# Resource Manual

### For

# Table of Contents

Welcome to our team at Cornerstone Building Brands! One tool you will use often is AccuQuote. This tool is designed to generate quotes and place orders for our Window and Patio Door products. This guidebook is designed to help you effectively use AccuQuote as a quoting and ordering tool for our **Ply Gem** and **Silver Line** brands.

## Let's Get Started

- If you do not have the AccuQuote software downloaded on your computer, you will need to do this first. Click on the link below and follow the download & installation instructions:
    - [Install Cornerstone AccuQuote](#)
- Once AccuQuote is successfully loaded onto your computer, double click the [icon] icon on your desktop
- Enter: Username and Password
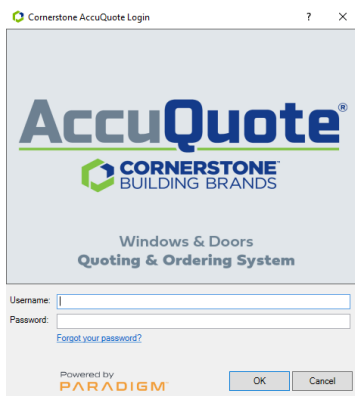


- Click on **OK**

Note: This will open the Main Screen

**Be sure to change your password as soon as you login the 1ˢᵗ time**

- Go to **Tools**; Click on **Change Password**; enter New Password
- Then, add your email address so you will be able to click on the **Forgot Password** on the login screen. Should you forget your password, we will send you a temporary password to log back into AccuQuote.
- Go to **Tools** and click on **User Management**
- Highlight your name, click on **Edit**, and **Add/Verify**

## Base Camp

Paradigm Base Camp is a free tool that you install on your machine to identify, optimize, and update Paradigm quote entry systems.  Click the link below to install now!

https://myparadigm.com/base-camp/

To learn more about Base Camp recommended settings and integrations, right-click the WTS Base Camp icon  in your system tray and select Documentation from the drop-down menu.
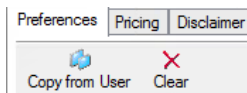
## User Preferences

- Go to the toolbar and click on **Tools**
  - Choose **User Preferences**
  - Product Knowledge
    - Choose the Product Options that you will use most frequently
    - Note: you can set preferences by brand
  - Pricing
    - Set pricing as needed
    - Enter Tax
    - Freight (as applicable), etc.
  - Disclaimer
    - Short note/statement that will appear on the report
  - Click on **Save**

## Customer Contact Preferences

- Highlight Customer Contact
- Right-click on **Edit**
- Pop-up Box titled – Customer Contact
- To mirror the User Preferences, click on **Copy from User**



- Click **Yes**
  - Preferences for PK information
  - Pricing
  - Disclaimer

Note: This will override previous User Preference Settings if you input new options
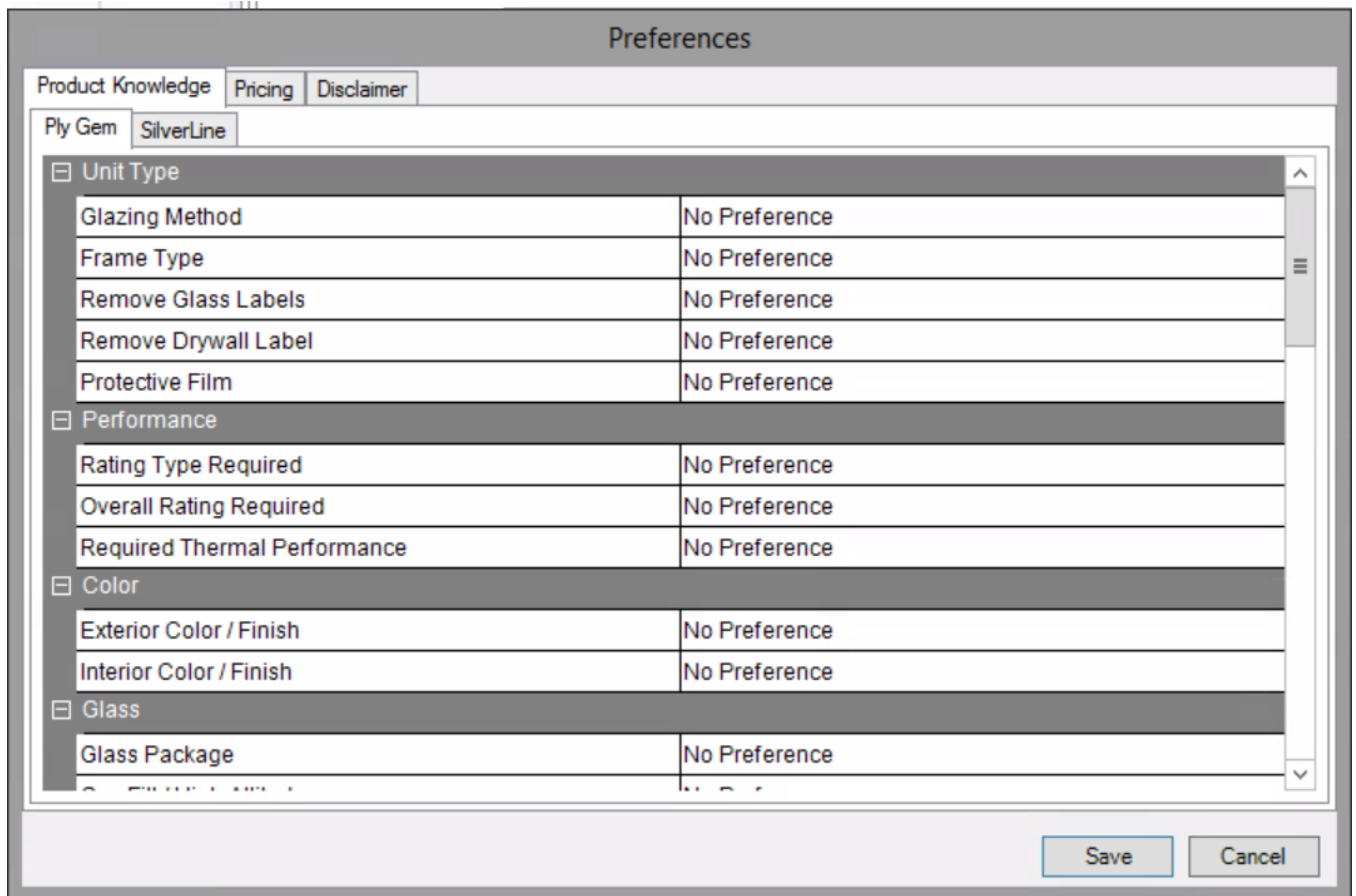
  - Click on **Save**

## Quote Preferences

- Open Quote

- Click on the [Pref] icon
    - Product Knowledge
        - Choose Product Options that you will use most frequently
        - Note: you can set preferences by brand
    - Pricing
        - Set pricing as needed
        - Enter Tax
        - Freight (as applicable), etc.
    - Disclaimer
        - Short note/statement that will appear on confirmation
    - Click on **Save**

    Note: This will override previous Preference Settings

# Global Changes

Global Changes allows the user to make a change/changes across multiple lines in much the same way you would set preferences. This new workflow removes the need to set global changes in the catalog as well as the separate activity for performing the change. Global changes are not available to a user after making question and answer edits to a configuration.

Note: Dimensional changes do not apply.

If multiple question and answer edits are made you can manage how they are applied from the Apply Changes to Other Lines screen by using the right and left arrow to review each change individually. After making any changes to a line item, users will now be prompted to make changes to the rest of their lines.
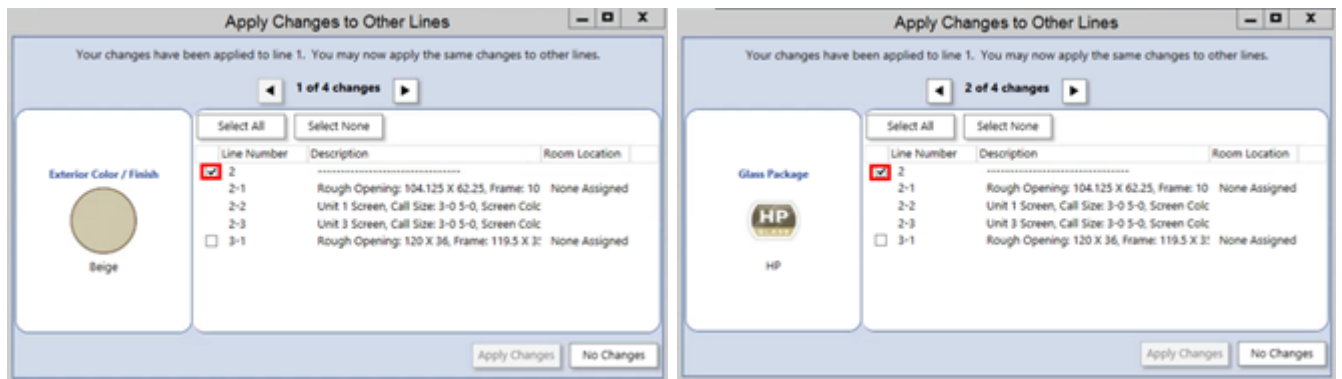


Note: Applying a change to a line automatically applies subsequent changes to that line. For example, checking the box to apply the first change to line 2 also applies the second, third, and fourth changes to line 2. Likewise, unchecking a change will also uncheck subsequent changes for that line.

