

Installing and Updating the JELD-WEN Quick Quote Program

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Obtaining the required Quick Quote files [\(Back to Top\)](#)

The JELD-WEN Quick Quote program is a powerful Microsoft Windows retail window and door quoting program. This state of the art tool is designed to help the JELD-WEN dealer be successful in quoting and selling the wide range of JELD-WEN products and accessories. The program is produced and maintained by JELD-WEN.

Obtaining the Quick Quote Files

The Quick Quote program can be obtained at the JELD-WEN Partners Portal. The JELD-WEN Partners Portal is a web site specifically designed for JELD-WEN dealers providing information and many useful sales tools. The JELD-WEN Partners Portal can be found at <http://PartnersPortal.JELD-WEN.net>. To access this secure website, a customer will need to register using a valid e-mail address, the customer name and the JELD-WEN Customer Number. The e-mail address will become the login. A password will be assigned to the e-mail address. The Quick Quote files are located on the Quick Quote tab of the Partner's Portal.



The Quick Quote program requires three files: a Quick Quote License File, Quick Quote installer and Quick Quote catalogs (depending on the JELD-WEN product lines offered by the dealer).

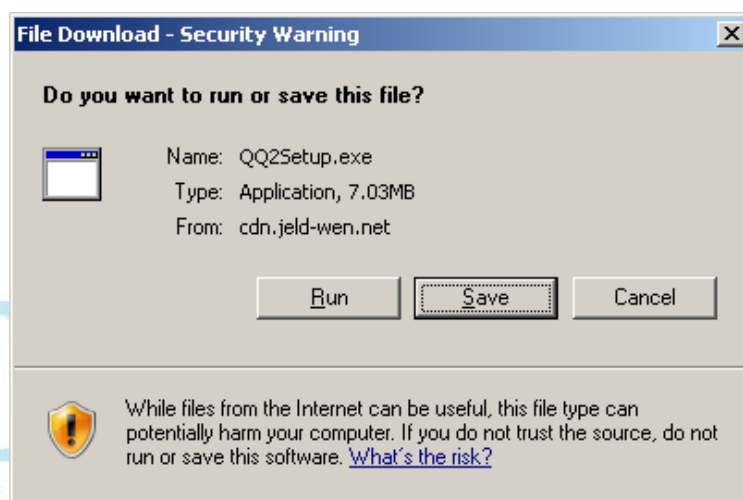
- License File – (#####.qqlic) - The license file provides Quick Quote with information concerning JELD-WEN customer number, the JELD-WEN product lines (catalogs) available to the user, pricing options and ordering capability. The license file will only need to be downloaded one time unless there have been changes to the account or a user is informed of a specific need to update the license file.
- Quick Quote Installer/Update – The Quick Quote Installer File (QQ2Setup.exe) contains the program files required to install/update and run the Quick Quote program.
- Quick Quote Catalogs – Each JELD-WEN product line is found in a Quick Quote catalog. The catalogs contain the products, options and features found on the JELD-WEN product being quoted.

Downloading the Quick Quote Files

The Quick Quote files must be downloaded from the Partners Portal to install or update the Quick Quote program. It is important to note, once the files are downloaded, the files can be shared between computers. For example, the files may be saved to a network server, a USB drive, CD or other storage medium. It is not necessary to download the installation or update files to each computer. Users must have the appropriate rights to save files and install/update the Quick Quote program.

Users can determine where the files can be saved. Because it is easy to delete files from the Windows desktop, saving files to the user's desktop, especially license files is not recommended. A suggested structure is to create a folder under the C:\Documents and Settings folder named "Quick Quote Updates" with two subfolders named "Catalogs" and "License Files" where the files can be consistently saved.

The user will be prompted with a dialog box when they click on the Quick Quote file links in the Partners Portal. A dialog box will appear asking the user to Run, Save or Cancel. Always select the option to Save the file and save the file to the appropriate location on the computer.



The files will be downloaded from the JELD-WEN Partners Portal.

