PARADIGM®

Technology for the Building Products Industry

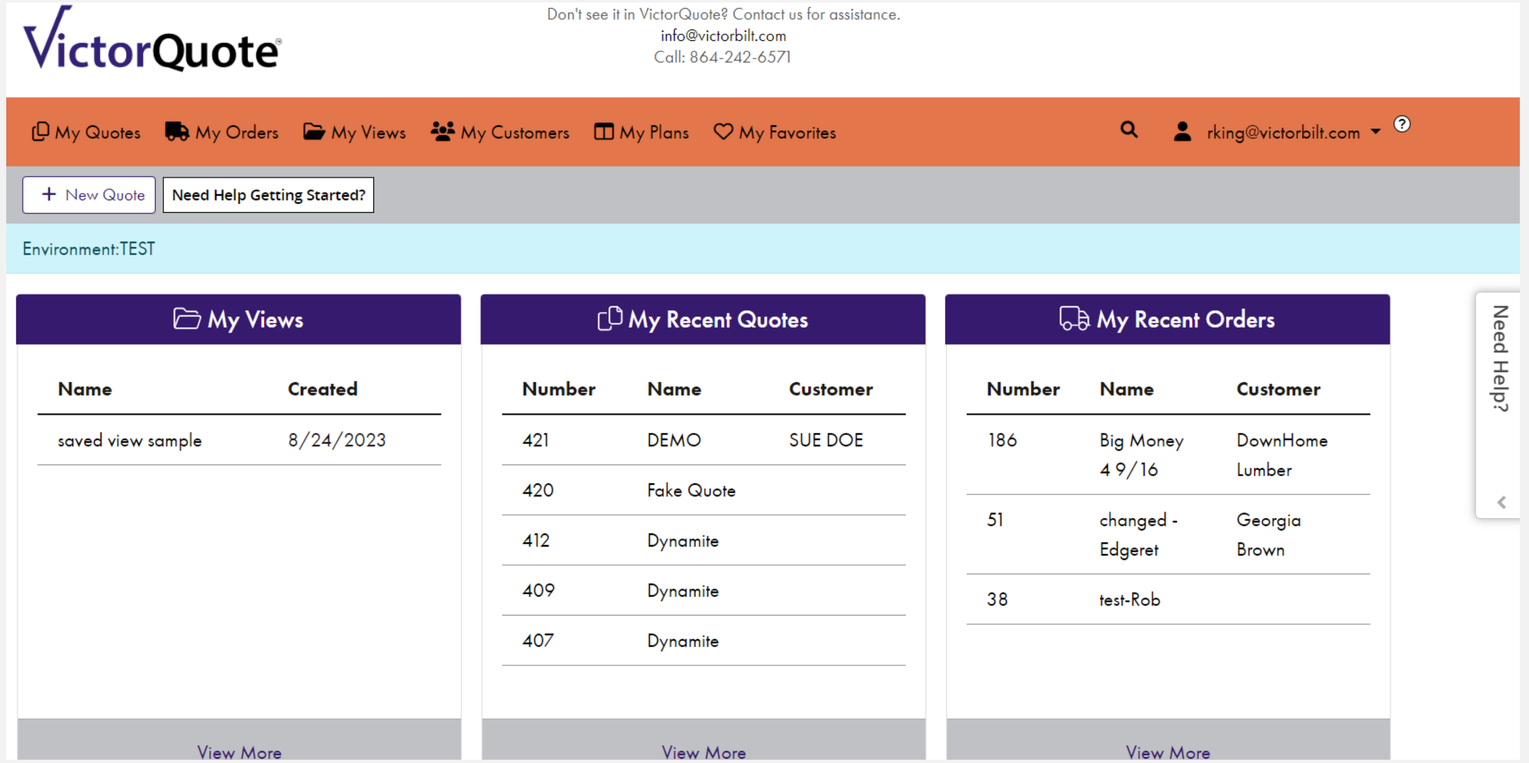
VictorQuote Training

DEALERS SUPPLY & LUMBER COMPANY

GREENVILLE | SOUTH CAROLINA

Overview
VictorQuote Website

- ✓ **Online quoting & ordering tool for windows**
- ✓ **Environment: https://victorquote.myparadigmcloud.com/login**



