# Electronic Quoting Quick Guide (Paradigm)

MI is pleased to offer an electronic quoting and ordering tool for you to supply formal quotes to your customers. These quotes can then easily be converted into orders. This will prevent any errors in the ordering process. Here is a quick guide to get you started.

First, you will need to request a username and password. This can be done using the dedicated support email paradigmsupport@miwd.com . You can also utilize this email for any questions or issues with the MI Quoting Tool. Your inside sales team has been trained and can assist with any questions.
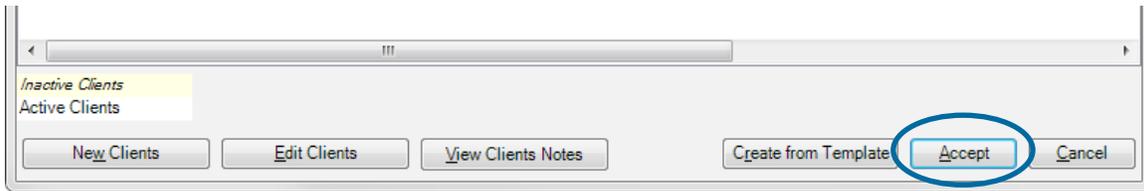
STARTING A QUOTE

1. Click the "New Quote" button in the upper left hand corner.
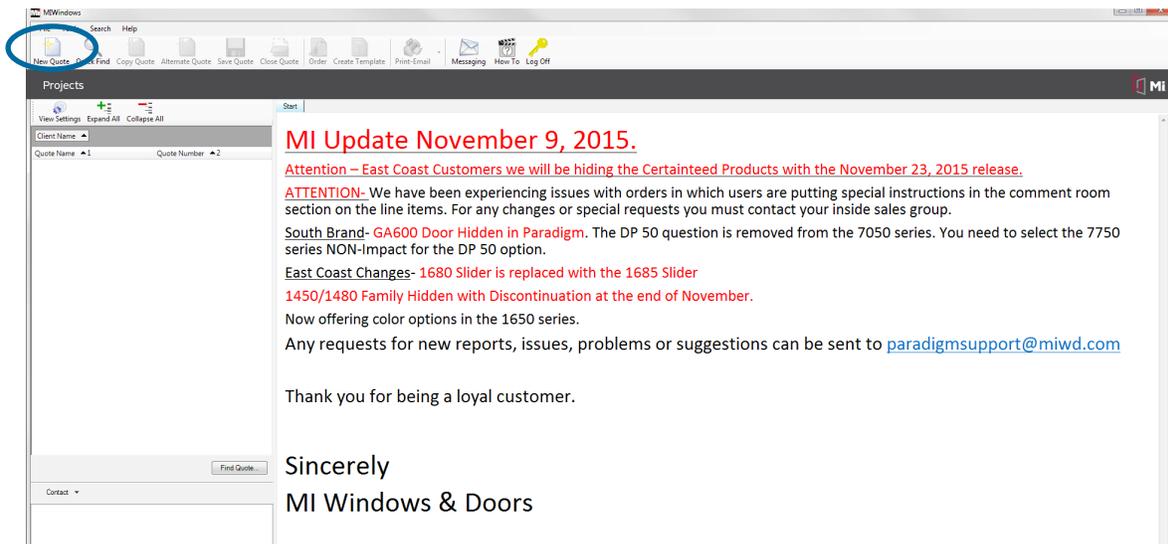

2. You will then be prompted to the new quote form. Your company account is tied to your login so all of the multipliers will be setup. This is where you name the quote using the "Project Name" and "Quote Name".

3. Click the "Accept" button.

4. Now you are ready to quote. There are several tabs on the quote forms and it defaults to the "Sold To" tab. This is your customers' information. You then go to the "Line Items" tab to start configuring units.
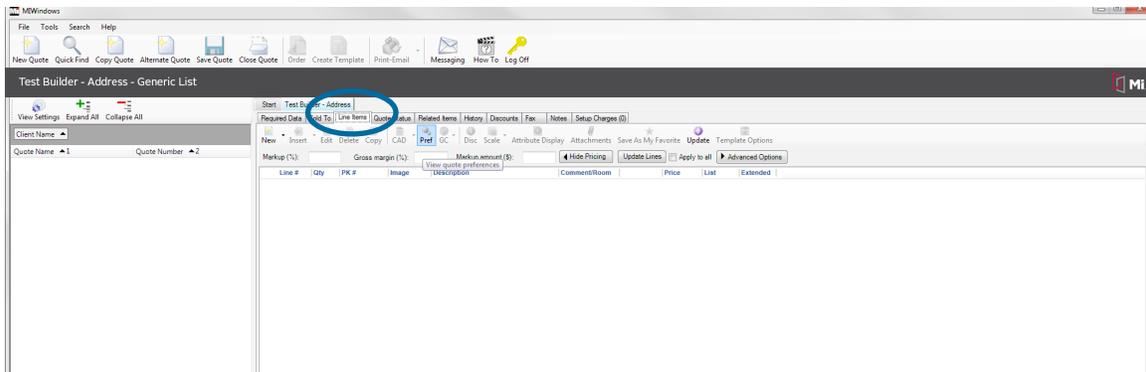