Installing/Updating the Quick Quote Program and Catalogs [\(Back to Top\)](#)

Once the files are saved, locate the files to install/update the Quick Quote program and catalogs. The files can be run from the Windows Run box or by using Windows Explorer. Clicking on the files will launch the installer programs. **Important note:** Always run the Setup/Installer program prior to running any catalog files.

First Time Installation of the Quick Quote Program

When Quick Quote is installed for the first time, the setup program will need to access the internet for a one-time download of files from Microsoft. The files, called the Microsoft.NET Framework, provide the computer with the necessary backbone to run the Quick Quote program. This process is automatic and will require a broadband or high speed internet

connection. These files may require administrative rights to install on the computer. Please consult your IT department to determine if this applies.

If a high speed internet connection is not available, a series of files can be downloaded from the Partners Portal. [Click here](#) for additional information on these files and the process for installing Quick Quote in this environment. .

Installing/Updating the Quick Quote Program

Locate the saved Quick Quote installer program (QQ2Setup.exe). Double click on the program to launch the installation/update. The installation and update consists of the following steps:

- Review of the License Agreement
- Downloading of the Microsoft .NET Framework (first time install only)
- Determining the program files folder (directory)
- Installation of the Quick Quote program.

While there are several configurations available for the JELD-WEN Quick Quote program, the program files will need to be installed on every computer running the Quick Quote program. Creating a shared quotes database will be discussed in detail later in the document.

Installing/Updating the Quick Quote Catalogs

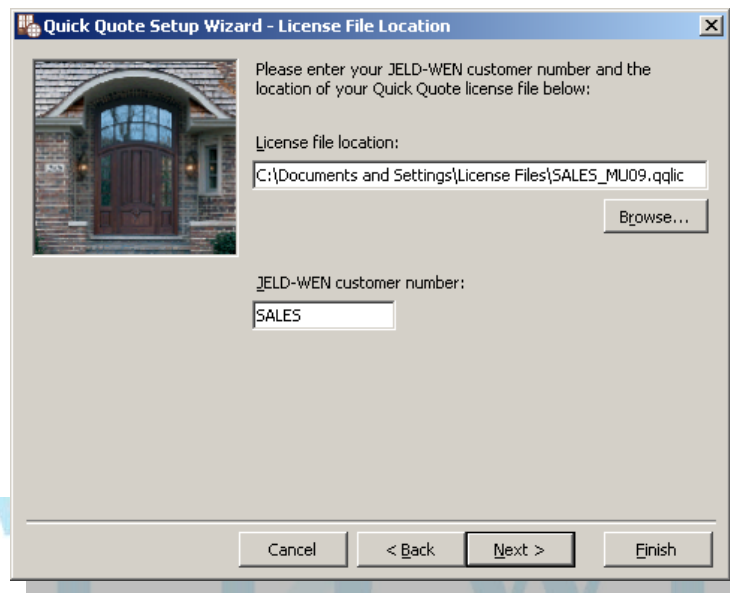
Locate the saved catalogs. Double click on the files to launch the catalog installation/update. The user is prompted to install and finish the installation of the JELD-WEN Quick Quote product catalogs.

A Quick Quote icon will be placed on the user's Windows Desktop.

