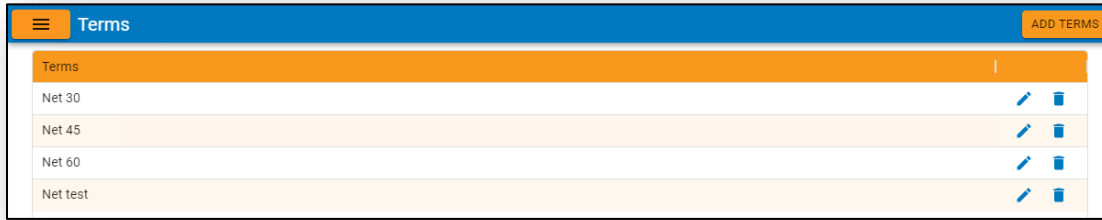




Select 'Edit' to make changes.

Terms Setup

To add payment terms, complete the following:

1. Select 'Setup' >> 'Terms'.

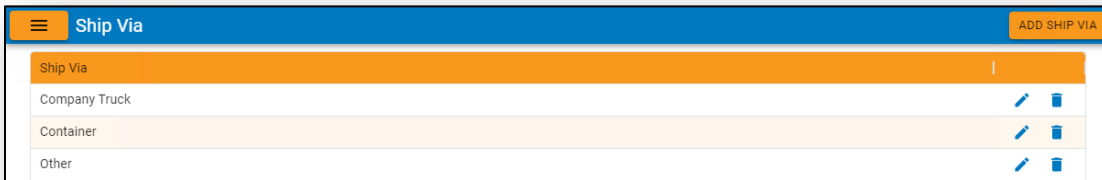




2. Select 'Add Terms'.
3. In the 'Terms' field, enter the name.
4. Select 'Add'. These can now be used in 'Quote Entry' or 'Customers' setup.
5. Select  'Edit' next to the appropriate 'Term' to rename the preconfigured value.
6. Enter the name in the 'New Name' field of the 'Edit Terms Record' prompt.
7. Select 'OK' to save or 'Cancel' to cancel changes.
8. Select  next to the appropriate value to delete a 'Term'. The user will be prompted to validate the deletion.

Ship Via Setup

To add shipment methods, complete the following:

1. Select 'Setup' >> 'Ship Via'.



2. Select 'Add Ship Via'.
3. In the 'Ship Via' field, enter the name.
4. Select 'Add'. These can now be used in 'Quote Entry' or 'Customers' setup.
5. Select  'Edit' next to the appropriate 'Ship Via' to rename the preconfigured value.
6. Enter the name in the 'New Name' field of the 'Edit Ship Via Record' prompt.
7. Select 'OK' to save or 'Cancel' to cancel changes.
8. Select  next to the appropriate value to delete a 'Ship Via'. The user will be prompted to validate the deletion.

Pricing

There exist three different types of pricing methods with which to set up a price table:

Tables

Discounts, markups, and margins can be added to parts and options by pricing category. All three are configured in the same manner.

- **Discounts** – Reduction from Manufacturer's or Dealer's list price.

For example, if the Manufacturer list price for a window is \$100.00 and the discount is 10%, the price to the Contractor will be \$90.00.

Note: This is based off of the 'List Price' from Core, NOT the price the Customer actually pays for the window. The Customer likely has their own discount % configured in Core that would be larger than the Contractor's discount % so the Customer is still paying less than they're charging.

- **Markups** – Increase from cost (Manufacturer's or Dealer's price to the FeneVision Web Dealer or Contractor level user respectively).

For example, if the Manufacturer's price to the FeneVision Web user is \$100.00 and the markup is 10%, the price to the Contractor will be \$110.00.

