m2o® Cloud User Guide

Version 1703

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1. About This Document

1.1 Purpose

This document intends to serve as a training guide for m2o® Cloud. m2o Cloud will allow you to generate product quotes faster and make order submission easier, all while reducing errors and ensuring order accuracy. It is important to note that because m2o Cloud contains permissions for each user, you may not have access to all of the functionality contained within this document. For additional information, please contact your systems administrator.

1.2 Audience

The intended audience is any new user of the m2o Cloud system.

1.3 Prerequisites

A log-in account for the m2o Cloud system is required. Additionally, an Internet browser that supports HTML5 is required. Common Internet browsers that support HTML5 include:

- Android Mobile Browser (version 2.1 and higher)
- Apple Safari for iOS (version 3.2 and higher)
- Apple Safari for OSX or Windows (version 5 and higher)
- Google Chrome (version 14 and higher)
- Microsoft Internet Explorer (version 9 and higher)
- Mozilla Firefox (version 7 and higher)

The m2o Cloud system makes use of JavaScript. JavaScript must be enabled in the Internet browser for the system to be fully functional. To check to see if JavaScript has been enabled and for further instructions on enabling it, please visit http://www.enable-javascript.com.

For Windows XP users, because m2o Cloud is not supported in Microsoft Internet Explorer 8, it is recommended that either Google Chrome or Mozilla Firefox be used. Google Chrome can be downloaded and installed by visiting https://www.google.com/intl/en/chrome/browser/ and Mozilla Firefox can be downloaded and installed from http://www.mozilla.org/en-US/firefox/new/.

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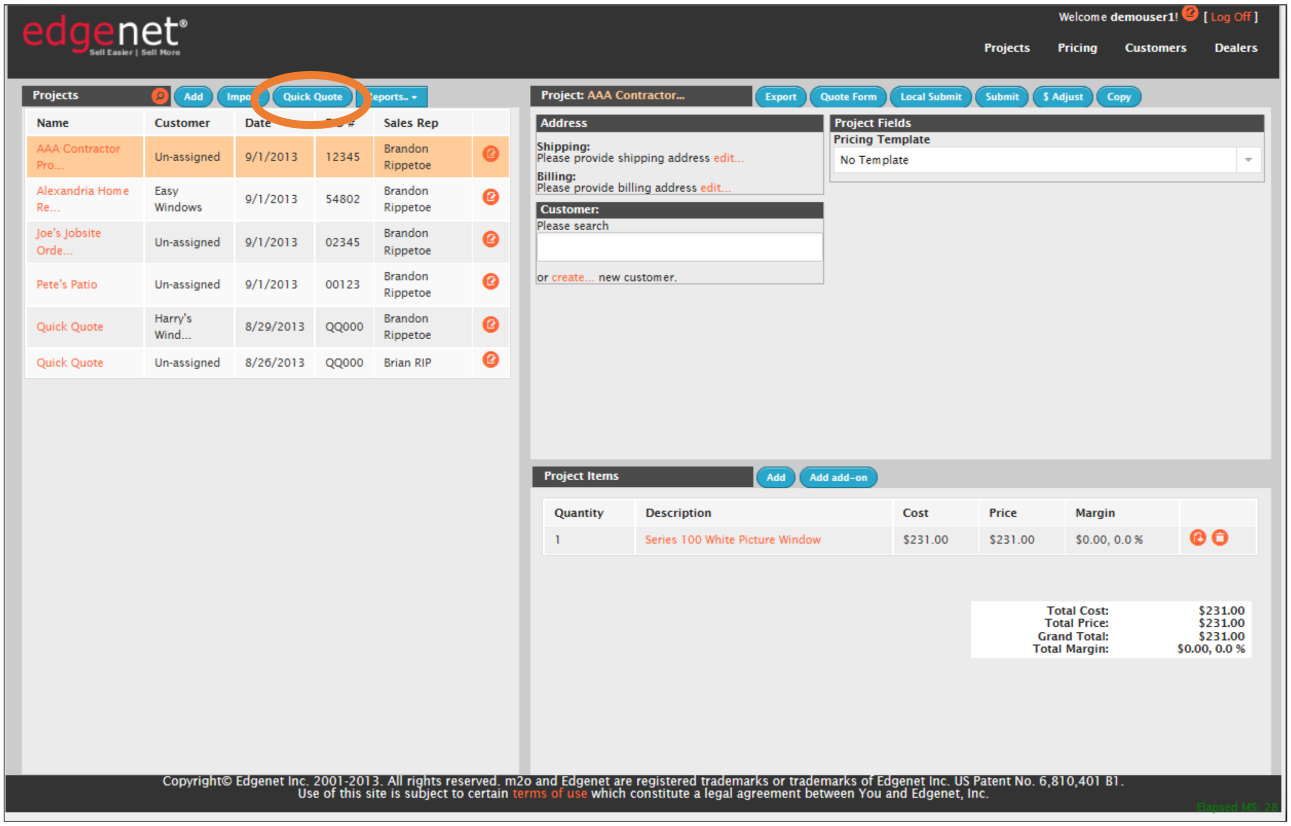
2. m2o Cloud Quick Start

2.1 Creating a Quick Quote

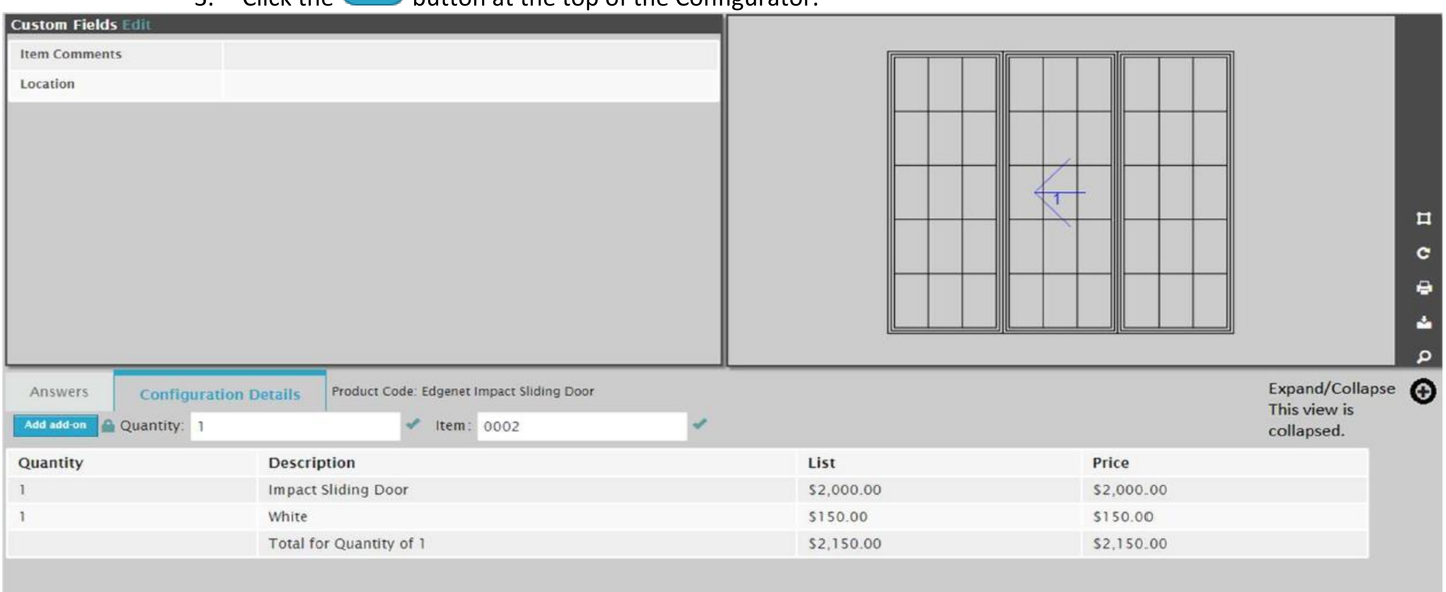
A Quick Quote allows a project to be quoted quickly, without requiring any customer information to be completed.

To start a Quick Quote:

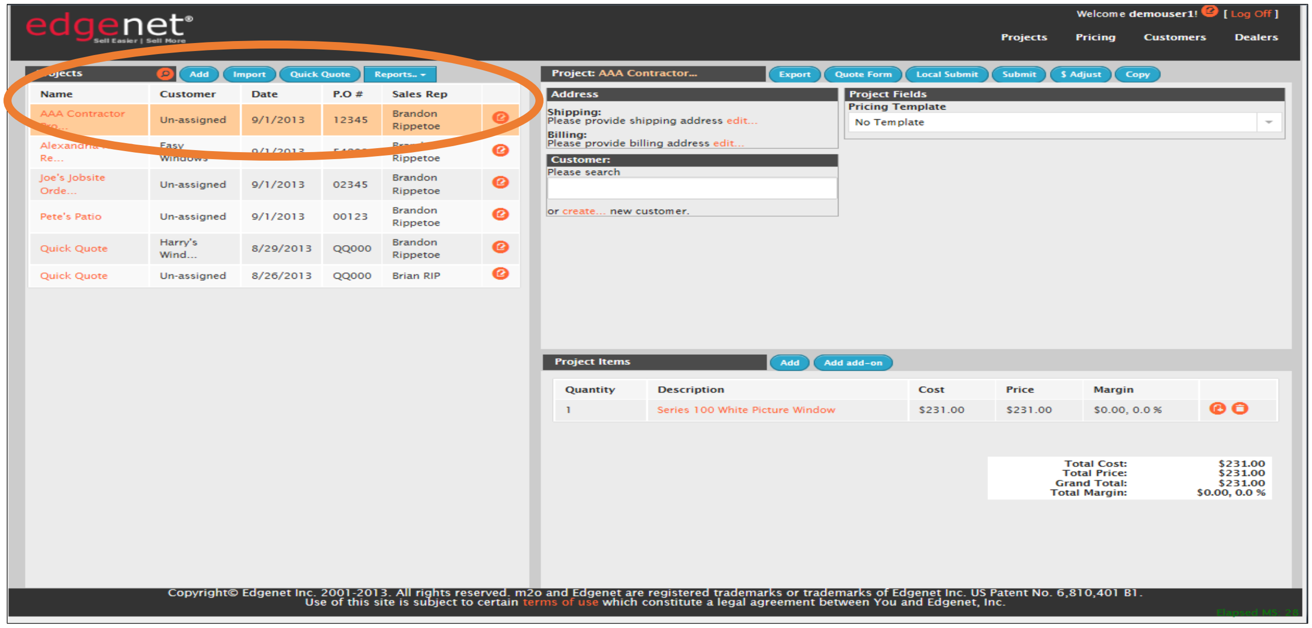
1. On the Projects tab if a different screen is selected. Click the Quick Quote button found in the upper-left of the page above the Project List to open the Configurator.



2. Complete the configuration of the Item. Once the configuration is complete, the pricing information will appear on the screen.
3. Click the Save button at the top of the Configurator.



The project that was just created will be automatically selected and at the top of the Project List. Any additional project details needed, such as Customer information, can now be added or changed.

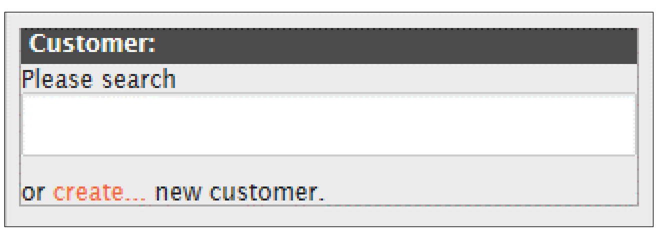


2.2 Adding a Customer to an Existing Project

Once a Project is created, a Customer should be associated with the Project.

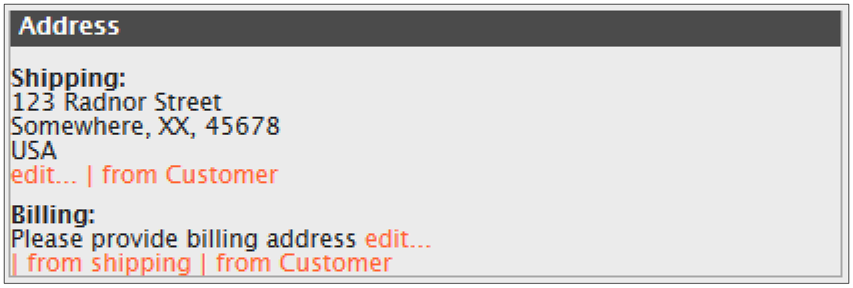
To add a Customer to an existing Project:

1. On the Projects tab, select a Project from the Project List.
2. In the Project Details section, find the “Customer” search box.



3. Begin typing the Customer’s Name, Customer ID, Shipping Zip Code, Shipping Email, or Shipping Phone Number. A search results list will begin to appear based on the information that has been entered.
4. If listed, click on the appropriate Customer to assign to the Project. If the desired Customer does not appear in the list, click on the “create…” link to add a new Customer.

The Customer Shipping and Billing Information can be imported into the Project by clicking on the “from Customer” link next to the Billing or Shipping section.

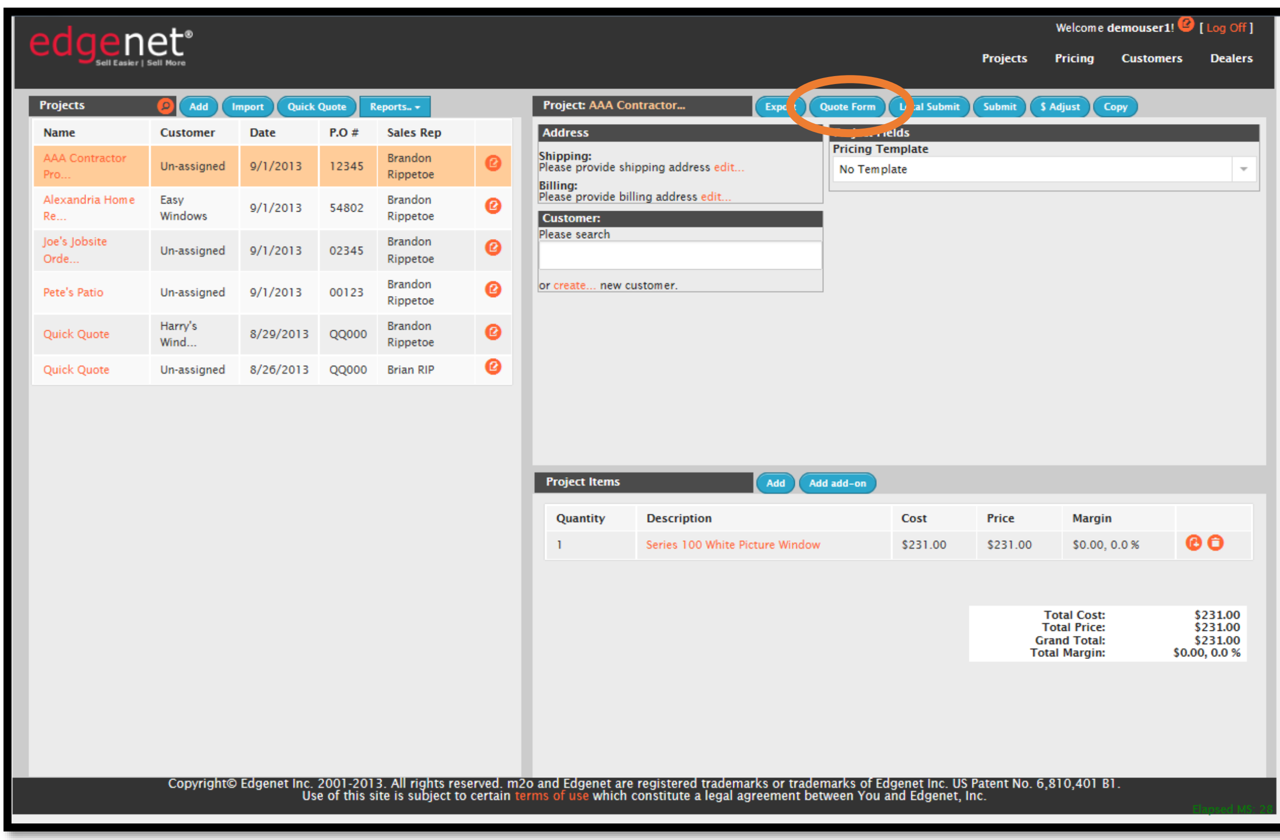


2.3 Generating a Quote Form

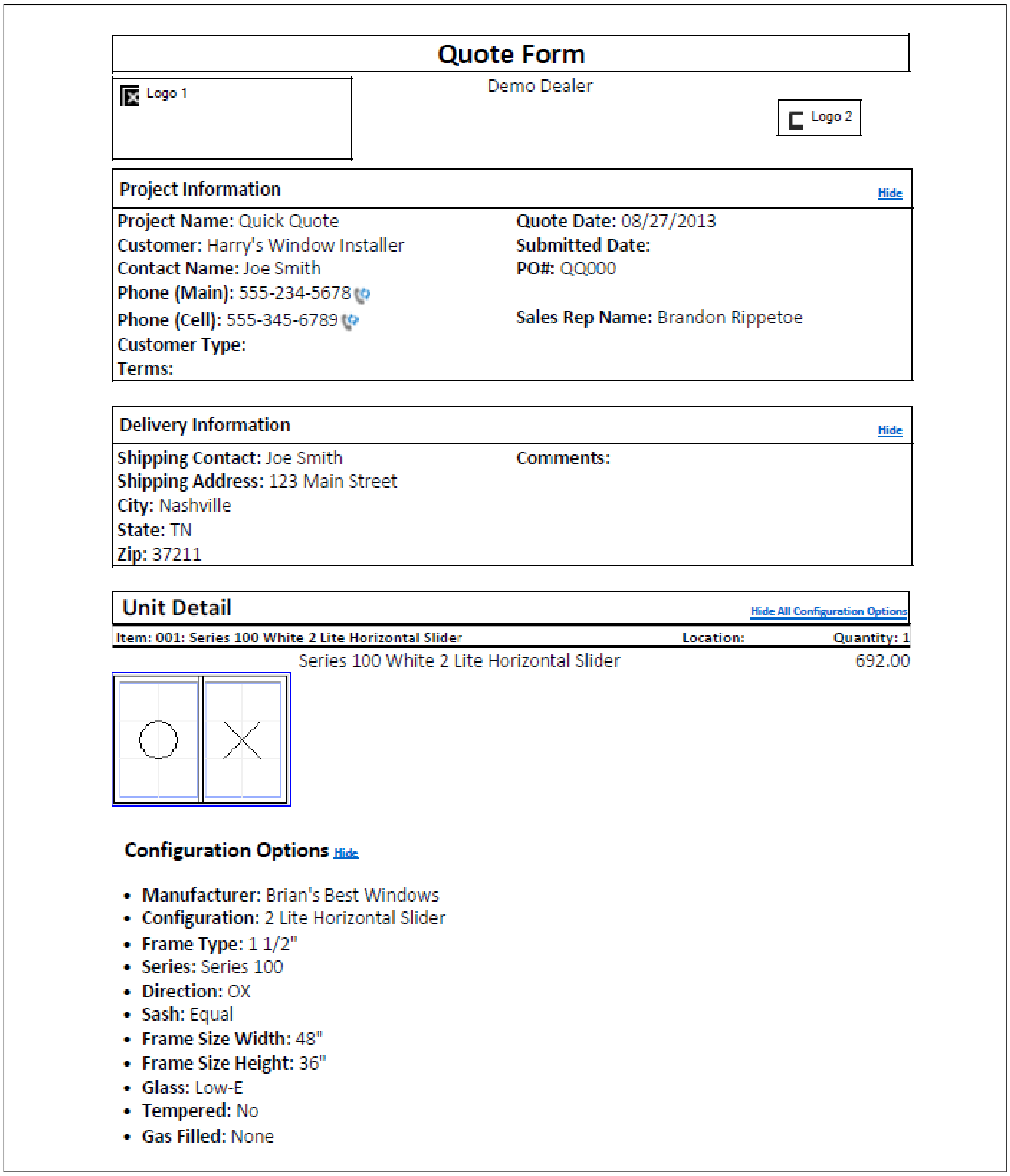
Once a Project is created, all of the required Project fields are completed, and a Customer has been added to the Project, the Quote Form can be generated.

To generate a Quote Form:

1. On the Projects tab, select the Project for which the Quote Form will be created.
2. Click the Quote Form button found above the Project Details section. Note that this button will only be available if all required fields have been populated and an Item has been configured.



3. The Quote Form will open in a new page, where the entire Project can be easily reviewed with the Customer and the page can be printed.



Quote Form

Demo Dealer

Logo 1 | Logo 2

Project Information Hide

Project Name: Quick Quote
Customer: Harry's Window Installer
Contact Name: Joe Smith
Phone (Main): 555-234-5678
Phone (Cell): 555-345-6789
Customer Type:
Terms:

Quote Date: 08/27/2013
Submitted Date:
PO#: QQ000
Sales Rep Name: Brandon Rippetoe

Delivery Information Hide

Shipping Contact: Joe Smith
Shipping Address: 123 Main Street
City: Nashville
State: TN
Zip: 37211

Comments:

Unit Detail Hide All Configuration Options

Item: 001: Series 100 White 2 Lite Horizontal Slider **Location:** **Quantity: 1**

Series 100 White 2 Lite Horizontal Slider 692.00

Configuration Options Hide

- **Manufacturer:** Brian's Best Windows
- **Configuration:** 2 Lite Horizontal Slider
- **Frame Type:** 1 1/2"
- **Series:** Series 100
- **Direction:** OX
- **Sash:** Equal
- **Frame Size Width:** 48"
- **Frame Size Height:** 36"
- **Glass:** Low-E
- **Tempered:** No
- **Gas Filled:** None

2.3.1 Print a Quote Form

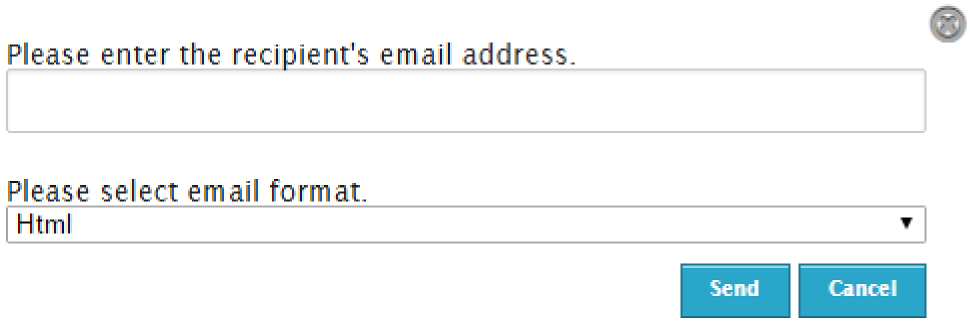
Once the Quote Form has been displayed, to Print a Quote:

1. At the top left of the quote form, click the Print Quote button.

2.3.2 Email a Quote Form

Once the Quote Form has been displayed, to Email a Quote:

1. At the top right of the quote form, click the Email Quote button.
2. The email dialog will appear. Enter the recipient's email address.



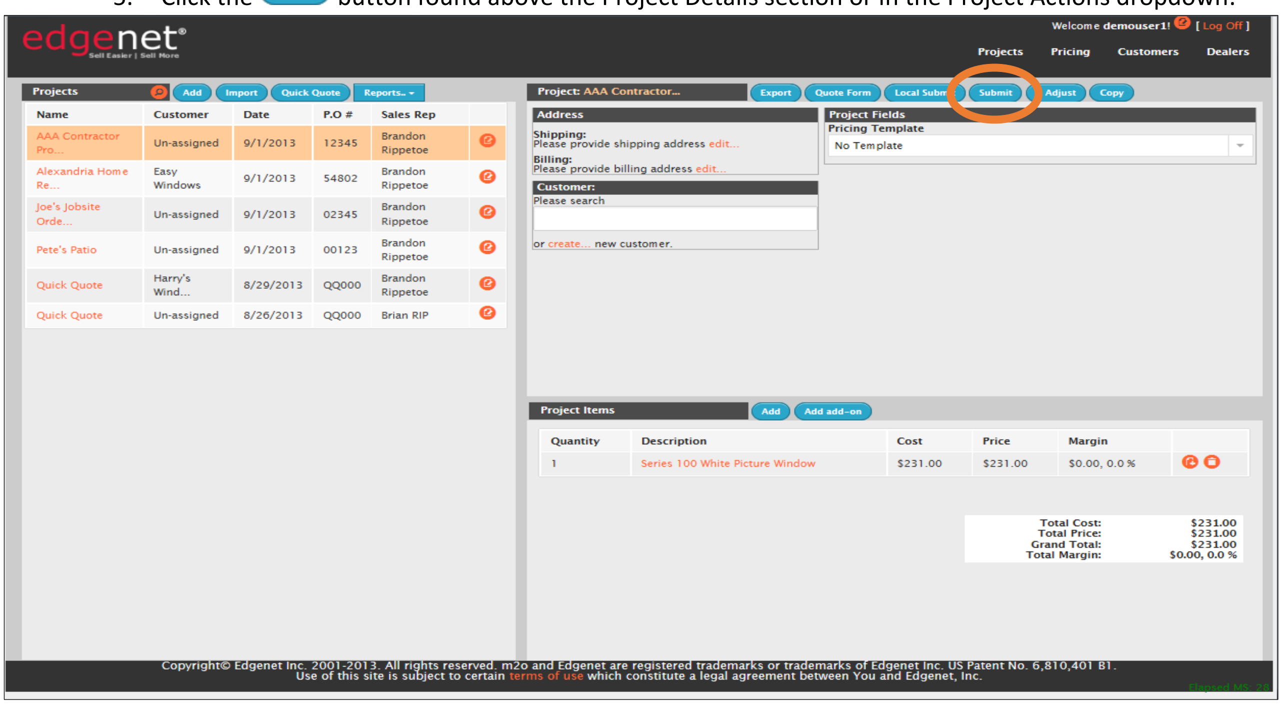
3. Once the email address is entered, select which file format you want the report(HTML or PDF) to be sent in, then click the Send button. A message will be displayed to validate the email was sent.

2.4 Submitting an Order

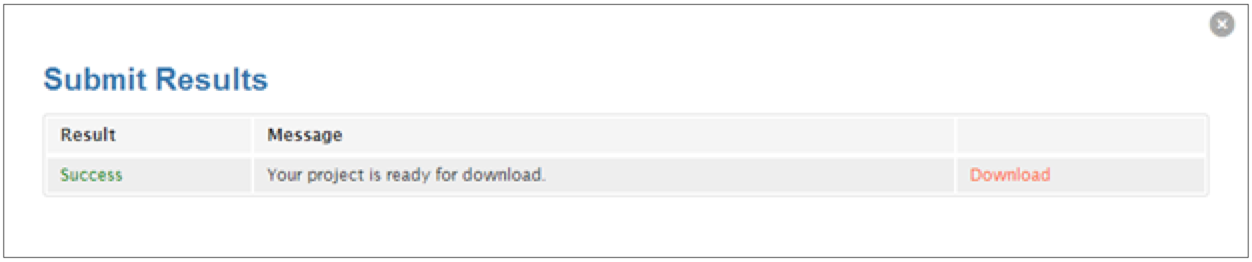
Once the Project has been reviewed and is ready to be ordered, it can be submitted to the manufacturer or supplier for fulfillment.

To Submit an Order for fulfillment:

4. On the Projects tab, select the Project to be submitted.
5. Click the Submit button found above the Project Details section or in the Project Actions dropdown.