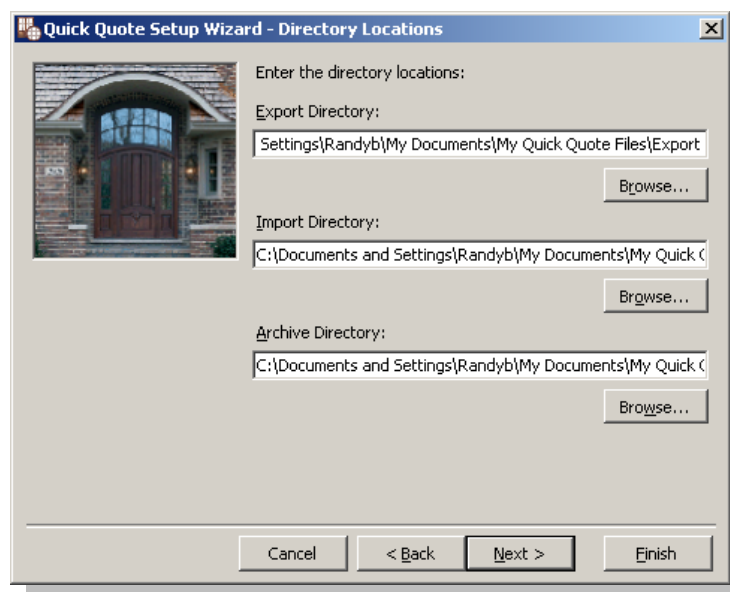
Setting up the Quick Quote Program

After Quick Quote is installed, Quick Quote will open the Quick Quote Setup Wizard. The Quick Quote Setup is designed to quickly and easily provide the program with the information required to run the Quick Quote program.

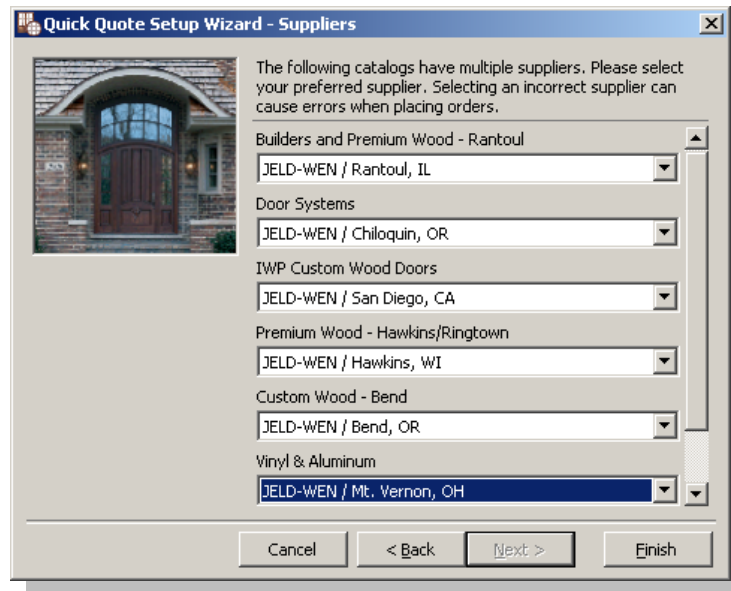
- The user will be prompted to load the license file from either the Partner's Portal or use a previously saved license file. Enter the appropriate method of loading the license file. The user will be prompted to enter the customer number. The customer number field will display an error if the JELD-WEN customer number does not match the customer number or the number is incorrectly entered.



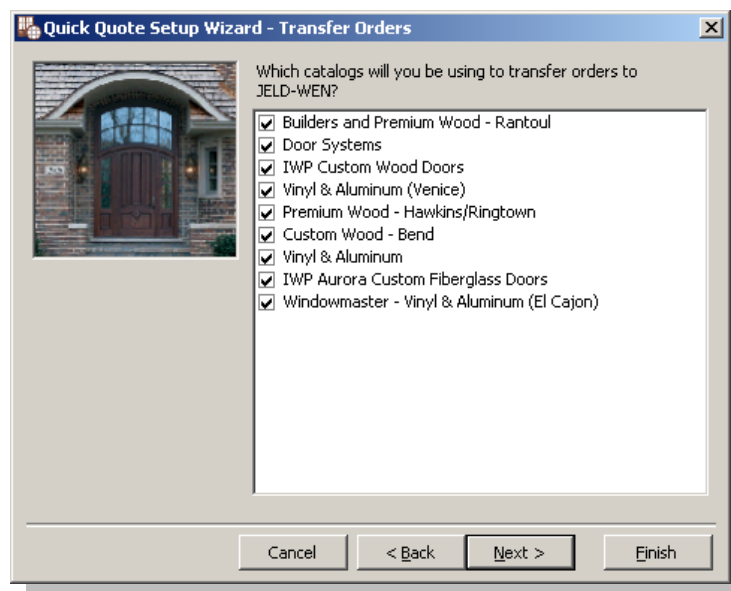
- The user will be prompted to enter locations for the Import, Export and Archive folders. It is normal to take the default values.



