

Dealer HaasWorx Overview

HaasWorx - Online Quoting / Ordering tool

- > Enter orders online.
- > Use the powerful quoting tool to track quotes.
- > Prompts to follow up, tracks why jobs are missed.
- > Increases order accuracy, all the way through the process.
- > Increases communication quality and speed about specific jobs or quotes.
- > Engineering and spring information.
- > Shop drawings.
- > Rich order history information.

• Definitions

- Configuration
 - A calculated sum of product option choices
- Line Item
 - A detailed summary of your configuration, a comment, or additional item
- Quote
 - A collection of one or more line items including a pricing summary

User Types

There are two available user types for customers using HaasWorx:

1. Sales/Quoting

- The sales type user can build and track quotes, but can not order product. Entering an anticipated close date is required.

2. Order Entry/ Quoting

- Order Entry has the authority to order product, and the order entry process is slightly streamlined. This user has a view of all the quoting activity of the Sales users.

The idea is to allow sales to work through and focus on the sales process. Gather the technical information, settle on an agreed price, add labor and markup, and produce an attractive document. The Order Entry person can then take that quote and quickly convert it into an order.

Quick References

- Function of a Quote
 - **All** orders start as a quote
 - Contains customer information (multiplier, ship-to...)
 - Edit a quote to change customer name -
 - Delivers a complete package of information to the order stage
- Function of a Configuration
 - Line item within a quote
 - Use for finding spring info
 - Find and share drawings
 - Edit a configuration to change door options
 - When editing a configuration, those changes will be seen on quotes containing that configuration as a line item
- Function of a Project
 - Use to group quotes together
 - **The only "common" input that quotes and configurations share**
 - P.O. #
 - Weekly truck
 - Construction Project
- Order Look-up / Search
 - What information are you looking for? What information do you have?
 - Quote info
 - Customer
 - Multiplier
 - Qty
 - Ship-to address
 - Configuration info
 - Product info
 - Color, size, model
 - Shop/spring drawing
 - BOM
- Filtering
 - Click "Filter On/Off" button to open the filter window. Choose the filter options to find the configuration or quote you are looking for.
- Sorting
 - Sort the entire list by any of the column's information by clicking on the red triangle next to the title
- Cancellations/Changes/Delete
 - Call your customer service rep immediately to change/cancel and order. There is no changing an order once its been requested in HaasWorx.
- My Profile
 - Click on My Profile to change password or other user information

Quote Properties page

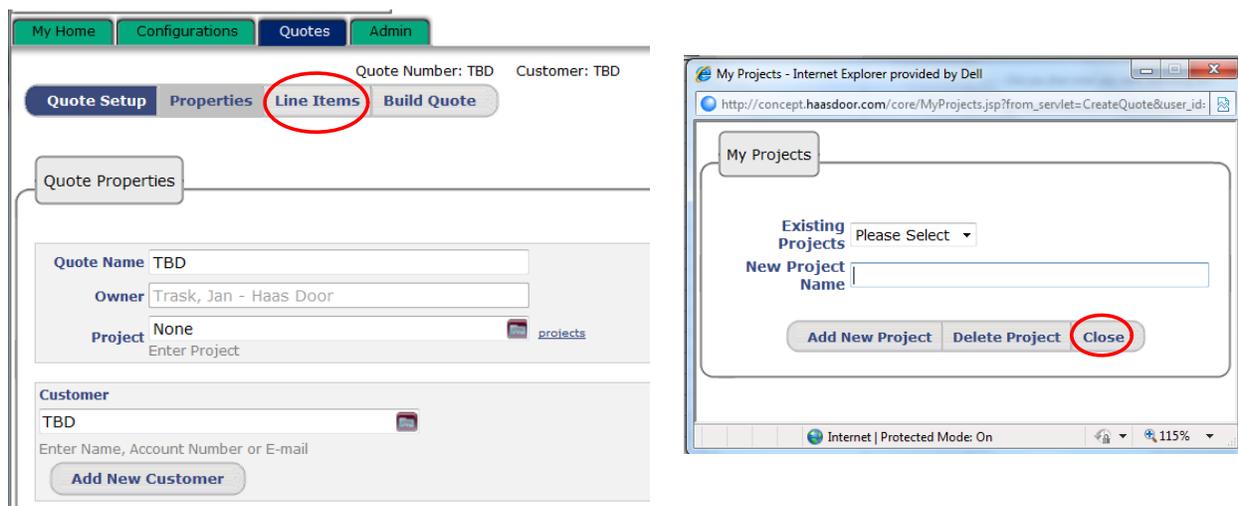
Enter an Order -> Starts with a QUOTE

After you're logged in, you can create a quote from the home page, or the quotes page menu.



