IQ+ FAQ AND PRO TIPS

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IQ+ EASY START GUIDE

Pro Tip: If you're just starting to use iQ+, building sample quotes is a great way to get comfortable with the tool. A good next step is to start with simple orders to learn the basics. As you advance in iQ+, begin building more complex units.

Q: What do I do with my iQ cip or xml files?

- A: iQ files cannot be imported into iQ+. As of 3/1/2021, iQ quotes and orders are no longer accepted.

Q: How do I integrate iQ+ to my Backoffice system?

- A: If your company currently integrates iQ to your POS system, you may want to do that with iQ+. Please reach out to your POS system vendor for assistance. Some integrations are available, and others are still coming but may have bridge solutions available.
  - **Resources**: There are resources available to help you understand the new iQ+ XML file and inform your POS system integration with iQ+. There's a packet with example files and mapping on andersenaccess.com under "Quotes" and then "iQ+ Easy Start Guide
  - **Support:** Andersen can answer questions about the XML file but any questions about how to develop the integration between iQ+ and the POS system need to be directed to the POS system software vendor.

Q: What are the different types of user roles?

- A: To log into iQ+, you must have an AndersenAccess.com login. Within Andersen Access, you can customize your permissions to run your business the way you want.
  - **Andersen Access Manager (AAM):** Approves access for new users and manages access for existing users at your location.
  - **Quote:** Ability to quote in iQ+. The AAM will select from the following types of quote roles.
    - **Create & View Quotes (Base price only)**: Allow user to see Andersen's base price only and restricts the user from viewing dealer location pricing.

- **Create & View Quotes (Dealer price):** Allow user to see both Andersen base price as well as dealer location pricing.
- **Access to User Quotes Only:** Also select this role to restrict the user to only see their own quotes in iQ+.
    - **View & Submit Orders:** Submit orders in iQ+ and place stock orders in andersenaccess.com. To make accessing iQ+ easy, by default, all andersenaccess.com users will have the
- **Quote – Create & View (Base Price Only) role.**

Q: How do I set up a centralized purchaser in iQ+?

- A: Some organizations choose to use a centralized purchaser to submit orders to Andersen. To set this up in iQ+, the AAM must follow the steps below:
    1. Choose what quoting role each person should have (base price only or dealer price).
    2. Ensure nobody quoting has "Access to user Quotes Only" selected. If selected, the purchaser won't be able to view and submit that user's quotes to Andersen.
    3. Ensure your purchaser has the **View & Submit Orders** role and is assigned to all locations they need to order for.

Q: Can I have trade users quote in iQ+?

- A: Dealer locations granting iQ+ access to dealer trade users (non-Certified Contractors) must apply the following roles: **Quote – Trade and Quote View Own Only**
    - Trade users will find base pricing visibility via the Abbreviated Quote Report – Base Pricing and inside the line configuration.
    - Role **Quote – View Own Only** will restrict quote visibility to only quote that a user owns. If this role is not applied, the **trade user will have visibility of all quotes** under the dealer number.

QUOTE AND ORDER PROCESS

Pro Tip: Each Quote and Order in iQ+ has a unique number that will never be duplicated. Refer to this number when discussing and tracking quote status.

Q: How do I submit an order?

- A: The ability to submit an order is managed internally by the dealer AAM. If a user has been given the permission to submit an order, there will be an orange SUBMIT button in the upper right-hand corner. Project Type, Delivery Type, Purchase Order, and an attached customer is required to order.

Q: What happens when I submit an order?

- A: The order will auto schedule or be sent to Andersen for review. You will not receive a bounce back email, to track an order refer to quote number or Purchase Order. The user who submitted the order in iQ+ will receive an acknowledgement once the order has been scheduled. Submit Receipt Email, under quote details, can be used for another user to receive an acknowledgement.

Q: What is the new SPR order process and what can I expect?

- A: You now can submit for a Special Product Request (SPR) directly in iQ+. When you have either added Instructions to Manufacturer on a configured line or created an Order by Description line, a button will appear next to the "Submit" button called "Submit to Engineering." This button will notify the Andersen Quote team that your quote needs attention. No other action, such as an email, is needed to have your quote, quoted. The same quote you created will be updated automatically and ready for your review. You will know your quote is complete when an Andersen Customer Service Rep contacts you via phone call or email. The turnaround time for quotes in iQ+ will be equivalent to what you experience today.