Registering for a VictorQuote Account

- You can ask your Outside Sales Person to request an account or email us directly at tadkins@victorbilt.com
- We will then send you an acceptance email with a link to https://victorquote.myparadigmcloud.com/login/register
- Click Register
- Submit the required information
- You will receive a confirmation email
- Click the link in the email, and enter the activation code you've been provided
- Once in explore and try our guided tutorials (WalkMe)

**If you already have an online Paradigm account, use this link instead https://victorquote.myparadigmcloud.com/login, enter your email address, click reset password. Once you get the reset password email you can use the activation code above to complete setting up your account.

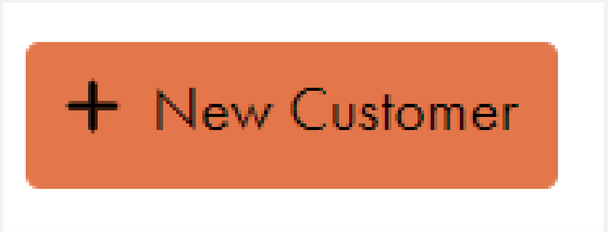
The system times out after 4 hours, to ensure the software remains efficient and secure.

If it's getting close to 4 hours since you logged in, finish your current workflow, then log out and log back in.

Creating a Customer

1. Click My Customers at the top of the page.

2. Click **+New Customer**

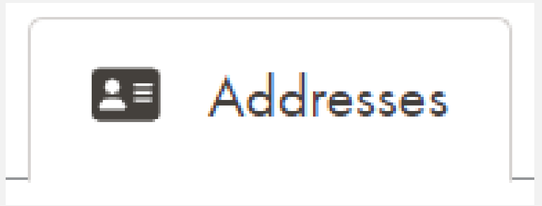


3. Enter **Full Name, Email & Customer ID**

4. Share with Manufacturer *(optional)* **–** Allows Dealers Supply to see your customers on any of your quotes to better serve you.

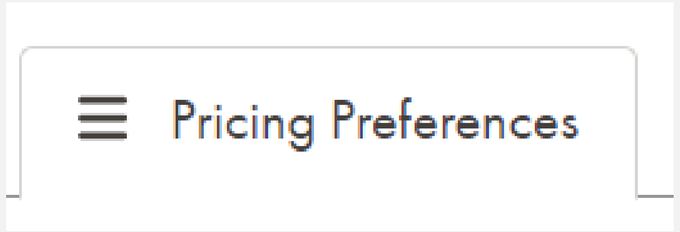
5. Click on **Save** at lower right.

6. Click on **Addresses**



7. Enter **Billing** and **Shipping** Addresses

8. Click on **Pricing Preferences**



Creating a Customer - *Continued*

9. Pricing Type – Choose one of the below.

- **Mark UP** *(USE THIS AS YOUR PRICING METHOD)* – this will be your sell price to your customer. By default, there will be a markup of 50%. If you would like to adjust this mark up, type in the Gross Margin you want to make on your order, enter a percentage to mark up your order or enter a dollar mark up or use markup dollar amount in combination with one of the other options.
- **Discount** *(DO NOT USE)-* the system will auto input information here for how it calculates things behind the scenes, please ignore and do not edit.

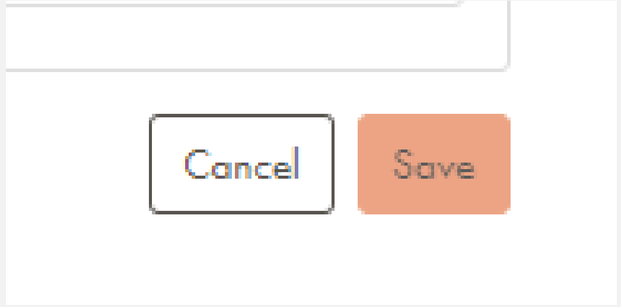
10. Tax 1 / Tax 2 – Enter the tax percentage you want to charge your customer or leave blank if they shouldn't be charged tax.