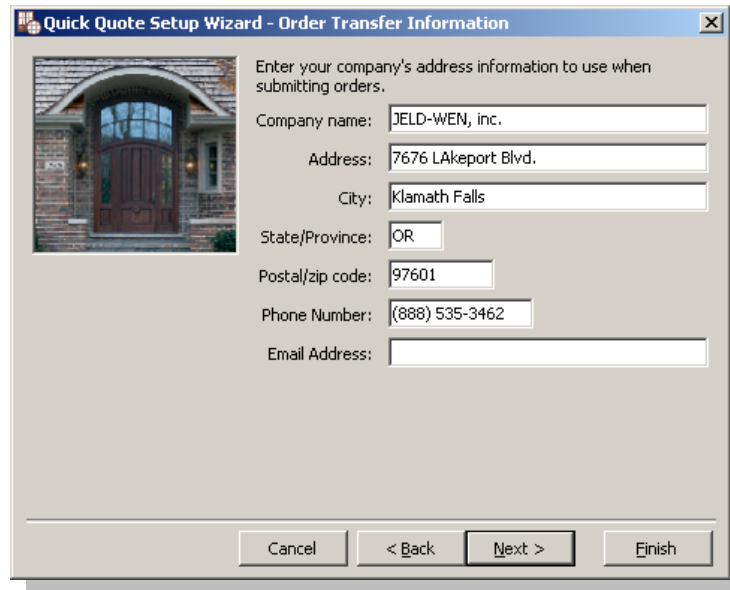
- The user will be prompted to select the JELD-WEN supplier if the user's Quick Quote program uses catalogs that have multiple suppliers (JELD-WEN manufacturing operations).



- The user will be prompted to enter a SiteID. The Site ID is a unique alphanumeric value that should not be replicated in the user's organization. Typical values are the user's initials, computer designation, etc.
- The user will select the catalogs from which they will be sending orders electronically to JELD-WEN. The user will be prompted to select the JELD-WEN operations to which they will be sending the orders electronically.

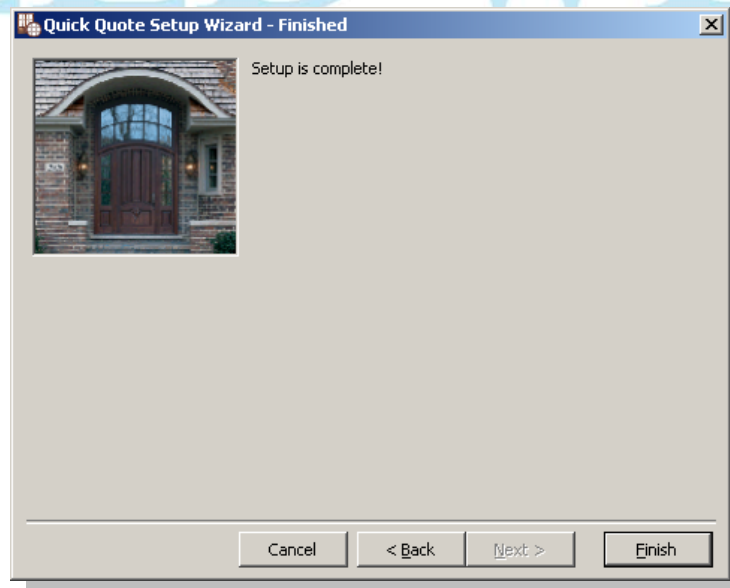


- The enter company information into the Setup Wizard if they will be electronically transferring orders to JELD-WEN using the Remote Order Entry (ROE) feature.



The screenshot shows a Windows-style dialog box titled "Quick Quote Setup Wizard - Order Transfer Information". On the left is a small image of a wooden door set in a brick wall. To the right of the image, the text "Enter your company's address information to use when submitting orders." is displayed. Below this text are several input fields: "Company name:" with the text "JELD-WEN, inc.", "Address:" with "7676 LAkeport Blvd.", "City:" with "Klamath Falls", "State/Province:" with "OR", "Postal/zip code:" with "97601", "Phone Number:" with "(888) 535-3462", and "Email Address:" which is empty. At the bottom of the dialog are four buttons: "Cancel", "< Back", "Next >", and "Finish".