It is recommended to step through each change to be sure all of the correct changes are applied.

After stepping through all changes and clicking Apply Changes, the Global Change Results are displayed along with any errors.

## Mark-Up Percent, Gross Margin, Flat Mark-Up and Discounts

- **Mark-up Percent (%)** – Fraction of Selling Price over Cost
    - Example: 20% Mark-Up
    - $116 dealer cost X 20% = $23.20
    - $116 + $23.20 = $139.20 retail price
- **Gross Margin** – Cost reflected as fraction of Selling Price
    - Example: 20% Gross Margin (auto-fills Markup to 25%)
    - $145.00 (retail) - $116 (dealer cost) = $29
    - $29 divided by $145 (retail) = .20 Gross Margin
- **Flat Mark-up Amount ($)** – This is a flat dollar amount added to each item
    - Example: Mark-up of $45.00
    - $116 dealer cost + $45 = $161.00 retail
- **Discount (%)** – From List Price
    - Go to: Tools; Customer Management; highlight & edit
    - Go to: General Tab (Mark-up/Discounts limits area)
    - Choose **Discount** (no limits) – **Submit**
    - Log-off and Log-on again for updated pricing

## Adding Taxes

There are two ways of adding taxes to a quote. The first way is to use Global Changes to add your tax to the quote you are currently working on.

- Click on the **Global Changes** button
- Select **Pricing Changes** from the drop-down menu
- Enter your tax in **Tax 1(%):** 5.00 = 5%
- Click **Apply to all** or select which lines you want to apply tax to
- Click **Apply**
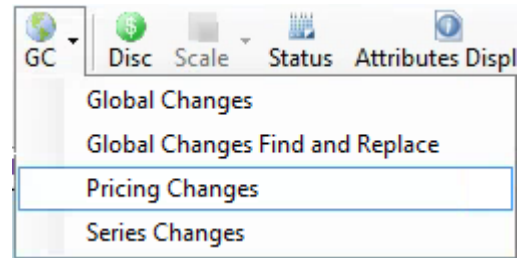
To set taxes in User Preferences follow these steps:

- From the **Tools** menu select **User Preferences**
- Select the **Pricing** tab
- Enter the desired tax and click **Save**

Note: Adding tax in the User Preferences will set taxes on all future quotes/lines. Use the aforementioned Global Change workflow to add taxes to an existing quote.
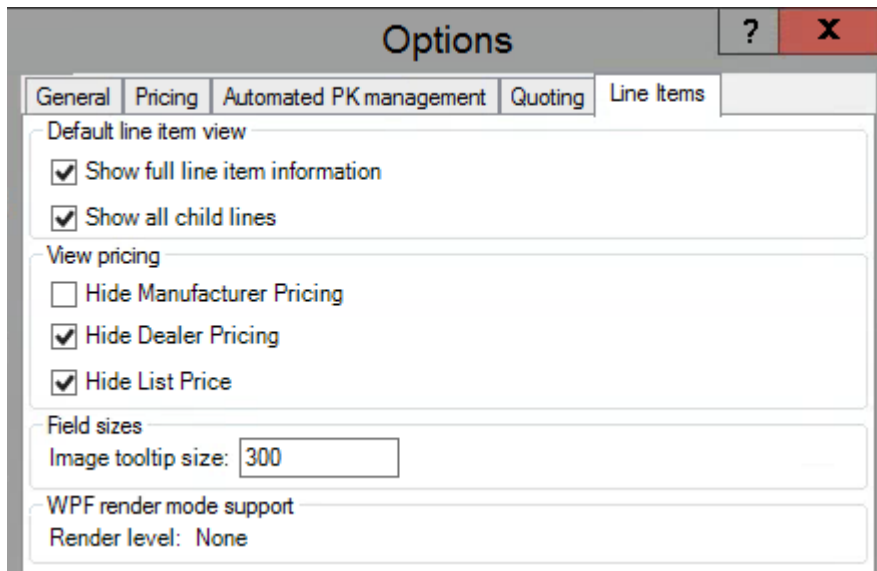
## How to Hide My Price from My Customers

- When you are creating lines with your customer looking at the screen, you may want to hide your price line. Click the **Price Options** button at the bottom of the **Line Items** tab, and select **Hide Dealer Price**. You can also do this for the List Price.

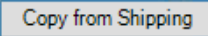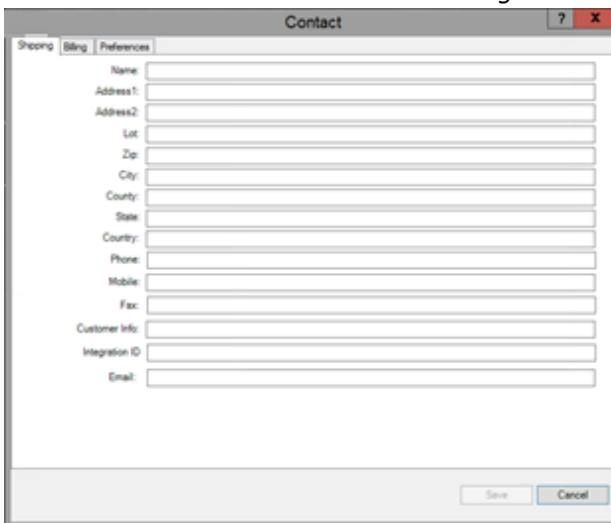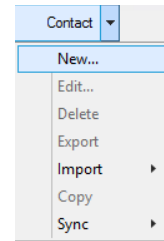| Hide Manufacturer Price |
| --- |
| Hide Dealer Price |
| Hide List Price |
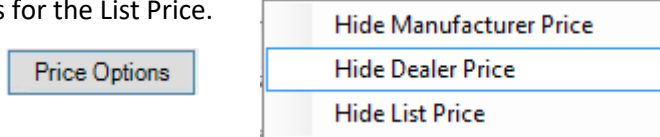
Price Options

- If you want those price lines to always be hidden, you can do that in your **User Options**.
- Go to **Tools** and select **Options**.
- On the **Line Items** tab, check the **Hide Dealer Pricing** and **Hide List Price** checkboxes

**Options** ? X

General | Pricing | Automated PK management | Quoting | Line Items

Default line item view
- ☑ Show full line item information
- ☑ Show all child lines

View pricing
- ☐ Hide Manufacturer Pricing
- ☑ Hide Dealer Pricing
- ☑ Hide List Price

Field sizes
Image tooltip size: 300

WPF render mode support
Render level: None

## Creating Customer Contacts

## Repeat Customers



- Go to Task Bar: **File**
- Choose **New**
- Choose **Contact**
- Or, use the **Drop-Arrow** on Customer Contact in the left margin
- Fill-in Pop-up box
  - o **Shipping Tab** – Fill in Customer Information
  - o **Billing Tab** – Fill in different than Shipping details
    - ▪ Or, use Copy from Shipping button 
  - o **Set Preferences** – Product, Pricing, & Disclaimer
    - ▪ Set unique details for this Customer Contact
    - ▪ Or, use **Copy from User** option
    - ▪ See Preferences – *Page #*

## Creating Project Folders
### Folders exist to organize your quotes – Located on left side of the main window

**Multiple setting options:**

- Select **View Settings**
- Drop arrow box under view
- Choose from **Group by Quote Status**
  - ○ **Status** of Quote will dictate which **Project** the quote will be located to view, edit, etc.
  - ○ Example: Active, Not Saved, Template, Ordered, etc.
  - ○ Simplified: Quote mandates placement – you don't have to manually "build" project folders.
- Or, choose **Group by Project**
  - ○ **Status** by Project Name can be structured to fit your company's needs
  - ○ Example: by Date (Jan 2016, Feb 2016, etc.)
  - ○ Example: by Project (Olsen Addition, Franklin Park, Marigold Lane, etc.)
  - ○ Example: by Sales Name (ISS/Jeffrey, OSS/Dale, DJackson, etc.)
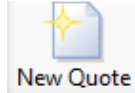    - ▪ (ISS-Inside Sales/OSS-Outside Sales with first or last name)