5. On the "Line Items" tab click the "New" button and it will start to build the unit you would like to quote. Finish all of the answers and a line item with your cost will be generated. You can then apply a margin to generate your sale price by putting the margin field and selecting "Apply to All" and then clicking "Update Lines". The advanced options allows you to add taxes and labor if you need to add this to line items.
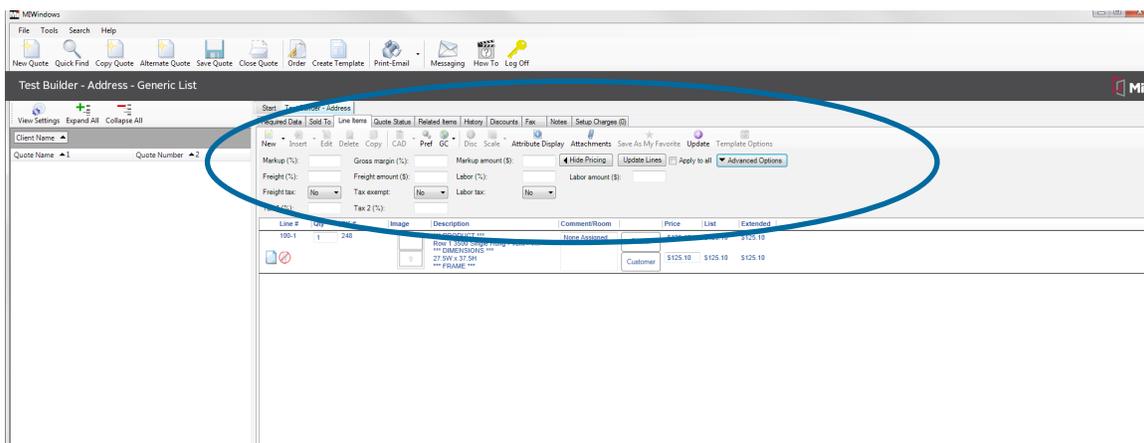
6. Once the quote is completed you can save and print the quote using the toolbar at the top. Saving the quote will generate a quote number that can be shared with others in the company to easily pull the quote up on other machines.
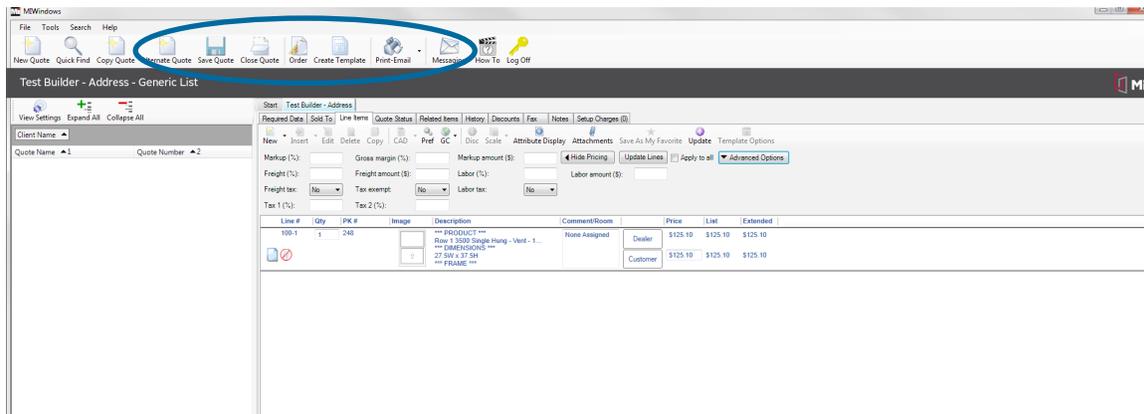
7. Printing the quote gives you a formal document that you can send to your customer with your company logo and information on it. When you print the quote you will have several report options. Any dealer quote will have your sell price on it. An acknowledgment will have your cost. You can also save the file in PDF format to email from the "Print Preview" option. Click the "File" button and select "Export to PDF".