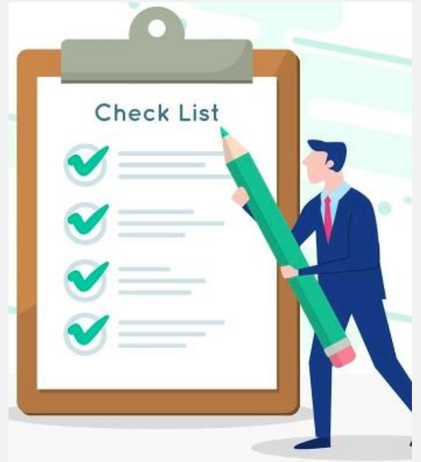
11. Freight – We do not recommend using this option since it adds freight - per line item.

12. Freight Taxable – You can check the **Taxed** box if you need to charge tax on the freight charge or leave **Exempt.**

13. Labor - We do not recommend using this option since it adds freight per line item.

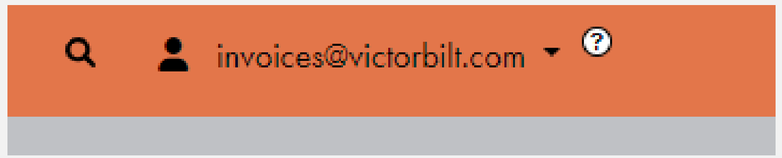
14. Click **Save** once you have filled in your necessary information.



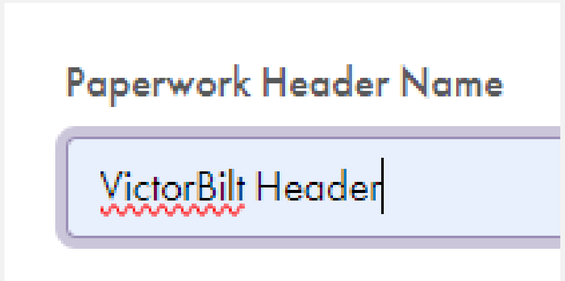


Adding Your Company Logo & Address to Your Quote Paperwork

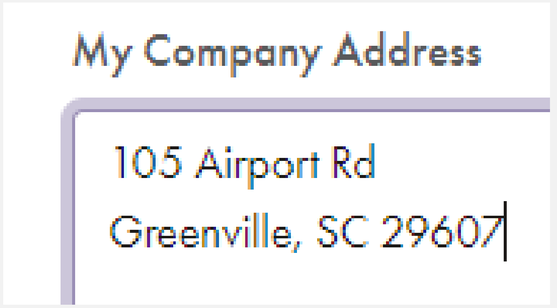
1. Click on your email address at the upper right



2. Choose **paperwork headers**
3. Then click on **New Header**
4. **Name** your **Paperwork Header**



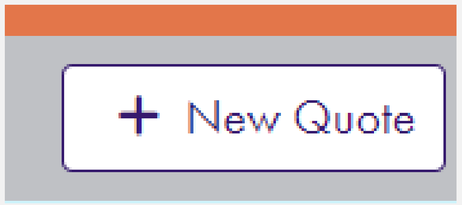
5. Enter your Company Address



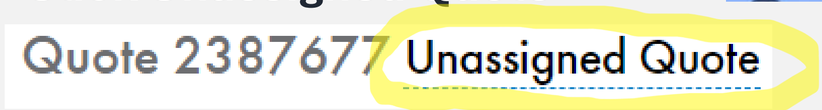
6. Add your Company Logo / Choose File – choose a file off your computer and click Create. This will now be your default address and logo on your quotes / orders. Multiple logos and addresses can be added and switched between for your paperwork.

Creating a Quote

1. **Click New Quote**



2. **Click Unassigned Quote**



3. **Enter Quote Name & Click Check Mark to Right**

3. **Project Name** – *(optional)* click Project Name, enter project name and click check mark to right *(many quotes can be attached to one project)*

4. **Quote Details tab information**

Purchase order - required to convert to an order. It must be unique for each order for that client.

Victorbilt Order # - will be manually updated by Dealers Supply after the order is processed.

Victorbilt Sales Rep - this is our outside sales representative for you.

Sales Rep - this is a free text field for you to enter the person from your company who is the contact for this quote.