Note: Status Button lists "Projects" either A-Z or Z-A
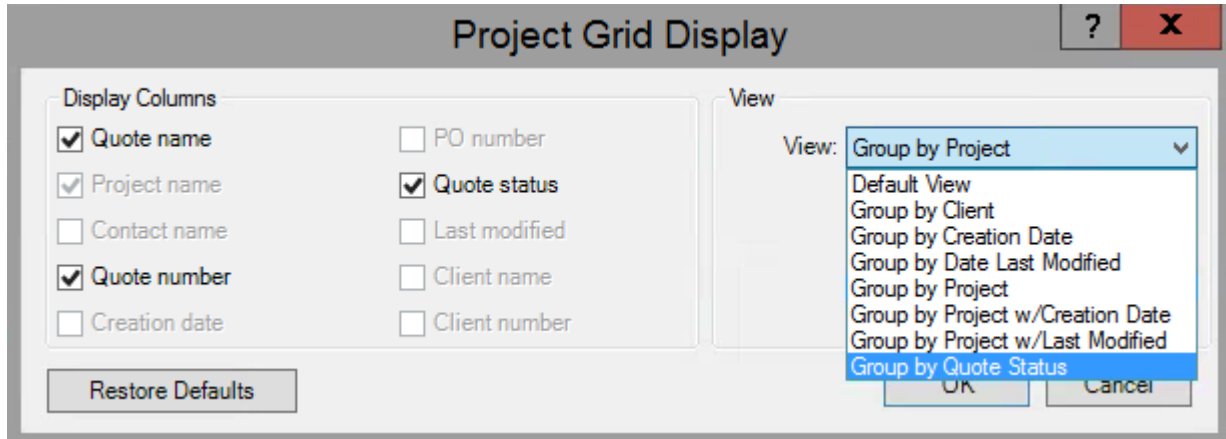
## Click on New Quote Icon



- Pop-Up—Enter Quote Information
    - o Quote Name
        - ▪ (Jackson Home, John Doe, Sally's Living Room)
    - o Project Name
        - ▪ For simplicity – Leave "Unassigned" and it will reside under the "Unassigned" Folder
        - ▪ Otherwise, assign a "Project" name
        - ▪ (Jan 2016, OSS/Joseph, Magnolia Lane, etc.)
    - o Create from Template, Accept, or Cancel



- Once the Quote Name and Project Name are entered, click on **Accept**
- If you change your mind and don't want this quote, click on **Cancel**
- **Create from Template** will only work once you save an existing quote as a template for future quotes (Master Quote, etc.)

## Inside Quote

- Click on **Sold To** tab
- Enter the Customer's Contact details under **Shipping**
    - o Or drag from **Customer Contacts** list on left
- Click on **Billing** tab
    - o Use **Copy from Shipping** button if information is the same
        - ▪ Continue adding "Job Info" as needed
- **Save Quote** to keep details entered up to this point
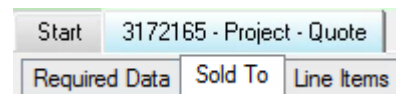




## Quote Effective Date

This feature allows customers to model future pricing based on recently announced price increase adjustments based on their specific account numbers. Use Quote Effective Dates in the system through the following steps:

- Update your quote to the latest PK Version, available on non-ordered quotes by right-clicking the quote in the project tree, or by making a copy using the **Copy Quote** button. Failing to do so may result in incorrect pricing
- On the **Required Data** tab check the box next to **Effective Date** to enable the Quote Effective Date field
- Select your desired price effective date using the calendar icon located at the far right of the  **Select a Date** field
- After selecting the effective date, the system will run through each line and update pricing accordingly. Once updates are complete, click the **Accept** button to proceed back to the Required Data tab. Your quote is now updated with the effective date pricing.

Note: A quote with an effective date cannot be submitted for order or certification. The quote effective date must be removed to perform these actions at which time pricing will revert back to current day values. To distinguish printed reports, the Quote Effective Date has been added to the bottom of the report when selected.

- Click on **New** icon inside quote
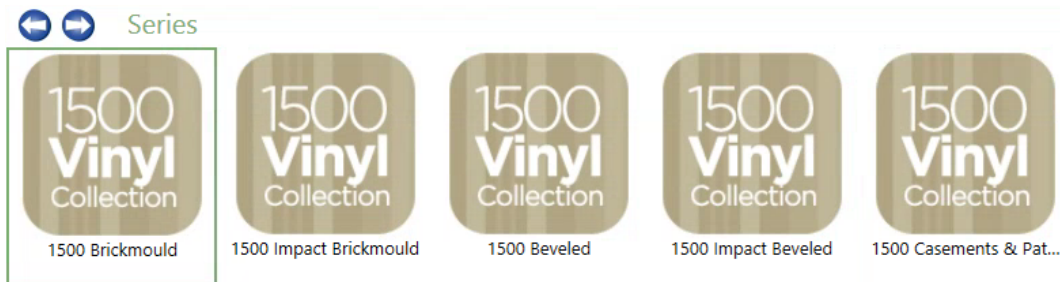


- Select the **Ply Gem** Icon
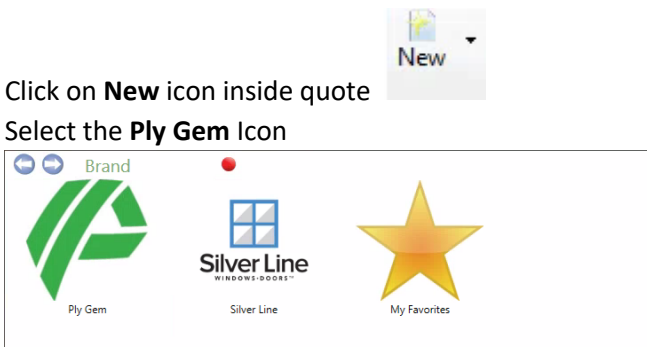


- Select your **Product – Windows or Patio Doors**
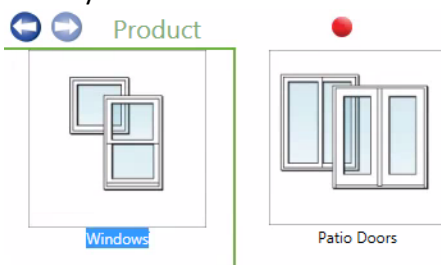


- Select your **Material – Vinyl**, **Aluminum**, **Aluminum Clad**, **Vinyl Clad**, **Wood** or **My Favorites**
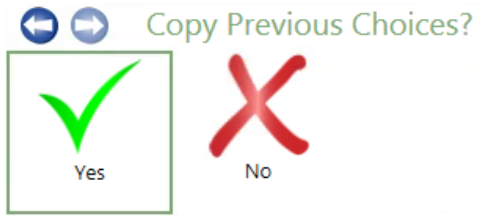


- Select **Series**



- Select **Product Group**
- Select Product Configuration
- Choose **Window Set**
- Copy previous changes? **Yes** or **No**

Note: This will copy previous options and speed up the line entry. However, if you added options that you do NOT want to be copied, you will need to make those changes on the new line item.

Copy Previous Choices?

Yes        No

- Finish answering questions
- **Save** Options
- The unit is complete when all the Steps have a green check mark

| Product Selection ✔ | Size & Features ✔ | Glass ✔ | Grilles ✔ | Hardware, Screen & Trim Options ✔ | Product Information ✔ |

## Mulled Options: Factory Mulled, Field Mulled, or Common Mull

- On left – look for **Horizontal Mulls** or **Vertical Mulls**

| Horizontal Mull | | Vertical Mulls | |
|---|---|---|---|
| Mull Type | FactoryMull | Mull Type | CommonMull |
| Mull Category | Mull Data | Mull Category | Mull Data |

Note: Mulls are based on the direction the mullion is applied

- Click on **Factory Mull** for units to be mulled in the factory
- Click on **Field Mull** for units being mulled in the field
- **Common Mull** – Continuous Mainframe (T-Mull)
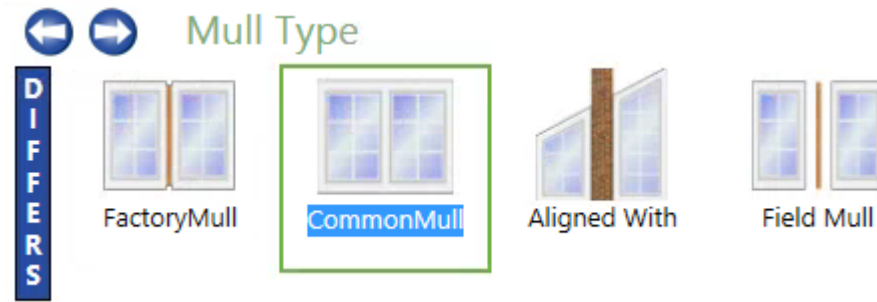


- **Finish** and **Exit**

# Aligned with Mulls

- Enter the Mulled Unit
- Click on **Vertical Mull**
- Choose **Aligned With**

Note: "Aligned With" is for units that will not be factory mulled. (Example: DH/QR's on each side of a fireplace. This helps align grids.)