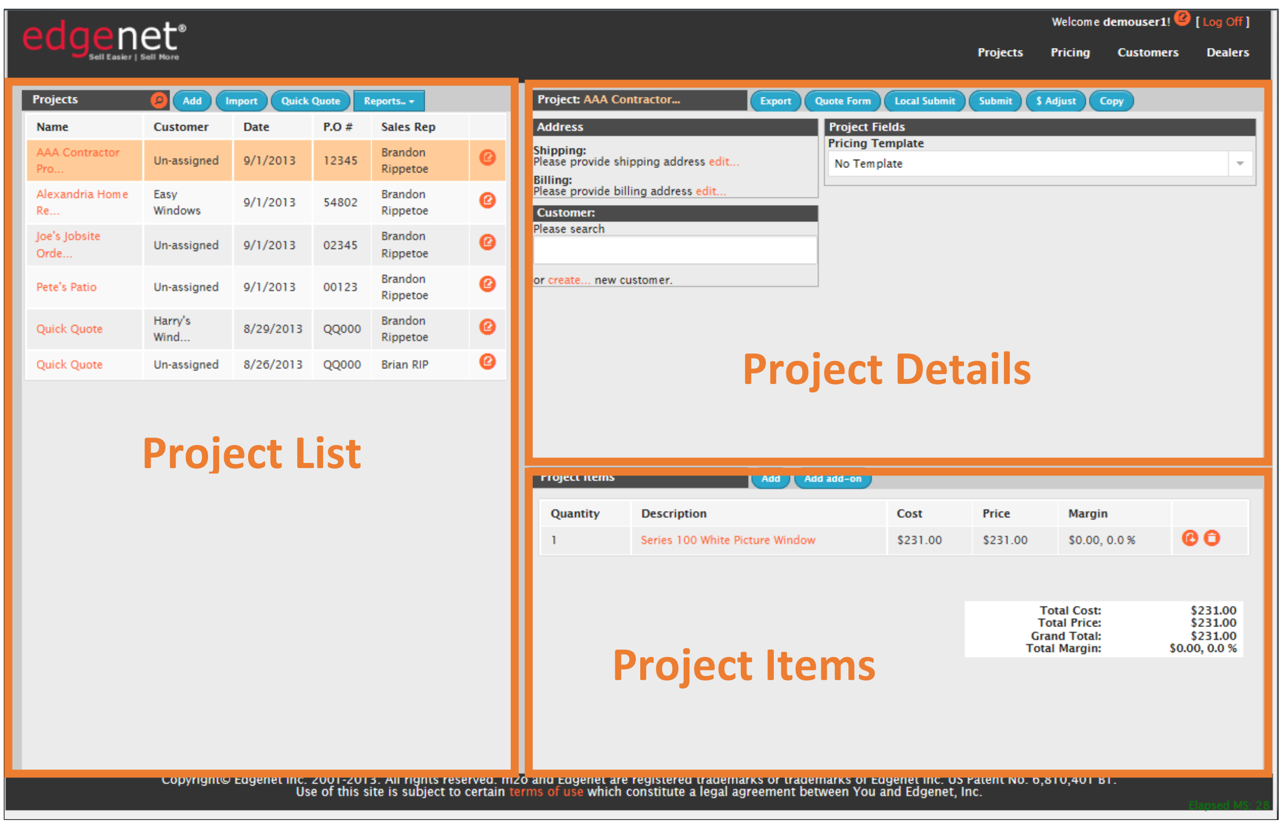
The Submit Process dialog box will display with the submussion status. There may be multiple Submit Processes required as determined by your administrator. Each Submit Process will result in a status message indicating whether it succeeded or failed.



3. Creating and Managing Projects

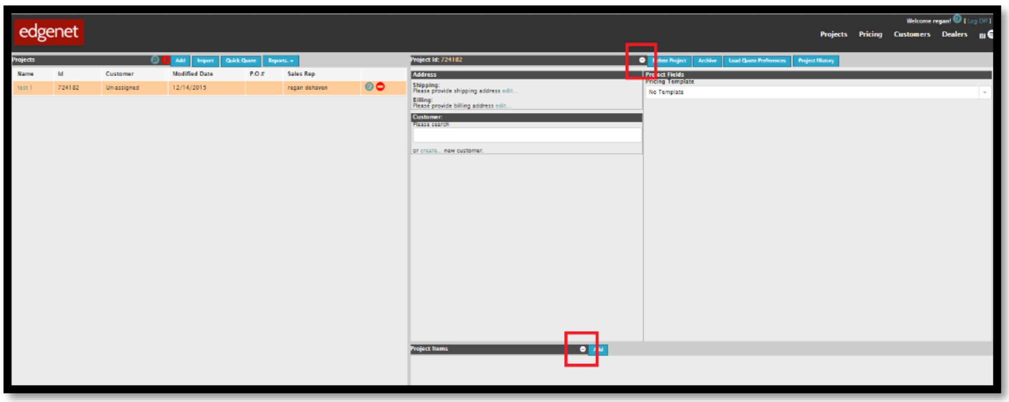
There are three primary sections on the Projects tab, as shown below:

- Project List
- Project Details
- Project Items



To more easily utilize each section of the Projects page, you can customize his or her pages by expanding and contracting the Project Details and Project Items sections to allow increased viewing space for the sections they utilize most.

By clicking on the – button within the section header, you can contract a section, and + will expand the section. For your convenience, the system will remember the selected expanded/contracted view and display that view for each project when re-opened.



3.1 Creating a New Project

To create a new project:

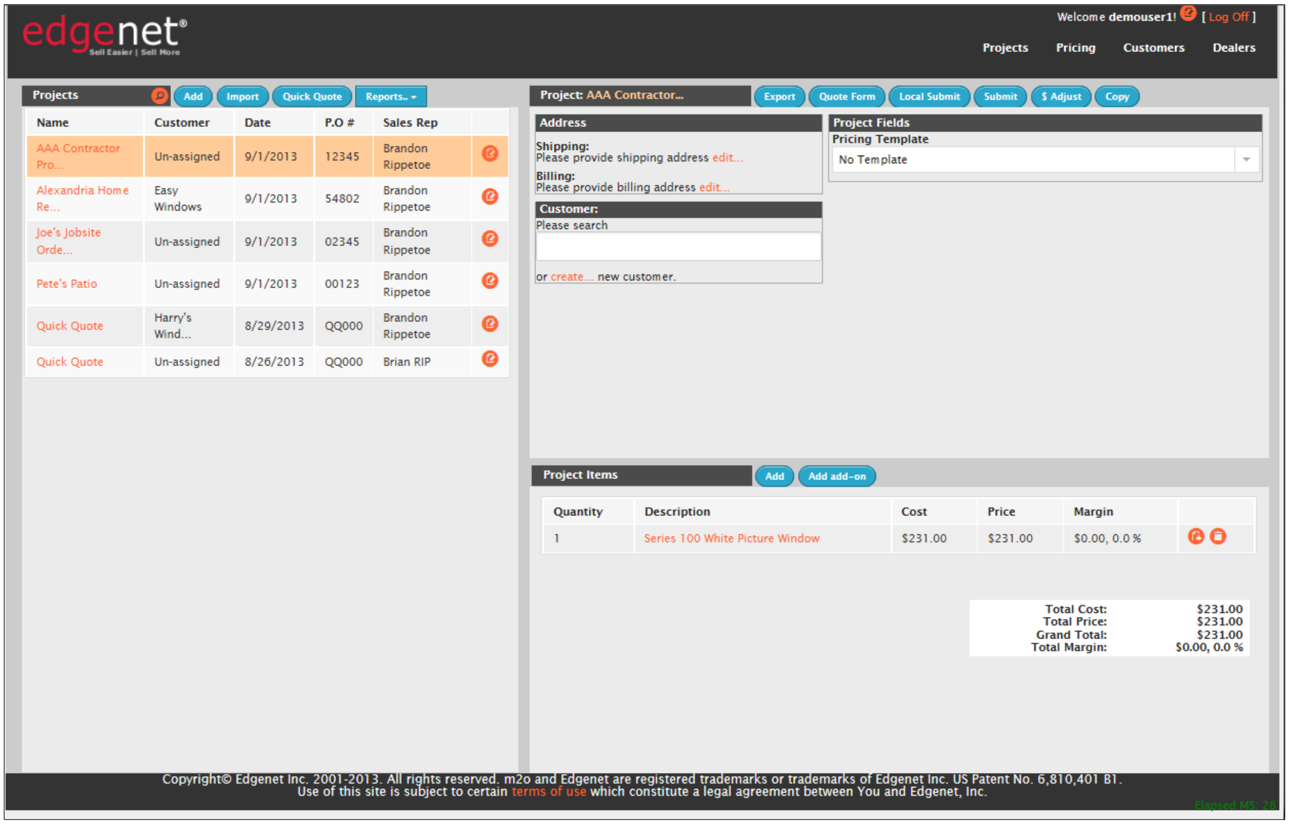
1. On the Projects tab, click “Add” in the Projects List section.
2. Once the “New Project” dialog box that appears, enter a Project Name and assign a PO#.

3. Click “Save”.

The Project has now been created. It will be automatically added to the Projects List.

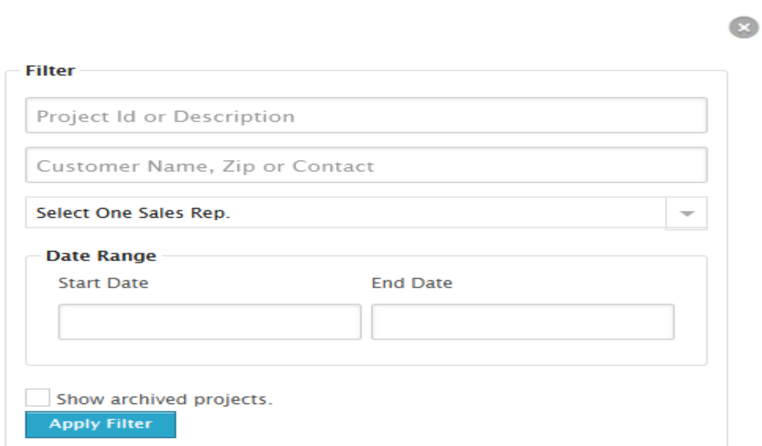
3.2 Searching for an Existing Project

After continued use of the system, the number of projects will increase in the Project List. To aid in finding a particular Project, there is a search feature available to find an existing Project.

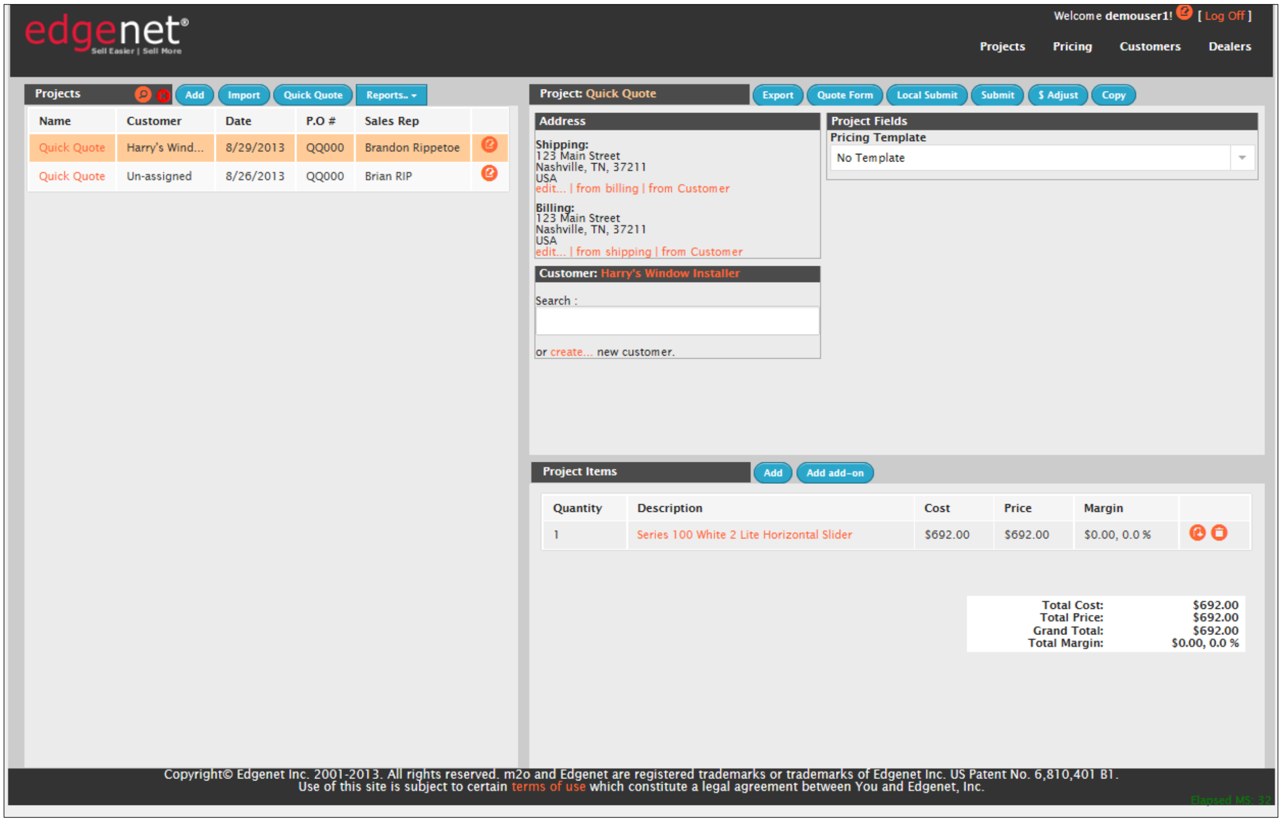


To find an existing Project in the list:

1. On the Projects tab, click on the "Set Filter" button found at the top of the Project List.
2. Enter the search/filter criteria in the dialog box, such as the Project Name, Customer Name, Customer ID, Customer Address, Customer Phone Number, Sales Rep, or date range. To search for archived projects, check the "Show Archived Projects" checkbox.
3. Click "Apply Filter".



Note that all search criteria does not need to be complete. Once the filter has been applied, the Project List will be updated to only display the results that match the search criteria. To clear the search criteria and view the full Project List, click the button found at the top of the Project List.



Project search and filtering can also be used in conjunction with generating reports. Editing an Existing Project

3.2.1 Editing a Project Name or PO#

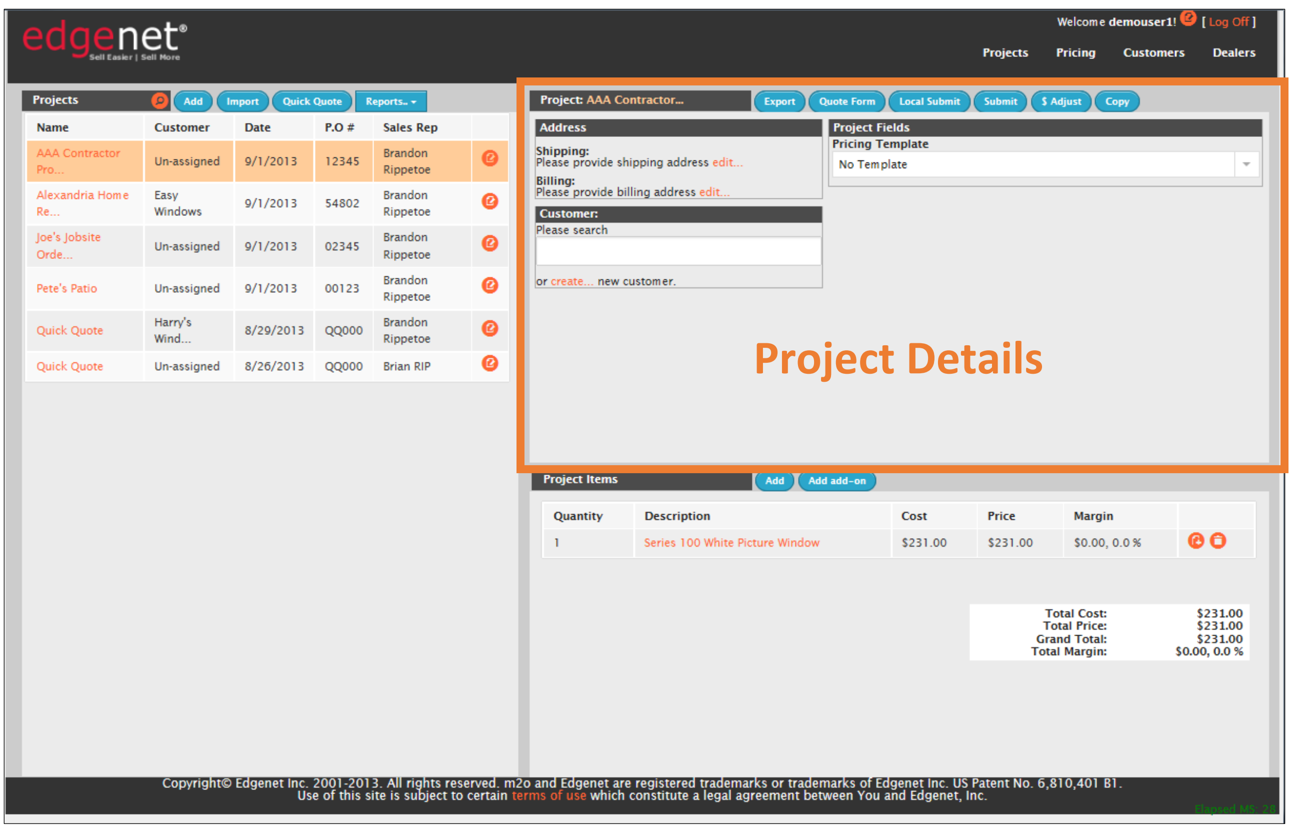
To edit the Project Name or PO# for a Project:

1. On the Projects tab, select a Project in the Project List.
2. Click the Edit button to access the dialog box.
3. Edit the Project Name or PO#.
4. Click the “Save” button.

3.2.2 Editing the Project Details

To edit the Project Details for a Project:

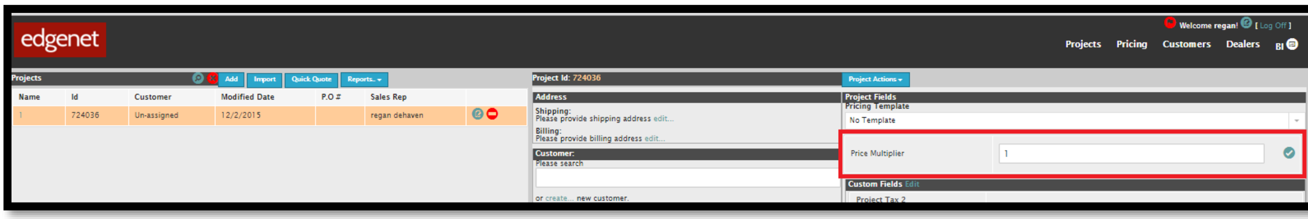
1. On the Projects tab, select a Project in the Project List by clicking on the Project Name. The Project Details section will update to reflect the details about the selected Project.



2. Update the Project Details, such as the Shipping and Billing Addresses, the Customer information, or other Project fields.

3. Pricing multiplier is an available Project field, when enabled in your network and will be visible in the Project details under the Pricing template.

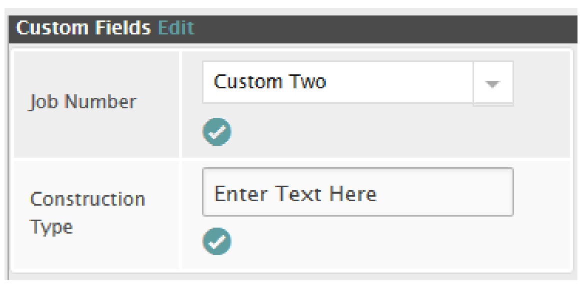
    - Acceptable vales are 0 - 4 with or without decimals
    - Once this value is entered and accepted the project should reprice
    - Pricing templates have precedence over the multiplier. If a pricing template is set to .25 and Multiplier Override is .5 then .25 will be used in the pricing engine.



3.2.2.1 Editing Custom Fields

To edit Custom Fields on a Project:

1. Click on the right side of the custom field to be edited. The field will be displayed in an editable format.
2. Update the field value and click the check mark. The update will be saved.



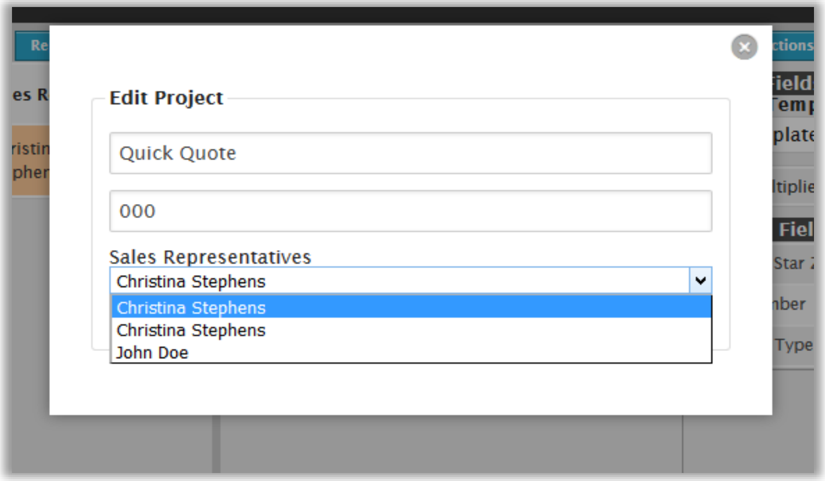
Note: The Edit link to the right of Custom Fields can also be used to edit the fields. Click the Edit link and the Project Custom Values dialog will be displayed where all the custom fields can be edited. Once the fields are updated, click the Save button.

Once updated, the fields are saved automatically and there is no “save” action that needs to be completed.

3.3 Changing Project Ownership

Dealers now have the ability to change the owner of a project from one user to another user within the same dealer.

When editing a project, users with permissions will have the option to select a Sales Representative. Selecting a different name from this dropdown will assign the project to the new Sales Rep. Users may assign to themselves or any other currently enabled user within the dealer to which the project is associated. Once the project has been submitted (or locked), users will not be able to change Sales Representatives.



3.4 Archiving a Project

To archive an existing Project:

1. On the Projects tab, select the Project to archive from the Project List by clicking on the Project Name.
2. Click the Project Actions button and click the “Archive” option from the drop down selection menu.
3. The system will display an archive state confirmation, click “Yes” to confirm the archive of the project or click “No” to keep it current.

The project has now been archived.

3.5 Un-Archiving a Project

To un-archive an existing Project:

1. On the Projects tab, click on the “Set Filter” button found at the top of the Project List.
2. Enter the search/filter criteria in the dialog box, such as the Project Name, Project Id, Customer Name, Customer ID, Customer Address, Customer Phone Number, Sales Rep, or date range.
3. Check the “Show Archived Projects” checkbox.
4. Click “Apply Filter”. The Project List will be updated to only display the results that match the search criteria.
5. Select the Project to un-archive from the Project List by clicking on the Project Name.
6. Click the Project Actions button and click the “Un-Archive” option from the drop down selection menu.
7. The system will display an archive state confirmation, click “Yes” to confirm the archive of the project or click “No” to keep it current.

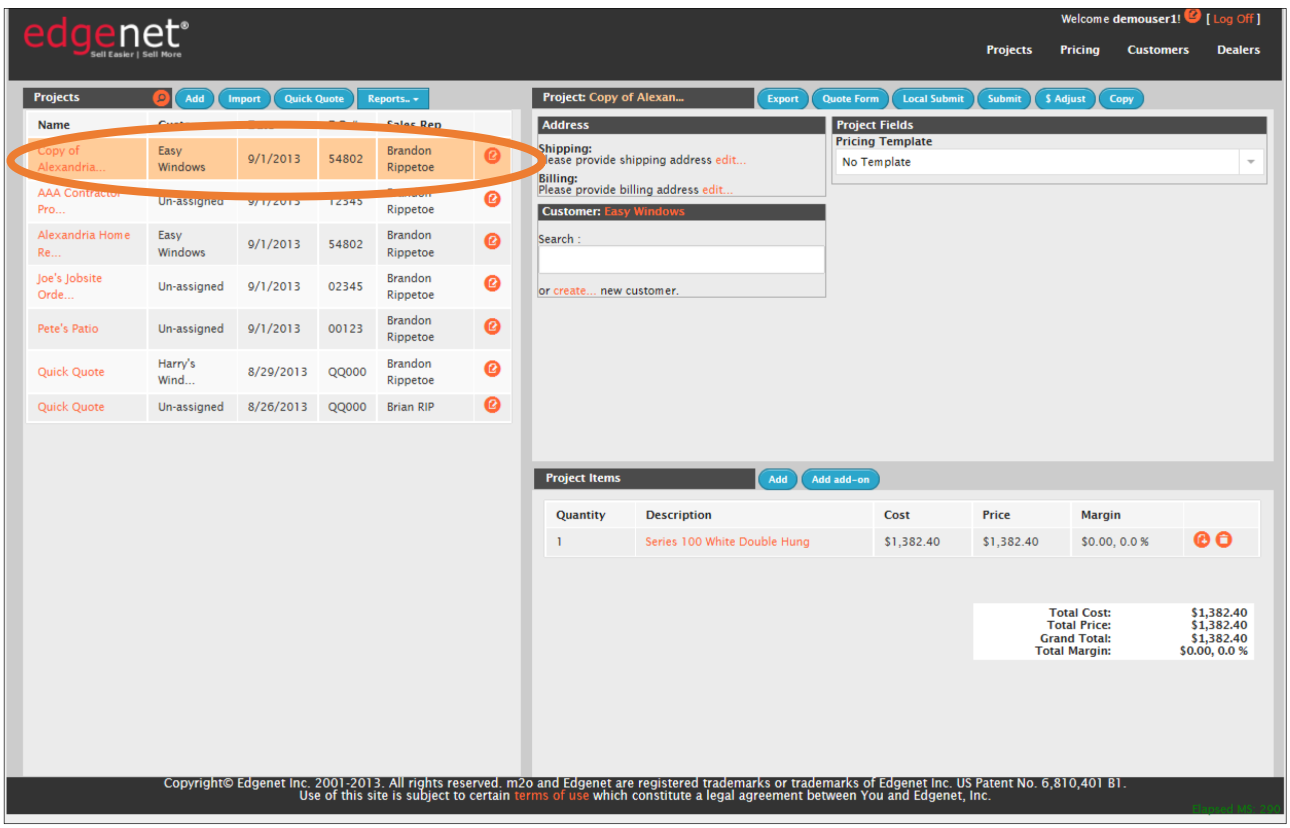
8. Click the button found at the top of the Project List to clear the search criteria and view the Project List.

3.6 Copying a Project

To copy an existing Project:

1. On the Projects tab, select the Project to copy from the Project List by clicking the Project Name.
2. Click the Project Actions button and click the Copy option from the drop down selection menu.

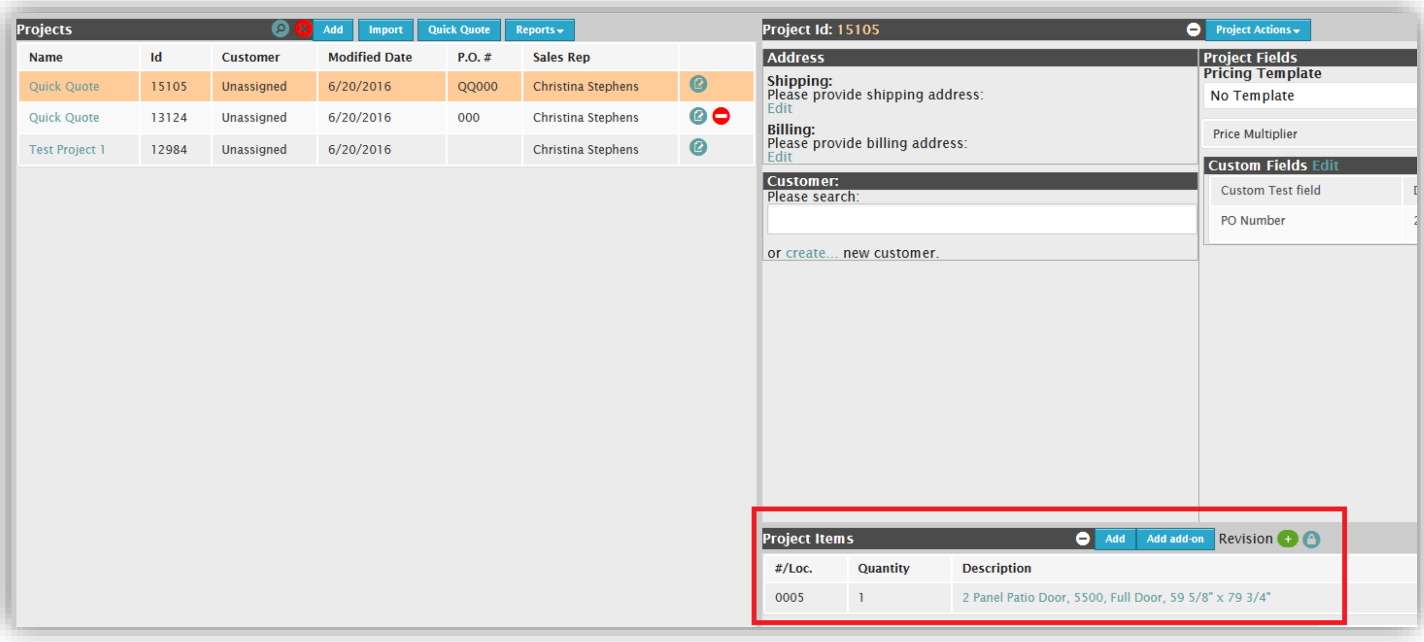
The project has now been copied and should appear in the Project List.