Q: How do I order by description or create a paperclip line item?

- A: Search "OBD" in the top keyword search in the guided shopping screen. Once you click on the paperclip tile you can start creating the configuration.

CUSTOMERS

Pro Tip: Verify your customer pricing preferences are set up the same as your default pricing structure.

- **Example:**
  1. Markup/margin dealers should have their customer pricing preference set up as Markup/margin.
  2. Discount dealers should have their customer pricing preference set up as discount.

Q: How do I update my trade customers information?

- A: This information cannot be updated within the tool. You will need to go the My Trade Accounts in Andersen Access to make these updates. This new information will automatically be updated within iQ+ and you will not need to reimport your trade.

Q: I can't find the trade user I am trying to import?

- A: The trade has not been associated or linked to your dealer number. You can make that association within My Trade Accounts or contact your sales rep to help make the connection.

Q: How do I include customer information on my paperwork?

- A: Once you have filled out your customer's shipping information, then it will appear on paperwork under the "Sold To:" field.

Q: How can I lock in customer pricing for users at my dealer location?

- A: In iQ+ you can import and create customers, set pricing preferences, and then share them to other iQ+ users. When sharing, you can set permission levels to Owner, Editor, or Viewer. The viewer permission would prevent users from making edits to pricing preferences.

MULLING

Pro Tip: The most common mull combinations have been preconfigured to save time while quoting. Check to see if your desired mull is included under the "Combination" path. For custom mulling outside of those looks, we suggest building from a single unit.

- **Example:**
    1. A picture window with two flankers can be built as a look by overall unit dimension.
    2. 100 series T-Mull with Easy Connect is custom and should be built from a single unit.

Q: Why won't my line save?

- A: There are a few things that could be preventing your line from saving. Below are steps for troubleshooting the error.
    1. Verify all the navigation tabs have a green checkmark. This means all questions have been answered.
    2. Check each tab for configuration errors (ex. inconsistent breather tube selection or size limitations).
    3. If you are mulling, verify the unit does not require reinforcement or a jobsite mull.
    4. Add Instructions to Manufacturer on the Ext Trim/EJ tab to save you work. Now you can request for assistance from a colleague, your Sales Rep, or our Customer Support Team.

PRICING

Pro Tip: There are three levels of pricing available in iQ. Identify which method(s) are most beneficial for your company and always be sure to review throughout the quoting process.

- **Base Pricing (formerly called list)**
    - Available on the quote regardless of your permissions.
- **Dealer Pricing**
    - In iQ+, your multiplier from Andersen is already loaded into the system so you no longer need to input it manually.
    - The system has both your Standard and Expedite discounts (selectable on the Order Details tab of your quote).
    - The ability to see Dealer discounted prices is a feature that can be turned on or turned off based on each person's account permissions. If you cannot see Dealer price in iQ+ and need to see it talk to the Andersen Account Manager (AAM) at your location. They can change your permission level.
- **Customer Pricing**
    - Customer pricing is a markup from Dealer Price. If you don't take any action on the customer pricing, it will be equal to Dealer Price. You can set customer pricing in the following levels:
        - **User Preference** – Markup will be applied to every quote created by the user

- **Customer Preference** – Markup can be added at a customer level. When creating a new customer in 'My Customers' section of iQ+ the markup can be done on the Preferences tab of the Customer Creation
- **Quote Preference** – All Lines on an individual quote can be updated at one time by using the pencil icon located next to the Customer Total located at the bottom of the quote.
- **Line Item Preference** – Each individual line on a quote can be updated using the pencil icon next to a line item's Customer price.
- **MISC Line** – This feature can be found in the drop down next to "New Line Item." It can be used for a one-time charge that is not supplied by Andersen. This line can have dealer and customer pricing of its own.

Q: How do I add a Freight or Labor charge to a quote?

- A: If you want to add Freight or Labor on all lines (ex. 5% of total order), you can set this at a User, Customer, or Quote level. If you are looking to add a one-time charge (ex. $500 Delivery Fee or Install Charge), you have two options.
  - Edit a single line and add the charge. This charge will apply to the Total Customer Freight/Labor Price at the bottom of the quote.
  - Add a MISC Line item. This will have dealer and customer pricing options.

Q: Where can I check the total Margin of a quote?