- Choose **Custom**
- Input the distance between the units (in inches)

Note: The distance between each unit must be the same.

| Vertical Mulls | |
|---|---|
| Mull Type | Aligned With |
| Mull Description | Custom |
| Custom Width | 2.5 |
| *Mirror Mulls* | Yes |
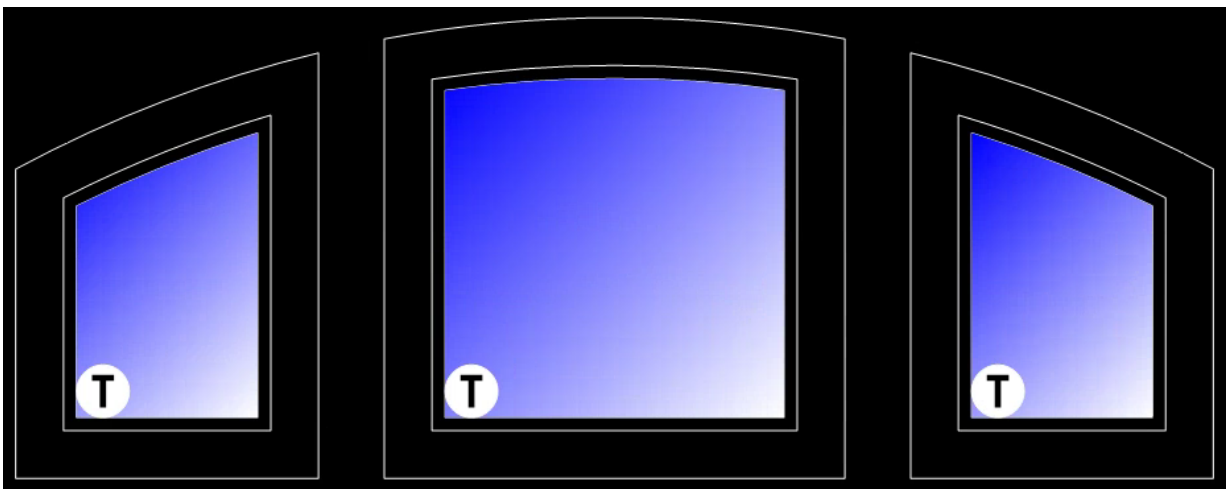
Remember to give total width on unit size including the distance between units

Note: Availability of Aligned With Mull varies by product line.

## Copy & Mull

With Copy & Mull, users can select an existing unit from the configuration to mull onto the configuration.

- Click Mull Unit

  ○ Mull New Unit
  ◉ Copy & Mull

- Select Copy & Mull
- Then select the unit you would like to mull from the configuration below and click Next.

  NOTE: The selected unit will appear highlighted in red.



- Choose where you would like to mull the unit to the configuration and click Next.
- In the next window you will be able to select your Stacking Rules, including the Mull Type, Mull Category, and Mull Description.
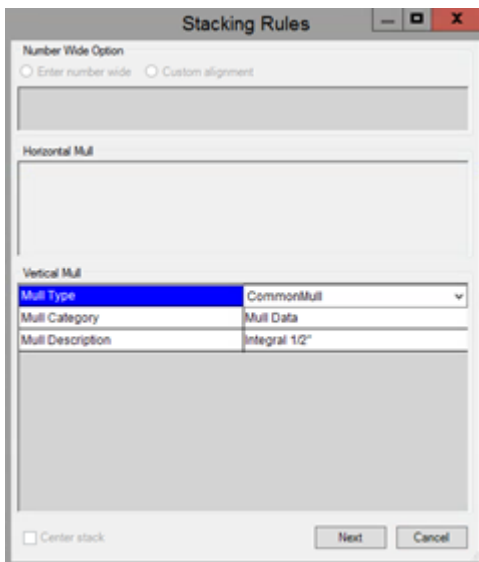


- Select Next to finish mulling the unit to your configuration.

## Add Grilles

- Edit line item
- Open **Grille Options**
- Click on **Grille Type** and choose which grille type you want
    - Contour, 1" Contour, and Flat
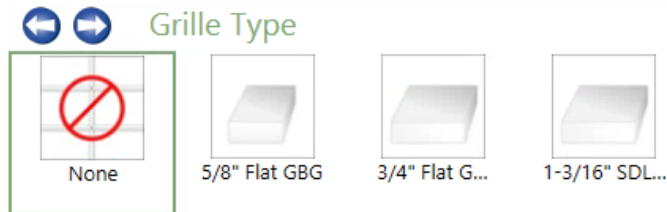


- Click on **Grille Pattern**
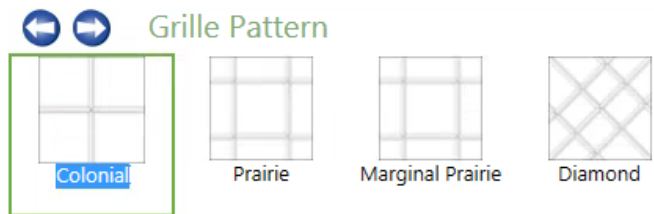


- **Finish and Exit**

## Copy Quotes

- Right Click on Quote listed under **Projects**
- Choose **Copy**
- Change **Quote Name** and/or **Project Name**
- **Save** and **Close**

**OR**

- In an open Quote
- Click on **Copy Quote** icon
- Change **Quote Name** and/or **Project Name**
- **Save** and **Close**

## Create Template/Master

- In open Quote
- Click on **Create Template**
- Create Template Name & Description
- Choose **Accept**
- **Save** and **Close**
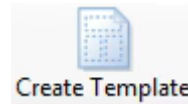
Note: A great way to make "Master Quotes" for Model Homes, etc.

## Create Alternate Quote

- Right click on Quote listed under **Projects**
- Choose **Create Alternate**
- Add **New** options (example: grids, glass package, color changes, etc.)
- **Save** and **Close**

**OR**

- In open Quote
- Click on **Create Alternate** icon
- Rename Quote
- Make any changes
- **Save** and **Close**

NOTE: When you want the same units on multiple quotes with other options.

# My Favorites

- In Quote, highlight the line item that you want to save
- Click on **My Favorites** icon
- Next time you add a line item you can click on **My Favorites** Tab
- Choose specific configurations from list saved





- Make any applicable changes
- **Finish** and **Exit**

Note: "My Favorites" saves configurations used frequently

New
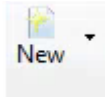
- Select **Window And Door Products**, Click **OK**
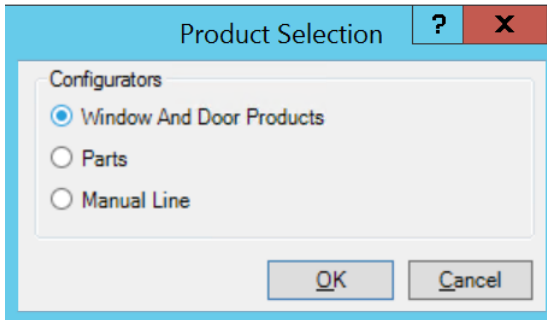


- Select a **Brand**



Silver Line

- Select **Product** – **Windows** or **Patio Doors**



- Select **Series**

- Select **Product Family**



| Single Hung Nailing Fin w/J-Channel | Single Hung Nailing Fin | Single Hung Masonry Flange | Single Hung Insert Frame | Double Hung Insert Frame | Hopper Multi-Purpose |
|---|---|---|---|---|---|
| 2900 | 2200 | 2100 | 2000 | 1200 | 5900 |

- Select **Product Group**



Single-Hungs  Gliding Windows  Picture Windows  Transoms  Specialty Shapes

- Choose **Product Configuration**



Single-Hung  Twin Single-Hung  Triple Single-Hung  Unequal Triple Single-Hung  Picture w/Flanking Single-Hungs  Single-Hung w/Flanking Picture Windows

Single-Hung Archtop  Twin Single-Hung Archtop  Single-Hung No Interlock  Twin Single-Hung No Interlock  Triple Single-Hung No Interlock

- Copy previous changes? **Yes** or **No**

Note: This will copy previous options and speed up the line entry. However, if you added options that you do NOT want to be copied, you will need to make those changes on the new line item.



Copy Previous Choices?