3.7 Project Revisions

To assist dealers with customers who prefer to explore multiple options as a part of the sales process, m2o offers the ability to easily create and compare revisions of a project.

Dealers who have access to Project Revisions will notice a new Revision label and a green '+' symbol in the Project Items section header. Dealers have the option to click the 'x' button to delete a project revision.

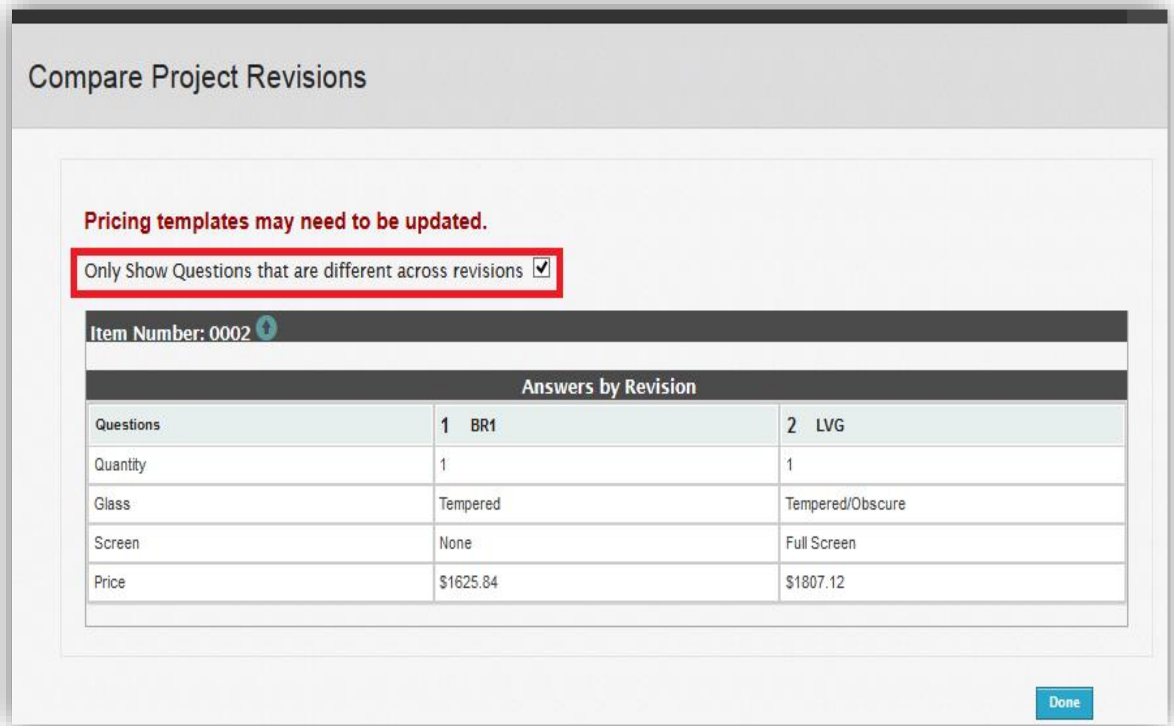


When the green plus symbol is clicked, m2o copies the current active project and labels it as Revision 2. The original version of the project is automatically numbered as 1. The active revision displayed in the Project Items for detailed review is indicated in grey, while the inactive revision is indicated in blue. Clicking on the blue number changes the Project Item view to the inactive revision selected, so that its details may be viewed. Users may create as many revisions as their dealer's m2o system setting has set for a maximum limit.

Once revisions are made, the user can open each revisions' items and reconfigure items to suit the customer's needs for exploration.

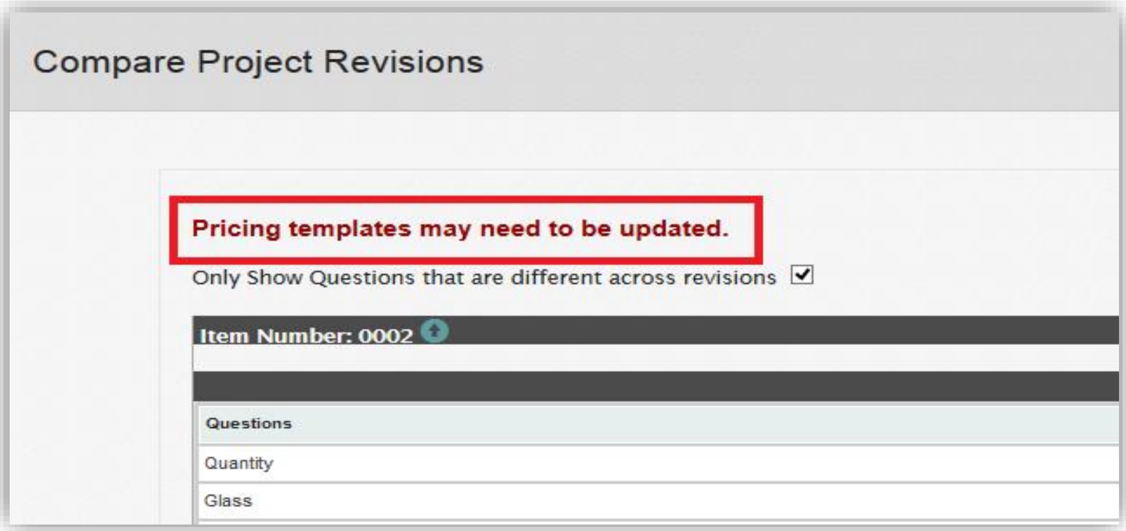
Once revisions are tuned to meet the customer's needs, the user can then compare the revisions by selecting "Compare Revisions".

When selected, m2o will analyze the differences among all revisions and display a side by side comparison of the items in each project revision. Only items with the same item number will be compared in this analysis. However, any custom naming entered into the Location field under Custom Fields during configuration will be carried through to the Revision Comparison. m2o will automatically show only those questions where answers differ for each item. To view all questions and their answers, users may de-select "Only show questions that are different across revisions."



Items that are unique across all revisions will display at the bottom of the comparison page, so that users can focus more readily on those items that need to be compared.

A persistent note at the top of the “Compare Project Revisions” page reminds users to review their pricing templates among revisions. Revisions retain the pricing template that was associated with the original project revision from which it was created. Subsequent updates to pricing on any given revision will cause the user to be prompted to update the pricing template on all other revisions.

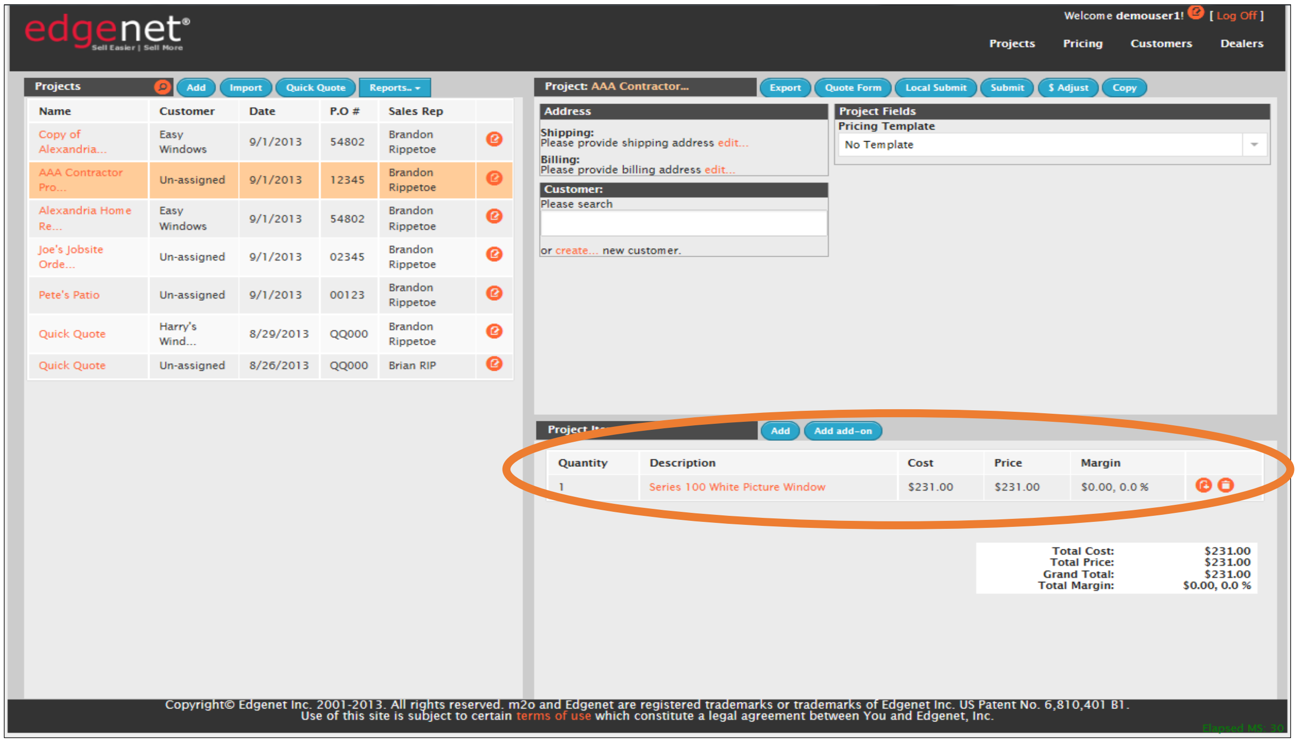


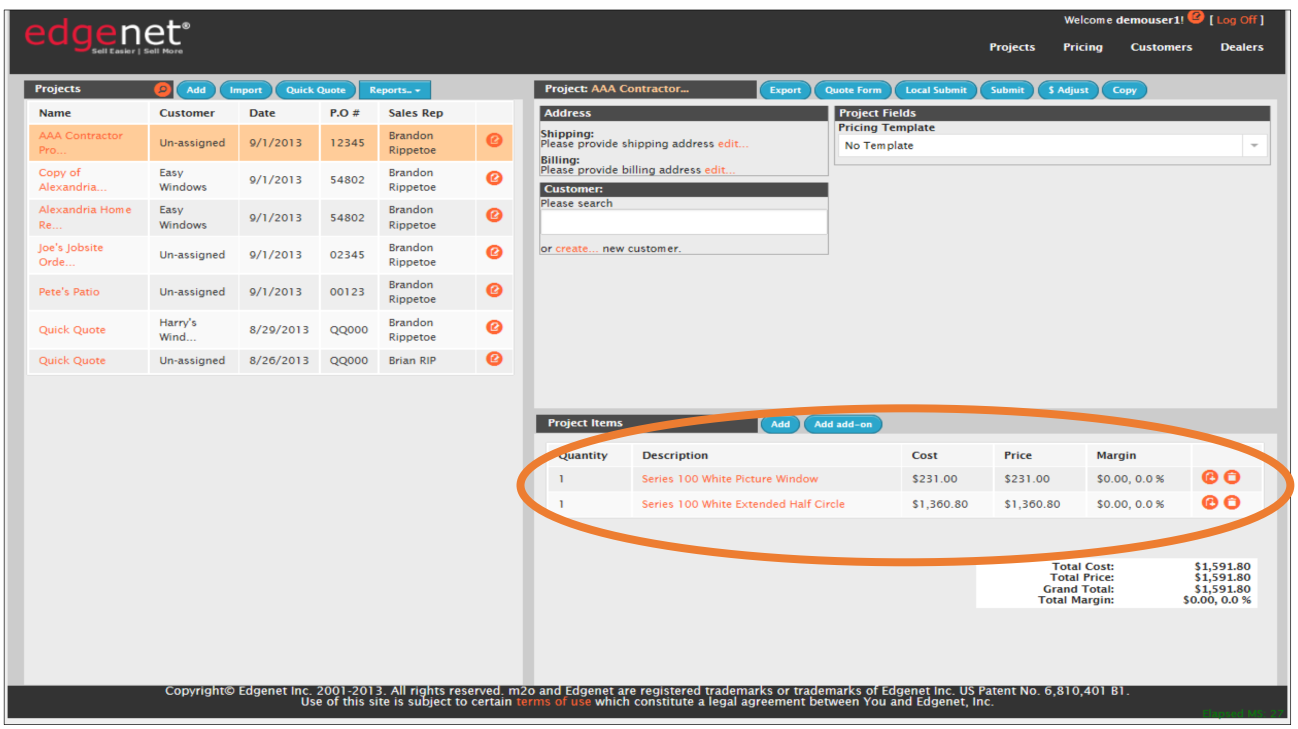
3.8 Adding an Item to an Existing Project

To add a new Item to an existing Project:

1. On the Projects tab, select the Project in the Project List by clicking on the Project Name.
2. In the Project Items section, click the Add button. The Configurator will appear, and the new Item can be created.
3. Once all of the Questions have been answered, click the Save button in the configurator to save the Item to the Project.

The new Item should now appear in the Project Items section on the Projects page.



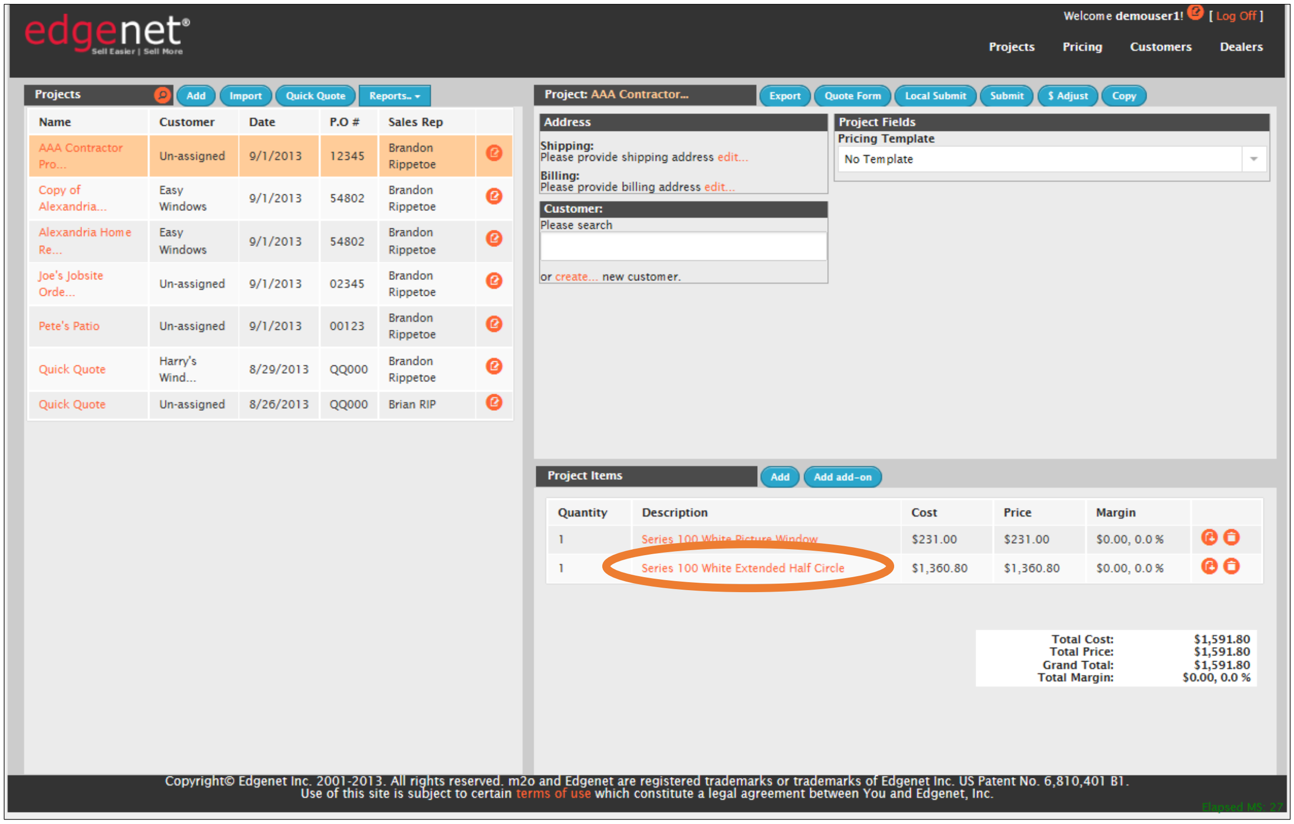


3.9 Editing an Existing Item on a Project

To edit an existing Item on a Project:

1. On the Projects tab, select the Project in the Project List that contains the Item to be edited.

2. In the Project Items section, select the Item by clicking on the Item Description. The Configurator will appear, and the Item can be edited as needed.



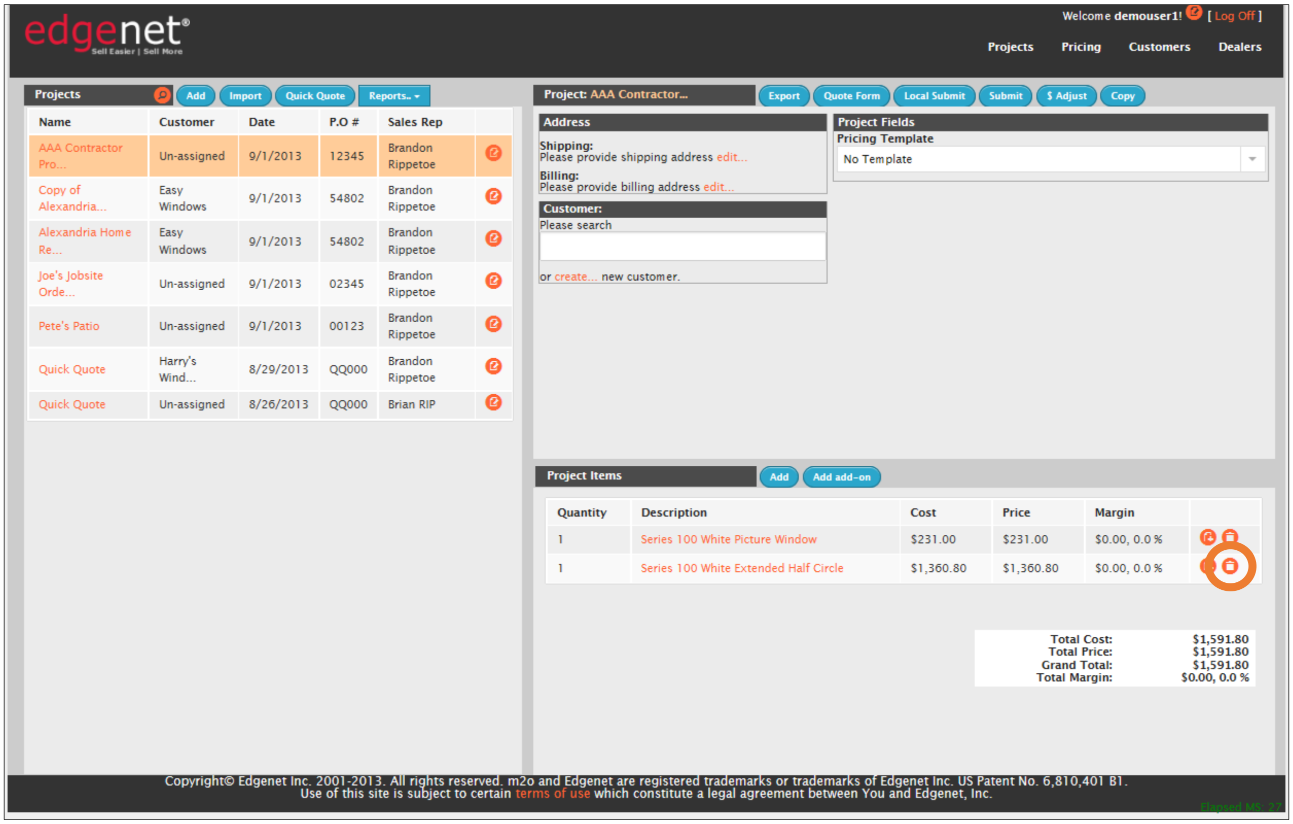
3. Once all of the Questions have been answered, click the Save button in the configurator to save the Item to the Project.

The updated Item should now appear in the Project Items section on the Projects page.

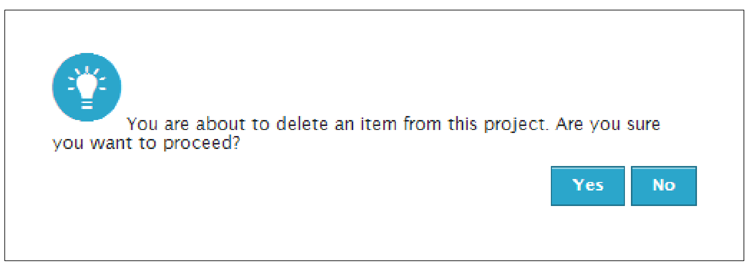
3.10 Removing an Item from a Project

To remove Item from a Project:

1. On to the Projects tab, select the Project in the Project List that contains the Item to be removed.
2. Locate the Item in the Project Items section and click the button.



3. When the delete confirmation dialog box appears, click “Yes” to confirm the removal of the item from the project or click “No” to keep the item.



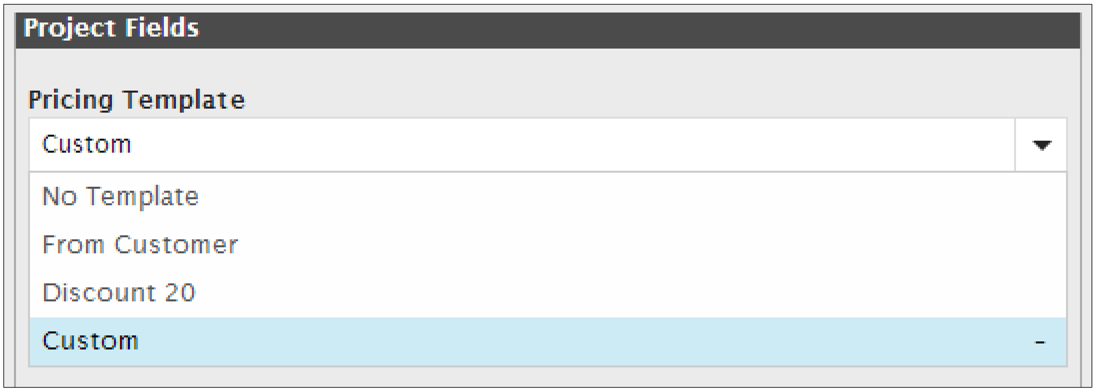
3.11 Adjusting Project Pricing

The retail pricing may be manually adjusted using the $ Adjust button. Not all users will have the ability to use this functionality. If available, please see the “Pricing Adjustments” section for more information.

3.12 Assigning Pricing Templates

Assigning a Pricing Template to a Project is a quick way to adjust the Project pricing according to predefined markups as set by the administrator.

When assigning a Pricing Template to a Project, there are a number of options to select. A template can be directly selected from a list, chosen “From Customer”, or no template can be selected. Additionally, in some cases, the drop-down list may have an option of “Custom”.



If a template is chosen from the drop-down list, the Project will use the adjustments as defined in that template. In order to assign a Pricing Template, select the desired Project from the Project List on the Projects tab. In the Project Details section, locate the Pricing Template drop-down list and select a template, “From Customer”, or “No Template”. The system will now apply the template selection to the Project pricing.

If “From Customer” is chosen, the project will automatically use the template that has been assigned to the Customer already associated with the Project. If the Customer associated with the Project changes, the Project will assume the new Pricing Template for the new Customer. If the Customer does not have a Pricing Template assigned, the Project will not use any Pricing Template.

3.13 Showing and Hiding Cost

If the permission to view cost and/or margin has been granted, clicking the button in the Project Items section will toggle the cost and/or margin for the Items. By default, the Project Items do not display the cost and margin. Click the icon to will reveal the cost and margin columns, as well as the totals. Click the icon again to hide the cost and margin from the display.

3.14 Using Item Library

The Item Library is a list of pre-configured items. A user can easily add any Item Library item to any project. With just a couple clicks, commonly configured items can be added to a project.
All dealer users can add pre-configured items from the Item Library to any of their projects. Only users with the proper permissions can add or remove items to and from the library. Those users which have the permission can add any item from any project to the Dealer’s Item Library for use by all dealer users.

3.14.1 User Permissions

There are two user permissions that work together to grant full Item Library edit permission to a user. To be able to remove an item from the Dealer’s Item Library the user must have permission to access the Dealers screen and must have the permission to manage the Item Library. To be able to add an item to the Dealer’s Item Library the user only needs to be granted the permission to manage the Item Library. This permission behavior is intentional so that users don’t accidentally remove other user’s items from the Dealer’s Item Library. Note: All dealer users can add items from the Item Library to their projects.

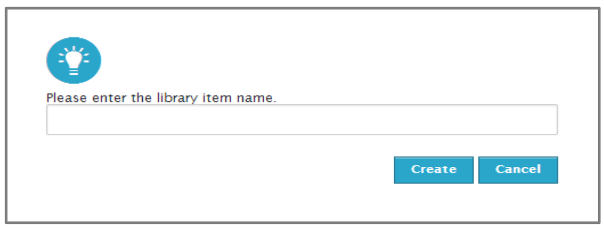
3.14.2 Adding Items to the Item Library

From the Projects page:

1. Configure an item and add it to a project.

2. Click the icon to the right of the Item description in the Project Items list. The Library Item Name dialog will be displayed. The Library Item Name will auto-populate with the Description of the item chosen. The name can be changed if desired.
3. Click Create. The item is added to the Item Library with the Library Item Name entered.

Note: When and item is added to the Item Library it is saved exactly as it has been created. This means all item-level price adjustments, item-level Add-Ons and item-level quantities are saved with the item. Give a meaningful name to the item when adding it to the Library so that coworkers can take full advantage of the time savings by using the Item Library item, this will also reduce the chances of cluttering the Dealer's Item Library with too many similar or duplicated items.

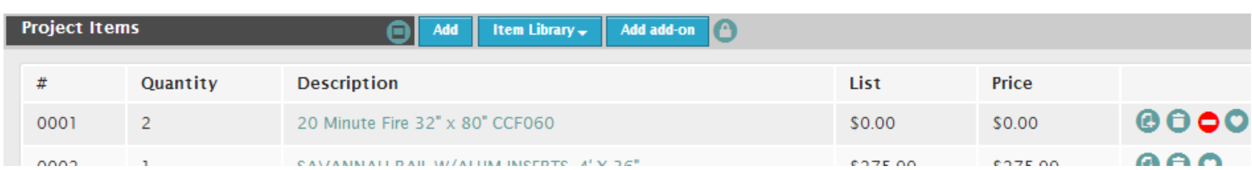


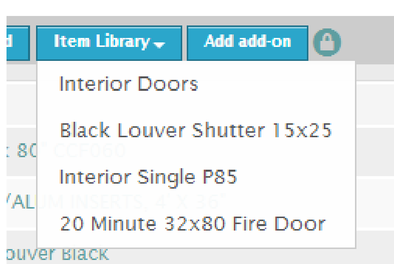
3.14.3 Adding Library Items to a Project

From the project page with a project select:

1. Click on the Item Library button located above the Project Items list.
2. Click on the item you want to add to the project.

