



System Login:

User ID: _____

Password: _____

Contacting support:

- Click **HELP/SUPPORT** on the bottom menu bar

HELP / SUPPORT

Please fill out the following information to request help.

From (your email address):

Subject:

Dealer Name:

Dealer Number:

Phone Number:

Extension:

Message:

Customer Service “exoQuote Support: 1-800-282-6019 x23012

Questions or errors e-mail: wreplacement@pgtindustries.com



Logging in to “exoQuote

www.exoquote.com

<http://www.pgtindustries.com>

My Account

The **MY ACCOUNT** area provides the opportunity to set user defaults that make your system usage easier. You can set a base pricing model for all customers, reports and system pricing views.

MY ACCOUNT

CUSTOMER SETTINGS

Default Customer Type:

Add New Customer as Private: Yes No

Default City:

Default State:

Default Pricing Method:

Default Pricing Percentage:

Default Tax Percent:

PRICING SETTINGS

Default to Display List: Yes No

Default to Display Cost: Yes No

Default to Display Sell: Yes No

REPORTS SETTINGS

Default Quote Report:

Default Sales Order Acknowledgement Report:

SHIPPING SETTINGS

Default Ship To:

Default Ship Via:

Creating a Quote

- Click **CREATE QUOTE**
- Enter customer information in the Name/Address box
- Enter pertinent information, PO #, job name, construction, market segment, etc.
- Select products for order from **CHOOSE PRODUCT** area using favorites, recent, A-Z tabs
- Click **PRINT** to print the Quote Order Acknowledgment or your predetermined default report
- Click **DONE** to save the quote

Selecting Products for Order

- Select products for order from **CHOOSE PRODUCT** area using favorites, recent, A-Z tabs
- Enter the product description or number in the search box
- Click **ADD PRODUCT** or click the picture and drag it to the line item area to add to the order
- Click the **CONFIG** button if the button appears red, or if you want to change a favorite or recently configured product
- When configured completely without error the configuration button will turn green

Global Changes

- Select the line items you'd like to apply a global change to by checking the boxes on the left
- Click **GLOBAL CHANGE**
- Select any changes you would like to make
- Click **Go** to activate the changes
- Each product may require updates be made to the configuration

Duplicate Item

- Select the products you'd like to duplicate by checking the box on the left
- Click **DUPLICATE ITEM**
- A duplicate item will be created as the last line item

LINE #	NAME	LOCATION	QTY	COST (DISC)	SELL (DISC)	ALL
<input checked="" type="checkbox"/>	1.0	HR710A	1	\$0.00		CONFIG

Delete Item

- Select the products you'd like to delete by checking the box on the left
- Click **DELETE ITEM**
- Click **OK** to confirm the products to be deleted

Completing Quote Options

- Print – preview and print the Quote Order Acknowledgment or your predetermined default report
- Save as Favorite – to add to your Favorite List
- Convert to Sales Order – to purchase the order
- Done – save as a quote
- Cancel – delete the quote

Search Feature

- Click the heading **QUOTES/ORDER/PRODUCTS/CUSTOMERS/REPORTS**
- Select from Recent, A-Z, or Favorites tab
- The Search field allows you to look for something specific in each category

QUOTES:

Edit
Copy
Delete
Favorite
Convert

ORDERS:

Edit
Copy
Favorite
XML

PRODUCTS:

PGT Products
Distributor Products
Discontinued
Set as Favorite Product
New Quote
Add New Product

Product Search Heading

RECENT A-Z FAVORITES

Search **SEARCH** **CLEAR** Only Show My Quotes **Advanced**

Products

- Click **CREATE PRODUCT** to create a database of individual Dealer Products

CREATE DISTRIBUTOR PRODUCT

Party ID: 57549

Product Name:

Product Description:

Unit of Measure:

List Price: \$0.00

Cost Price: \$0.00

Sell Price: \$0.00

Taxable:

Favorite:

SAVE **CANCEL**

Customers

- Click **CREATE CUSTOMER** to set up a new customer

Reports

- Click the heading **REPORTS** to view the current list of your available reports
- Click **CREATE REPORT** to create a new report
 - Enter the name of the new report
 - Click the desired report attributes
 - Click **Save** when complete
- Click **OPTIONS** to select specific attributes to appear on all of your PGT reports

Convert Quote

1. Click on the Quote in the carousel on the dashboard and select **Convert Quote**
2. Click the **QUOTES** heading to search for the quote to convert

- Type quote number in the Search field and uncheck "Only Show My Quotes" box
- Click **SEARCH**
- Select **CONVERT** from available options

EDIT **COPY** **DELETE**

FAVORITE **CONVERT** **REPORTS**

3. Edit Quote and select **Convert Order** within Quote

System Requirements

- Operating System: Windows 7, Windows Vista, Windows XP Service Pack 2
- Intel Pentium III 450 MHz or faster processor (or equivalent)
- 1GB of RAM
- Internet Explorer 7, 8, or 9