Yes     No

- Finish answering questions

- To save the line item, click on **Add to Quote**   Add to quote

22

# Factory Mulling

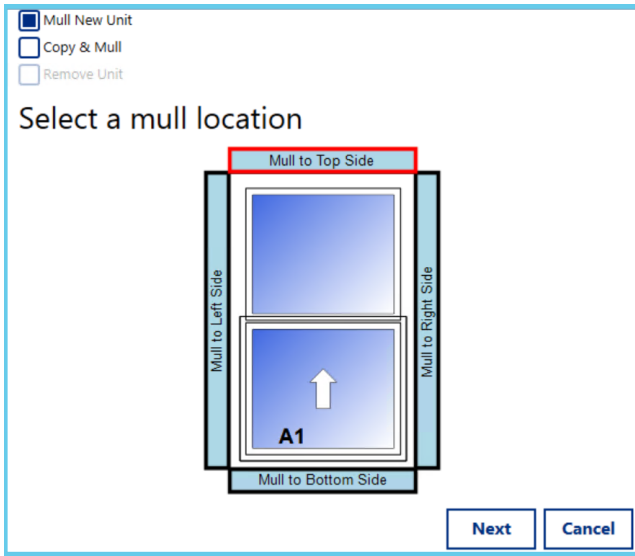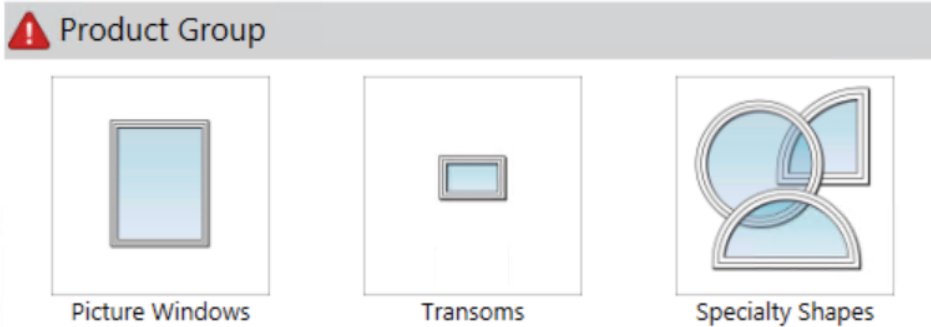- Choose **Series**, **Product Family, Product Group** and **Product Configuration**



- Note: The Mull button will be disabled until all questions are answered 
- Finish adding Options by answering questions in the order that they appear

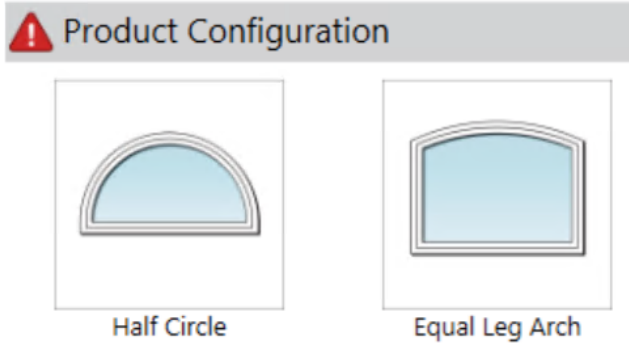- Click on **Mull** 
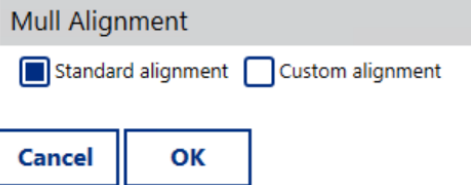- Select a **Mull Location** and click **Next**



- Select **Product Group**

- Select **Product Configuration**



- Select **Mull Alignment** and **OK**
  - **Standard alignment -** Units will mull over entire unit
  - **Custom alignment** – able to select mull points, used for aligning unit over center of a triple unit



- Answer any additional questions for the second unit
- Save unit by clicking on **Add to Quote**

# Enhanced Steps Configurator Overview

**Visual indicators.** Green check marks show which questions and steps are completed, and red triangles indicate required questions and steps that aren't completed.

**Easy navigation.** Users can see all questions in one place, instead of clicking on individual questions. Users can navigate to different steps using the step bar at the top of the configurator, or with the next step buttons at the bottom.

**Consolidated answers.** Default answers are shown alongside manually selected answers, so it's easy to understand the entire configuration and change answers if necessary.

**Summary.** The Step Configurator shows a summary of the configuration, which automatically expands to the step that a user is working on. This summary gives them a view of everything they need to answer and anything that's already been answered.

# Enhanced Steps Configurator Overview

## See Limitation Messages on Steps

To view limitation messages for step questions, select a step with a limitation icon. You are taken directly to that step, where you can see any pending messages or limitations. When you create a quote, you might see limitations for unanswered questions or questions that have hard (red) or soft (yellow) stop limitation.

## Configuring a Product

1. On the **Line Items** tab of the quote, click **New Line Item**.
2. Depending on your setup, you might need to:
   a. Select a brand.
   b. Select a product. After you've made your selections, the Step Configurator appears.
3. In the **Step Configurator**, answer all the questions to configure the unit your customer wants.
   a. A green check mark on an answer indicates that you've selected it.
   b. Similarly, a green check mark on the step name (such as Size & Features) indicates that all the answers in that step have been answered.
4. Move to the next step in the configuration by clicking the step names in the navigation bar at the top, or the next step name under the last question on a page.
5. When your configuration is complete, click **Add to Quote** to add the line item to the quote and return to the Line Items tab.

## Adding and Mulling Units

You can use the Mull feature to mull a unit to your configured line item. For example, you can stack windows on top of one another, or add them side by side. For each unit you add or change, you might need to answer additional configuration questions.

Two different mull workflows are available:

- **Mull New Unit.** Allows you to configure a new unit to mull.
- **Copy & Mull.** Allows you to copy a previously configured unit in the current quote to mull.

To stack a new unit on top of or beside an existing unit in the configurator, click **Mull** and a select **Mull New Unit** if not already selected. Next you will select the location the new unit will be mulled to the current unit then click **Next**. Complete the mulling process by selecting the product you want to mull to the current unit using the filtered product selection. When you're done, click **Ok**. The step configurator returns to where you left off in the line-item configuration.



**Mull Alignment** – where available you can choose between **Standard** alignment or **Custom** alignment. **Custom** alignment allows you to control the design by selection a starting and ending stacking point. If needed, click **Reset** to clear your selections. Click **Finish** to return where you left off in the line item configuration.

To stack an already configured unit on top of or beside an existing unit select **Copy and Mull** from the mull window and click **Next**. Select the location you would like to the copied unit to me mulled and select **Next**. The step configurator returns to where you left off in the line-item configuration.
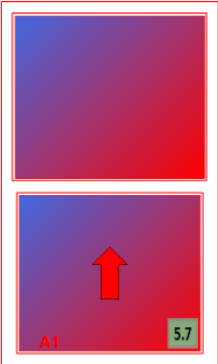


### Removing Mulled Units

You can remove a mulled unit by clicking the **Mull** button and selecting the **Remove Unit** option. Next select the unit you want to remove and click **Finish**. The step configurator returns to where you left off in the line-item configuration.
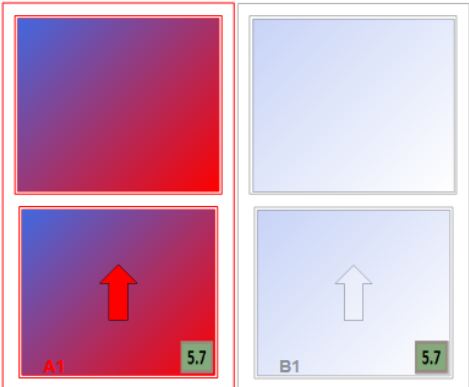
## Edit Mulled Units

The Step Configurator allows you to quickly edit individual mulled units or whole mulled configurations. You can also select multiple units to edit them all at once.

There are two different methods you can use to edit mulled units:

**Use clickable drawings**. The clickable drawings feature allows you to select one or more units within the mulled configuration by simply clicking on the unit drawing. When the units you want are selected, you can make configuration changes that apply just to those units. The units you are currently editing will be listed at the top in a lighter blue color.
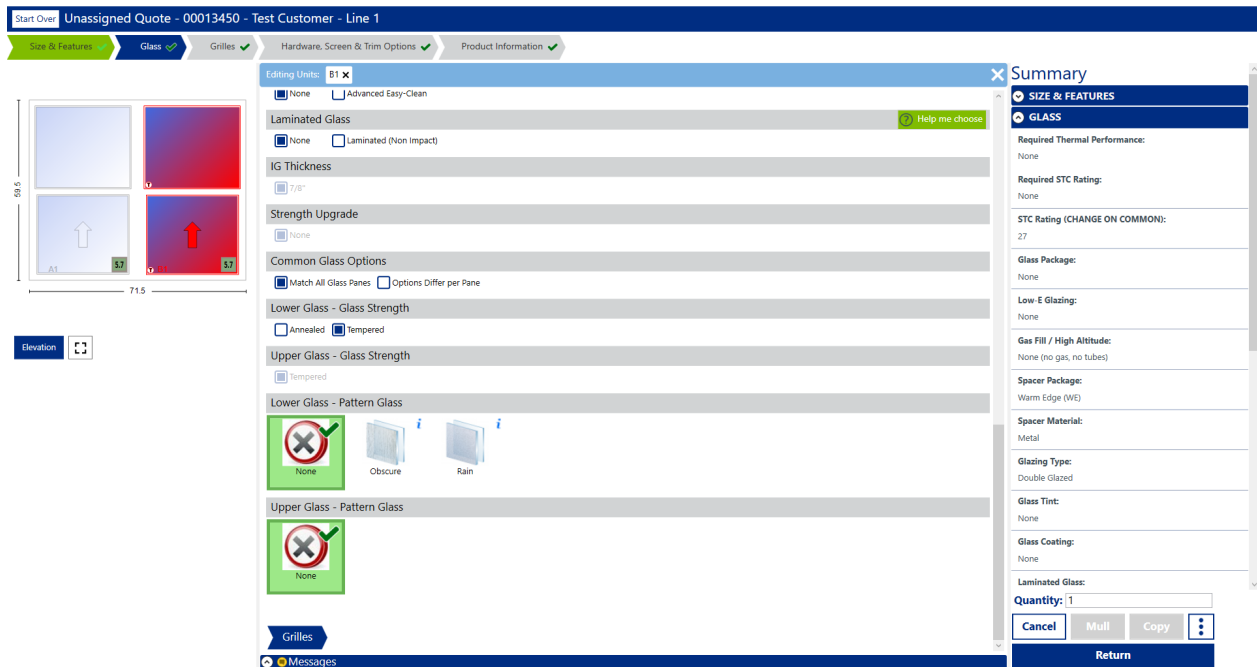
# Enhanced Steps Configurator Overview

**Use "Set per unit" or "Set for all" buttons**. After you've mulled units together, a button appears for questions that might be answered differently for each unit of the configuration. This button toggles between the following functions:

**Set per unit**. Make selections for each unit individually.



**Set for all**. Make selections that apply to the entire mulled configuration.

**Quick Access Buttons**

Quick-access buttons in the bottom toolbar make it easy to update quantities and move on to the next step of building your quote.
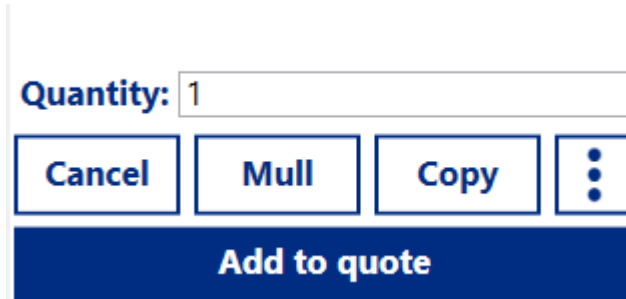


**Cancel**. Close without saving changes.

**Mull**. Mull a new unit onto the current configuration.

**Copy**. Finish this line and start a new line with the same options and configuration.

**Additional Options**. Display additional options: Window Group Information, Description and Export Unit.

The Step Configurator does not contain the "Finish and New" option, the Copy and Start Over button can be used as an alternative to quickly starting a new configuration within the configurator.

## "View" Option is available to help you decide which type of report you want to print or email

### Print Report

- Open Quote
- Click on **Print/Email** icon on the top task bar
- Choose **Print**
- Select **Report**
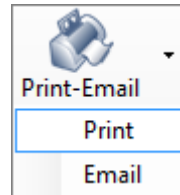
- o Cornerstone Dealer Quote
- o TwoStep Cost Report
- o TwoStep List Price Report
- o Etc.

- Choose **Print**
- Select **Printer**
- Specify **Printer Properties**
- Select **Ok**

### Email Report

- Open Quote
- Click on **Print/Email** icon on the top task bar
- Choose **Fax/E-mail**
- Select **Report**
    - o Cornerstone Dealer Quote
    - o TwoStep Cost Report
    - o Etc.
- Select **Fax/E-Mail**

## CAD

DXF Exporting has been improved to allow the user to export a better DXF drawing or Printable PDF drawings. Multiple lines can be selected which will produce DXF's or PDF's for each line item. Drawings include dimensions and can include a quote block with Quote Number, Export Date, & Line Number. Options are shown below.
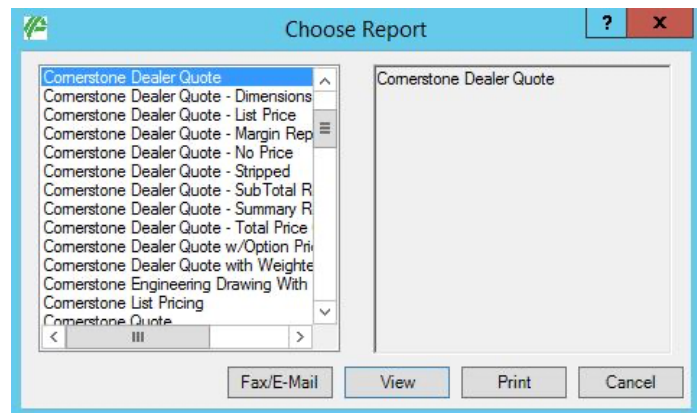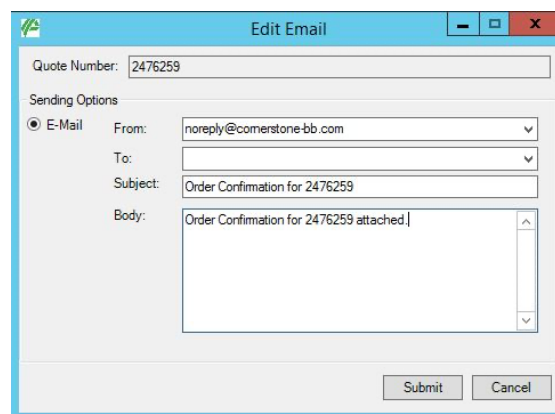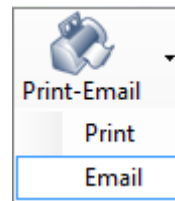


- Add as **New** line item and click **CAD**
- Export line item as DXF or PDF
- **Save** under **My Documents** and import into Auto-CAD
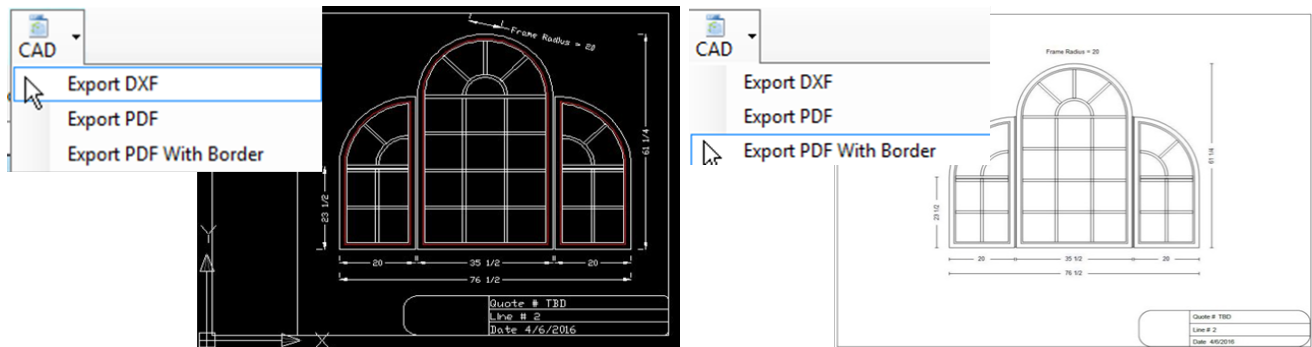


NOTE: By holding down the Ctrl Key, the user can select multiple line items for DXF/PDF creation. Users can select a range of line items by selecting a line item and holding the Shift Key while selecting a range of desired line items.

## Accessory Parts – Ply Gem

- Create new line item or copy line form existing order
- Under **Unit Type** select the Part you need



- Answer all questions
- **Finish and Exit**

## Accessory Parts – Silver Line

- Create new line item or copy line form existing order
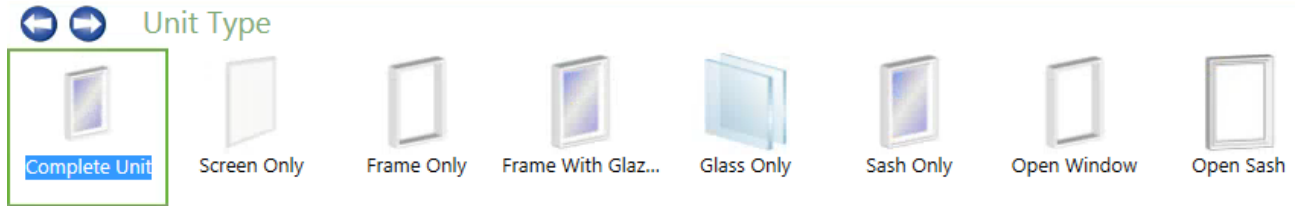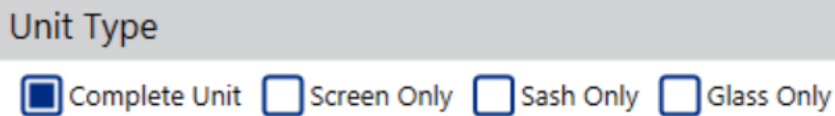- Under **Unit Type** select the Part you need


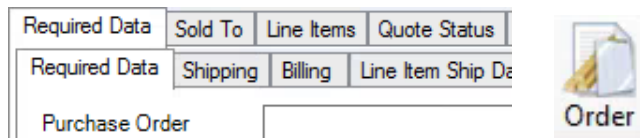
- Answer all questions
- **Add to Quote** to save the line item

NOTE: Accessory Parts may not be available for all products.