The item has now been added to the currently selected project.
Note: The item will be added to your project exactly as it was saved to the Library, so if the item was saved to the Item Library with any item-level price adjustments, item-level Add-Ons and/or item quantities, it will be added to your project with these same characteristics.

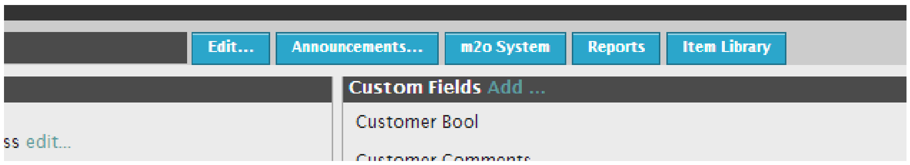


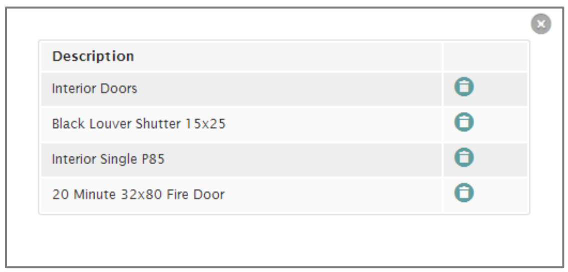


3.14.4 Removing Items from the Library

From the Dealers page:

1. Click on the Item Library button located above the dealer details section of the page.
2. Find the item to be removed and click the button located to the right of it in the list. The item has now been removed from the Item Library without a confirmation.



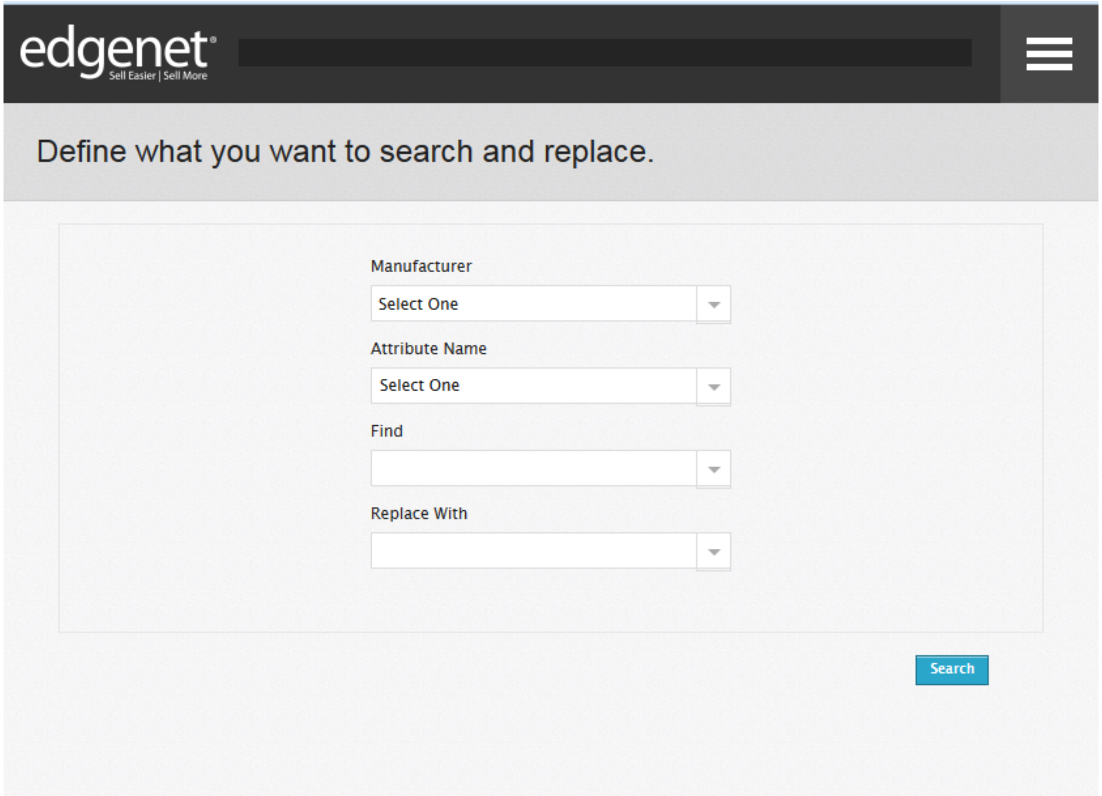


3.15 Search and Replace

The search and replace functionality allows the user to search configured items for a specified attribute value and replace it with another value. Search and Replace can be performed on all units of a project.

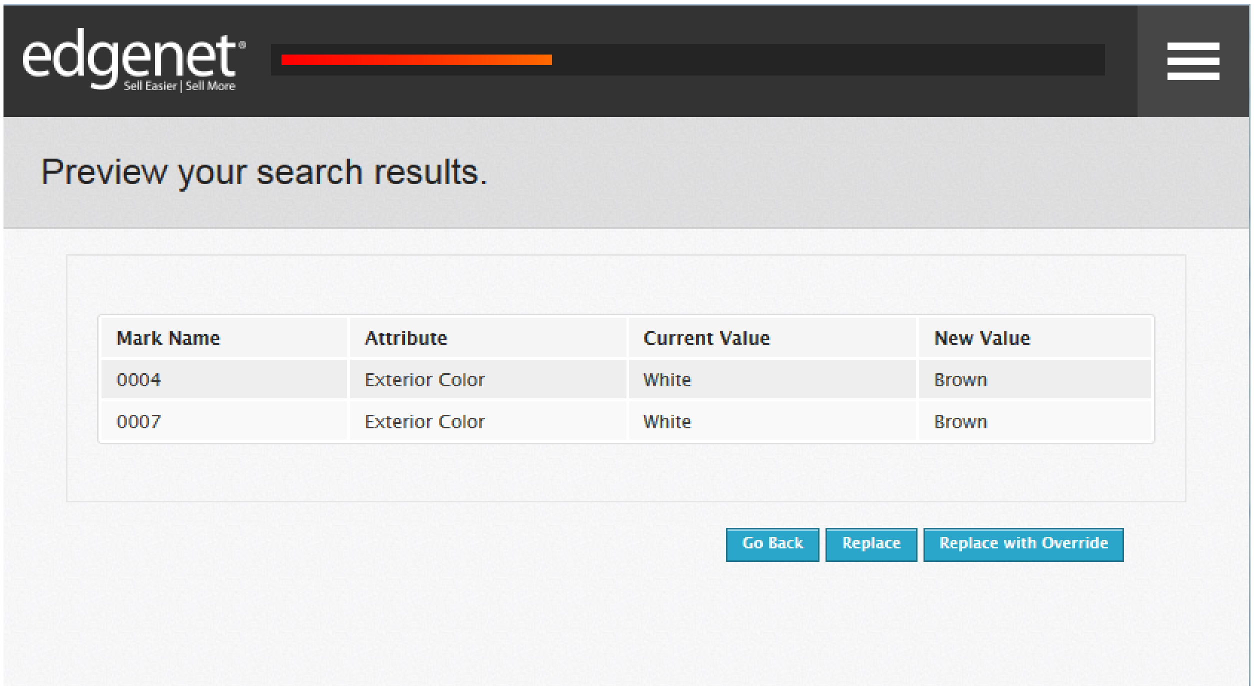
To perform a search and replace:

1. On the Projects tab, select the Project for which the search and replace will be performed.
2. Click on the Project Actions button above the Project Details section.
3. Click the **Search & Replace** option from the Project Actions menu. The Search and Replace window will then be displayed.



To select search criteria:

1. Select a Manufacturer (if applicable) from the Manufacturer drop down list box.
2. Select an Attribute Name from the **Attribute Name** drop down list box. The attribute name will correspond with a question in the configuration questions list.
3. Select the attribute value to search for from the **Find** drop down list box. The attribute value will correspond with an answer for the selected attribute name.
4. Select the attribute value to replace from the **Replace With** drop down list box. This attribute value will also correspond with an answer for the selected attribute name.
5. Click the **Search** button. The Search and Replace search results window will display.



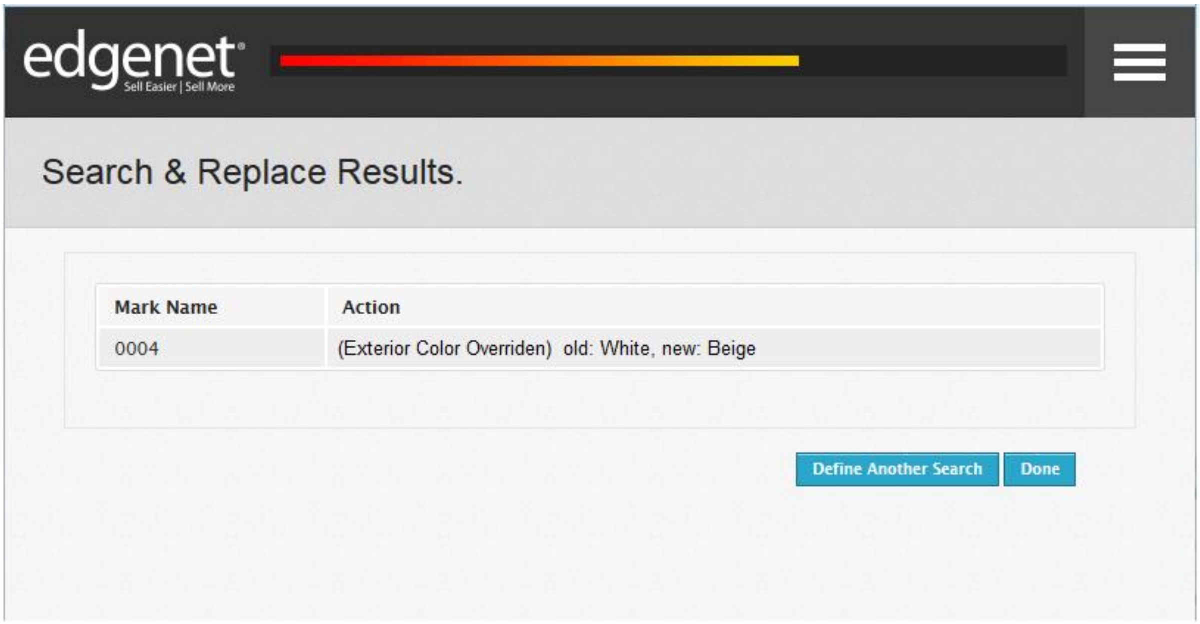
To change search criteria:

1. **Click** the **Go Back** button.

Click the **Replace** button to search through all the items in the selected project for items that have the specified *Find* value answer for the specified Attribute Name question. Then the system will check to make sure that changing that value to the specified *New Value* will not result in changes to other attributes in the same item due to the constraints of other attributes. The system will then replace the Current Value with the New Value only where it will not cause other attributes to change.

To replace the current value with the new value for each item if override is needed:
Click the **Replace with Override** button to search through all the items in the selected project for items that have the specified *Current Value* answer for the specified Attribute Name question. The system will then override the Current Value with the New Value. The other attribute values that were constrained to the replacement attribute will be unanswered and item will marked as incomplete.

Once the Replace with Override is complete the Search and Replace Results Window with Override results will be displayed.



To define another search:

1. **Click** the **Define Another Search** button and return to the original Search and Replace window.

Exit Search and Replace:

2. **Click** the **Done** button to return to the Project tab.

3.16 Using Add-Ons

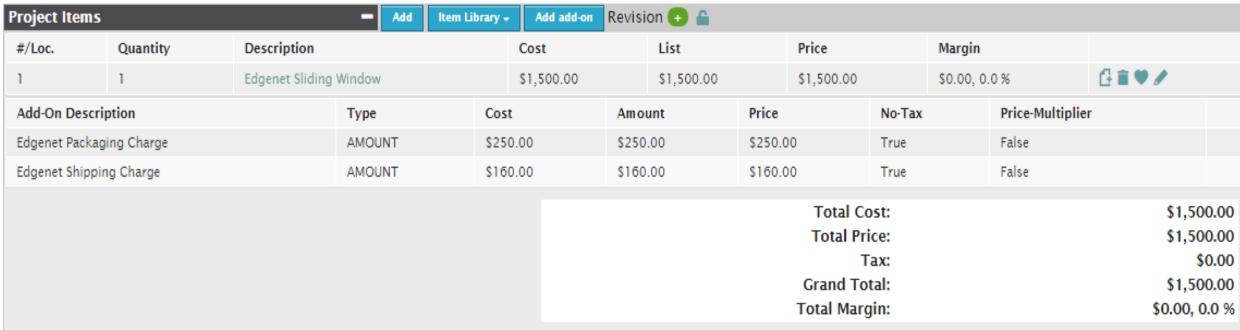
Add-Ons are typically used to add additional “off-the-shelf” items or services to the project. For example, you may want to add a service such as product installation or delivery. They can also be used to add common accessory items such as additional hardware or specialty items to the customer quote. Add-Ons can also be used for discounts or promotions to reduce the price of an item or the total project price. Add-Ons will adjust an item and total project price but will not affect the invoiced cost amounts between the manufacturer or supplier. Only users with the appropriate permission will be able to access Add-Ons. The dealer admin can also create and manage a library of Add-Ons that users can choose from. Catalog generated add-ons are add-ons that are added to projects by the catalog. These add-ons are usually for shipping and installation fees.

3.16.1 Adding a Project-Level Add-On

To add a Project-level Add-On:

1. On the Projects tab, select the Project in the Project List for which the Add-On will be added.
2. Click the 

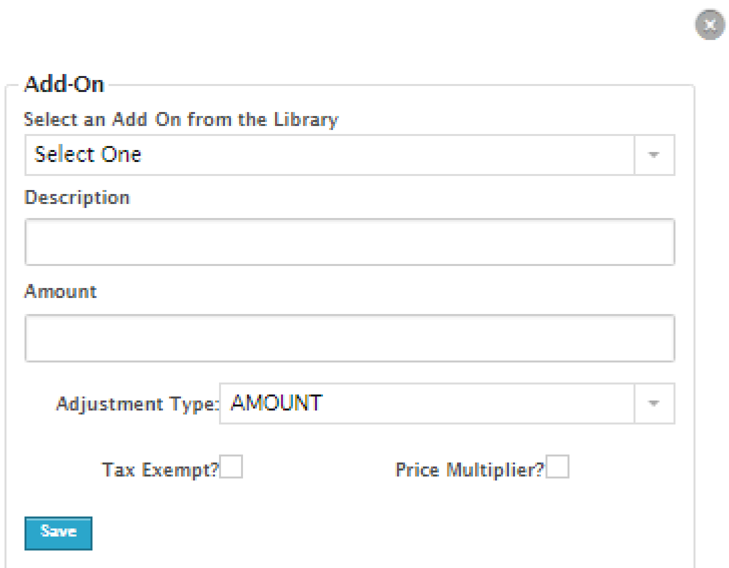
button in the Project Items section to open the Add-On dialog box.



#/Loc.	Quantity	Description	Cost	List	Price	Margin
1	1	Edgenet Sliding Window	$1,500.00	$1,500.00	$1,500.00	$0.00, 0.0 %

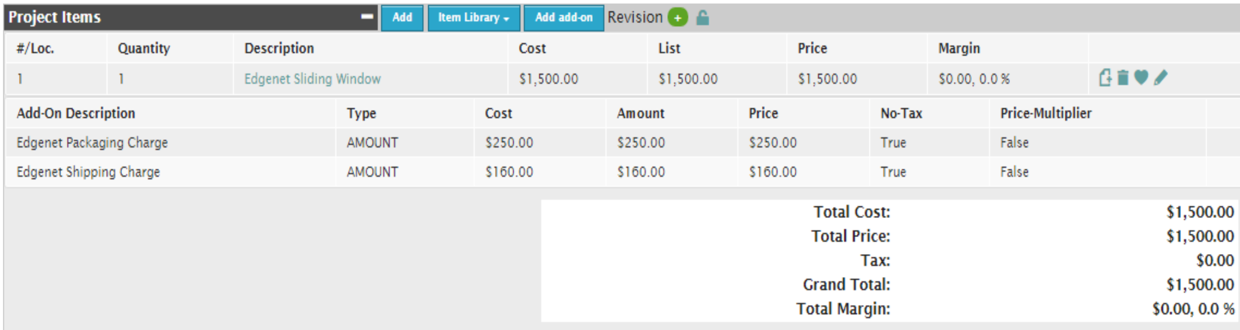
Add-On Description	Type	Cost	Amount	Price	No-Tax	Price-Multiplier
Edgenet Packaging Charge	AMOUNT	$250.00	$250.00	$250.00	True	False
Edgenet Shipping Charge	AMOUNT	$160.00	$160.00	$160.00	True	False

Total Cost:	$1,500.00
Total Price:	$1,500.00
Tax:	$0.00
Grand Total:	$1,500.00
Total Margin:	$0.00, 0.0 %



3. There are two ways to add an Add-On:
   i. Select an Add-On:
      i. Choose an add-on from the "Select an Add On from the Library" drop down. The dealer admin must have previously created a library of Add-Ons before the user is able to choose from the library.
   ii. Create an Add-On:
      i. Entering a name or short description for the Add-On and specify the amount of the Add-On. The amount can either be a positive or negative value.
      ii. Select the Adjustment Type as either an Amount or a Percentage. By choosing "Amount" as the Adjustment Type, the Total Project Price will be adjusted by the dollar value entered in the Amount field. By choosing "Percentage" as the Adjustment Type, the Total Project Price will be adjusted by the percentage entered in the Amount field. If the adjustment type is percentage, price multiplier will not be available.
      iii. Select whether the Add-On should be tax exempt or not.
      iv. Select whether or not the Add-On should effect price multipliers or not.

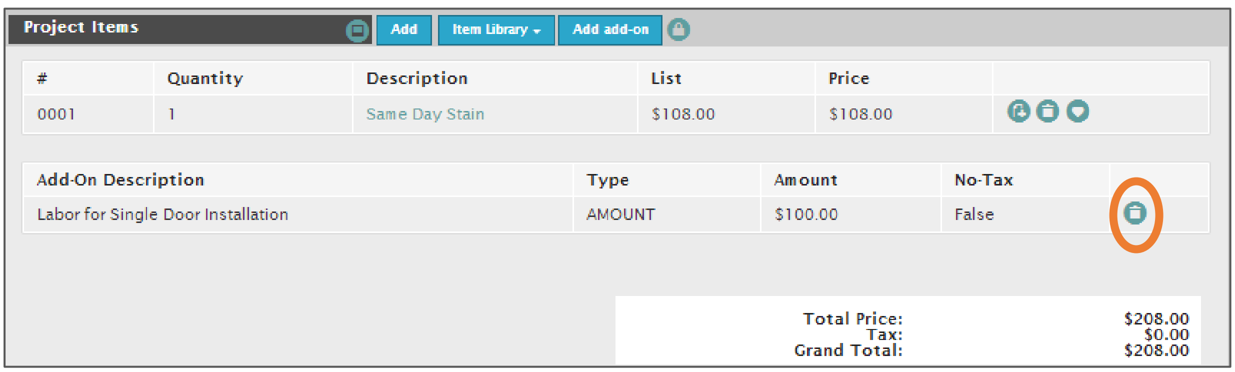
4. Click Save. The Add-On will be reflected in the Project Items section of the Projects tab below any configured Items.



3.16.2 Removing a Project-Level Add-On

To remove a Project-level Add-On:

1. On the Projects tab, select the Project in the Project List for which the Add-On will be removed by clicking on the Project Name.
2. Select the Add-On to remove in the Project Items section of the screen
3. Click the "Delete Add-On" button to the right of the Add-On. The Add-On will be removed.



3.16.3 Adding an Item-Level Add-On

To add an Item-level Add-On:

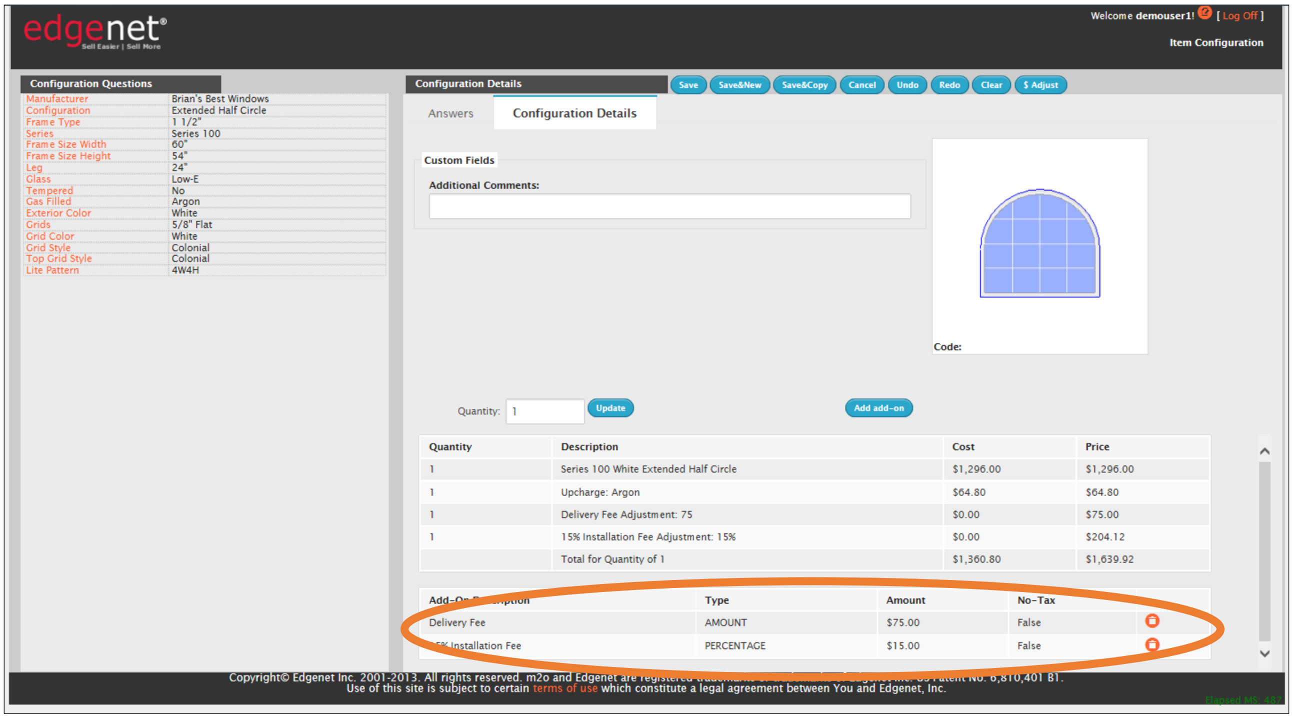
1. On the Projects tab, select the Project in the Project List that contains the Item for which the Add-On will be added by clicking on the Project Name.
2. Select the Item from the Project Items section of the screen to open the Configurator.
3. Select the "Configuration Details" tab within the Configurator.
4. Click the "Add add-on" **Add add-on** button to open the Add-On dialog box.

5. There are two ways to add an Add-On:
   i. Select an Add-On:
      i. Choose an add-on from the "Select an Add On from the Library" drop down. The dealer admin must have previously created a library of Add-Ons before the user is able to choose from the library.
   ii. Create an Add-On:
      i. Entering a name or short description for the Add-On and specify the amount of the Add-On. The amount can either be a positive or negative value.

ii. Select the Adjustment Type as either an Amount or a Percentage. By choosing "Amount" as the Adjustment Type, the Total Project Price will be adjusted by the dollar value entered in the Amount field. By choosing "Percentage" as the Adjustment Type, the Total Project Price will be adjusted by the percentage entered in the Amount field.

iii. Select whether the Add-On should be tax exempt or not.

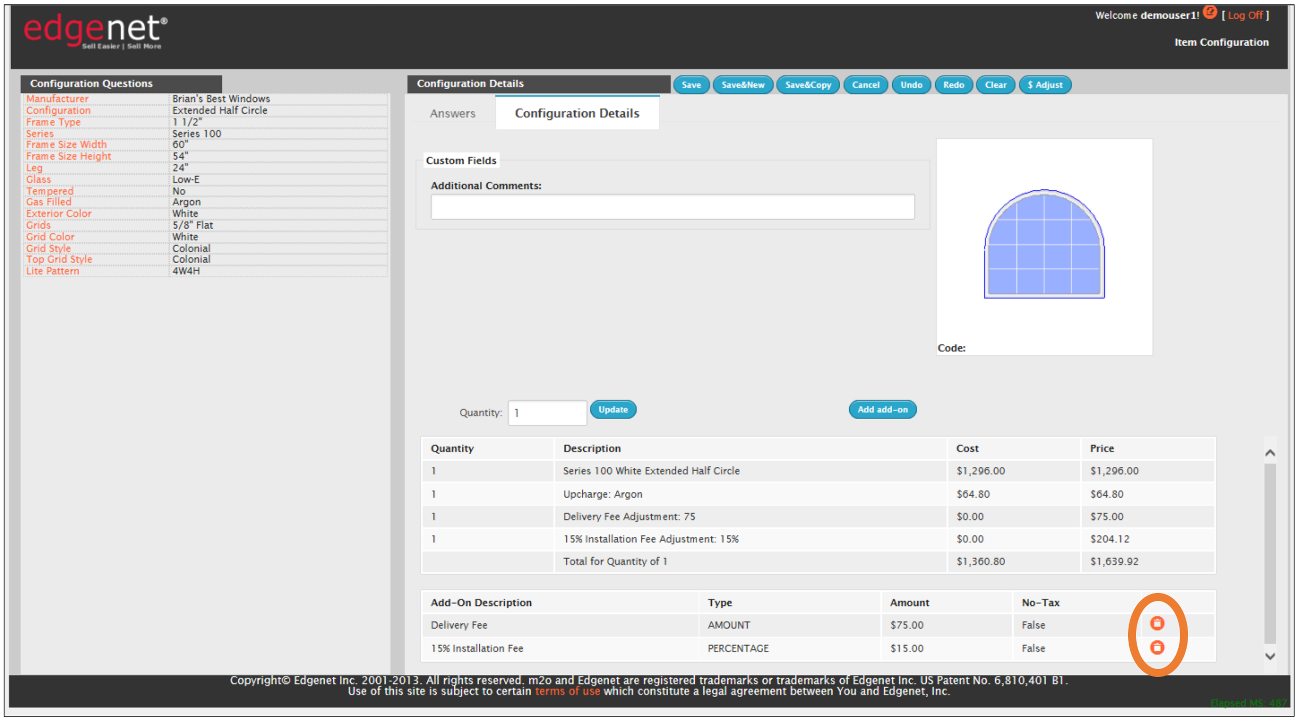
6. Click Save. The Add-On will be reflected below the pricing of the Item on the “Configuration Details” tab.



3.16.4 Removing an Item-Level Add-On

To remove an Item-level Add-On:

1. On the Projects tab, select the Project in the Project List that contains the Item for which the Add-On will be removed by clicking the Project Name.
2. Select the Item from the Project Items section of the screen to open the Configurator.
3. Select the “Configuration Details” tab within the Configurator. Locate the Add-On to remove under the Item’s pricing
4. Click the “Delete Add-On”  button to the right of the Add-On. The Add-On will be removed.
5. Click the “Edit Add-On”  button to the right of the Add-On to edit the Add-On.



3.17 Copying an Item within a Project

On occasion, it may be necessary to copy an Item within a Project to create either a duplicate or a similar Item for additional editing.

To copy an Item:

1. On the Projects tab, select the Project in the Project List that contains the Item to copy by clicking on the Project Name.
2. Locate the desired Item from the Project Items section of the screen and click the "Duplicate this Item" button to the right of the Item. The Item will immediately be copied within the selected Project.