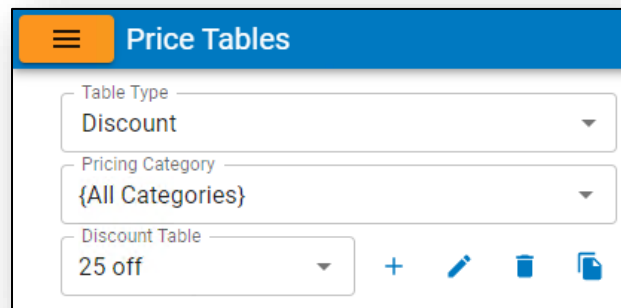
- **Margins** – The Dealer or Contractor determines a margin % and the price to the Contractor or Extended Contractor is adjusted so that the Dealer receives that margin. $\text{Gross Margin \%} = \text{Profit} / \text{Contractor's Price}$.

For example, if the Manufacturer's price to the FeneVision Web Dealer level user is \$100.00, and the margin is to be at 20%, the price for the Contractor will be \$125.00.

Discounts

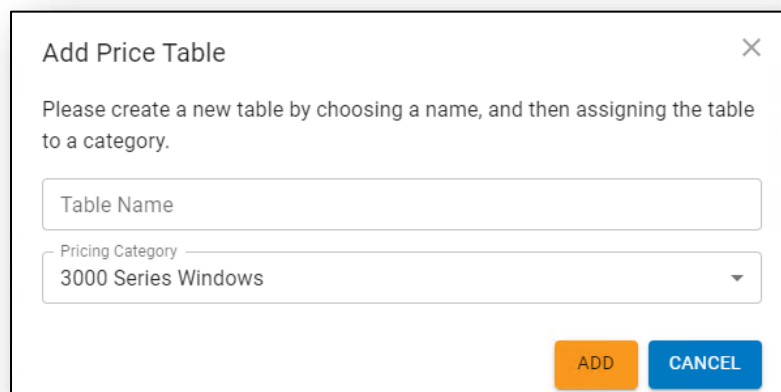
To set up a discount pricing table:

1. Select 'Setup' >> 'Pricing' >> 'Tables'.



2. Choose 'Discount' from the 'Table Type' dropdown.

3. Select .



4. Enter the name of the new discount table and choose the pricing category.
5. Select 'Add' to add the new table or 'Cancel' to cancel the changes.

- When the user selects 'Add', the screen will display the parts for the category. The user can fill in the table with the discount(s) for the parts, global options, and part-specific options. The table is now available to be assigned to Contractors or Extended Contractors in 'Customer' setup.

Select the 'Parts' tab to add pricing to parts.


The screenshot shows the 'Price Tables' interface. At the top, there are several dropdown menus: 'Table Type' set to 'Discount', 'Pricing Category' set to '{All Categories}', 'Discount Table' set to '25 off', and 'Parts' set to 'Parts'. Below these is a table with the following data:

Part	Description	Schedule	Discount Mult.	Option
8000-EXJAMB	Extension Jamb	{None}	25.0000	<input checked="" type="checkbox"/>
8000-EXJAMB2	Extension Jamb	{None}		<input type="checkbox"/>
8000-EXJAMB3	Extension Jamb	{None}		<input type="checkbox"/>
8000PW	PICTURE WINDOW	{None}		<input type="checkbox"/>
8100SH	SINGLE HUNG	{None}		<input type="checkbox"/>
8100SH-11		{None}		<input type="checkbox"/>
8100SH-12		{None}		<input type="checkbox"/>

- For each part to which the discount will apply, either assign a schedule from the drop-down or indicate a 'Discount % / Mult.'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
- If desired select the option checkbox so that discounts for the part will be used for the all of part's options unless an overriding value for the option has been entered.
- Select to fill down the specified value to all parts below the row (*optional*).

Select the 'Options' tab to add pricing to options.


Code	Description	Schedule	Discount Mult.
333	1/3,1/3,1/3	{None}	
424	1/4,1/2,1/4	{None}	
ALUM	ALUMINUM	{None}	
ARG	ARGON GAS	{None}	
ARGS	ARGON GAS	{None}	
BG	BEIGE	{None}	
BRCL	BRONZE/CLEAR IG	{None}	

1. To enter option discounts for specific parts, select a part from the 'Part' drop-down or leave it as '{All Parts}' to enter option discounts for all parts.
2. If desired filter the option list by selecting an option group from the 'Option Group' drop-down.
3. For each option to which the discount will apply, either assign a schedule from the drop-down or indicate a 'Discount % / Mult.'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
4. Select  to fill down the specified value to all options below the row (optional).