- The user can now run the JELD-WEN Quick Quote program.



The screenshot shows a Windows-style dialog box titled "Quick Quote Setup Wizard - Finished". On the left is the same small image of a wooden door set in a brick wall. To the right of the image, the text "Setup is complete!" is displayed. At the bottom of the dialog are four buttons: "Cancel", "< Back", "Next >", and "Finish".

Checking the Quick Quote Version

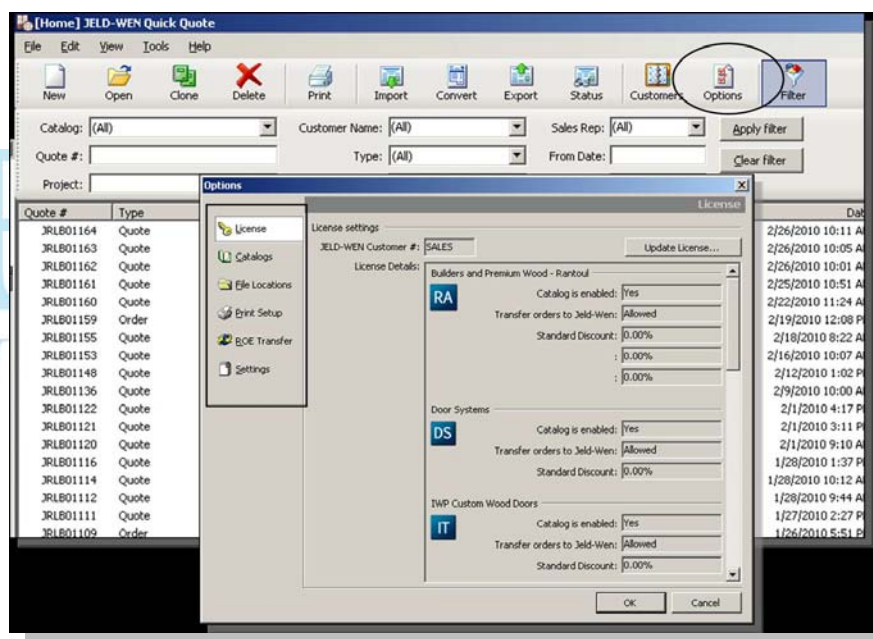
The version of Quick Quote should be reviewed after installing/updating Quick Quote. The Quick Quote version can be determined by going to the Help Menu (not icon) and clicking on

About JELD-WEN Quick Quote. The versions can be matched with the versions listed on the Partner's Portal.

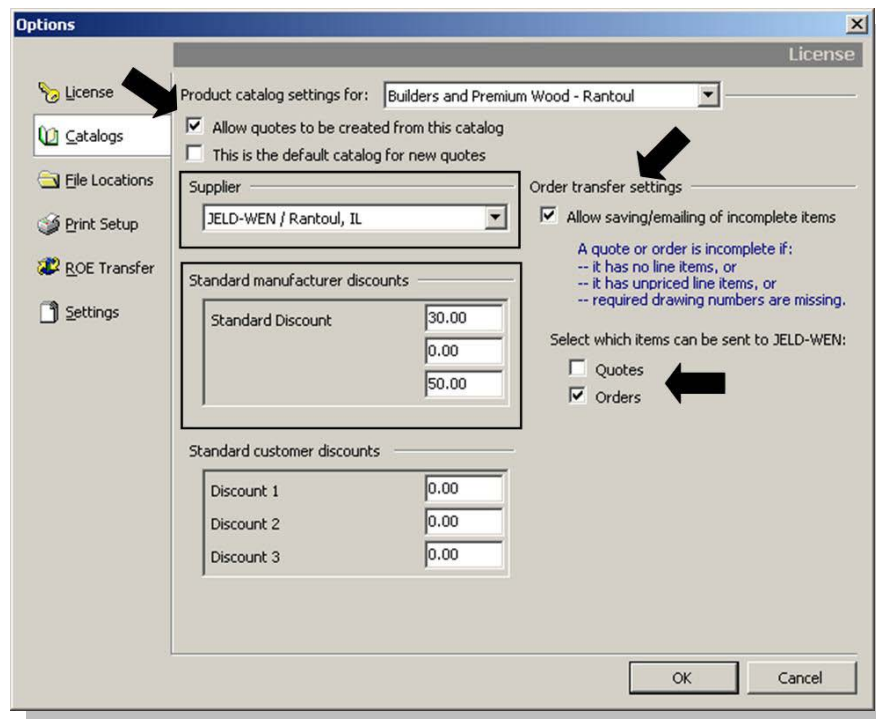
The Core version should correspond to the QQSetup.exe file. The installed catalogs should match accordingly.