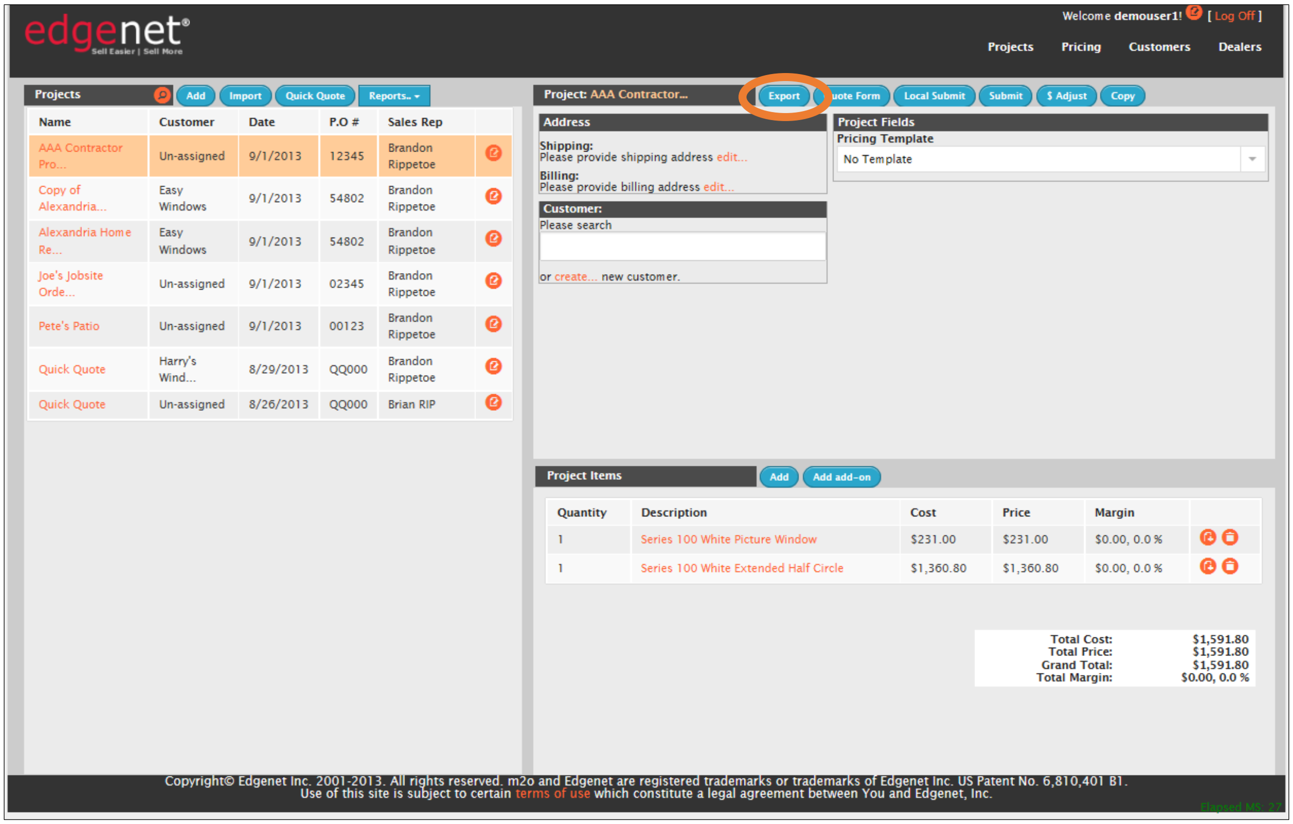
Note that Items can only be copied within the selected Project. Items cannot be copied from one Project to another.

3.18 Exporting a Project Using XML

If a project needs to be viewed or downloaded to a desktop outside of the submission process, this can be done by exporting the Project XML information.

To export the Project XML:

1. On the Projects tab, select the Project to export in the Project List by clicking the Project Name.
2. In the Project Details section, click the "Export" button to generate the XML. The XML can now be viewed or downloaded to the desktop.

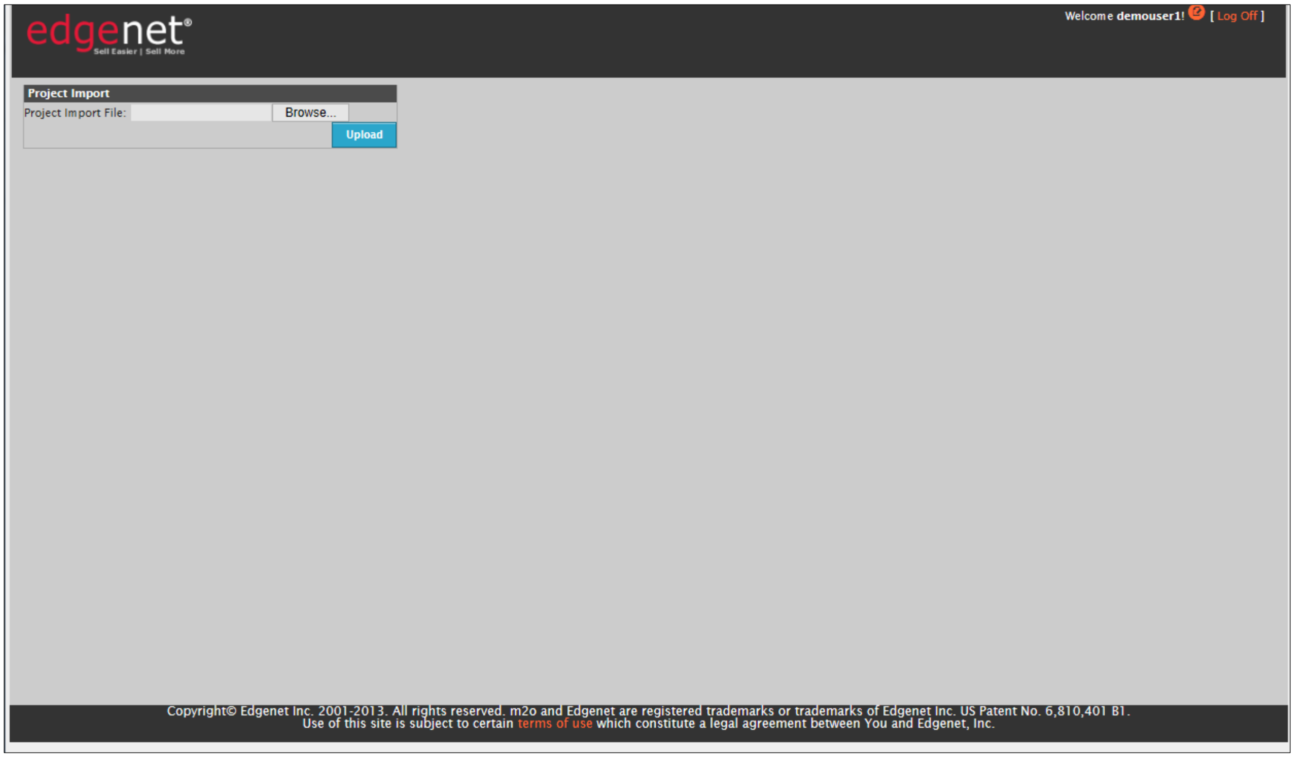


3.19 Importing a Project Using a CIP File

Projects can be imported from the legacy m2o SmartClient system by first saving the Project in CIP file format. Please see the m2o SmartClient User Guide for more information on saving a CIP file. Once saved, the Project CIP file can be imported into m2o Cloud.

To import a CIP file:

1. On the Projects tab, click the "Import" button in the Project List section.
2. Browse to and find the CIP file and then click "Open".
3. Click the "Upload" button to import the data from the CIP file. The imported Project will now appear in the Project List and can be submitted or edited as needed.

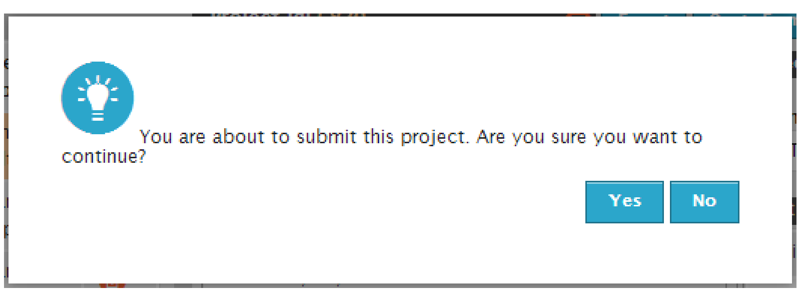


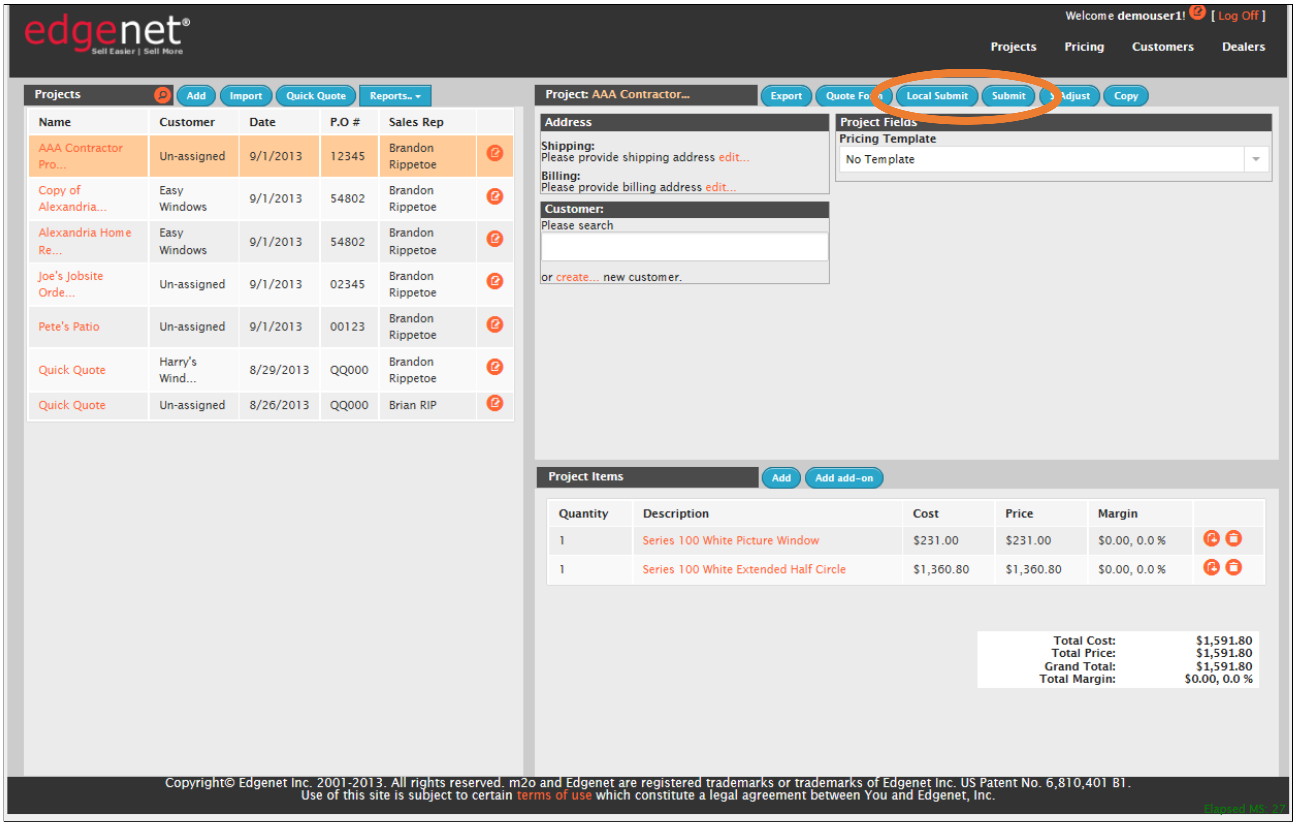
3.20 Submitting a Project

When the Project has been completed and is ready for submission, there are two options to submit the Project. "Local Submit" is for internal store or dealer submission only and will not create an order for the manufacturer. "Submit" will create an order that is immediately sent to the manufacturer for processing and fulfillment.

To submit a Project:

1. On the Projects tab, select the Project to submit in the Project List by clicking on the Project Name.
2. Under the Project Details section, select either the Local Submit or Submit button to submit the Project. To help ensure you do not accidentally submit a project to your manufacturer, if you perform a Submit a confirmation dialog will be presented asking you to confirm the project submission.



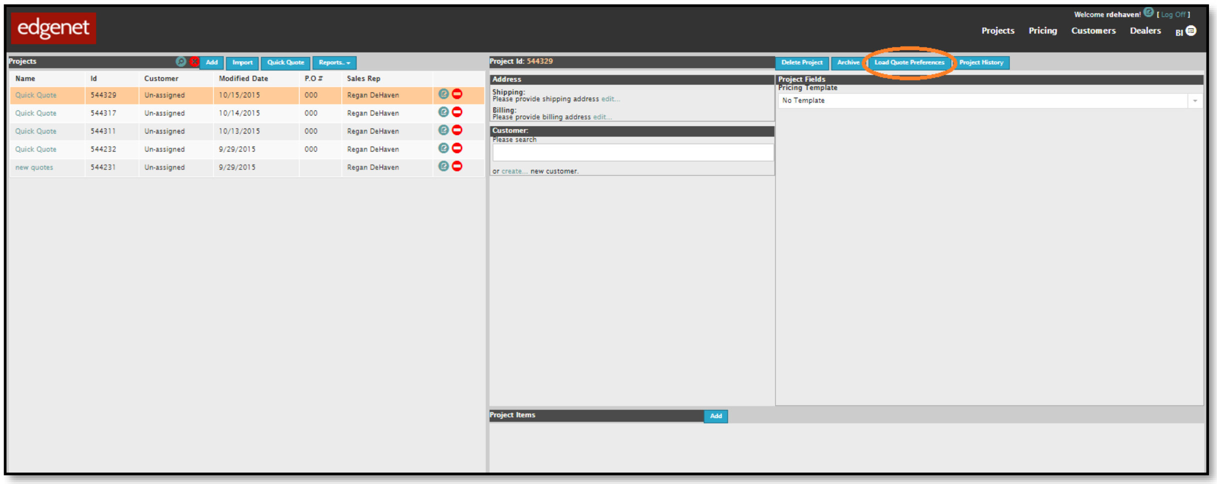


3. The Submit Results dialog box will open and display the results of the submission. If the submission has failed, please follow the instructions in the results to address any possible issues, then attempt the submission again.

Note that depending on how your administrator has configured the submission processes, you may be prompted to download the XML. Alternatively, you may simply be notified that the submission was either successful or failed without further information. Some users may use parent submit in which case your parent dealer will have to approve your project before it is sent to the manufacture.

3.21 Loading Project Preferences

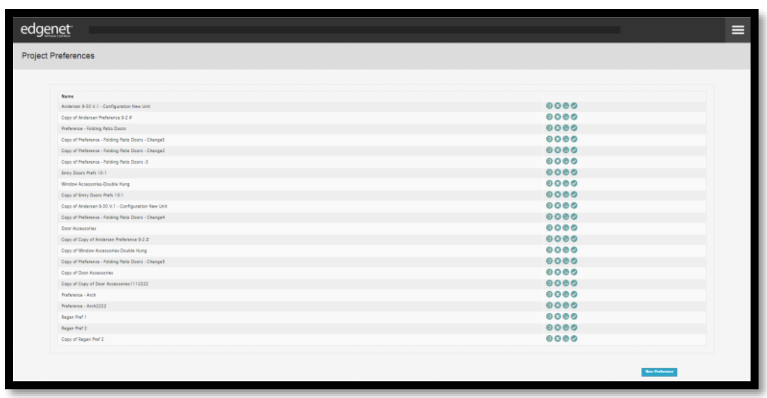
Project preferences allows you to create preferences by manufacturer catalog or import previously created project preferences from legacy Smart Client and apply these preferences to an open project within m2o cloud.



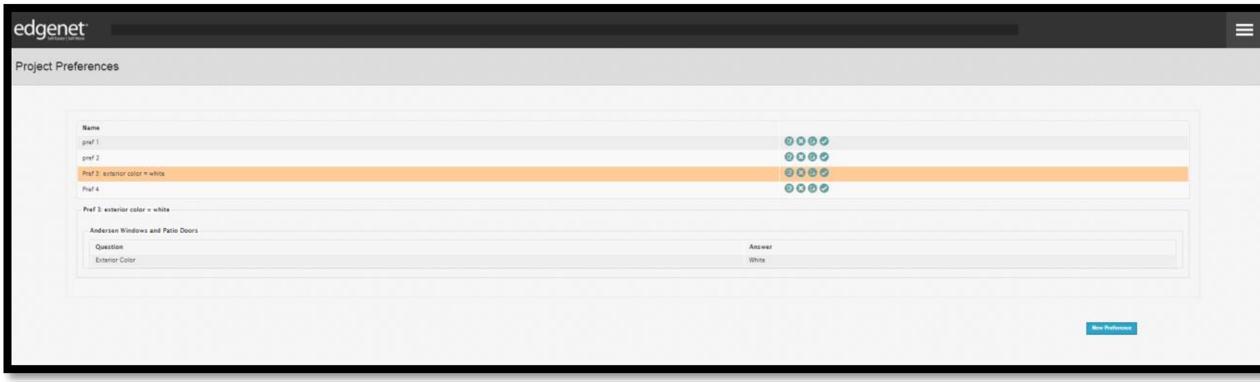
Accessing Project Preferences

To utilize the Project Preferences feature, you will select Load Quote Preference from the Projects page from the Project Action actions menu – this will display as a button if no items have been created or be located in the Project Actions dropdown if items have been created in a project.

Project Preferences landing page: After you select the Load Quote Preferences button, you will land on the Project Preferences landing page



By clicking/selecting an individual Project Preference, you will be able to preview the preference. The default preview will show the first populated manufacturer catalog project preference and the Q/A pairs that have been answered.



On this page, you will see all previously created Project Preferences and perform the following actions by clicking on the circle icons in line with the Preference Name.

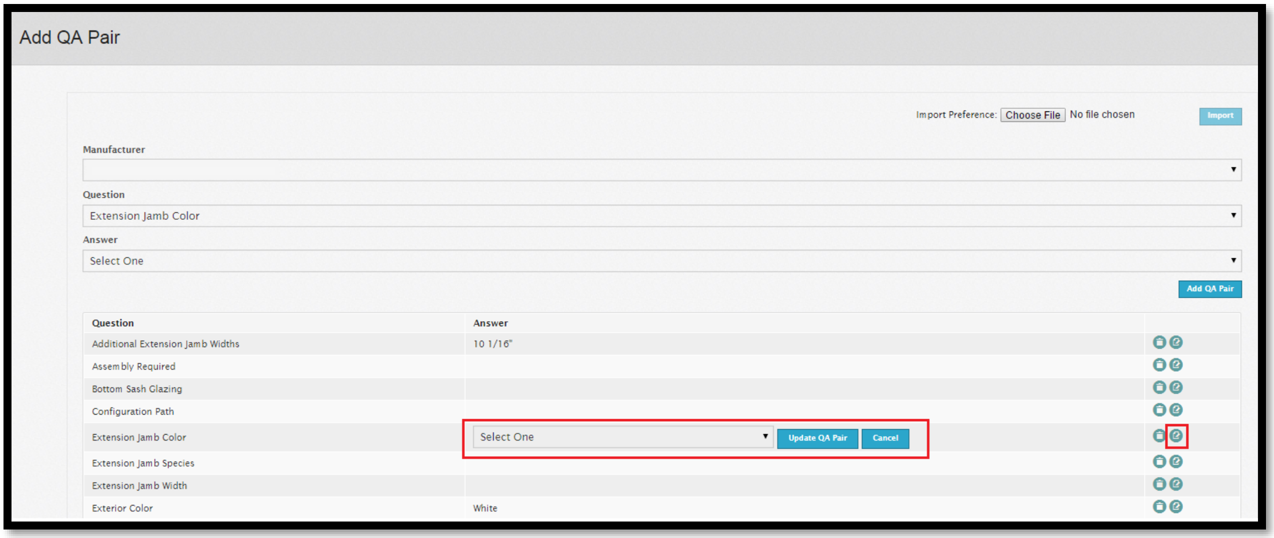
- Edit this Preference: This selection allows you to edit a previously created Preference.
- Delete this Preference: This selection allows you to delete a previously created Preference. There is a built-in confirmation step for this selection.
- Copy this Preference: This selection copies the selected Preference, automatically naming the new Preference 'Copy of 'Preference'
- Apply this Preference: This selection applies the Preference to the current project, and will take you back to the Projects page.

You can also create a new Project Preference by clicking on the New Preference button at the bottom of the page.

Creating and Editing a Project Preference
Step 1: Define Preference: This step in the process requires you to create a Project Preference name and select Define.
Step 2: Create Preference by adding QA pairs
Once you have defined a new Project Preference, you will land on the Define QA pair page.
The default view on this page will show the first catalog within the available catalogs and the predefined Questions selected for Preference.

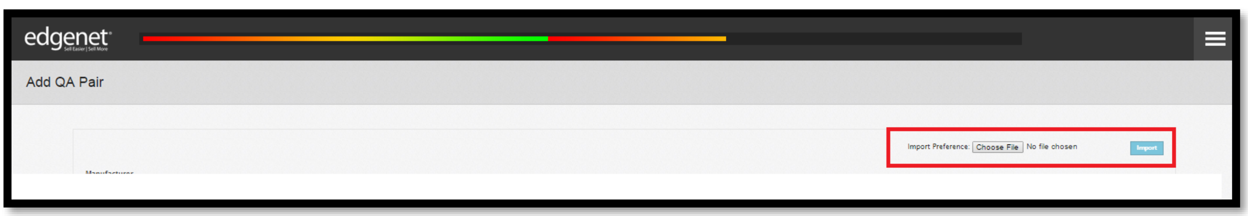
First, you will select the desired manufacturer from the top dropdown list.
You can define their Question and Answer pairs for the Project Preference in 2 ways:

1. Select individual Q and A from the drop down selection at the top of the page.
2. Edit Default questions and provide answers by clicking on the Edit button to the right of each Default question in the list.
3. You may also delete Default questions you do not want to include in that Preference by utilizing the delete button.
   - After you define all desired Q/A pairs for the Preference, you can Save or Save and Apply, as needed by selecting the appropriate button at the bottom of the page.



Importing a Project Preference

You are also able to Import Project Preference from Legacy Smart Client Preference by clicking on the Choose File and Import buttons at the top of this page.



Applying a Project Preference

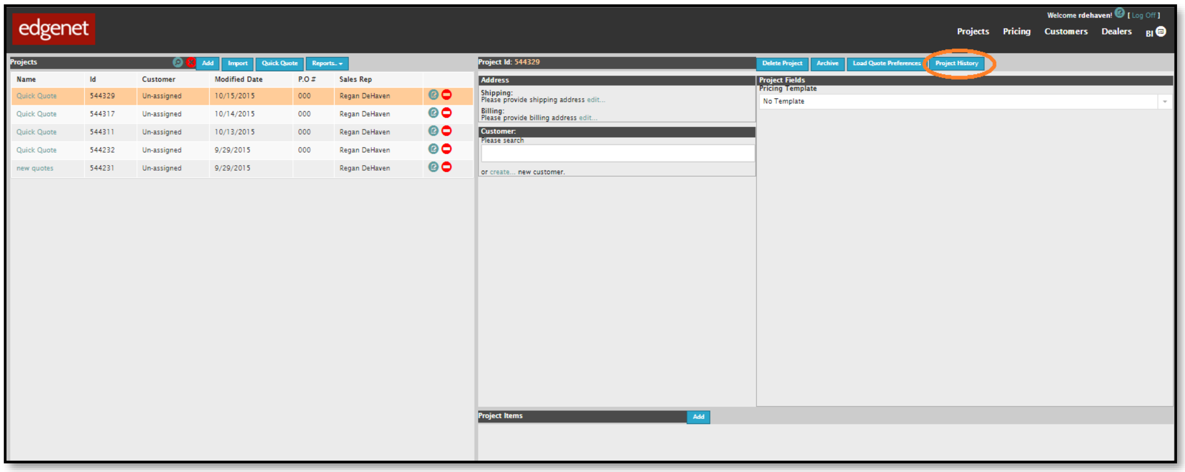
You can apply Project Preferences from the Project Preferences landing page list or after creating or editing a Project Preferences and selecting Save & Apply.

Once a Project Preference is applied, you can create an item or edit a previously created item with the preferences applied. You should begin answering the questions in the configurator and the preferred answers will be populated as appropriate.

If you select and view a preferred QA pair, the Preference star will be highlighted to indicate the preferred answer.

3.22 Viewing Project History

Project History allows a user to view a project history so that all users are able to view individual actions applied to the project and the user that applies the changes. This is standard functionality that will be visible to all projects.

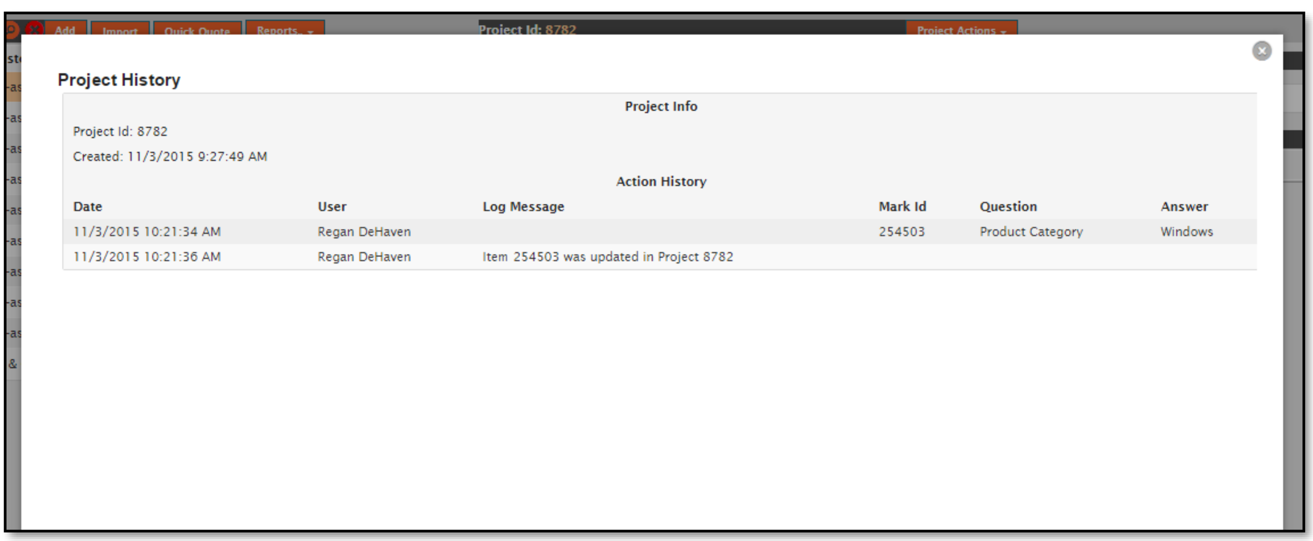


Project History can be accessed from the Projects tab from the Project Actions drop down menu. Project History includes information on the following actions:

- Project Created
- Item updated – including Q and A changes
- Item deleted

Project History provides the below information on each of these actions:

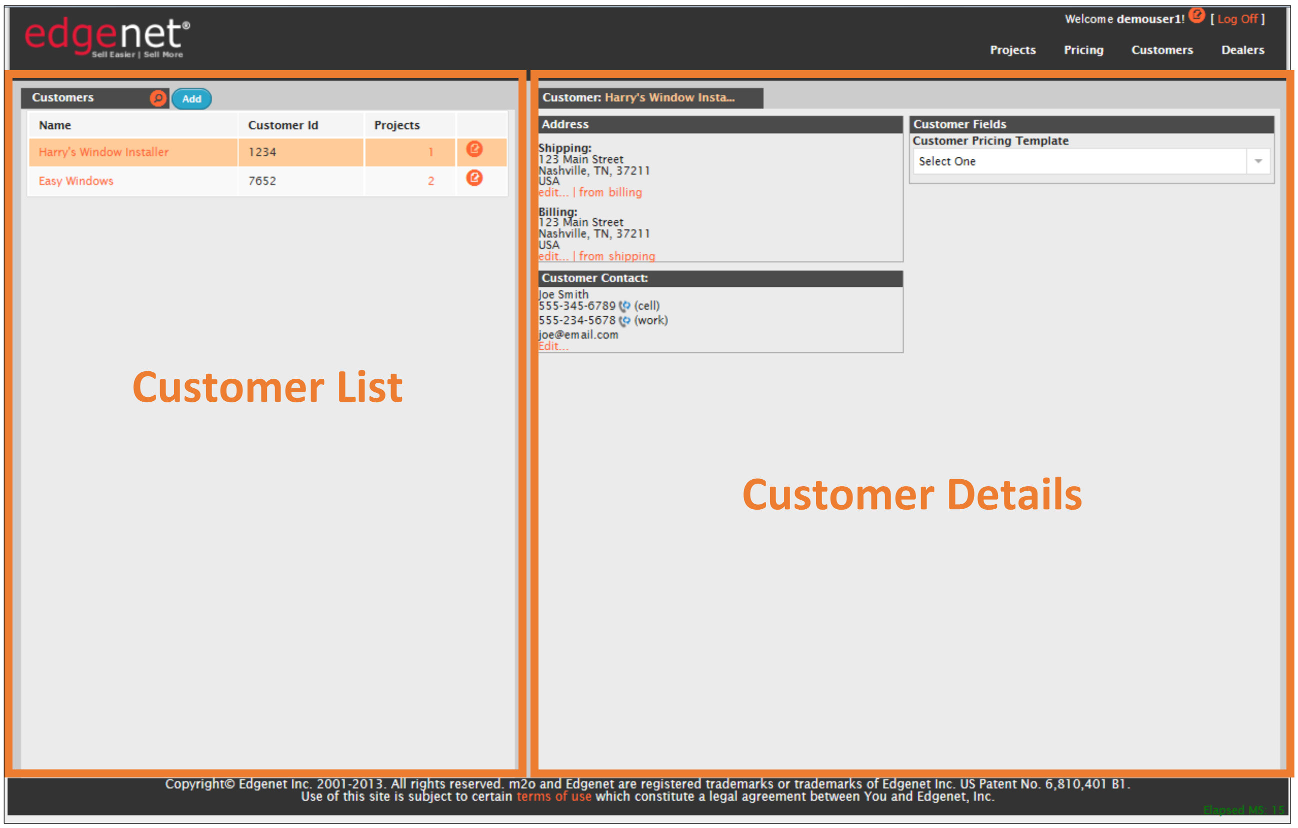
- Date | Time
- User making the changes
- Log Message – contains summary information on changes (Item X was updated in Project XYZ)
- Mark ID
- Question
- Answer
- Item Number



4. Creating and Managing Customers

Customers can be created by anyone with permission to create a new Customer. Users may only be able to add existing Customers to a Project based on Permissions granted by their administrator. Once a Customer is added to the system, any of the Customer-related information may be edited.