## Turning a Quote into an Order

- Edit the Quote
- Add PO under **Required Data** tab
- **Save** Quote
- Click **Order** from the top task bar
- Attribute Display will show discrepancies between lines

| Line # | Color / Finish | Glass Package | Screen Option | Grille Application | Lower Glass: | Lower Glass: | Upper Glass: | Upper Glass: | Nail Fin Setback |
|--------|---------------|---------------|---------------|--------------------|--------------|--------------|--------------|--------------|------------------|
| 1-1 | Almond | LE | No Screen | None | Tempered | No | Tempered | No | 1 3/8" |
| 2-1 | Almond | LE | No Screen | None | | | | | 1 3/8" |
| 2-1 | Almond | LE | No Screen | None | | | | | 1 3/8" |
| 3-1 | | None | Half Screen | None | Annealed | None | Annealed | None | 1 3/8" |
| 3-1 | | None | Half Screen | None | Annealed | None | Annealed | None | 1 3/8" |

- Choose **Accept**
- Select **All**
- Select **Accept** after you okay these limitations

## Order in Queue to Process

-  = Pending Confirmation

-  = Order Processed

## Changes to a Quote/Order

- **Edit** Quote and make changes
- **Save**

## Glass Icon's on Pictures

- Tempered 

- Clear Opening Area (sqft) 

## Add Your Logo to Your Reports

- Add your logo to the report
  - Create a copy of your company logo named "dealerlogo" (this is case sensitive) and save it to your My Documents folder. (Note: Please use one of the following file formats for your logo: .jpg, .jpeg, .png, .bmp, .tif, .tiff, .gif)
- Adding your address to the report
  - Create a file called "dealerinfo.txt" (this is case sensitive) and save it to your My Documents folder. Please format as seen below with your information after the =.
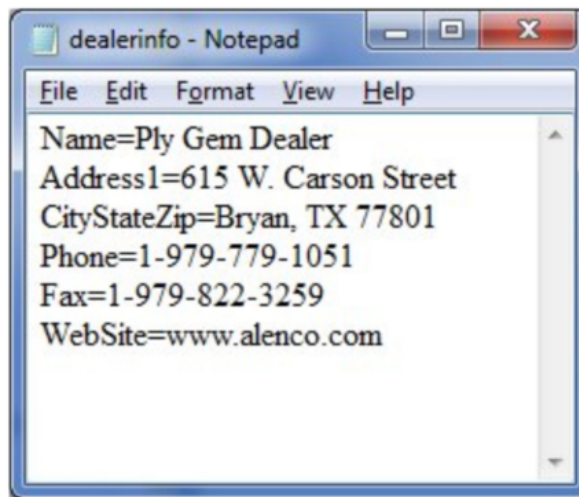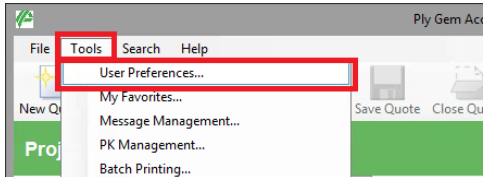


- Your address information and logo will appear on all reports beginning with "Cornerstone Dealer Quote".

# Add Disclaimer to your Reports

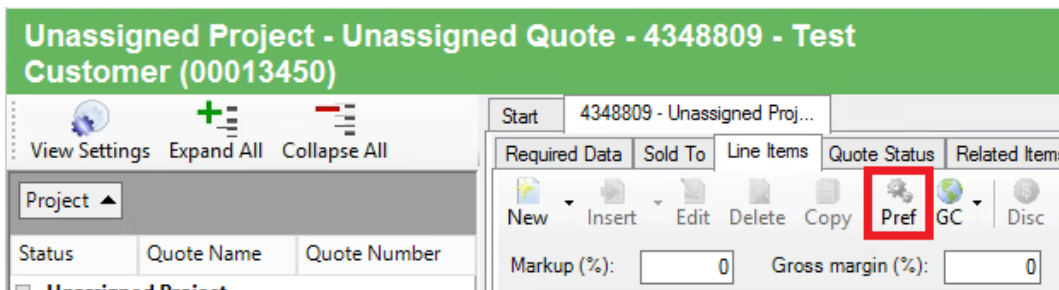In AccuQuote, click **Tools** > **User Preferences.**



Enter your disclaimer in the text box on the **Disclaimer** tab:



This disclaimer will be automatically added to all new quotes you create and will display on dealer reports.

To override this disclaimer on an individual quote, in your quote, click the **Pref** button on the **Line Items** tab.



Enter your disclaimer in the text box on the **Disclaimer** tab.

## Recommended Settings for Tablets

The following are the recommended settings for tablets or High DPI devices:

- **Resolution Size:** 1440 X 900
- **Display Size:** Set to Smaller (may be indicated as 100%)

If you prefer to increase the display size from Smaller it is recommended to disable the DPI setting for the application.

- Right-click the shortcut used to launch Ply Gem AccuQuote and select properties from the drop-down menu
- On the properties menu click the **Compatibility** tab and check **Disable display scaling on high DPI settings** as shown below
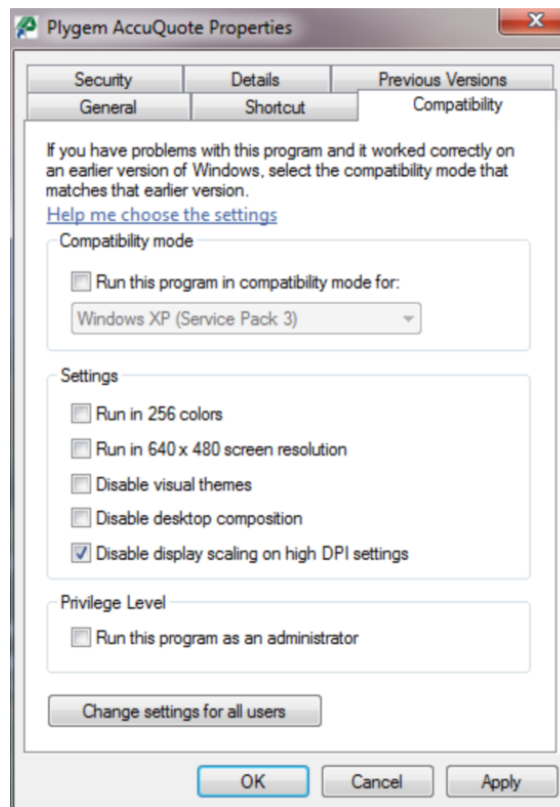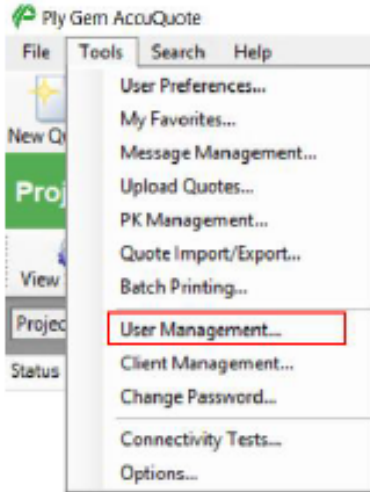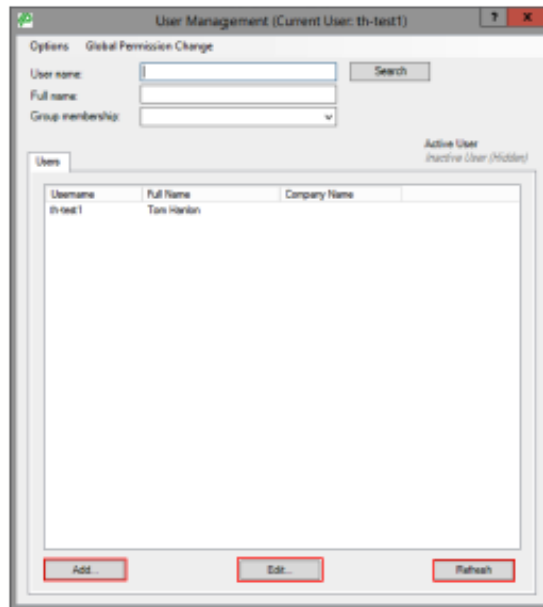
**Dealer Admin instructions**