Configuring the Quick Quote Options (General use configurations) [\(Back to Top\)](#)

Quick Quote can be tailored to the organizations specific needs. From the Quick Quote Home Screen, click on the Options icon on the Toolbar or use the menu selection Tools/Options to options dialog box. Default setting should be as follows (tabs are values on the left side of the dialog box):

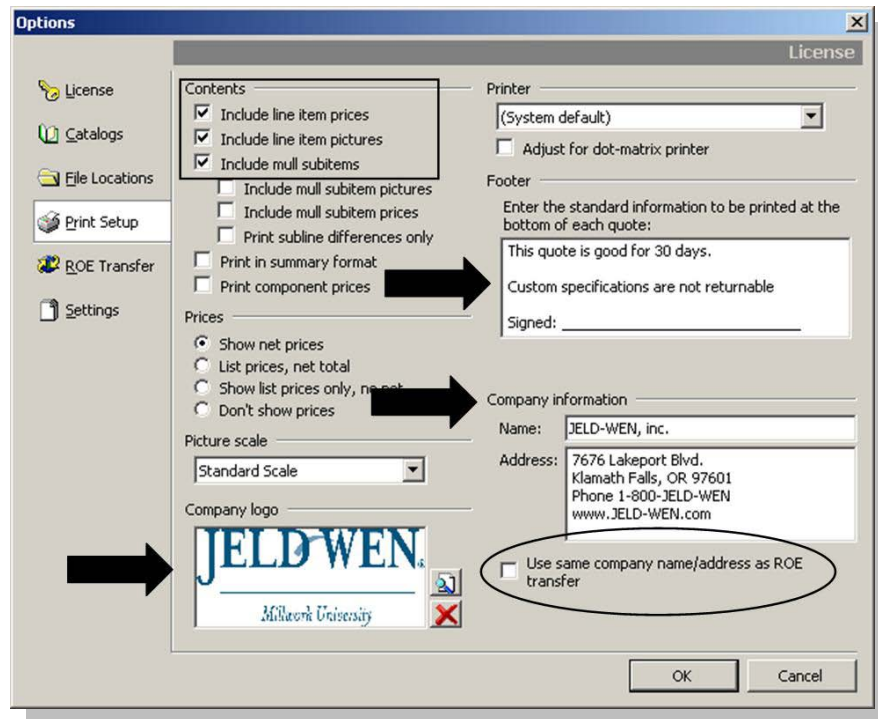


Catalog - Each catalog is configured separately. Catalogs are selected from the product catalog drop down box.



- Several JELD-WEN products are manufactured in different locations. Depending on the product, you may be required to enter a supplier (JELD-WEN manufacturing location).
- If the manufacturer discount is visible, enter the appropriate JELD-WEN discount. This will not be visible if the discount has already been entered into the Quick Quote database.
- Check the Allow quotes to be created from this catalog.
- Under the order transfer settings, check “allow saving/e-mailing of incomplete items”. Also make sure the Quotes is unchecked under “Select which items can be sent to JELD-WEN:”

Print Setup – These are the printing defaults. Many of the defaults can be changed when the user prints a quote allowing print job tailoring to the specific print job requirements.



- Generally leave the “Include mull subitems” checked but uncheck the remaining subitem/sub-line options.
- Company logos can be placed in Quick Quote. These are graphic files such as .jpg, .bmp and .ico files.
- A short message can be placed at the bottom of the quote.
- With few exceptions, leave the “Use same company name/address on ROE transfer” unchecked. Enter the information in the Company information field. The address field can handle up to 6 lines. This allows for telephone, fax/e-mail and website information.