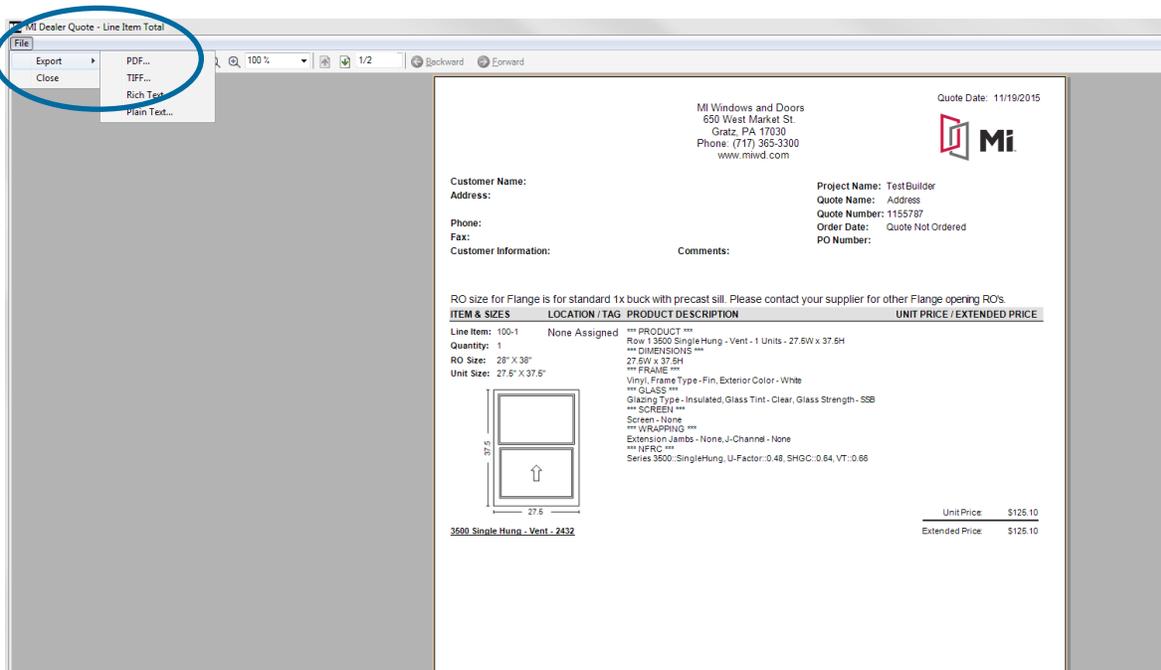
7. Convert the quote to an order. This is done by going to the "Required Data" tab and entering the purchase order number on the "Purchase Order" line.
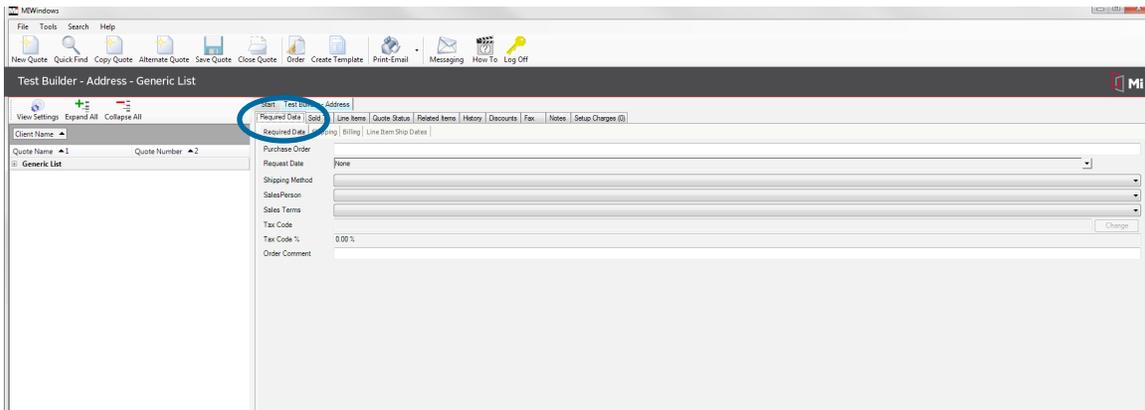
8. Click the "Order" button on the main tool bar. The quote will be converted to an order and your acknowledgment will be sent via email or fax the same as a standard order. You will also see a dollar sign next to the quote to confirm the order.

PREFERENCES AND GLOBAL CHANGES

Preferences can be set at the user, customer, or quote level. This allows you to assign answers to questions before starting the quote. This is done by clicking on the "PREF" button on the line items tool bar.

Global Changes (GC) allows you to change an option (Clear Glass to Low-E) for an entire quote. This is done using the "GC" button on the line items tool bar.

Contact your local sales representative or email paradigmsupport@miwd.com with questions regarding quoting.

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