On the Customers tab, there are two main sections – the Customer List and the Customer Details. The Customer List contains all of the Customers available in the system for a given Dealer. The Customer Details section contains information about the selected Customer. By default, the top Customer is the list is selected.

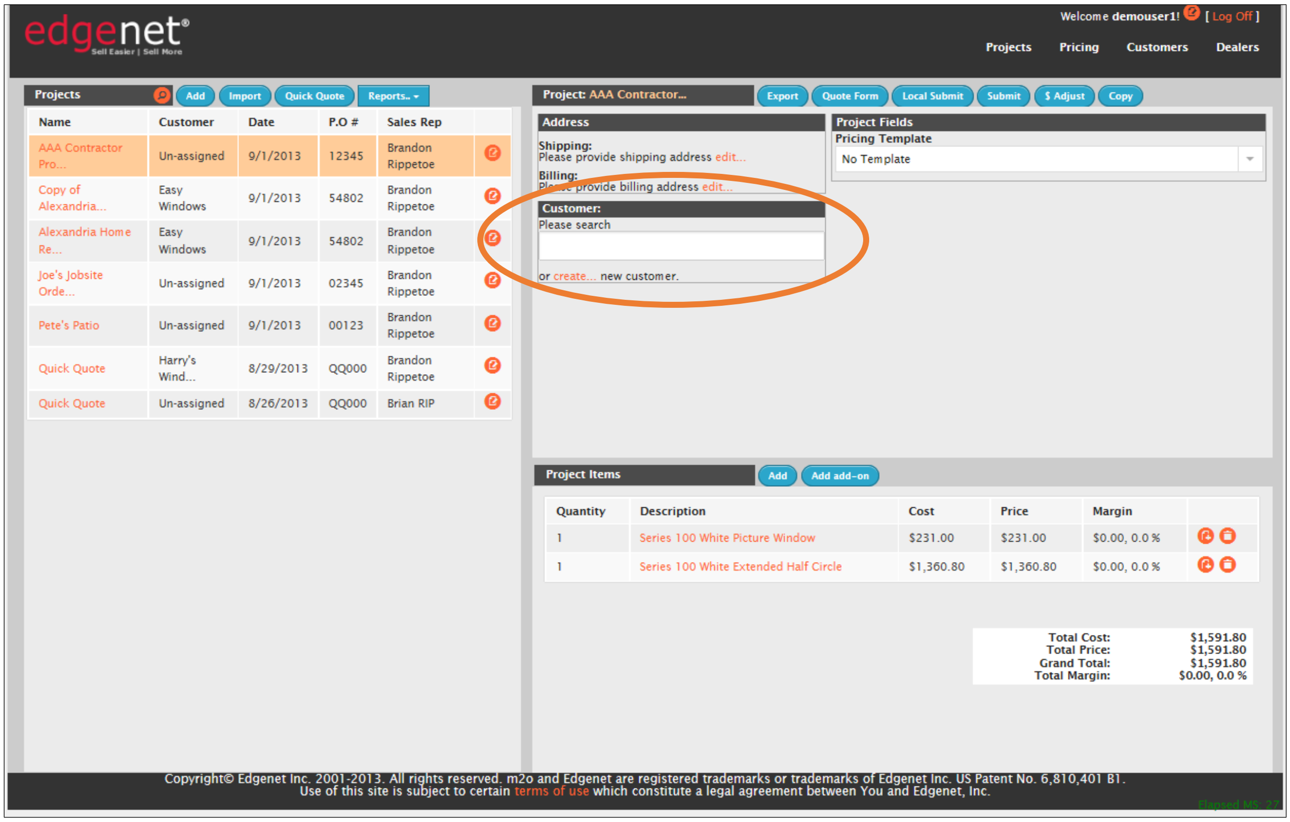


4.1 Quick Creation of a Customer

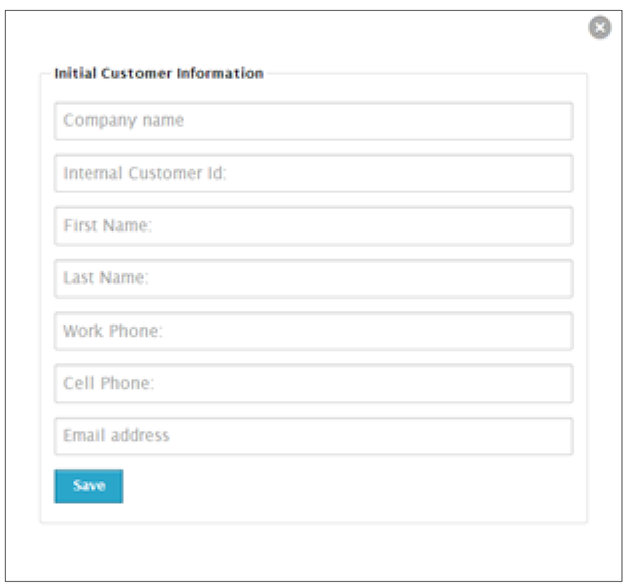
A new Customer can quickly be created and added while creating or modifying a Project.

To create a new Customer quickly:

1. On Projects tab, locate the "Customer" box in the Project Details section.



2. Click the "create…" link to open the "Initial Customer Information" dialog box.



3. Enter the customer name or company name for the Customer.
4. Assign the Customer an ID number.
5. Fill out the additional Customer contact information, such as first and last name, phone numbers, and email address.

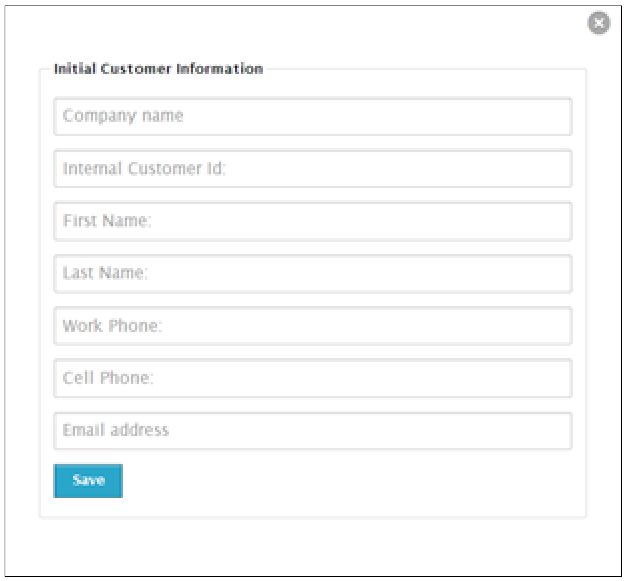
6. Click the Save button to save the Customer and return to the Projects tab.

The Customer has now been created and automatically added to the current Project.

4.2 Creating a New Customer

To add a new Customer to the system outside of any Project association:

1. On the Customers tab, click the “Add” button in the Customer List section to open the “Initial Customer Information” dialog box.

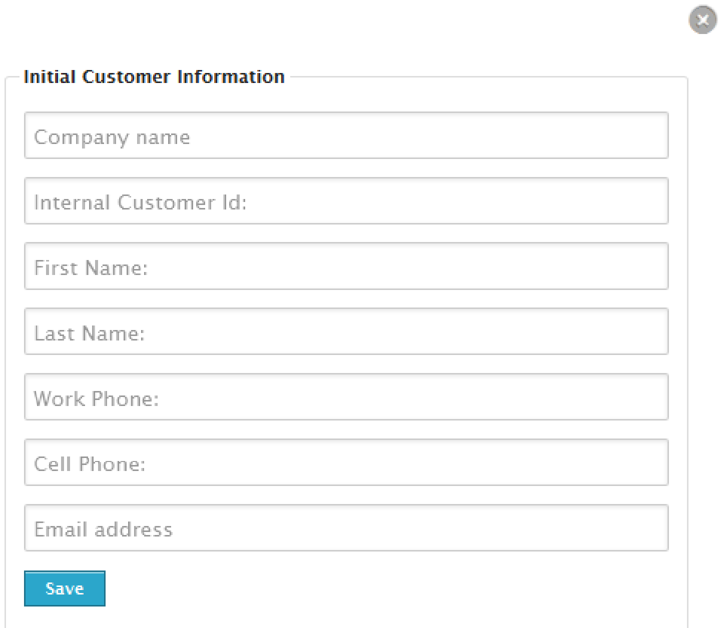


2. Enter the customer name or company name for the Customer.
3. Assign the Customer an ID number.
4. Fill out the additional Customer contact information, such as first and last name, phone numbers, and email address.
5. Click the Save button to save the Customer and return to the Customers tab.

The newly created Customer will now be in the Customer List and is selected as the current Customer for additional editing.

4.3 Editing a Customer

There are several pieces of data that can be collected and edited for each Customer. These include general information, such as Name and ID, in addition to Billing Address, Shipping Address, and Phone Numbers.



To edit a Customer’s Name and/or ID:

1. On the Customers tab, select the Customer from the Customer List by clicking the Customer Name and click the “Edit Customer” button to the right of the Customer.
2. In the “Initial Customer Information” dialog box, edit the customer name or company name and/or Customer ID as necessary.
3. Click the Save button to save any changes.

Any additional Customer information can be edited by selecting the Customer from the Customer List and modifying any necessary fields in the Customer Details section. These fields include:

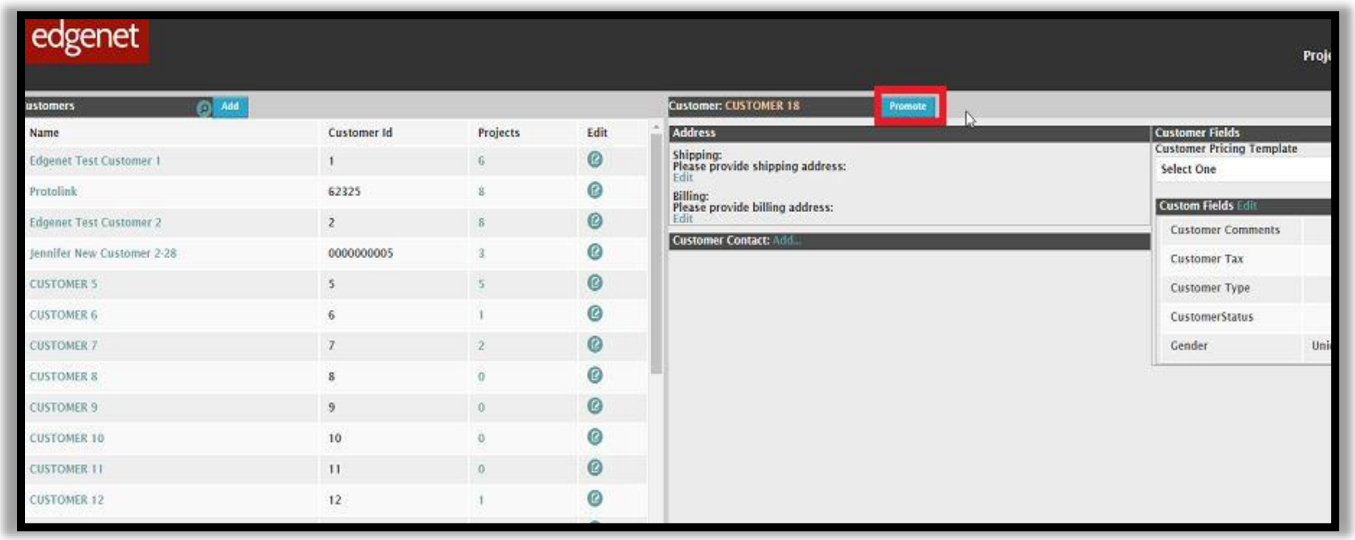
Shipping Address
Billing Address
Customer Name
Work Phone Number
Cell Phone Number
E-mail Address

Additionally, there may be more fields available under the “Customer Fields” section. These are fields that have been added by your administrator. These fields will vary depending on the system setup.

4.4 Promote To Contractor

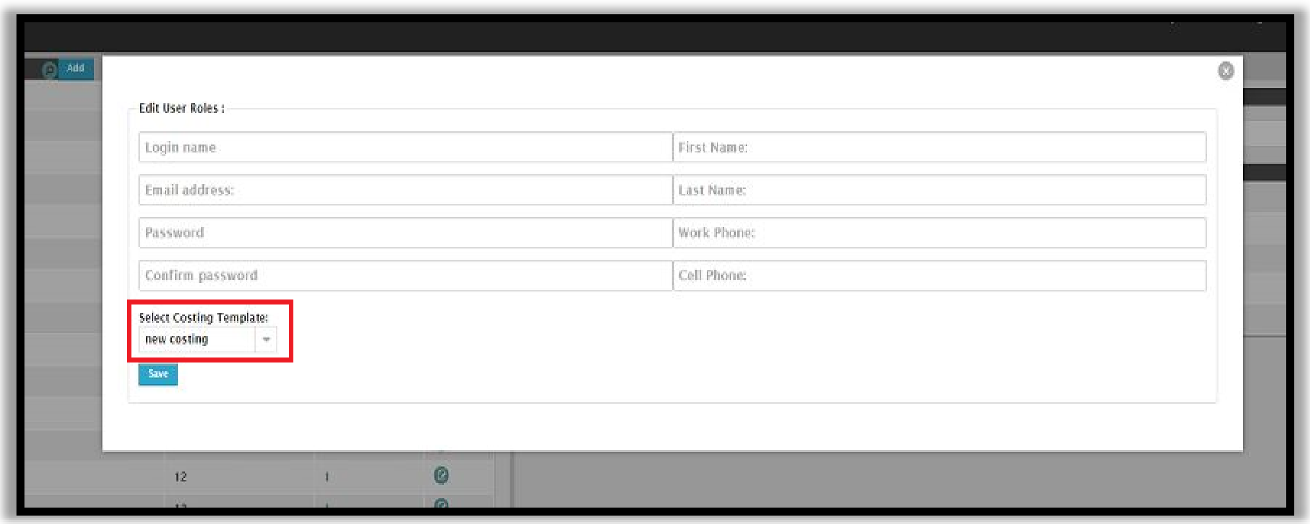
Dealers with the ‘Can promote customer to contractor’ permission who are allowed to assign costing templates will be able to promote an existing customer to Contractor status. This will grant the newly promoted Contractor access to m2o as a child dealer.

To promote to Contractor, search for and select an un-promoted customer's record on the Customer screen. Once selected, click the "Promote" button in the top right window. (This button will be hidden for customers who have already been promoted.)



A window will open with fields for the information needed to create the Contractor as an m2o user.

- This form will be prepopulated with any existing information known from the original customer information.
- All fields, except Cell Phone, are required.
- Usernames must be less than 250 characters.
- Passwords should be at least 6 characters.
- Additionally, an initial costing template must be selected from among the pricing templates available for the parent dealer.

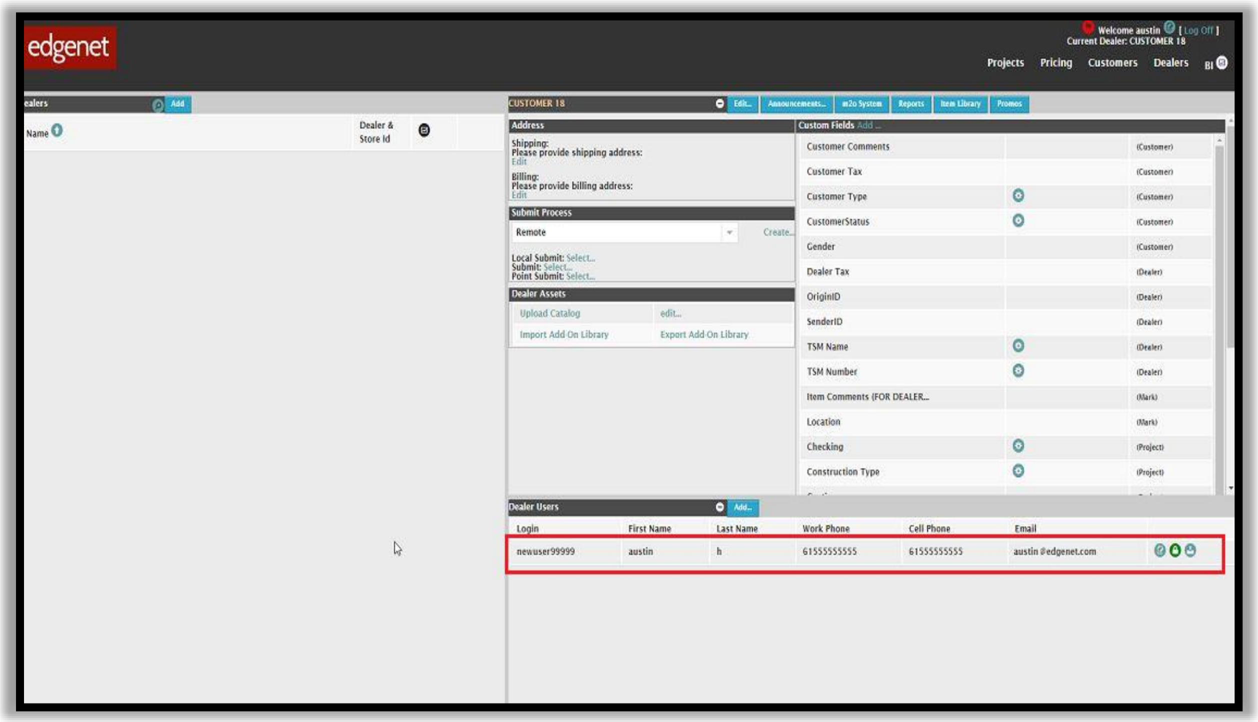


When complete, click "Save". This will create a new child dealer, a new user under that child dealer, assign the costing template selected and send a welcome email to the Contractor with the information needed to log into m2o.

The new 'Contractor' user will have a defined, limited permission set, including:

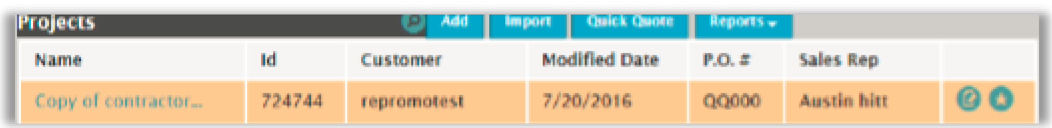
- Ability to create quotes and submit orders to my parent dealer.

- Ability create my own customers
- Ability to create and apply pricing templates
- Ability to generate a printed quote
- Ability to submit a project



Once promoted, Contractors will enjoy the same abilities as a child dealer, as well as the ability to submit a project. Upon project creation, a user will submit a project utilizing the submit process designated during set-up.

Projects that have been submitted by a contractor will have a new 'star' icon next to the project.



The recommended submit process is the current Parent Submit process. This will send the submitted project to the parent dealer for review and approval (or rejection). Once a parent dealer submits, the order will be submitted to the manufacturer from the parent dealer.

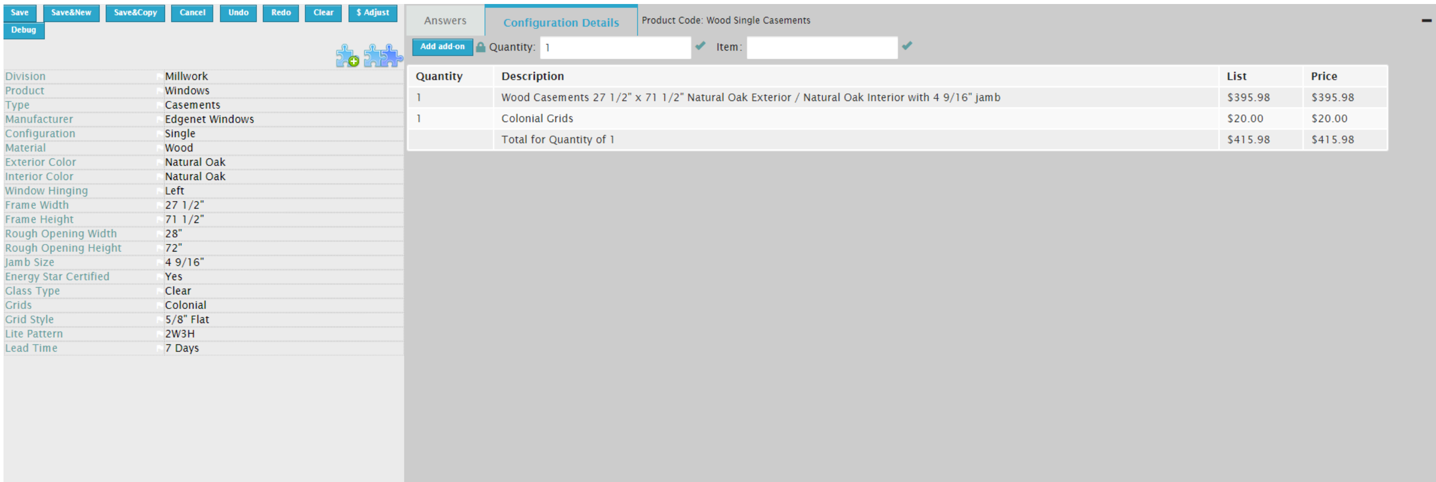
- All relevant promotions will be applied to the parent dealer.

If the parent dealer desires to update the costing associated with the contractor user, he can view the costing templates on the pricing page and update as appropriate.

To demote a contractor, a user must gave the 'Can promote a customer to contractor' permission to use. Users can demote a contractor by clicking on the demote button on the customers page.

5. Using the m2o Configurator

The m2o Configurator is used to configure Items and choose options. There are three main sections of the Configurator.



- The Configuration Questions contain the list of all available questions for the current Item, as well as all selected answers.
- The Answers tab contains all available answer options for the currently selected question.
- The Configuration Details tab contains pricing information for the current Item, as well as any Custom Fields, and an image which represents the fully configured Item.
- The '-' button at the top right of the screenshot above can be used to expand/collapse the Answers and Configuration tabs. The view shown is expanded. When the view is collapsed, you will be able to see the parametric drawing, custom fields, and warnings.

5.1 Configuration Questions

The Configuration Questions section is a list of all product questions, along with the user-selected answer for each question. As answers are selected for each question, the list will be populated and the user will be presented with the set of available answers for the next question. The user may select an individual question to answer or choose to answer the questions in the order which they are presented. Once all of the questions have been answered, the system will automatically switch to display the "Configuration Details" tab instead of the "Answers" tab.

5.2 Answers Tab

The Answers tab displays the available answers for the currently selected question. Often, the answer options are represented by a graphical answer. See section 5.5 for more information on additional Configurator icons.

If a selected question has too many answers to display at one time, the system will display the total number of answers, a search box, and the first 20 answers in the list. The user may type in a partial answer in the search box and the system will update the answer list, showing only those answer options that include the entered search value.

5.3 Configuration Details

The Configuration Details tab is automatically opened after all questions have been answered. This tab displays all properties that are specific to the configured Item. These properties include pricing line item descriptions, as well as the pricing itself. Additionally, an image will be displayed to represent the configured Item. This tab also contains any Custom Fields that are specific to the Item.

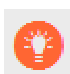
5.4 Configurator Buttons

There are several buttons available on the Configurator screen to perform necessary actions.

- **Save** – The "Save" button saves the current Item to the Project and returns to the Projects tab.
- **Save&New** – The "Save&New" button saves the current Item to the Project and starts a new Item for configuration.
- **Save&Copy** – The "Save&Copy" button saves the current Item to the Project and automatically creates a copy for additional editing as necessary.
- **Cancel** – The "Cancel" button discards any changes to the current Item and returns to the Projects tab.
- **Undo** – The "Undo" button discards the last change that was made to the Configuration Questions.
- **Redo** – The "Redo" button will reapply any changes that have been undone to the Configuration Questions.
- **Clear** – The "Clear" button clears the current Item of all Question and Answer selections.
- **$ Adjust** – The "$ Adjust" button opens the Pricing Adjustment dialog box. This button will only be available if it has been enabled by the administrator.

5.5 Other Configurator Icons

There are several other icons that may appear during the normal configuration of an Item.

	This icon indicates that Question-level Help is available. It appears next to the Question Prompt when there is Help available for the current Question. Click the icon to view the Help page and receive more information about the current Question.
	This icon indicates the Answer option is the "standard" Answer. This will appear at most on only one Answer for a given set of Answers, and it will always be the first Answer in the list.
	This icon indicates Answer-level Help is available. It appears above the graphical answer when there is Answer-level Help available. Click the icon to view the Help page and receive more information about the Answer option.
	This icon indicates that selecting this Answer will un-answer one or more Questions lower in the Question list.
	This icon indicates the Answer can be set as the preferred answer. Click the icon to set the preferred answer for the Customer, Dealer, or User. Then, click on the icon in the selection menu to set the preferred answer.

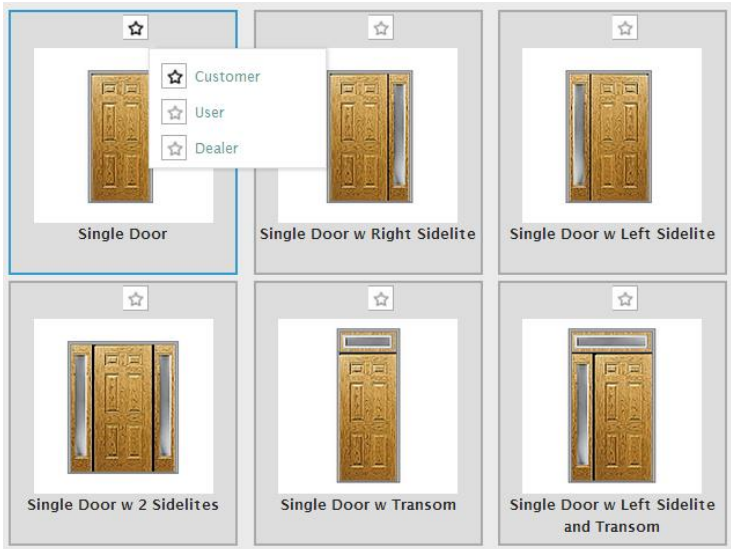
5.5.1 Preferred Answers

All users can set preferred answers. There are no user permissions required to use or set preferred answers. Preferred answers can be set on each question for a Customer, User and/or Dealer. Customer preferred answers always override User preferred answers and User preferred answers always override
Dealer preferred answers. For each question only one answer can be set as preferred for each Customer, User and for the whole Dealer. If, for example, 1) the Dealer has the preferred Color as White, 2) the User has the preferred Color as Brown and 3) the Customer has the preferred Color as Green, then the system will show Green as the preferred answer. The preferred answer will display with a bold icon  above it. If the preferred answer icon is not displayed in bold  the answer has not been set as preferred.