Order Comment - free text field (80-character limit) for notes

Ship via – this is how Dealers Supply will get the product to you.

Order Processing Status - there are four answers you will see:

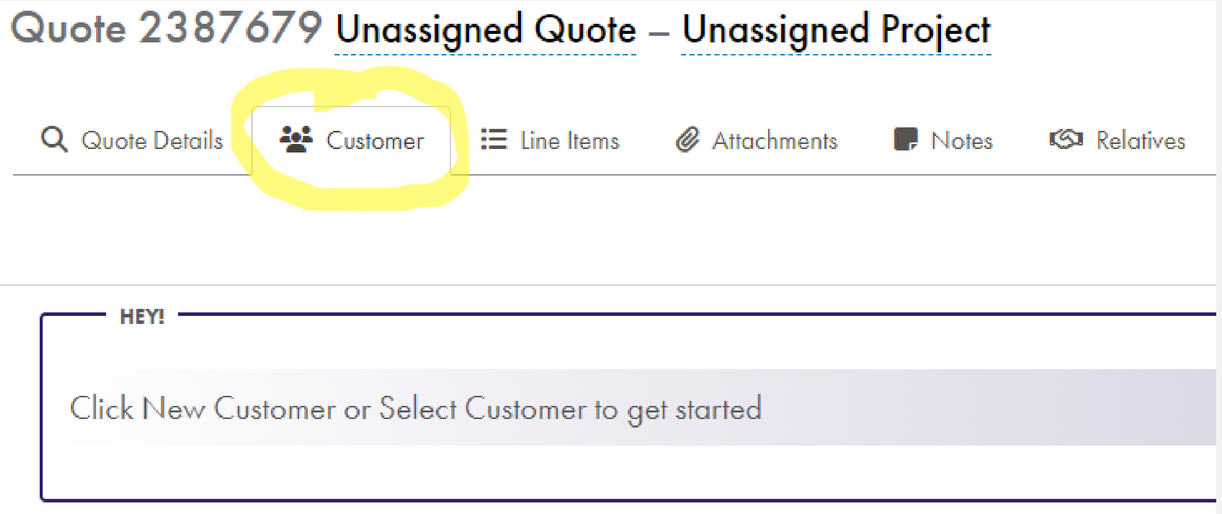
- Not started – automatically selected
- Incomplete – selected after quote is ordered but there is something delaying the order
- Order entered – person converting the quote to an order must change this to show entered
- Order invoiced – after order is invoiced, Dealers Supply will change the order in VictorQuote to show invoiced

Click Save once you have gone through your details tab

Creating a Quote - Continued

- **Customer Tab**

5. Click **Customer**

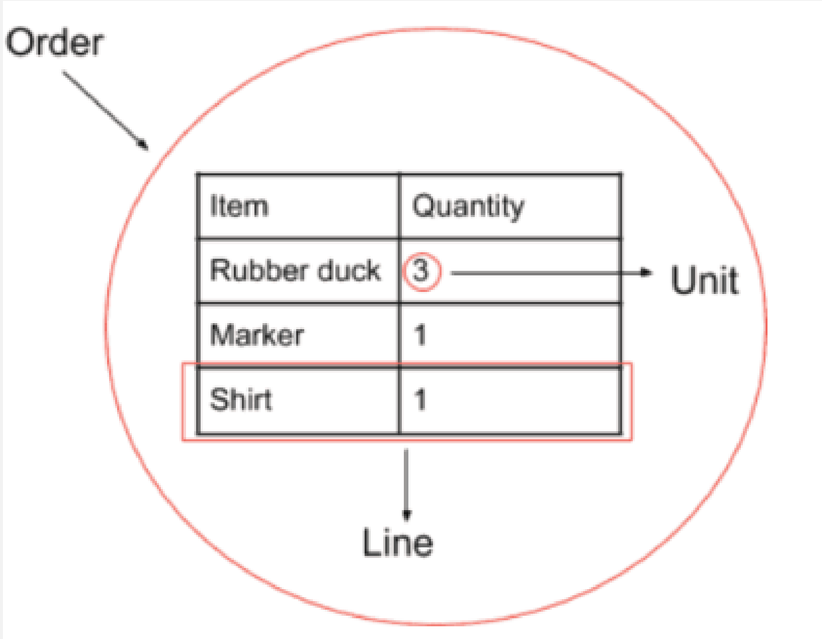


6. **Click Select Customer to Right & Enter your Search by client name or number** *(you can search by their business name or just a portion of it, their account number, their address or by city)*. If they aren't set up go to My Customers at the top of the page and click here, then click New Customer and enter their information. You can set up their Billing & Shipping Address as well as your pricing preferences for this client.