ROE Transfer- Remote Order Entry (ROE) - The ROE Transfer settings determine if and how Quick Quote orders are electronically transferred to JELD-WEN.

Options

License

Convert to Order
☒ Enable convert-to-order

Company address information
Customer: (Your company name, etc)
JELD-WEN, inc.
Address:
7676 Lakeport Blvd.
City:
Klamath Falls
St/Pv: Postal/zip code: Site Phone Number:
OR 97601 (888) 535-3462
Email Address:
randyb@jeld-wen.com

Site information
Station ID: RLB
The Station ID will identify this computer, and should be unique within your organization. It must be three letters or numbers, with no punctuation.

Proxy settings
☒ Connect without using a proxy
☐ Connect using Internet Explorer's proxy
☐ Connect using this proxy:
Type: (Default)
Server:

Custom Export
☐ Use custom export method

OK Cancel

- Select the “Enable convert-to-order” if the user will be converting the quotes to order. This option allows the user to change the quote (retail facing document) to an order (a wholesale facing document) and allow the user to order products electronically from JELD-WEN.
- The Custom Export is used when Quick Quote creates a specific file for importation of data into a user’s enterprise information system. If this option is required, please consult Quick Quote Support for assistance.
- The Station ID is a unique identifier. It is a three character alphanumeric field.

Settings - The Settings tab creates program and user specific settings determining how the Quick Quote program will operate for the specific Quick Quote installation.

The screenshot shows the 'Options' dialog box for the JELD-WEN Quick Quote program. The 'Settings' tab is active. The 'License' section at the top right shows the 'Next quote number' as 'RLB 01165' and an unchecked checkbox for 'Accrue tax 2 to tax 1'. The 'Taxes' section contains two rows: 'State' with a tax rate of 6.0000% and 'Local City' with a tax rate of 0.7500%. The 'Quote preferences' section has four checkboxes: 'Verify suppliers when creating new quotes' (checked), 'Start new quotes in the quote header screen' (unchecked), 'Automatically add customers from imported quotes to customer list' (unchecked), and 'Create imported items as quotes (Note: This option will not import End Customer ID)' (unchecked). The 'File preferences' section has two checkboxes: 'Compress archived quotes' (checked) and 'Compress backed-up quote databases' (checked). The 'General preferences' section has two checkboxes: 'Always use full screen when starting Quick Quote' (checked) and 'Automatically use this user name when starting Quick Quote' (checked) with the username 'Millwork Univer'. Below this is a dropdown menu for 'Clicking "New" on the home screen creates a new:' set to 'Quote'. At the bottom is a dropdown for 'Logging level (takes effect after Quick Quote is restarted):' set to 'Information'. 'OK' and 'Cancel' buttons are at the bottom right.

- Two tax entities can be entered for a default tax rate. They will appear as separate lines unless the “Accrue tax 2 to tax 1” is selected.
- Review the options under general preferences. Select the value which is most useful to the user.

Once the above items have been completed, Quick Quote should be fully configured for a general use installation and is now ready to use.

Configuring the Quick Quote Program to Use a Shared Quotes Database [\(Back to Top\)](#)

The Quick Quote program can be configured to allow multiple users to share the quotes database. Using Quick Quote as a shared database increases the efficiency and reliability of the program as well as providing for a higher level of customer service. Additionally, any installation/update and license files can be placed in this same location, streamlining the installation and update process. This is most effective when Quick Quote is originally installed. For assistance in consolidating existing installations, please contact QuickQuoteSupport@JELD-WEN.com.