- A: At the end of the quote, you can expand "Customer Total" to view added Freight, Labor, Tax, and any discounts applied to your customer(s) pricing. If you click on the total, you can easily view your Total Quote Markup dollar amount, percentage, and total quote Gross Margin.

Q: How do I hide dealer cost when I am working with a customer?

- A: When you are in the Line Items tab, you can "Hide My Pricing" or "Hide All Pricing." This option will be picked until you deselect it. There is also an option to remove dealer pricing visibility through user permissions.

Q: Why is pricing not adjusted on new line items?

- A: When adjusting pricing on a quote level, it will only apply to current lines. Select "Update Preferences for this Quote Only" to have pricing apply to current and future lines.

NAVIGATING QUOTES

Pro Tip: To view quotes and orders owned by another user, use the drop down the gear in the left of My Quotes and My Orders. Selecting "See data from other users" will update your list to all quotes at your dealer.

- Creating a View with no filters selected will also generate a full list. Try adding new filters to narrow the search!
- If you are not seeing these options, check with your AAM. User permissions may be preventing you from viewing quotes owned by another.

Q: How do I change a dealer location or Client ID on a quote?

- A: You are unable to change the dealer location of a specific quote; however, you can copy the quote onto a new client ID.
    1. Open the quote you'd like change, use the "Actions" drop down, and select copy. You will be brought to a screen to copy to the same client ID or select a new client ID.

Q: What is a Kit Order?

- A: This is how Andersen packages product on a job for shipping purposes. Majority of dealers are defaulted to 'yes' on this question to consolidate packaging.

Q: What is Effective Date?

- A: This field will only be used during Andersen price adjustment.

Q: How do I print a Quote?

- A: When you are in a quote, there is an "Actions" drop down on the right. Select "Paperwork" and you will see all the reports can view, download, or email.

Q: What does the "Actions" drop down do?

- **Edit PO:** Ability to split an order by line or by category, adjust order quantity, add an alternate Purchase Order, and delay product for later delivery.
- **Paperwork:** Print your quote with various reports with customer, base, and dealer pricing. Reports can be emailed directly and downloaded.
- **Export:** Download an iQ+ XML file for POS import. XML Files cannot be imported into iQ+.
- **Update:** Manually update quote to the most recent release. iQ+ will prompt you if a manual update is needed.
- **Copy:** Duplicate an entire quote or order. If dealer has multiple locations, this is where you can copy to a different client ID.

TERMINOLOGY DIFFERENCES

iQ Term	iQ+ Term	Notes
Project Review	Double Check	Automated check run to look for discrepancies in a quote
Search and Replace	Global Changes	Changing an attribute (ex: exterior color) across all lines in a quote
Quick Spec	Quick Configure	Ability to do a quote without setting up a quote header info first/cannot be ordered in iQ but can be ordered in iQ+
Job Name	Quote Name and Project Name	iQ+ has two names rather than one, It is project name that flows to the OTT and aa.com as the job name
Dealer	Client	When iQ+ mentions the term 'client' it is talking about the dealer
List Price	Base Price	iQ+ uses base price instead of list price. aa.com will still refer to list price on its paperwork.
Reports	Paperwork	Printable reports are found in iQ under the Reports tab and in iQ+ they are found in the Paperwork section of the Actions list
Split Arm	Hinge with Wash Mode	Operator option for Casement windows
Straight Arm	Hinge with Widest Clear Opening	Operator option for Casement windows
100 Series	100 Series and 100 Series - Insert	No Flange with Exterior Kerf can be found down the 100 Series – Insert path
ASW	Complementary Shape	Specialty units which complement frame depths of Andersen Products
Flexiframe	400 Series Specialty	Used alone to maximize a view or combined with venting windows to create large combinations. Available in a variety of shapes and sizes.
Additional Line	OBD and MISC Line	Order by Description lines are for non-configured parts supplied by Andersen. MISC Line items are for dealer to end customer use only and are not supplied by Andersen.

LOOKING FOR MORE TRAINING?

- Check out the **iQ+ East Start Guide** in either Andersen Access under “Quotes” or in iQ+ under the “Need Help Getting Started?”
- **Andersen Academy** is an excellent resource for comprehensive iQ+ learning content.
- iQ+ has built in tutorials throughout the quoting process to help you through specific tasks. Click on "Need Help?" on any page to start a tutorial.