Markups

To set up a markup pricing table:

1. Select 'Setup' >> 'Pricing' >> 'Tables'.

2. Choose 'Markup' from the 'Table Type' dropdown.
3. Select .

Add Price Table ✕

Please create a new table by choosing a name, and then assigning the table to a category.

3000 Series Windows
▼

ADD
CANCEL

4. Enter the name of the new markup table and choose the pricing category.
5. Select 'OK' to add the new table or 'Cancel' to cancel the changes.
6. When the user selects 'OK', the screen will display the parts for the category. The user can fill in the table with the markup(s) for the parts, global options, and part-specific options. The table is now available to be assigned to Contractors or Extended Contractors in 'Customer' setup.

Select the 'Parts' tab to add markups to parts.

☰ Price Tables

Markup
▼

{All Categories}
▼

BZWCMarkup

+
✎
🗑
📄


Parts
▼

Part	Description	Schedule	Markup Mult.	Option
8000-EXJAMB	Extension Jambs	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> 🔄
8000-EXJAMB2	Extension Jambs	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> 🔄
8000-EXJAMB3	Extension Jambs	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> 🔄
8000PW	PICTURE WINDOW	{None} ▼	0.1000	<input type="checkbox"/> 🔄
8100SH	SINGLE HUNG	{None} ▼	0.1000	<input type="checkbox"/> 🔄
8100SH-I1		{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> 🔄
8100SH-I2		{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> 🔄

1. For each part to which the markup will apply, either assign a schedule from the drop-down or indicate a 'Markup % / Mult.'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
2. If desired select the option checkbox so that markups for the part will be used for the all of part's options unless an overriding value for the option has been entered.
3. Select 🔄 to fill down the specified value to all parts below the row (*optional*).

Select the 'Options' tab to add markup(s) to options.


Code	Description	Schedule	Markup Mult.
333	1/3,1/3,1/3	{None}	<input type="text"/>
424	1/4,1/2,1/4	{None}	<input type="text"/>
ALUM	ALUMINUM	{None}	<input type="text"/>
ARG	ARGON GAS	{None}	<input type="text"/>
ARGS	ARGON GAS	{None}	<input type="text"/>
BG	BEIGE	{None}	<input type="text"/>
BRCL	BRONZE/CLEAR IG	{None}	<input type="text"/>

1. To enter option markups for specific parts, select a part from the 'Part' drop-down or leave it as '{All Parts}' to enter option markups for all parts.
2. If desired filter the option list by selecting an option group from the 'Option Group' drop-down.
3. For each option to which the markup will apply, either assign a schedule from the drop-down or indicate a 'Markup % / Mult.'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
4. Select  to fill down the specified value to all options below the row (optional).

Margins

To set up a margin pricing table:

1. Select 'Setup' >> 'Pricing' >> 'Tables'.

2. Choose 'Margin' from the 'Table Type' dropdown.
3. Select .

Add Price Table ✕

Please create a new table by choosing a name, and then assigning the table to a category.

3000 Series Windows
▼

ADD
CANCEL

4. Enter the name of the new margin table and choose the pricing category.
5. Select 'OK' to add the new table or 'Cancel' to cancel the changes.
6. When the user selects 'OK', the screen will display the parts for the category. The user can fill in the table with the margin(s) for the parts, global options, and part-specific options. The table is now available to be assigned to Contractors or Extended Contractors in 'Customer' setup.

Select the 'Parts' tab to specify margins for parts.

☰
Price Tables

Margin
▼

{All Categories}
▼


Bay Bow Margin Table
▼
+
✎
🗑
📄

Parts
▼


Part	Description	Schedule	Gross Profit Margin	Option
8013BAY	3-LITE BAY	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> ⬇
8015BOW	5-LITE BOW	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> ⬇
BSHELL	BBW Purchased Shell	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> ⬇
BW3	3-Lite Bay	{None} ▼	<input style="width: 50px;" type="text"/>	<input type="checkbox"/> ⬇

1. For each part to which the margin will apply, either assign a schedule from the drop-down or indicate a 'Gross Profit Margin.'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
2. If desired select the option checkbox so that the margin for the part will be used for the all of part's options unless an overriding value for the option has been entered.
3. Select ⬇ to fill down the specified value to all parts below the row (*optional*).