Setting an answer as the preferred Dealer answer means that all dealer users will see that answer as the preferred answer, unless another answer has been set as the User or Customer preferred answer.

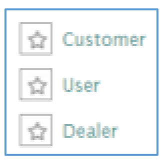
Setting an answer as the preferred User answer will override the Dealer preferred answer, however if the assigned Customer also has a preferred answer set then the Customer's preferred answer will show as the preferred answer.

By setting a Customer's preferred answers, all users working with that Customer's projects will see the Customers preferred answers. Note: Customer preferred answers only appear when the customer is assigned to the project.



To Set an Answer as Preferred:

1. Navigate to the question for which you want to set a preferred answer
2. Click the preferred answer icon located above the graphical answer, the system will display a choice box to set the answer as preferred for the Customer, User or Dealer. (Note the Customer choice will only appear if a Customer is assigned to the project)
3. Click one of the preferred answer choices icon to set the preferred answer.



Notes: The answer will now be set as a preferred answer. The answer will also be selected in the current configuration.

Next time you select that question you will see the preferred answer by noting its bold preferred answer icon .

To Change a Preferred Answer: (Same steps as setting a preferred answer)

1. Navigate to the question for which you want to set a preferred answer
2. Click the preferred answer icon located above the graphical answer, the system will display a choice box to set the answer as preferred for the Customer, User or Dealer. (Note the Customer choice will only appear if a Customer is assigned to the project)
3. Click one of the preferred answer choices icon to set the preferred answer.

NOTE: Users that "Impersonate" or use My Dealer View to access other dealers will see the Dealer's and Customer's preferred answers for which those they are currently working in. These users will also maintain their own preferred answers across all dealers for those they impersonate to or are assigned to.

To Unset a Preferred Answer:

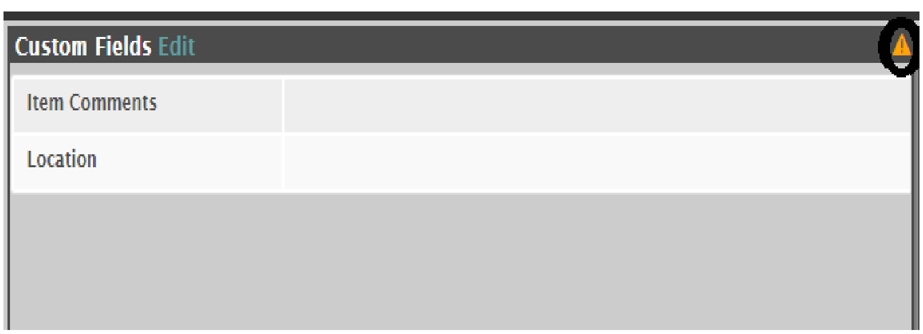
1. Navigate to the question for which you want to unset a preferred answer
2. Click the preferred answer icon ☆ located above the graphical answer, the system will display a choice box to set the answer as preferred for the Customer, User or Dealer. (Note: The Customer choice will only appear if a Customer is assigned to the project.)
3. Click the preferred answer choice icon ☆ to unset the preferred answer.

5.6 Warnings and Messages

The manufacturer may utilize various warnings and messages for the user throughout the configuration of an Item. These messages can contain valuable information about the current Item in process. For instance, a message may indicate the minimum and maximum width or heights available for a given Question. Alternatively, a message may also provide other useful information to guide the user on how to complete the current Item configuration.

Warnings and messages will appear in a colored box at the top of the Configurator page.

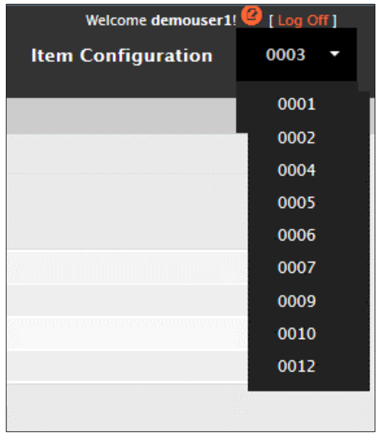
Note that if a warning appears in a box with a red background, a critical error has occurred. Please take note of the actions occurring leading up to the error and report it to your administrator.



When you 'X' out of the warning message, the icon will remain so you can go back and view any previous warning messages.

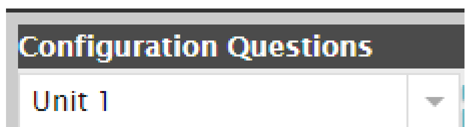
5.7 Navigating Project Items

From the Configurator, it is easy to view a different Item within the same Project by using the Item Picker. Click the drop-down Item Picker to select the Item to view in the Configurator to open the Item immediately. The Item Picker makes it simple to switch from Item to Item without leaving the Configurator.



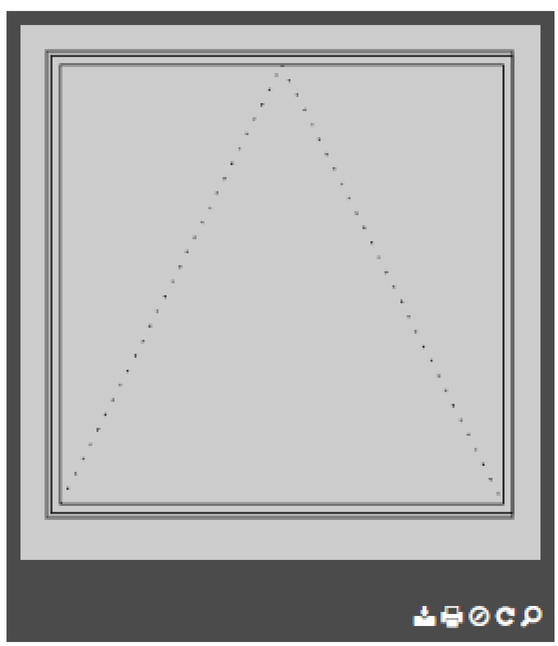
5.8 Parametric Drawing

The parametric drawing is a representative picture of your configured unit. The drawing will show after you have completed your configuration and m2o takes you to the configuration details tab on the configuration page. The drawing can show different unit in your project which are selectable by a drop down at the top left of the configuration page.



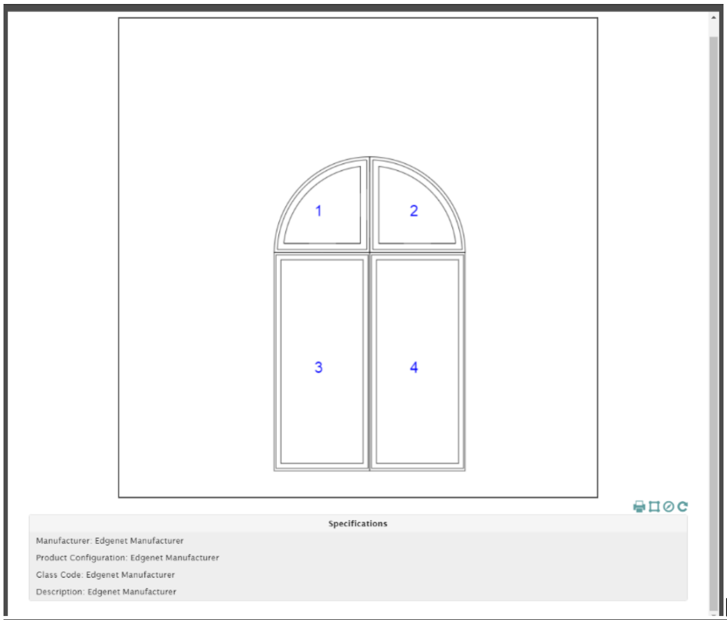
5.8.1 <u>Dimensional Lines and Unit Layers</u>

On the parametric image you can select different layers which are unit dimensions defined by the catalog. At the bottom of the parametric drawing, you are also able to view your product code. If you have designed a composite unit, you will have the option to toggle the unit numbers off and on.



5.8.2 <u>Expanded View</u>

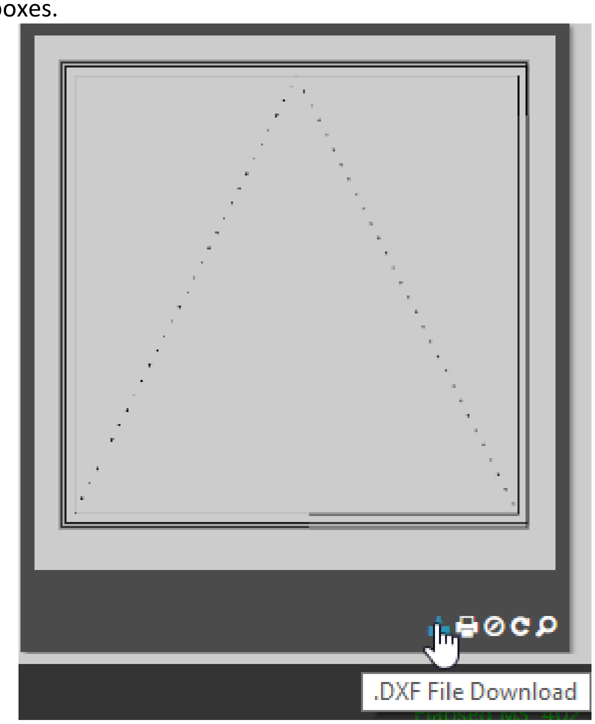
On the expanded view which is accessed by clicking on the magnifying icon, you will also have the option to print the parametric drawing. Any selected dimension layers or unit numbers which are toggled on will be present when you print your drawing



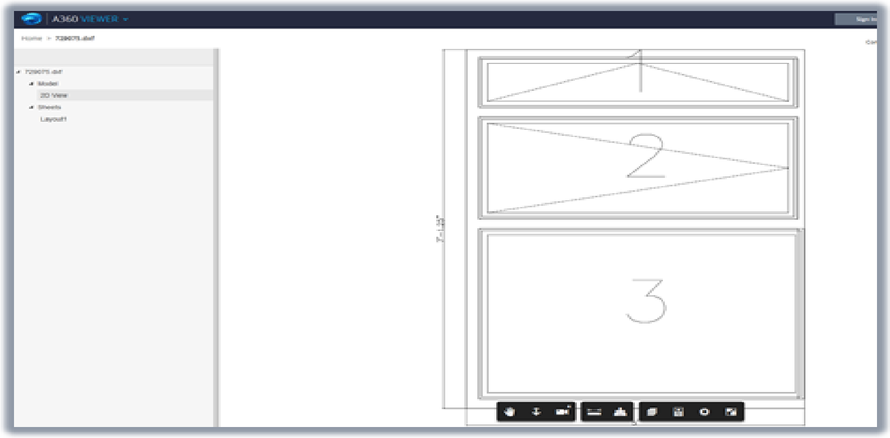
5.8.3 <u>DXF File Download</u>

m2o now has the ability to download the parametric drawing in a .DXF file format. The drawing will have user selected layers (dimensional lines and unit labels) present in the file download.

Users will be able to download this file by clicking on the '.DXF File Download' icon located on both, the default or expanded parametric drawing boxes.



Users should be able to view their .dxf dile in standard CAD drawing tools that support this file type.

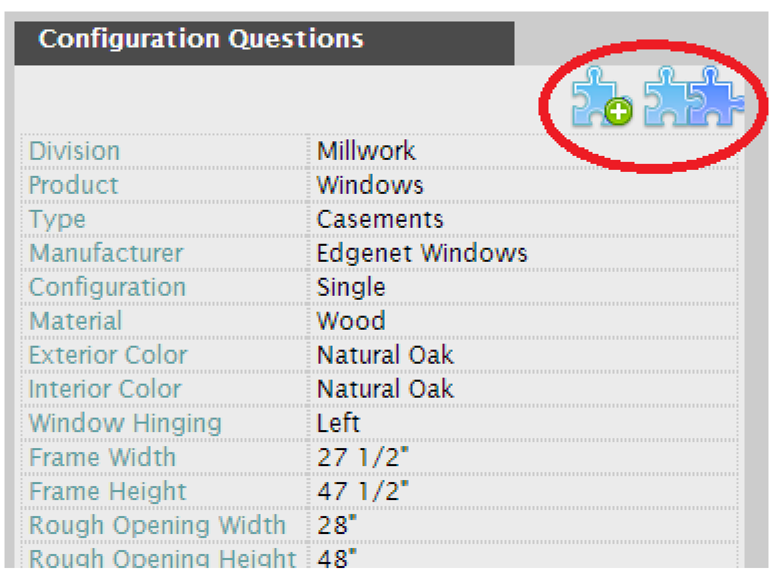


6. Composite Design (Mulling)

Composite Design is the process of joining multiple units together to create a larger composite unit. A composite unit provides a unique design and visual appeal of 2 or more units mulled together. If you are a catalog developer or manufacturer that has an m2o catalog and are interested in taking advantage of the Composite Design functionality, please contact your account or support manager at Edgenet.

6.1 When is Composite Design Available

If enabled in the catalog, Composite Design will be available once a unit has been configured with a valid Width and Height. You can easily determine if composite design is available for the configured unit if you see the puzzle buttons at the top of the Configuration Questions list.

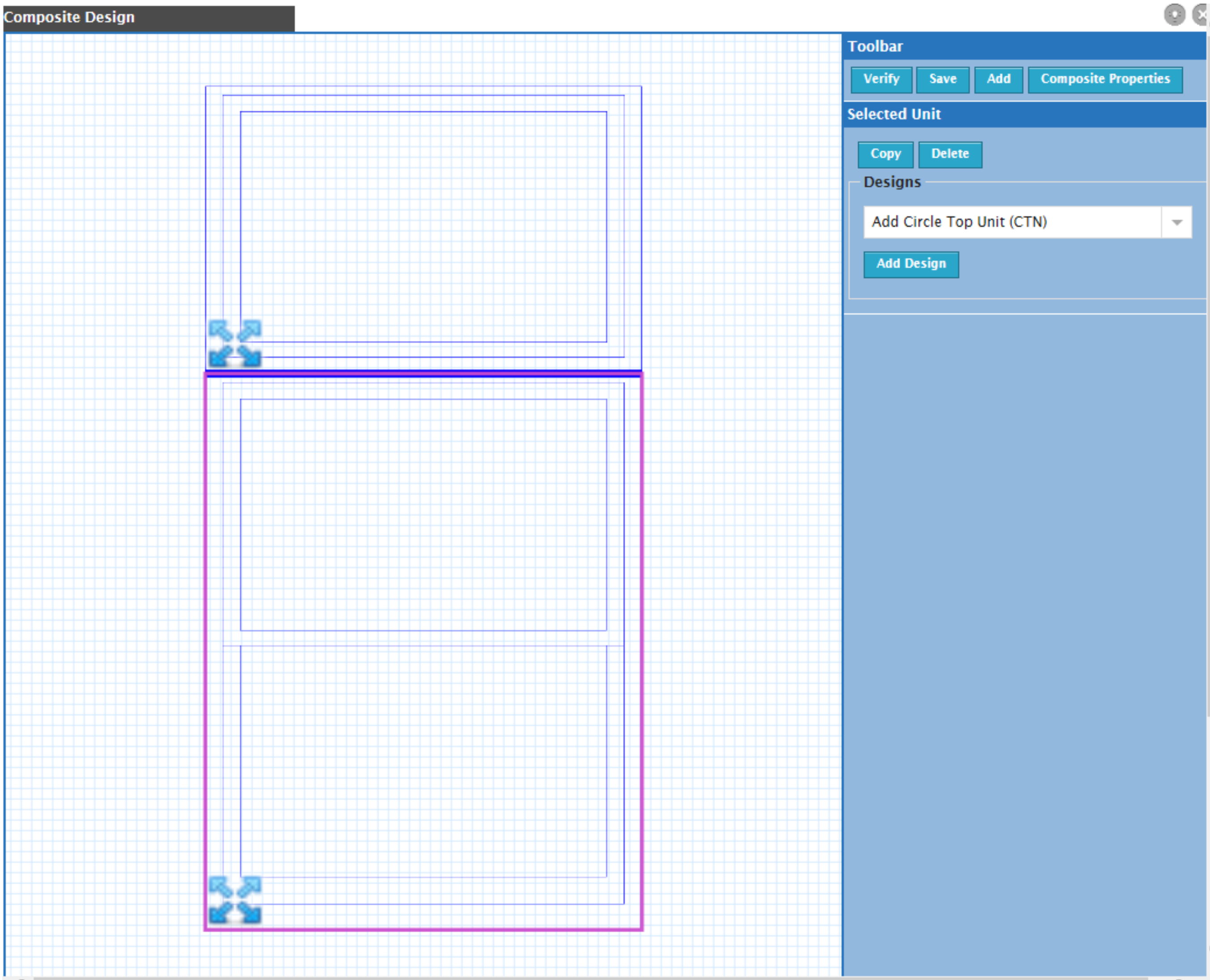


Opening the Composite Design Editor

1. Click the  button.
2. The system will now open the mulling editor.

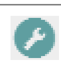
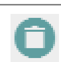
6.2 Composite Design Window Overview

All the standard mulling features can be found within the Composite Design editor. The menus and available features within the editor are dynamic and contextual. This means the various features and buttons are only available based on the current unit selections. In the example below, all the features are visible on the screen because the user has created a group, and has selected a unit and a mullion.



6.3 Composite Design Editor Sections and Buttons

Main Mulling Editor Buttons	
Verify	Verifies the current composite. The results will be displayed in the context menu on the right side of the editor.
Save	Saves the composite. A composite unit can be saved without being verified. Always save the composite unit, or the changes made will not be kept.

Add	Opens the configurator with a new unit ready for configuration.
Composite Properties	Opens the composite properties dialog, where common option values can be changed across the entire composite unit.
	Cancels the current composite design and closes the Composite Design Editor.
Selected Unit Section	
Copy	Copy the current unit(s) selected and adds it to the composite design.
Delete	Delete the unit(s) currently selected.
Group	Available when two or more units are selected. Grouping units will activate the Groups section.
Add Design	Available if the catalog is set up to use Add Design for one or more of the currently selected units. To use Add Design, select a unit or action from the Design dropdown and click the Add Design button.
Groups Section	
The Groups section is only available when a group has been created. It shows a list of all the groups created. Also note that if a unit is selected which is part of a group then that group will be highlighted in the list of groups. Below are the buttons available in the Groups section.	
	Opens a dialog that allows you to specify if the mull is performed at the factory or in the field.
	Dissolves the group. This will not delete the units, just the grouping.
Mullion Options Section	
The Mullion Options section is only available when a mullion is selected.	
Mull Type	Choose between Standard or Custom (spread mulls). Note the Space can only be changed when Custom is selected.
Material	Choose between available materials.
Direction	Specifies the direction of the selected mullion.
Space	Displays the current mullion size. If Standard Mull Type is selected this will display the current mullion size. If Custom Mull Type is selected a custom mull size can be entered.
Ok	Saves the current Mullion selection. Must save the selection or they will not be saved.
Cancel	Cancels the current Mullion selection.

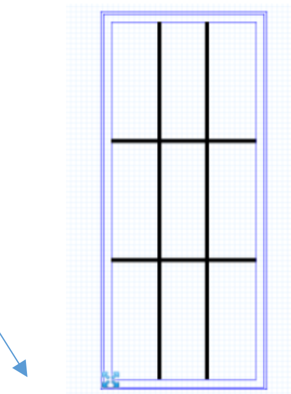
6.4 Using the Composite Design Editor

Simple Interactions

- Select a unit by clicking on it.
- Select multiple units by clicking on each unit consecutively to multi-select.
- Unselect all currently selected units by clicking in an open area of the editor.
- Zoom in and out by using the mouse scroll wheel.

Advanced Interactions

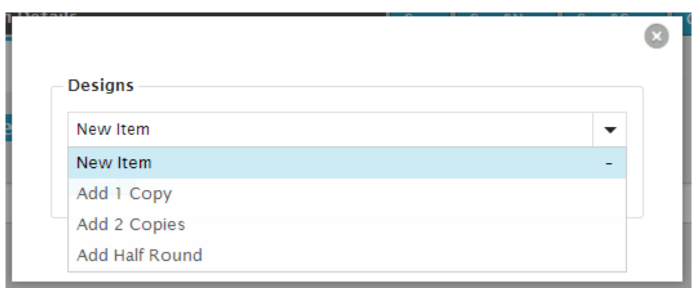
- Click and drag and open area of the editor to move the composite around.
- Click and drag units close to other units and they will snap together to create a possible mull.
- Click the  icon which is located in the lower left corner of all units in the composite editor. This will open the catalog size page for the unit where you can easily choose from the available sizes.



6.5 Add units to the Composite by Using the Add Design feature

The Add Design feature, if available, allows you to add new units to the composite without entering the composite design editor. The Add Design feature is also available within the composite design editor too to quickly add units to the composite.

1. Click the  button to add a new unit, a copy of the current unit or a predetermined unit to the composite unit. The Designs dialog will be displayed.
2. Choose a unit from the drop down.



3. Click the Add button.

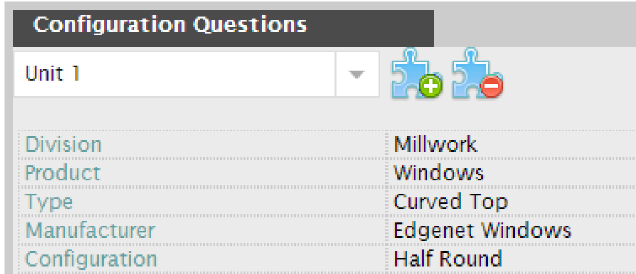
The item added to the design is now the selected item in the composite design editor.

6.6 Removing units from the Composite

There are 2 ways to remove a unit for the composite. The first, and easiest method is to remove it while viewing in the item configurator. The second method allows you to remove it while you are working with the Composite in the composite design editor.

To Remove a Unit while in the Configurator

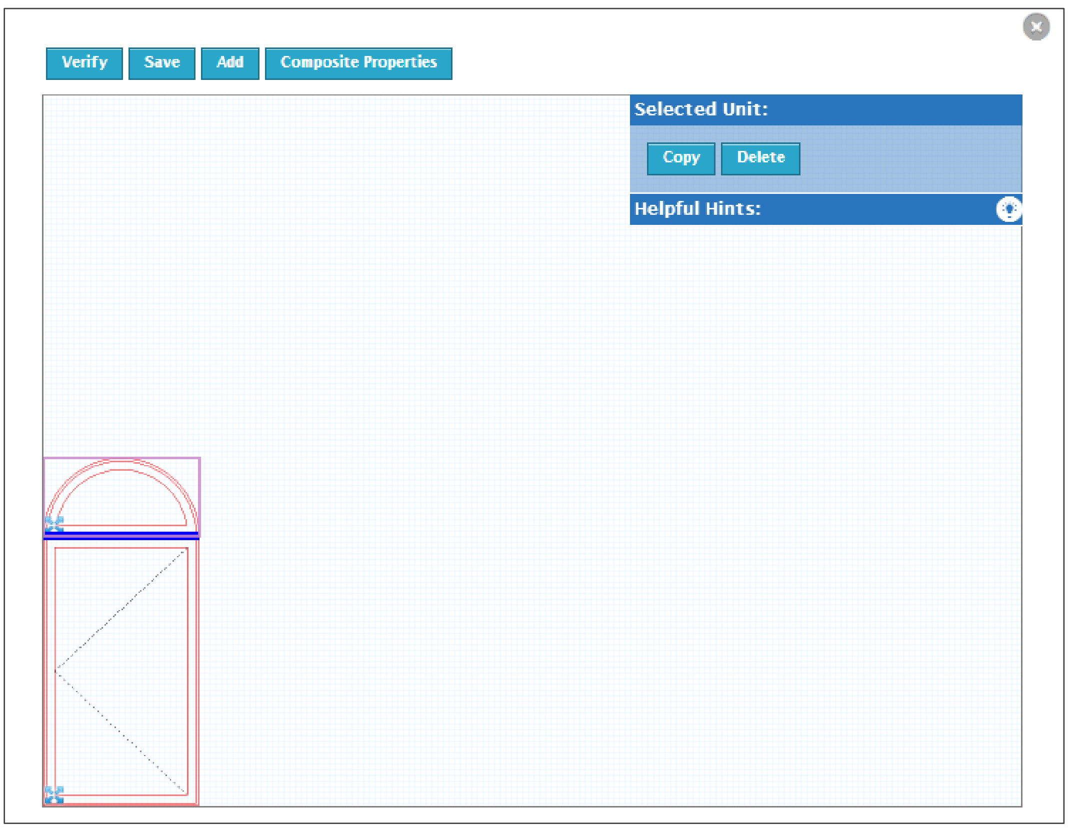
1. Select the unit to remove from the unit drop down located above the Configuration Questions list.



2. With the unit selected click the  button.
3. The unit has now been removed from the composite.

To Remove a Unit while in the Composite Design Editor

1. Click on a unit in the editor to select it. The system will now display the Selected Unit context menu in the upper right of the editor.
2. Click the Delete button.
3. Click Save to permanently remove the unit.



Note: As many changes as desired can be made to the composite unit while in the composite design editor, but changes will only be made permanent after clicking Save. If the  button is clicked, all changes will not be saved and the composite will remain as it was configured prior to entering the composite design editor.

7. Pricing Hierarchy

This section covers the different type of pricing modifiers and the order in which they take place.

This is a list of commonly used labels for different prices:

1. Dealer Cost
2. List Price (MSRP)
3. Sale Price

All of the above labels are configurable so please map above terms to your nomenclatures. In absence of any adjustments all of the above values are the same as the catalog normally contains the list price.

All pricing for items can be modified by the following factors:

1. Pricing Multiplier
2. Pricing Templates
3. Pricing Adjust (works like a template)
4. Costing Templates
5. Pricing Multiplier Override

From the above list pricing adjust can be applied to project or a mark (an item in the project). Pricing Adjustments are much like pricing templates without a template association.

Here is the order in which the pricing modifiers take place:

1. System iterates through project item(s).
2. Pricing Adjustment on Marks and Project are merged, giving precedence to mark adjustments.
3. Merged adjustments are applied to the item(s).
4. System Checks for Pricing Multiplier Override and Pricing Multiplier (Pricing Multiplier Is the only one that will exist in cloud).
5. Pricing Multiplier is applied to the item(s) given there are NO Adjustments as it relates to current configuration from step 2.

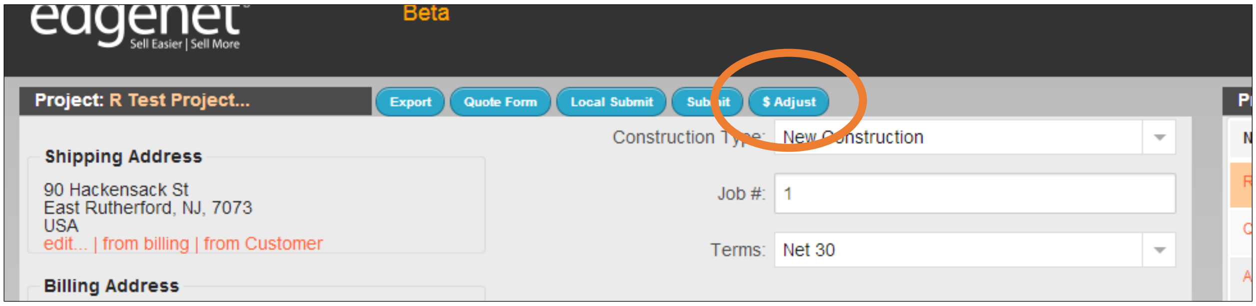
8. Pricing Adjustments

Similar to Pricing Templates, Pricing Adjustments allow the modification of the retail price for configured Items. Pricing Adjustments allow custom modifications to be made to the pricing line items without using a Pricing Template. This feature should not be confused with Add-Ons. Pricing Adjustments are used to change the actual retail price of a given product group or catalog Item, as opposed to adding or reducing service charges.