Quote Properties page - on this page you enter your:

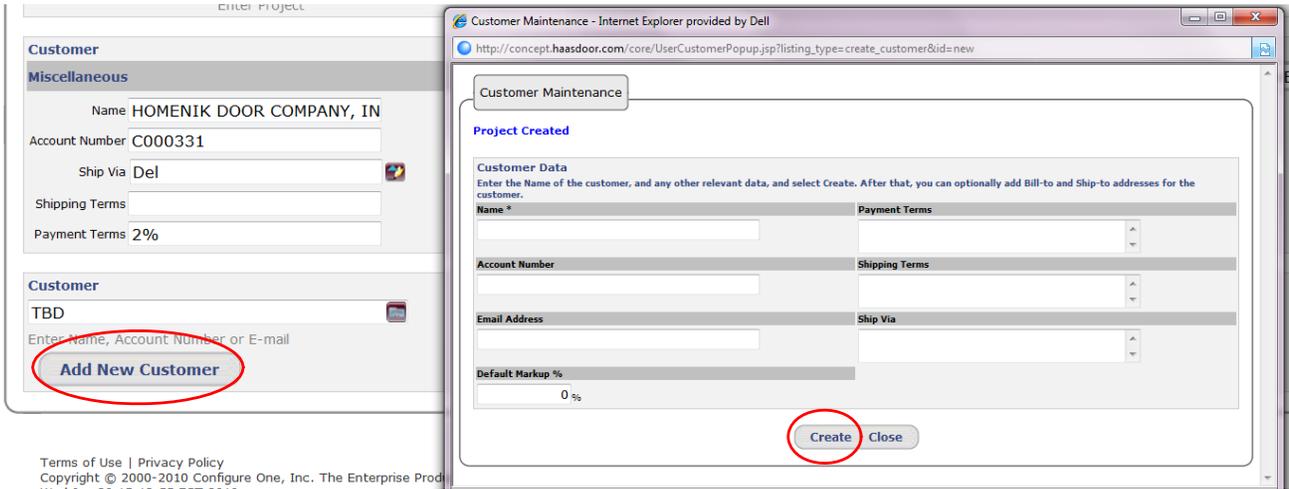
1. Quote Name - from customer
2. Project
 - a. To create a new project, click on the small blue "[projects](#)" link. This opens the "My Projects" window. Type the new project name (reference name or number) in and then "Add New Project", then "Close" to close the small window.
3. Customer name
 - a. **You only need to enter your customer's information if you want it to appear on a quote to them, otherwise, leave it TBA**
4. When finished, click **Line Items**



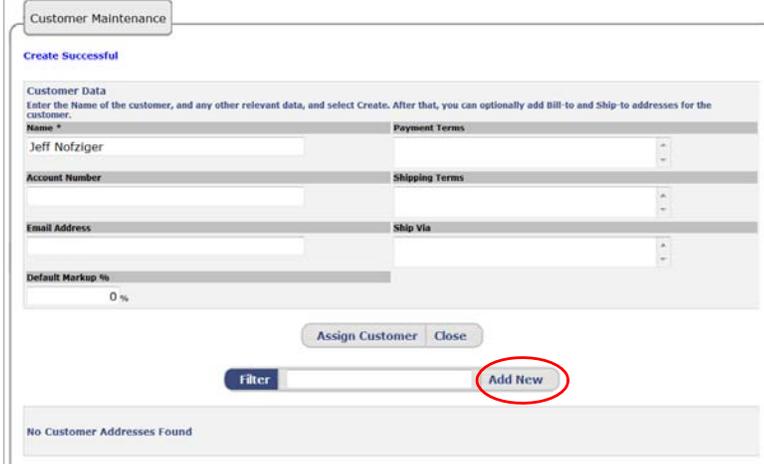
Entering new customers

Wednesday, January 20, 2010
3:27 PM

Click on "Add New Customer". Fill in the Customer Maintenance screen (only Name is required) then "Create".



After you click "Create", click "Add New" to enter Bill-to and Ship-to info for the customer you created.