7. **Click Select once you find the customer you are creating the quote for**

8. **Apply customer to quote pop up** – review and click Apply

Creating a Quote - *Continued*



Example when choosing windows

- **Line Items Tab**

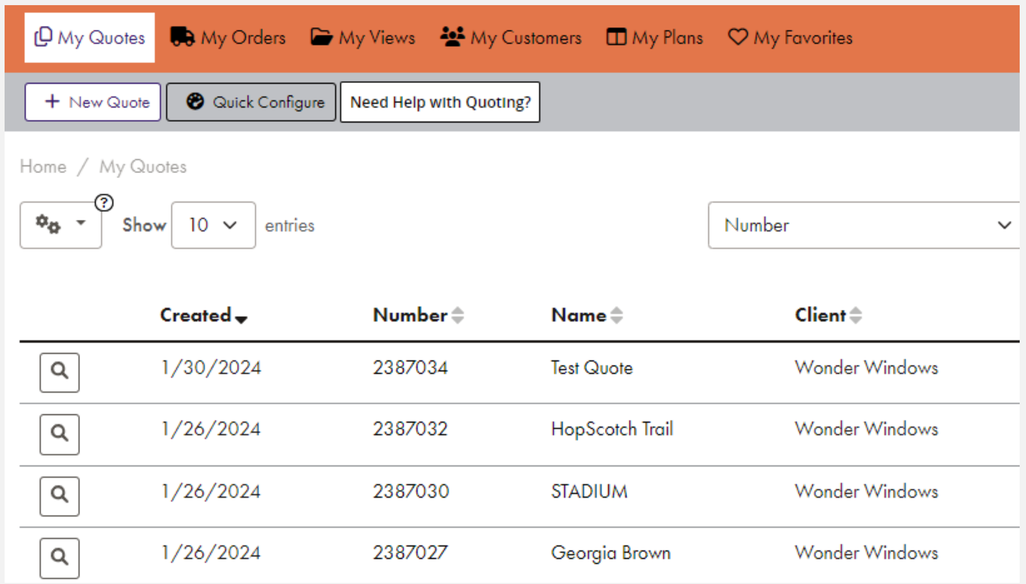
9. Click **Line Items**
10. Click **New Line Item** to far right in orange

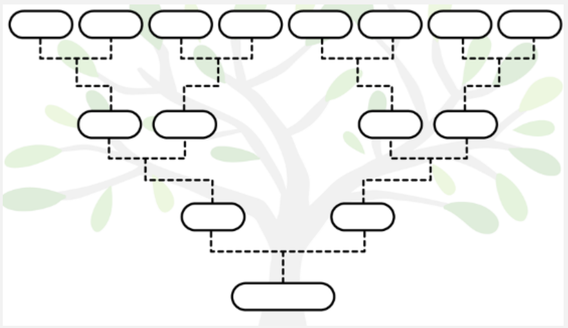
11. **Select Product Line** – Click on the product you want to add
12. **Product Selection | Size & Features | Glass | Grilles | Hardware, Screen & Trim Options –** let the system guide you through and choose the specifications for your product / products on your quote

Creating a Quote - *Continued*

- **Attachments / Notes / Relatives Tabs**

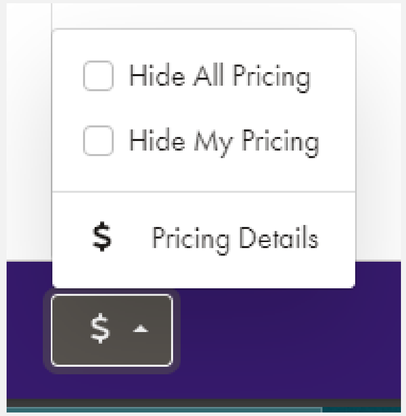
13. **Attachments *(not required)***– attach plans, pics, etc.
14. **Notes *(not required)***– save notes about the job
15. **Relatives *(not required)***– Find linked alternates and service orders
16. Click Add to Quote (your quote is now saved and will show when clicked on under My Quotes in the upper left corner