To Add, Edit or Disable users go to Tools>User Management



If you are a Dealer Admin your User Management screen will have the options to Add, Edit and Refresh.
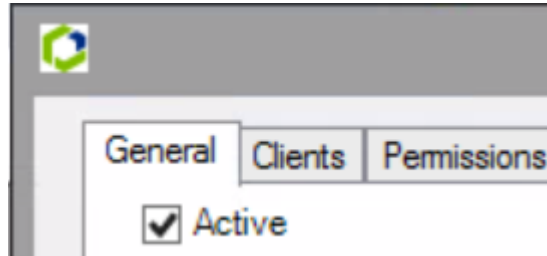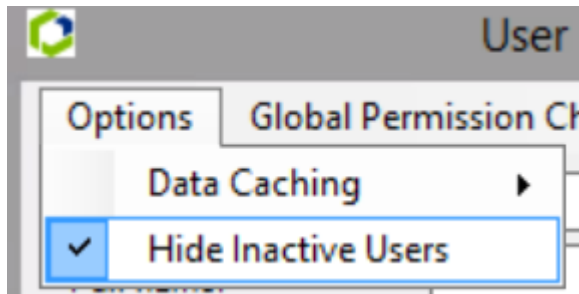
**Managing existing users**

If you hit Refresh you will get a list of all the users associated with your branch or branches.

To deactivate a user, highlight their name and hit Edit. In the Edit User window uncheck Active.



To reactivate a user, go to Options and uncheck Hide Inactive Users. You can then highlight their name and hit Edit. In the Edit User window check Active.
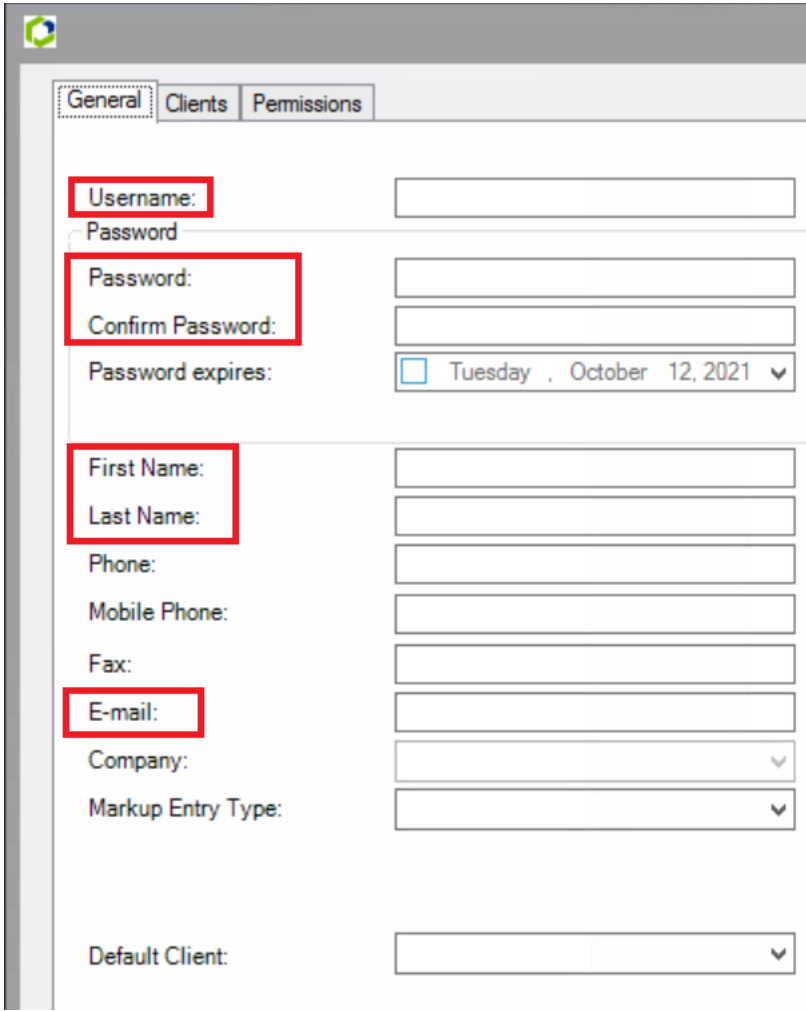
**Adding new users**

To add a new user hit the Add button

1. General Tab

        a. Create user name – _first.last@company

              i. Ex: john.doe@123lumber

        b. Create password and confirm

              i. Passwords have a 90 day expiration policy by default

        c. Add users first & last name

        d. Add email – _This will allow the user to use the Forgot Password tool on the login screen
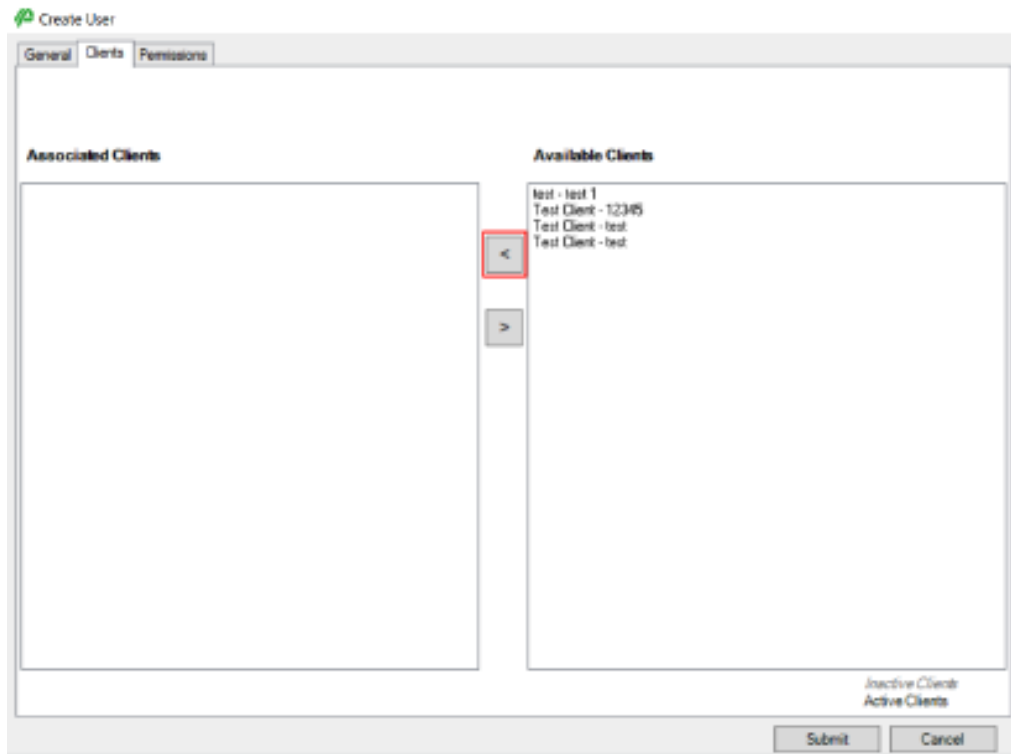
2. Clients Tab – _Highlight the client or clients that you want the user to be associated with and hit the button to move it to the Associated Clients list.



     i. If you associate the user with more than one client you will need to go back to the General tab and select one of them as the Default Client. Which client you pick does not affect the users access

3. Permissions Tab

    a. Brand associations – _Select the brand or brands you want the user to be associated with. Not all brands will be available. This depends on which brands your branch is associated with

    b. Group – _This is where you set the users security group

        i. General User – Steps: Standard order entry

        ii. General User – Steps Dealer Admin: Standard order entry + can Add\Edit users

        iii. General User – Steps List Only: Can create quotes but can only see list price and cannot place orders

        iv. General User – Steps Quote Only: Can create quotes and see cost but cannot place orders

    c. DO NOT make any changes to the Associated or Available permissions lists



    After all fields have been filled hit Submit

**How Do I Sign Up?**

- Contact your Cornerstone sales representative

**Username/Password Invalid**

- If you receive an "Access Denied" message when logging in, click **OK** and go back to the log in window and click on **Forgot Your Password**
- Enter your username and your email address and a temporary password will be emailed to you
- **For Silver Line**, contact the AccuQuote Desk at cbbsupportdesk.slaq@cornerstone-bb.com
- **For Ply Gem**, contact the AccuQuote Desk at accuquotehelp@cornerstone-bb.com

**Error Messages**

- Click on **Copy**
- Go to your email account
- Send to: cbbsupportdesk.slaq@cornerstone-bb.com
- Add subject line
- In body:
  - Give brief description of what you were trying to do when the error message appeared
  - Right-click and copy error message to email
  - Send