Select the 'Options' tab to specify margin(s) for options.

1. To enter option margins for specific parts, select a part from the 'Part' drop-down or leave it as '{All Parts}' to enter option margins for all parts.
2. If desired filter the option list by selecting an option group from the 'Option Group' drop-down.
3. For each option to which the margin will apply, either assign a schedule from the drop-down or indicate a 'Gross Profit Margin'. To see information about 'Schedules' setup, see 'Setup' >> 'Pricing' >> 'Schedules'.
4. Select  to fill down the specified value to all options below the row (*optional*).


To edit the name of a discount, markup, or margin table, complete the following:

1. Select the 'Table Type', 'Pricing Category' and 'Table' from the drop-down list.
2. Select .


3. Enter the new name.
4. Select 'OK'.

To delete a table, complete the following:

1. Select 'Setup' >> 'Pricing' >> 'Tables'.

2. Select the 'Table Type', 'Pricing Category' and 'Table' from the drop-down list.
3. Select  . This will permanently delete the selected table.

To copy a table, complete the following:

1. Select 'Setup' >> 'Pricing' >> 'Tables'.
2. Select the 'Table Type', 'Pricing Category' and 'Table' from the drop-down list.
3. Use  to copy the current table.
4. Either create a new table or select an existing table to copy to.


Schedules

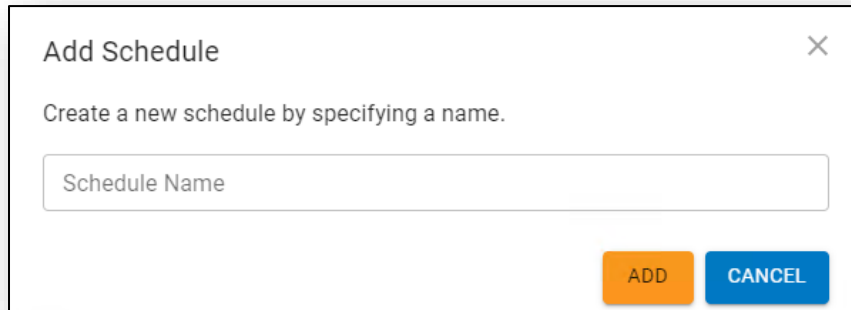
Pricing schedules are based on the calculated united inch (UI) of the unit. United inch equals height plus width.

For example, if a window has a width of 24" and a height of 36", the united inch (UI) is 60" (24 + 36 = 60).

When a schedule with several UI measurements and pricing values has been created and assigned to a part, units with the indicated part will receive the price adder for the price of the next highest united inch. If the unit is beyond the highest united inch row, then the amount indicated at the bottom of the screen will be added to the highest price for every specified number of united inches entered in the field.

To set up pricing schedules, complete the following:

1. Go to 'Setup' >> 'Pricing' >> 'Schedules'.
2. Select  .
3. Enter a schedule name and select 'OK'.



The 'UI' and 'Price' columns will appear as shown below. Type in a UI and a price, then select the 'Add' link.

- **UI (United Inch)** – Upper limit based on height + width.
 - **Price** – Price of the part to be used when the dimensions are <= to the UI specified.
4. Continue to add 'UI' and 'Price' categories until all standard groupings are entered. At the bottom of the page, a charge can be added per additional UI beyond the maximum UI within the schedule.


UI	Price
20	CAD100.00
40	CAD195.00
60	CAD290.00
80	CAD385.00
100	CAD470.00

Add an additional for every UI beyond the maximum.