Setting Up the Shared Quotes Database (LAN only)

- A folder is created on a shared network drive. Any user accessing this folder will need to have full read, write and create rights to the folder. It is suggested the folder be called JELD-WEN Data. (This is a one time process)
- Subfolders are created under the JELD-WEN Data folder. A suggested structure is to create a folder called “Quick Quote Updates” with two subfolders named “Catalogs” and “License Files”. The shared license file and updates are moved to these folders. (This is a one time process)
- The Quotes database is copied from a local user’s computer to the JELD-WEN Data folder on the shared drive. The quotes database, QQData.mdb, is typically found on the local computer in the C:\Documents and Settings\<user name>Application Data\JELD-WEN\Quick Quote 2 folder. (This is a one time process).
- After the quotes database is copied from the local computer, the Quick Quote program will need to point Quick Quote to the shared database. Click on the options icon and select the File Locations tab. In the field labeled Quote database, browse to the location of the network database. This process will need to be performed on all computers accessing the shared quotes database.

Important Note: Computers which are used apart from the network can not be configured to use a shared quotes database or assets (i.e. laptops used in the field or away from the office).

Special Quick Quote Configurations [\(Back to Top\)](#)

- Quick Quote can be used in a Citrix or Terminal Services environment. Please contact QuickQuoteSupport@JELD-WEN.com for additional information.
- Quick Quote may have the capability to interface with certain Enterprise software applications. Please contact your JELD-WEN Sales Representative for specific details.

To Obtain Support for the JELD-WEN Quick Quote Program [\(Back to Top\)](#)

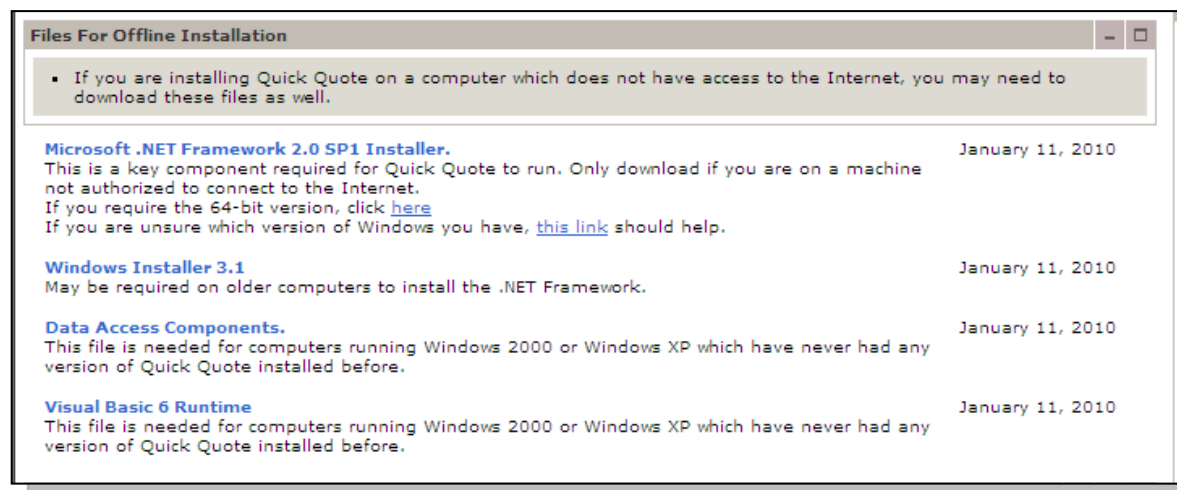
The JELD-WEN Quick Quote program is backed by an extensive support network to help you grow your business selling JELD-WEN windows and doors.

- Technical support can be obtained via e-mail at QuickQuoteSupport@JELD-WEN.com.
- Product support or questions concerning how to create items in Quick Quote can be answered with the JELD-WEN Inside Sales team at the appropriate JELD-WEN manufacturing facility.
- Questions concerning the Partners Portal can be addressed at PartnersTechSupport@JELD-WEN.com.

Thank you for using the JELD-WEN Quick Quote system,

Installing Quick Quote on Computers Without a High Speed Internet Connection [\(Top\)](#)

The Microsoft files required to create the backbone of the Quick Quote program can be obtained on the JELD-WEN Partners Portal if the computer does not have access to a high speed Internet connection. The files are located below the Quick Quote catalog files.



The files can be downloaded can copied to another medium, such as a USB flash drive. The files will need to be installed prior to installation of the Quick Quote program.