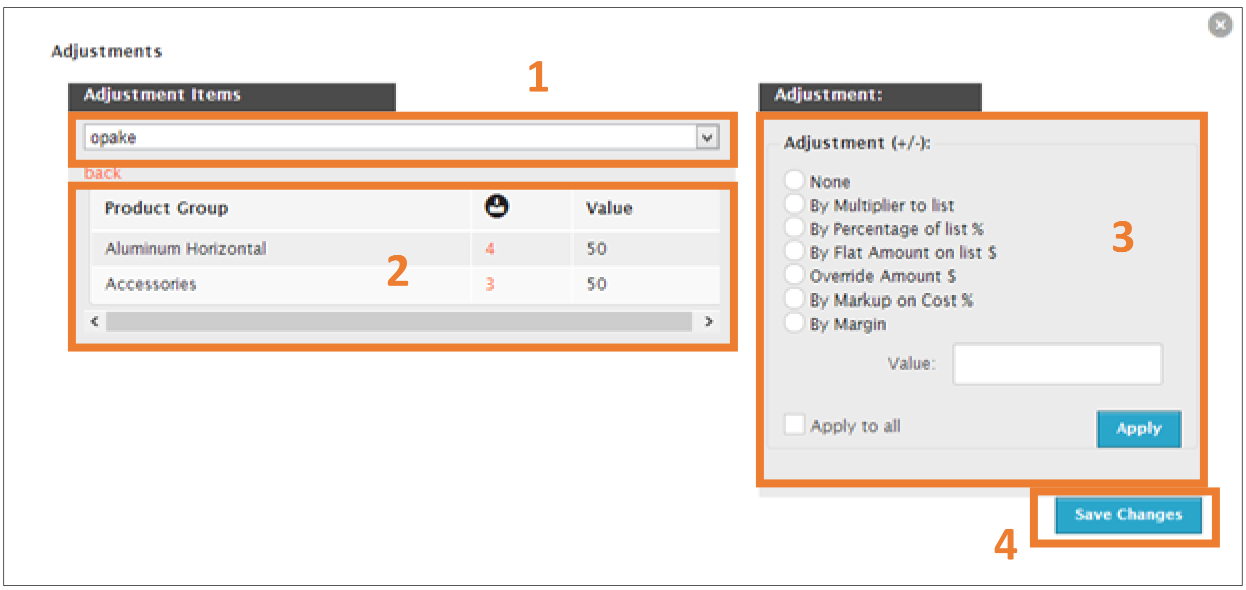
Note that Pricing Adjustments will only be available if they have been enabled by your administrator.

To create an adjustment to the Project price:

1. On Projects tab, select the Project in the Project List that will be adjusted by clicking on the Project Name.
2. Click on the “$ Adjust” button in the Project Details section to open the Adjustments dialog box.

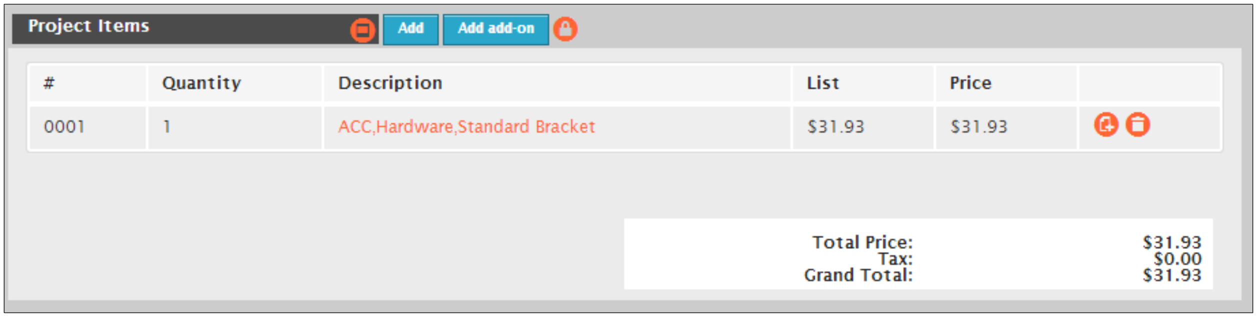


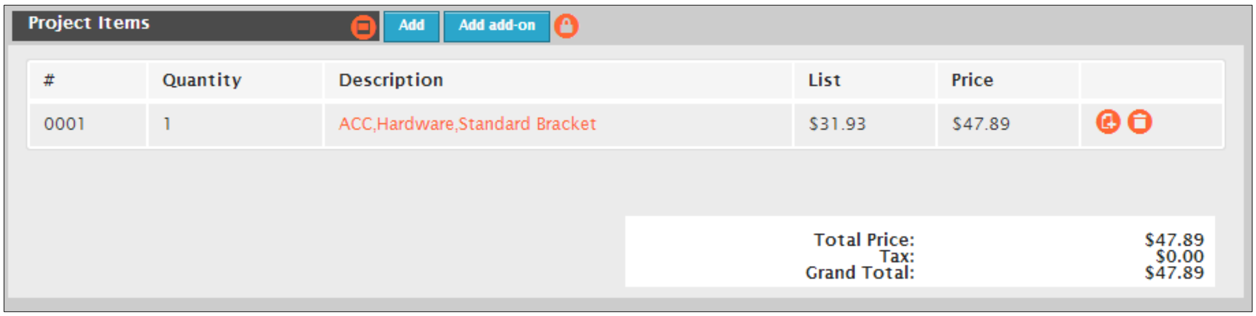
3. In the Adjustments dialog box, select the Manufacturer Catalog Name from the drop-down list as shown in section 1 of Adjustments dialog box below.
4. Select the Product Group to which the adjustment should be made. The Product Groups are shown in section 2 of Adjustments dialog box below.



5. Select whether the Pricing Adjustment will be a change to the Multiplier or based on a Percentage, and enter that amount into the Value field.
6. Click the “Apply” button to apply the Pricing Adjustment to the selected Product Group.
7. Click “Commit Changes” to save all Pricing Adjustments to the Project.

The Pricing Adjustments will be automatically applied to the Items listed in the Project Items section.





9. Quote Review

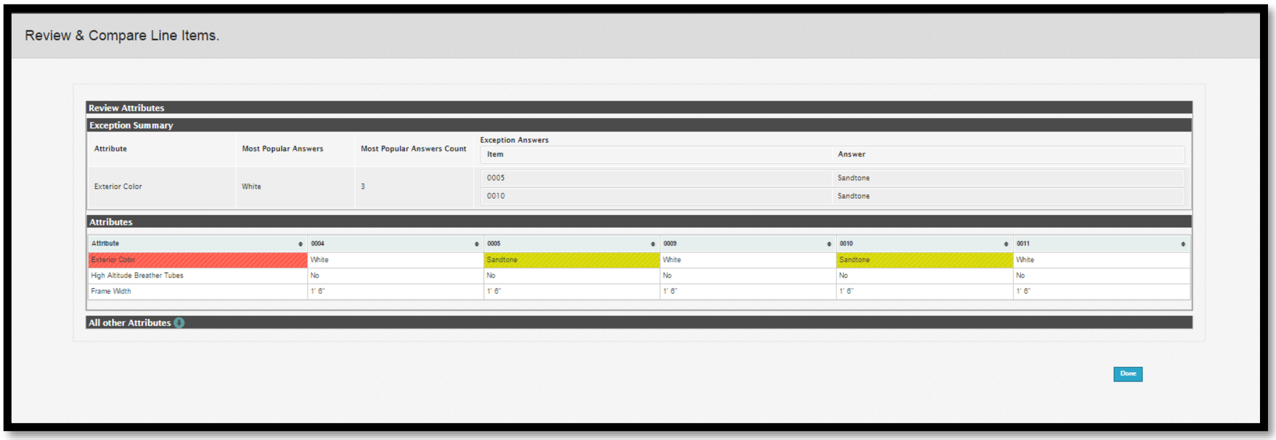
Quote review is a new step in the submit process that gives you a chance to review and fill out any required project fields, but more importantly it allows you to easily reconcile the configuration differences across all the items in the project. This is really helpful to prevent accidental configuration mistakes before you submit. For example, easily see that all interior doors on the project are the same style/material, have the same finish options, use the same hardware type, etc….

9.1 Using Quote Review

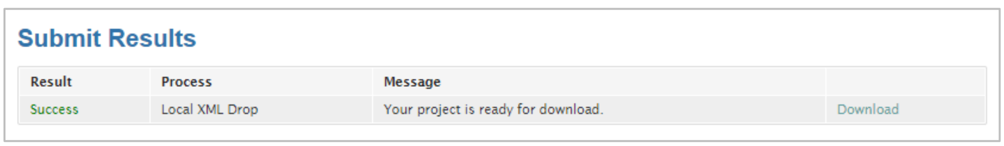
1. Create your project and click **Submit**
2. Fill out Required Project Fields and click **Next**

3. Review and compare project items
   - Every Attribute that has option differences will be highlighted in Red. You can click on any answer for any item to open the item configuration screen. You can then change the answer and save the item to continue reviewing the project items.
   - There are 3 sections of attributes to review. The exception summary provides a summary of the exceptions in the project. Only attributes with exceptions and the appropriate items/answers are displayed. The top section **Review Attributes** are the attributes that have been marked by the admin as

important to review so they are automatically shown. The lower section can be expanded **All other Attributes** to show all other attributes for your review as well.

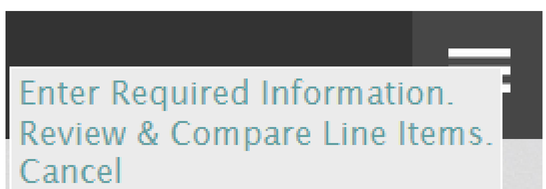


4. Click **Submit** to submit the project

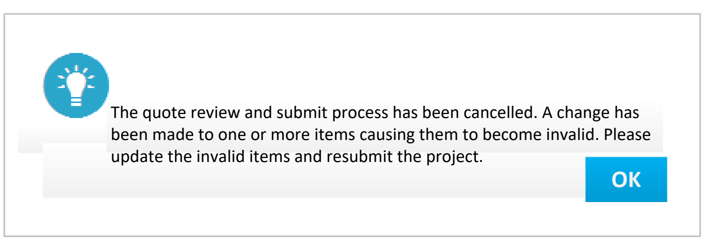


9.1.1 Notes

You can use the Quote Review Menu ☰ to go to any step in the quote review process. You can also cancel the submit process and go back to the projects page.

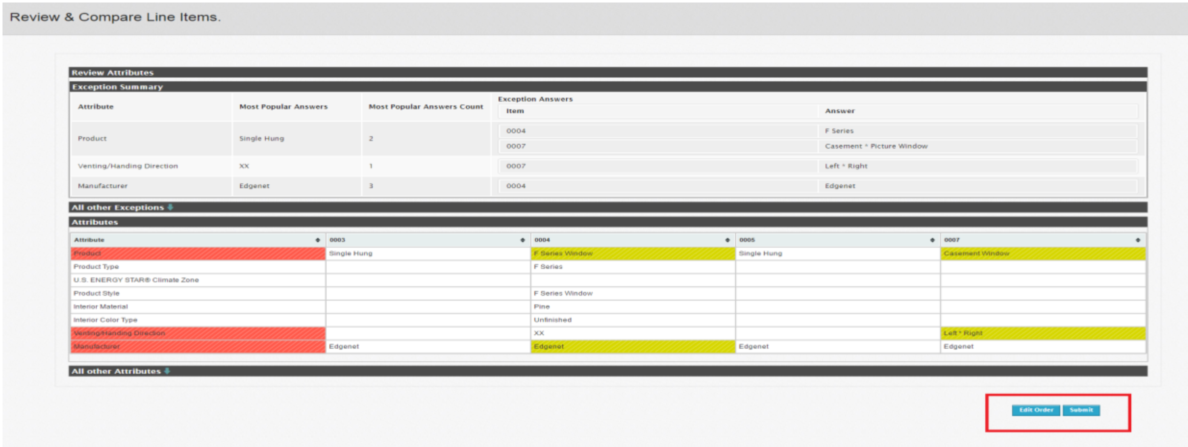


If you click on an answer in the compare and review step and then make and save a change that then invalidates the item the quote review and submit process will be canceled and you will be notified with the following dialog.



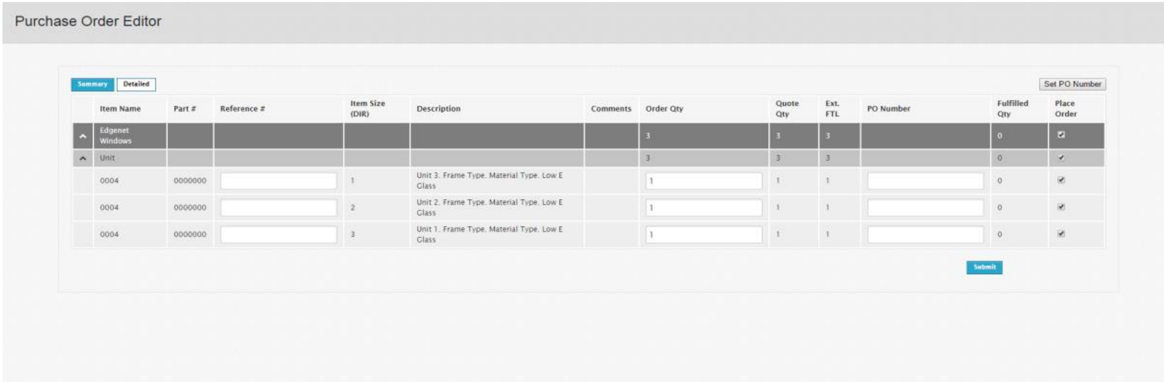
10. Edit Purchase Order

During the submission process, users are given the opportunity to edit the Purchase order (PO), submit, or cancel the order.

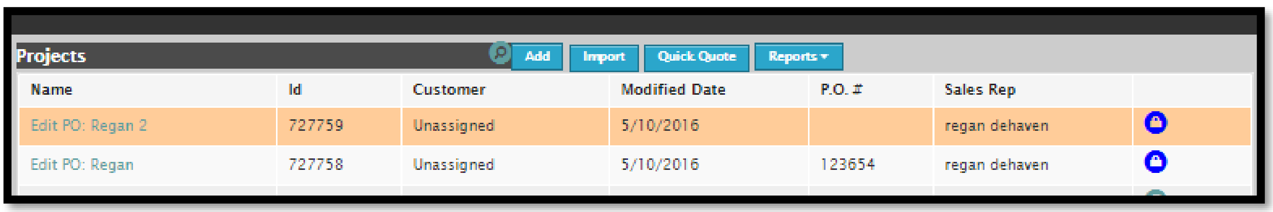


Once on the Edit Purchase Order screen, users will have the ability to edit designated fields. These fields are configurable and can include manufacturer specific custom fields in addition to the standard required fields listed below:

Name	Description	Default value	Editable	Required
Item Name	Item name or number as defined within the project	Prepopulated fromproject item	No	N/A
Description	Manufacturer description of item	Prepopulated from project item		N/A
Reference number	Users can use this field to pass reference information to the manufacturer	Empty	Yes	No
PO Number*	Purchase order number to be sent with each individual order	Empty	Yes	Yes
FulfilledQty	Quantity by line item that has been ordered against this project	Calculated and populated by system	No	N/A
OrderQty	Quantity of each component in current order	Quote quantity	Yes	Yes
QuoteQty	Total quantity of each component in quote	Prepopulated from project	No	N/A
Place order	Yes/No checkbox: If this is checked = Yes and the part will be included on the order. If the box is unchecked = No. The items will not be included on the order.	Checked	Yes	Yes

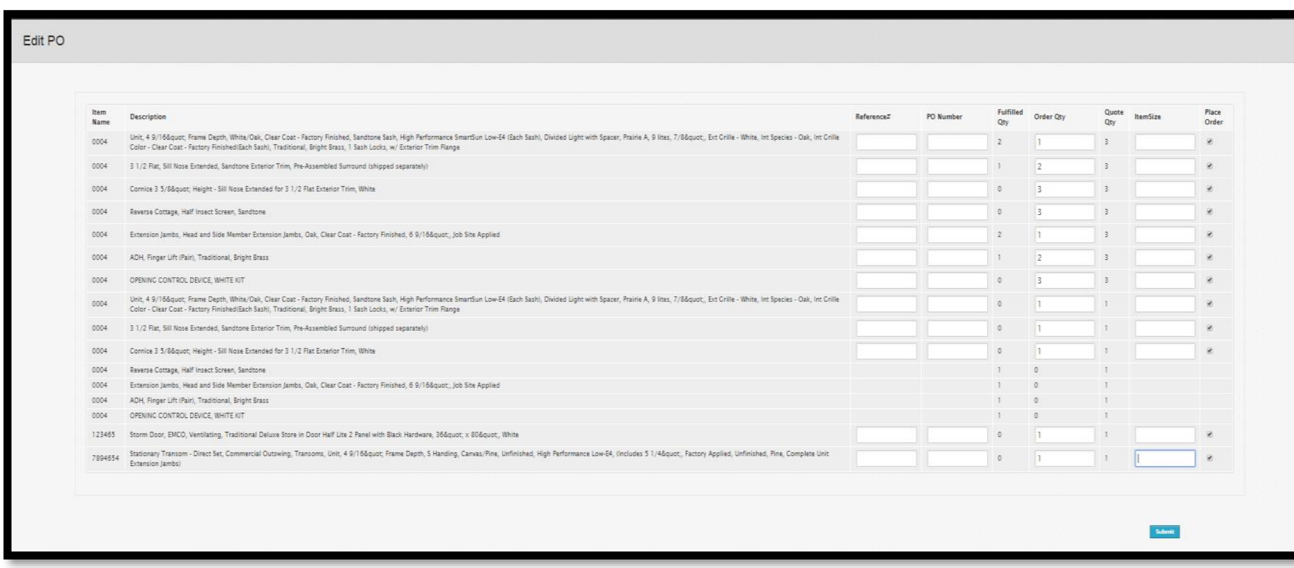


Users will have the option of viewing Edit PO in a Summary View or Detailed View. The Summary View groups all of your items by type, as defined in the catalog. The Detailed View groups all of your items by item.
Users can choose to order only a portion of their configured project items. If an order is placed that contains less than 100% of the project, users can return to the project at a later time to order the remainder of the items. These projects will be available on the user's Project list and will be indicated by a New 'Partially submitted' blue lock icon. This state allows users to continue to submit additional orders, however the project will be locked for editing.



The view users will see upon returning to the Edit PO feature reflects the remaining quantity eligible to be ordered.

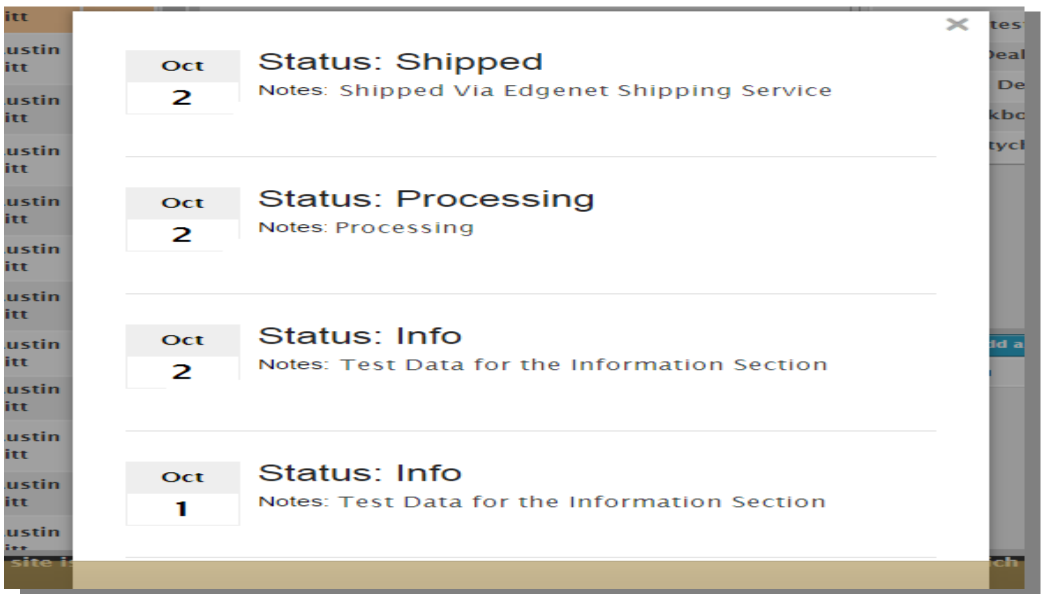
- Same experience exists for return visits to submit additional orders against the project.
- A user can only submit up to 100% of an order. No item can be order more than 1 time.
- A user can submit their order in as many different orders as desired.
- A user can use the "Set PO Number" button to set the PO number for each line item of your project.



Pricing will update, as appropriate, for a partially submitted project if a new compatible catalog is uploaded with different price. Unlocking a partially submitted project will reset the submit process and allow the project to be edited. The Edit Purchase Order functionality will also reset, allowing the user to order the full quote quantity even if previous orders were submitted prior to the project being unlocked.

11. Order Status

With two-way communication status enabled, users will be able to receive updates from the manufacturer on their project. This data exchange may be real-time or may experience some delay, depending on how your manufacturer chooses to send Order Status data. Note: All users will have this functionality enabled, so please contact your system administrator if you believe an error is occurring.



This information can be accessed on the project page to the right of the selected projects ID.

Whenever the order status is changed for a project either by feed or an administrator, the sales rep will receive an email containing the new order status and all previous order status updates.

12. Glossary

12.1.1 Add-On

An Add-On is a Dealer-specific option that can be added to a Project, such as Installation Fees.

12.1.2 Announcement

An Announcement is a clickable image that appears on the main screen that is displayed after logging into m2o Cloud. It serves to provide users information about product changes; promotions; upcoming events; product documentation, such as installation instructions and warranty information; or any other communication related to product offerings or the m2o Cloud system. If there are multiple Announcements available, they will alternate in a carousel.

12.1.3 Answer

An Answer is an option that is selectable for a given attribute, or Question. Answers may be clickable or appear as a text field that accepts text or measurements. Answers are available through the Configurator.

12.1.4 CIP

A CIP file is a file that contains project information that was exported from a SmartClient environment. The file extension is .cip.

12.1.5 Configurator

The Configurator controls the configuration of individual Items according to the Manufacturer's product information.

12.1.6 Custom Fields

Custom Fields are fields that have been created by a Manufacturer or a Dealer to supply additional information about Project, Dealers, Customers, or Items. Because Custom Fields may be created by administrators, it is possible that each user will have slightly different Custom Fields available.

12.1.7 Customer

A Customer is an individual or business purchasing the Item(s) being configured. A Customer may be a contractor, a homeowner, or anyone else that may need to order Items. Each Customer will typically have a Company Name and an Internal Customer ID associated with him/her.

12.1.8 Customer Details

The Customer Details section contains all of the data about the Customer, such as billing and shipping information, contact name, and phone numbers. The Customer Details appear on the "Customers" tab.

12.1.9 Customer List

The Customer List appears on the "Customers" tab and contains a list of all Customers available to the current user.

12.1.10 Dealer

A Dealer is a collective group of users that share the same system settings, product costing, and product availability. A Dealer can be a manufacturer location, a retail chain, an individual store, a distributor, or a group of Sales Reps.

12.1.11 Dealer Network

A Dealer Network is the entire set of all active and inactive Dealers across the entire system.

12.1.12 Help

Help is a link to a Web page within the Configurator that provides the user with additional information about the current Question or Answer option. The data contained within the Help is intended to provide the user with the necessary information to make a decision on which Answer to choose and as a result, minimize the number of product returns.

12.1.13 Item

An Item is a Manufacturer's product that has been configured using the m2o Configurator. An Item contains questions and answers, as well as pricing information for the product. In some cases, an Item may also be referred to as a Mark.

12.1.14 Item Library

The Item Library allows the user to define a list of most commonly used pre-configured items. These items can easily be added to any project.

12.1.15 Item Picker

The Item Picker allows the user to switch Items within a Project without leaving the Configurator Page. This makes navigation more efficient since the user does not have to go to the Project page to view different Items within a single Project.

12.1.16 Local Submit

Local Submit is for internal store or dealer submission only and will not create an order for the manufacturer.

12.1.17 m2o

m2o is Edgenet's special order software that is the industry standard for electronic product catalogs, custom product configuration, and retail special order.

12.1.18 Manufacturer

A Manufacturer is a company that builds and sells products that are offered through m2o Cloud.

12.1.19 Permissions

Permissions are the set of options that each user has available to him. The Permissions control the breadth of functionality that a user may access within m2o Cloud.

12.1.20 Pricing Adjustments

Pricing Adjustments are modifications of the sell price for configured Items. This feature should not be confused with Add-Ons or Pricing Templates.

12.1.21 Pricing Template

A Pricing Template is a user-defined set of adjustments to modify the sell price of individual catalog product groups.

12.1.22 Pricing Template Adjustments

A Pricing Template Adjustment is an individual catalog product group adjustment within a Pricing Template.

12.1.23 Pricing Template List

The Pricing Template List is a list of user-defined Pricing Templates. The Pricing Template List appears on the "Pricing" tab.

12.1.24 Project

A project is any collection of items that is created for a given customer. A project can contain multiple configured items. Additionally, a project may include project details such as shipping and billing information, project terms, customer contact information, and any special pricing add-ons or adjustments that may be required to submit, process, and fulfill an order.

12.1.25 Project Details

The Project Details section contains all of the data about the Project, such as billing and shipping information, Customer selected, and custom fields available. The Project Details appear on the "Projects" tab.

12.1.26 Project Items

The Project Items section contains each of the Items configured for the Project and the associated Prices, Costs, and Margins. Additionally, the Project Items section may contain any applicable Add-Ons. The Project Items appear on the "Projects" tab.

12.1.27 Project List

The Project List appears on the "Projects" tab and contains a list of all Projects available to the current user.

12.1.28 Project Reports

Project Reports are various reports that can be generated with information about selected Projects. For instance, a Project Report may provide information about all Projects grouped by Sales Rep, Customer, or last modified date.

12.1.29 Question

Questions are attributes that make up the needed information for a Manufacturer to build a product. After configuring an Item, each necessary Question will have an Answer associated with it. Examples of Questions are Color, Frame Size Width, Frame Size Height, and Material.

12.1.30 Question Prompt

A Question Prompt is a prompt for the currently selected Question within the Configurator. The Question Prompt typically provides direction to the user as to the information being collected for the current Question. It will appear above the list of Answer options in the Configurator.

12.1.31 Quote Form

The Quote Form contains all of the Items and pricing the selected project, as well as the Project Name, Customer Contact, and Delivery information. This report has the ability to be emailed in a pdf or html file format.

12.1.32 Sales Reps

Sales Reps are the users of m2o Cloud that have the abilities to configure Items and submit orders.

12.1.33 Sub-Dealer

Sub-Dealers are all of the Dealers that are "below" the current Dealer in terms of hierarchy in m2o Cloud. For instance, a Manufacturer may be considered a Dealer, and all stores that sell the Manufacturer's products are its Sub-Dealers. Similarly, a company may be a Dealer, and each of the company's store locations are the company's Sub-Dealers.

12.1.34 Submit

Submit will create an order that is immediately sent to the manufacturer for processing and fulfillment.

12.1.35 Submit Process

A Submit Process defines how a Project is transmitted to the Manufacturer to complete an order. A Submit Process can also be used for internal sales order submission. There are four types of submit process: Parent Submit, Email, Local File, and Remote.

12.1.36 Submit Type

There are two Submit Types – "Local Submit" and "Submit". A Project may use one or both of these Submit Types when completing an order.

12.1.37 Total Project Price

The Total Project Price is the price for the entire Project, including all Pricing Adjustments and Add-Ons.

12.1.38 XML

XML standard for Extensible Markup Language. The XML output from m2o Cloud contains the necessary information for a Manufacturer to fulfill and order, including Dealer and Customer information.