Then fill in the information here, then click "Create"

Customer Address

Contact Name * Primary

Address Line 1 * Address Type
Bill To

Address Line 2 Address Line 3

City *
State * Postal Code *

Country *
Please Select

Phone Number Fax Number

Email Address

Create Cancel

Quote Line Items / Configuration Properties

Quote Line Items

View Summary History 5 per page

New Line Item Configuration Salable Item Additional Item

Configuration

New Configuration Please Select Go

Clear

This page is where you decide what type of line item you would like to add to the quote. Choices are:

1. **Configuration**
 - i. New Door, Section, Sections Only
 - ii. Under "Please Select" choose the model (600 series, 700 series or PAN) and click **GO**
2. Additional Item
 - i. Use this for any item you want to include on the quote that Haas Door does not sell. You can add \$\$ to it. Operators, Extra work to be done...
3. Comment
 - i. Add a comment to your quote that is informational only, no \$\$.

Configuration Properties Page

Configuration Properties

Configuration Name Q-10941-2

Project Training

Customer CASPER VANDERHAM

Continue Cancel

RMT-600 SERIES

Here's where you're able to change the configuration name. The automatically generated one (Q-10941-2) can be changed to anything you like. If this is a quote with multiple doors or line items, you can change it to something as basic as "9x7".

You can also just click past, and not change it.

Add to Quote

Once your product is configured, you need to add it to the quote. If you "Return to Quote", it will take you back to the quote properties page, and you'll lose your configuration.

The screenshot shows a software interface with a top navigation bar containing 'My Home', 'Configurations', 'Quotes', and 'Admin'. A 'Feedback' link is located in the top right corner. Below the navigation bar, the product information is displayed: 'Product: RMT-600 SERIES Configuration Name: Q-10941-2 Serial Number: C-11406-W'. Two icons representing 'Return to Quote' and 'Add to Quote' are shown, with the 'Add to Quote' icon circled in red. On the left side, there is a 'Configuration Links' sidebar with sections for 'ACTION ITEMS', 'DESIGN DRAWINGS', 'DESIGN REPORTS', and 'HISTORY'. The 'Price Listing' link in the 'DESIGN REPORTS' section is highlighted. A 'Price Listing' callout box is positioned above a table that details the pricing for the configuration.

Description	Price
Door Price (1.00 @ \$ 1,360.00)	\$ 1,360.00
Torsion / Extension Price (1.00 @ \$ 0.00)	Included
Strut Pricing: (1.00 @ \$ 0.00)	Included
List Price	\$ 1,360.00

Quote Line Items page

At this point, your quote now has a line item added to it. From this page, you have the option to:

1. Change Quantity
2. Review /edit the configuration's information by clicking the "+" button
3. Add a new line item, or configuration to the quote
 - a. If you add a new line item, it will take you back to the "Quote Line Items" page
4. If you're satisfied with the content and order of the line items, **Build Quote**

Quote Number: Q-10941 Quote Name: Training Project: Training Customer: CASPER VANDERHAM / C000444

Quote Setup Properties Line Items **Build Quote** Save Cancel

Quote Line Items

View Summary History 5 per page

New Line Item **Configuration** Salable Item Additional Item

1-1 of 1 Line Item

Line Item Listing [goto Bottom](#)

Item	Reference #	Description	Unit Price	Qty	Ext Unit Price	Discount	Net Price	Ext Net Price
	1	C-11406-W COMPLETE DOOR; 16'-0" X 7'-0" 4-8 RMT-680Y; RAISED	\$ 1360.00	1	\$ 1360.00	0 %	\$ 1360.00	\$ 1360.00
Totals				Qty 1	Ext Unit Price \$ 1,360.00	Discount 0% \$ 0.00		Ext Net Price \$ 1,360.00

Template None Price Book List Price - 2007

Quote Build Page

Job name can be the same as the quote name from the first page.

Don't type anything at this time in the Special Requests text box.

The Quote Inputs area is where the dealer can add margin and labor to the quote. Markup is entered as a percentage, the labor is added as a flat dollar amount.

Entering in the Anticipated Close date is a requirement for the sales-type user, not a requirement for order entry-type users.

Build Quote

QUOTE INPUTS

Job Name

QUOTE INPUTS FOR #1 [C-13137-W]

Special Requests

Markup Percentage

Labor Amount

Material Sales Tax (Percentage)

Labor Sales Tax (Percentage)

QUOTE FORECAST

Anticipated Close Date

Probability of Sale

Build Quote

Once the quote is built, you can [View Quote to End User](#), or [Request Order](#).

Viewing the quote will open a new window to the quote in a .pdf form. From there you can print it or email it to a customer.

Request Order will take you to the last page where you enter a requested ship date and a P.O.