5. Go to 'Setup' >> 'Pricing' >> 'Tables' and add the schedule to the part.


Edit Schedules

To edit an existing schedule, complete the following:

1. Go to 'Setup' >> 'Pricing' >> 'Schedules'.
2. Select the schedule from the drop-down list.
3. Select .

Delete Schedules

To delete an existing schedule, complete the following:

1. Go to 'Setup' >> 'Pricing' >> 'Schedules'.
2. Select the schedule from the drop-down list.
3. Select .

Company

Individual Dealer information can be configured and users from the Dealer's company can be added as well.

Information

To enter information about a Dealer's or Contractor's company, complete the following:

1. Select 'Setup' >> 'Company'.
2. Select the name of the 'FeneVision Web' user's site in the list on the left side of the screen.
3. Select 'Edit' on the right side of the page to change information.

Company EDIT


Company Information

Name: Ed Biggs
 Web URL:
 Address 1: 1234 Oak Dr
 Address 2:
 City: Cleveland
 State: OH
 Zip Code: 44114
 Phone: 2164748816
 Fax: 8888888888

Settings

Default PO Number: Mfg Default - Blank (Override)
 Default Customer Ref: Mfg Default - Blank (Override)
 Default Quote Status: Available

Logo



4. Edit the company's address information in the provided fields as needed.

Note: this information will be displayed on the quote report given to the end user.

5. The 'Default Mfg PO Number' and 'Default Mfg Customer Ref' settings are used when the quote is uploaded to the Manufacturer. The PO number and customer reference between the FeneVision Web user and the Contractor or Extended Contractor are not necessarily the same PO number and customer reference between the Manufacturer and the FeneVision Web user.
6. To add a logo, select 'Browse'. Select the logo to be added.
7. Select 'Upload Logo' to upload the logo to FeneVision Web. Select 'Clear Logo' to remove the logo from Web. The logo will be displayed on reports given to the Contractor.
8. Select 'Apply' to save or 'Cancel' to delete the changes.

Users

To add additional users or change the permissions of a user, complete the following:

1. Select 'Setup' >> 'Users'.

User Name	First Name	Last Name	Mfg Site
abc	Dealer	User	{All Sites}
abcwilson	Brett	Wilson	{All Sites}
charles			{All Sites}
curry	tom	curry	{All Sites}
dealer	Dealer	Test	{All Sites}
engle			{All Sites}
klinect	Brian	Klinect	{All Sites}
klinectDeal	Deal	Klinect	{All Sites}
mm	Marie	Magraw	{All Sites}
mm2	Marie	2	{All Sites}

2. Select a company from the drop-down list. Selecting {Company} will create dealer level users; while selecting an individual company from the list will create contractor level users.

Note: If creating users as the contractor, the company option will not be available.

3. Select 'Add User', and then complete the information on the screen (*site(s), user name, password, and permissions are required*).

Note: If the 'Inactive' box is checked, the user will not be able to log in to FeneVision Web.

4. Select the site(s) for which the user will be able to create quotes. Use the left and right arrows to assign/unassign the site(s). If the user will be granted a customer level login, the administrator should check the {All Sites} checkbox. Customer level logins will be allowed to create quotes for all sites.
5. The default authentication type is set to 'Standard'; however, if using single-sign-on (SSO), the authentication type can be changed to 'Single Sign On'.

Note: The authentication type is only enabled if Single-Sign-On is enabled through WebAdmin.

6. The default permission is set to 'Administrator', equivalent to a standard user with all boxes checked. If a 'Standard User' is selected, permissions can also be selected. The following permissions can be selected:
 - **Approve Holds** – Approve 'Web Approval' holds placed on quotes or orders by the Manufacturer.
 - **Create / Modify Customers & Pricing** – User will have the ability to create and modify Contractors, their accompanying information, and pricing.
 - **Create / Modify Quotes** – User will have the ability to create and modify quotes that can be uploaded to orders.
 - **Delete Quotes** – The user can delete quotes that have not yet been uploaded as orders.
 - **Modify Quote Pricing** – Allows the user to manually edit the pricing on quotes.
 - **Modify Quote Taxes** – Allows the user to manually edit the tax pricing on quotes.
 - **Upload Quotes** – Permits the user to upload quotes to the Manufacturer.
 - **Upload Quotes with Exceptions** – Permits the user to upload quotes to the Manufacturer even if line item exceptions exist on the order.
 - **View Cost** – View the cost from the Manufacturer for the line items on quotes.
 - **View Pricing** – View the pricing information for the Dealer for line items and quotes, as well as the pricing tab in options wizard.
 - **View Quote Markup/Margin/Discount** – View the markup/margin/discount pricing information for the Dealer for line items and quotes.
 - **View Quotes (Dealer)** – View quotes generated by the Dealer.
 - **View Quotes (Contractor)** – View quotes generated by the Contractor.

