



To start a new quote, select the **New Quote** icon.





To create a new line item, select the **New** icon.

New Quote Returns C	Contract Adj	Quick Find	Copy Quote	Alternate Qu	ote	
New Project - New Quote - WTS (300001)						
🔊 + <u>:</u>		Start V	Vorkflow Queue	New Project	- Nev	
View Settings Expand All		Deale Info	Customer Infe	Line Items	Quote	
Project 🔺		New -	New Insert Import Lines Edit Dele			
Status Ouote	Ouote	in	e# 0tv 1	T DK # Ims	909	



Use the finish options to build a new item, copy, or exit.





Click **Qty** to change the quantity.





To **Print-Email**, or **Save**, click the respective buttons.

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Save Print-Ema



Answer all required questions.

File Tools Search Help



## Preferences

Set default preferences for questions



To set a default preference for your questions, click the Pref icon.





Select what you would like defaulted, and choose your new option.

Preferences					
Product Knowledge Pricing Customer List Price Codes Disclaimer					
Windows and Patio Doors Architectural Doors					
Unit Type					
Unit Type	No Preference				
ServiceQuoteConfiguratorLoaded	No Preference				
Sidelite Series	No Preference				
Sidelite Type	No Preference				
Out Swing	No Preference				
Zip Code	No Preference				
DP Requirement	No Preference				
Center Hinged	No Preference				
Replacement Part Location	No Preference				
Angle Of Deflection	No Preference				
Color					
Exterior Color	No Preference 🔹				
Custom Applied Exterior Color	No Preference				
Specify Special Color	White				
Interior Color/Finish	Beige				
Specify Special Color/Finish	Brown				
Primed Interior	Custom Applied Exterior Color				
	Save Cancel				



Click Save when finished.

## **Global Changes**

Edit many lines at once

## To edit many lines at once, click the GC icon.





Select what you would like changed, and choose your new option.





Select which line items you would like them applied to. To select multiple, Control-Click or check Apply to all.



Click Apply when finished.