The screenshot shows the HaasWorx web application interface. At the top, there is a navigation bar with "My Home", "Configurations", and "Quotes" tabs. A user profile bar shows "Welcome MJOHNSTON" and a "Logout" button. Below the navigation, the quote details are displayed: "Quote Number: Q-12260", "Quote Name: Casper", "Project: North Building", and "Customer: HOMENIK DOOR COMPANY, INC / C000331". There are buttons for "Options", "Edit", and "Promote". On the right side, there are two circular icons: "View Quote to End User" (circled in red) and "Request Order" (circled in green). The main content area is titled "Quote Summary" and contains a "Properties" table.

Properties			
Quote Number	Quote Name	List Price	Net Price
Q-12260	Casper	\$ 1,400.00	\$ 532.00
Create Date	Modify Date	Status Date	Build Date
1/21/2010 6:43:32 AM EST	1/21/2010 6:59:13 AM EST	1/21/2010 6:59:13 AM EST	1/21/2010 6:59:08 AM EST
Creator	Modifier	Status	Build Number
Johnston, Mike - Homenik Door Company	Johnston, Mike - Homenik Door Company	Created	1

Quotes / Configurations tab

From almost anywhere in the site, you can access the navigation tabs at the top. The Quotes tab and Configurations tab will be used frequently.

Customer	Quote Name	Project	Quote Number	Status	Create Date	Quote Options	Order Number
ACCESS ENTRY SYSTEMS INC.	Hartham - 622	19206	Q-10936	Created	10/23/2009		H000637
ACCESS ENTRY SYSTEMS INC.	M. North	19205	Q-10933	Created	10/23/2009		H000634

Both of them have similar looking options and columns, notice that "Project" is on both lists.

Customer	Configuration Name	Project	Configured Date & Time	Owner	Configuration Options	Status
CASPER VANDERHAM	Q-10941-2	Training	10/25/2009 9:19:58 PM EDT	Trask, Jan - Haas Door		Configured
CASPER VANDERHAM	Q-10941-1	Training		Trask, Jan - Haas Door		Initiated

If you are searching for a particular quote/configuration, enter searchable information into the search bar. That will narrow your results. From there, sort the list by the column's heading.

Search / Filter

What are you looking for?

Technical information?

- Spring size?
- Shop drawing?
- BOM?

Search for the **Configuration**

General information about a specific quote?

- Ship-to address?
- Net price?
- Quoted price?

Search for the **Quote**

The quote holds the **customer information** (the bill/ship-to, multiplier) the **line items** (quantity), and the dealer inputs (markup/labor). It comes up with a grand total (\$). If you need to review or edit these things, look up the quote.

The configuration holds all the product choices, and calculates BOMs and drawings based on the choices. If you need to change information concerning the product, look up the configuration.

If you change a configuration that is already used in a quote, the next time you open that quote, the new configuration information will be shown.

Filter

Find the "Filter On/ Filter Off" button in the blue menu bar.



Using the filter tool, put the information you have about a quote/config you're looking for. Make sure the "Filter On" button is selected, then click "Apply Filter". Remember when you're done to reset your filter to "off".

Use the "Owner" = All to look over all of your customers at once. Choose a user to see only his/her quotes/configs.

Configuration Filter

Apply Filter Reset Close

Filter Off On

Save Filter 

Project All  Product All 

Customer All  Status All 

Status Date From  To  Within Last 

Configured Date From  To  Within Last 

Match Either Range Match Both Ranges

Apply Filter Reset Close

Quote Filter

Apply Filter Reset Close

Filter Off On

Save Filter 

Owner Nofziger, Edward - Super Eddie 

Project All  Template All 

Customer All  Status All 

Status Date From  To  Within Last 

Modify Date From  To  Within Last 

Match Either Range Match Both Ranges

Apply Filter Reset Close

Work Sheet

1. Enter a quote for a 16x8 670A 15"r for a customer who is using HW.
 - a. Job Name: Trask
 - b. Project: 3345
 - c. Customer : Casper
2. Create a quote for a 610RPW 9x8 32" plain glass top
 - a. Job Name: Williams
 - b. Project: 3345
 - c. Customer: Casper
3. Edit the 16x8 670A configuration. Change to 16x7 680W 15"r. Check the quote that was created for it. See how editing a configuration changes it in the quote it is in also.
4. Find the spring size on the 9x8 above
5. Locate the spring drawing on the 16x7W
6. Change the customer name on the 610RPW 9x8

Enter live orders if we have some