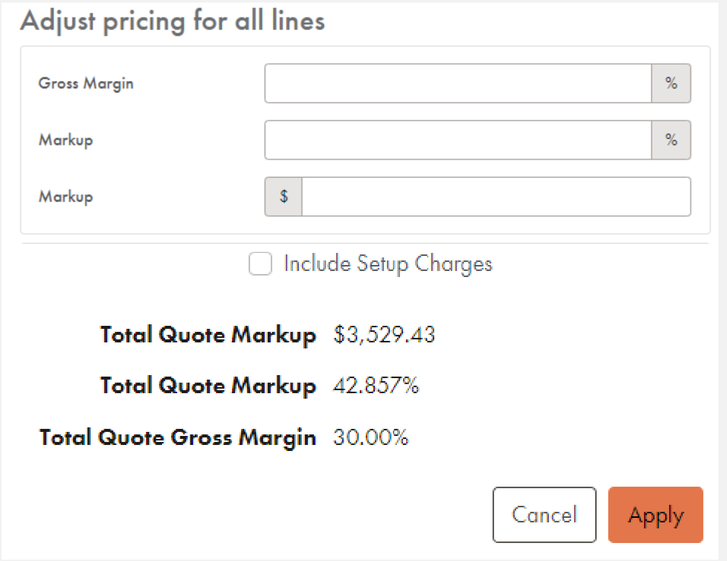
Hide All Pricing / Hide My Pricing / Pricing Details

Click the Dollar Sign at the Bottom Left of the Quote



This is great if you want to share your screen with your customer, without sharing your cost or pricing

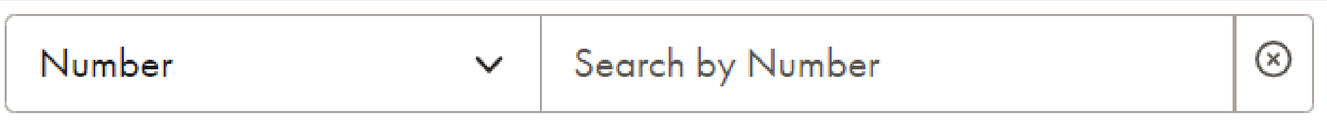
- **Hide All Pricing** – Click this to Share Your Screen Specs & Drawings Only *(no pricing)*
- **Hide My Pricing** – Click this to Show Your Customers Price Only *(your cost is not shown)*
- **Pricing Details** – You can review and make changes to your Markup / Margin as well as adjust taxes here



Find Quotes and Orders

1. Click the task you want to preform

2. Search



- In My Quotes / My Orders - Use the dropdown shown above to search by Number, Name, Client or PO Number

My Views

- These are saved searches – great for finding quotes or orders that are referenced often. Pin your frequently used views to get quick access to them. You can unpin them at any time by clicking on the icon.

- **To create a view, it must contain <u>at least</u>:**
  - View name
  - One display column
  - One of the starred filters (for performance reasons)
  - Views can be shared with other internal users in your company location

HOMEPAGE SHORTCUTS

MY RECENT QUOTES – shortcut to your 25 most recent quotes.

MY RECENT ORDERS – shortcut to your 25 most recent orders.

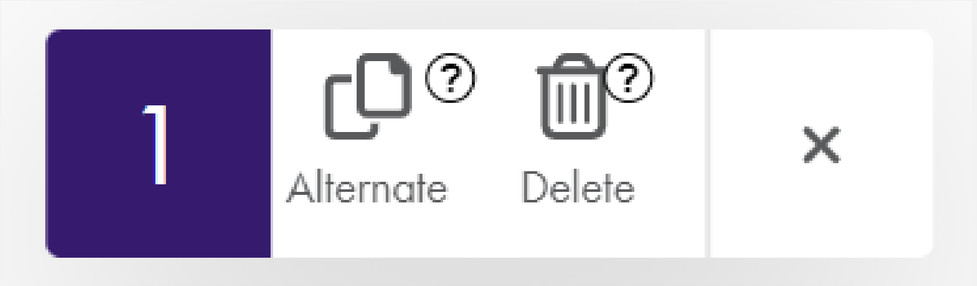
Creating Copies of Lines in Quotes & Creating Alternate Quotes

Creating a copy of the line item you previously quoted

✓ In your quote, check the box to the left for the line or lines you want to copy and click **Copy** to the right. Then you can edit if necessary.