The 'View Quotes (Dealer)' and 'View Quotes (Contractor)' relate to one another as represented in the Permission's chart. This chart is displayed in the 'The Dealer's Experience' >> 'Permissions'.

Note: Only users with the type of Administrator are able to create users with a Standard type. Users signed-in as a standard user are not able to change the type during user creation.

7. Select 'Save' to save the changes to the user, 'Cancel' to cancel the changes made to the user, or 'Back' to return to the list of users.

Note: Users can be edited and deleted. Some users do not have a delete icon next to them – these users were created by the Manufacturer; therefore, they cannot be deleted.

Login

The 'Users' dialog allows the Dealer-level user to change login information including password, first and last name, and email address.

The screenshot shows a web interface for editing a user profile. The title bar reads 'Edit abcc' and includes 'SAVE' and 'CANCEL' buttons. The main content area is titled 'General' and contains the following fields: 'User Name' with the value 'abcc', three checkboxes for 'User Inactive', 'Mfg Inactive', and 'Customer Inactive', a 'Type' dropdown menu currently set to 'Administrator', 'First Name' with the value 'Contractor', 'Last Name' with the value 'User', and an 'Email Address' field.

To edit user information, go to 'Setup' >> 'Users'. Select a user from the list on the left.

1. Select 'Edit'
2. Make the necessary changes and select 'Save'.
3. Users can also access their login information by selecting 'Settings' in the upper right corner.

FeneVision Core

Several settings within FeneVision Core affect the functionality of FeneVision Web. These settings should be configured as needed, prior to and while using FeneVision Web.

Inactive Dealers

Within FeneVision Core's 'Customers' setup screen, a Manufacturer can flag a Dealer as inactive. When this occurs, FeneVision Web logins for that Dealer immediately become inactive. See the FeneVision Core User Manual for more information regarding this function.

Set Contractor Upload Action

Within FeneVision Core's 'Customers' setup screen, the Manufacturer can control what happens when a customer uploads a quote from FeneVision Web. There exist four options:

- **{None}** – Order is uploaded, and no emails / faxes will be sent to the Dealer.
- **Send Confirmation** – Order is uploaded, and a confirmation email/fax will be sent to the Dealer based on their 'Auto' (acknowledge type) setting.
- **Acknowledge** – Order is uploaded, and FeneVision Web services will attempt to acknowledge the order. If an issue occurs during acknowledgement, the order will still be uploaded, but a message will be returned to the Dealer. This message is configurable via a setup parameter. Contact FeneTech for assistance.

- **Acknowledge and Auto** – Once the order is uploaded, it is automatically acknowledged, and the confirmation is sent to the Dealer via their 'Auto' ('Acknowledgement Type') setting. If the order is uploaded and the acknowledgement fails, no email / fax will be sent to the Dealer.

Part and Option Configuration

FeneVision Core part and option configuration can be specialized for FeneVision Web. Reference the FeneVision Core 'Parts' setup section of the FeneVision Core User Manual.

Visible in Remote / Web

When a part is configured in FeneVision Core as 'Visible in Remote / Web', the parts are visible in FeneVision Web but not in FeneVision Core. This would be useful for items with discounts and upcharges solely between the Dealer and the Contractor with no impact to the Manufacturer.

Help

Users can access the most up-to-date user manuals from the FeneVision Core, Tracking, or Trucking applications. See the FeneVision Core user manual for additional steps to access the full user manual directory.