Creating an Alternate quote *(great if you need to make comparison quotes for a customer showing pricing variations)*

- You can create an alternate quote with one or more line items from your existing quote. Select one or more lines or select all. Then in the menu that appears at the bottom of the page, click Alternate.
- Note that the original quote has a type of “Normal” and the new quote has a type of “Alternate”
- Use the Relatives tab to navigate between the two quotes



Printing & Emailing Quotes / Placing an Order

HOW DO I PRINT OR EMAIL MY CUSTOMER QUOTE:

To print or email a quotation to your customer go up to the upper right and click on Actions and choose Paperwork – Dealer Quote to Customer *(includes customer prices)* or Paperwork – Dealer Quote No Pricing *(no pricing is shown). From here it will allow you to print, download or email your quote.*

HOW DO I PLACE MY ORDER WITH DEALERS SUPPLY:

To place your order with Dealer Supply, go into your quote and navigate to the upper right and click on Submit Order. We will send an email confirmation once we have entered your order and the status will change in VictorQuote to “Order Entered”.

My Plans

Plans are jobs that are continually quoted or ordered

- Great for popular products or a home that is used repetitively. **Create a plan to use as a template for new quotes or create a quote or order from an existing plan.**

My Favorites

You can use this feature to save configured lines as favorites and add favorite lines to quotes.

This saves time if you're frequently configuring the same or similar products in the Window & Door Configurator.

Show only My Favorites

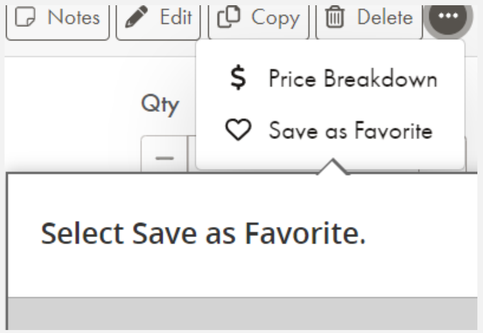
Search by name, description or tag

	Name	Description	Shared with Group	
☐	Edisto Beach project Window	Traditions Series Natural Double Hung Call Size: 2-8 x 4-6 | Rough Opening: 34 5/16 x 57 3/4 Unit...		
☐	FAVORITE	Traditions Series Primed Double Hung Call Size: 2-8 x 5-2 | Rough Opening: 34 5/16 x 65 3/4 Unit ...		
☐	FAVORITE ESTATE DBL HUNG	Estate Series Composite Double Hung Call Size: 2-4 x 5-2 | Unit Type = Sash Replacement System | ...		

My Favorites - *Continued*

Create My Favorites

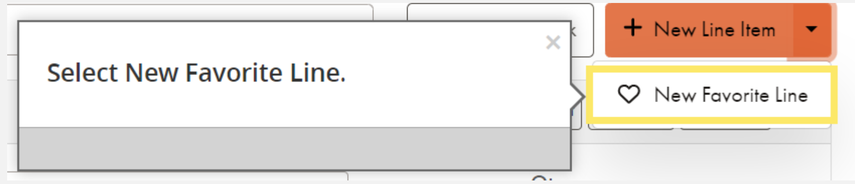
1. Select the line Items in your quote you want to save
2. Select save as favorite



3. Select Create new or Overwrite existing *(Overwrite would be used when a spec has changed or just a simple edit needs to be done).*
4. Add Name and tags - *Tip: Include words you might use to search for later*
5. Click Save

Apply a Favorite

1. In your quote you would click the dropdown for new line item and choose **New Favorite Line**.



2. Choose which favorite you want to add to your quote and click **+**..

End of Presentation