

Electronic Quoting and Ordering with VT and Comsense Enterprise

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Overview:

1. Comsense and VT Industries have collaborated in the development of an extension of Comsense Opening Suite to provide distributors the ability to submit, electronically, wood doors for quoting, door configuration validation and purchase orders. (There is no requirement to access or learn VT-Online quoting/ordering software).
2. Comsense has developed a new catalog for VT Industries, code named ‘VI’. This catalog has been developed with VT specific nomenclature and door attribute definitions to allow for a fully configurable wood door definition required for quoting and ordering of doors electronically directly with VT Industries.
3. Project ‘Door Takeoff’ windows and Enterprise ‘Door Configuration’ windows have been expanded to accommodate the additional wood door definition attributes and properties required to define a fully configured door ready for direct submission to VT Industries for order processing.
4. The electronic interface points within Comsense Opening Suite are as follows:
 - a. Project estimating - ‘Pricing’ window (for quoting purposes).
 - b. Project detailing – ‘Pricing’ window (for product validation and re-quoting after detailing and/or quoting for change orders).
 - c. Enterprise – ‘Quote’ window - (for quoting purposes).
 - d. Enterprise – ‘Sales Order’ window (for quoting and/or product validation).
 - e. Enterprise – ‘Purchase Order’ window (for electronic submission of purchase order).

5. Managed Product/Stocking product definition is also accommodated through the expanded features of the 'Door Configurator' allowing for creation of stock replenishment purchase orders for electronic submission.

Setup procedures:

1. The first step is to contact Comsense Support to schedule the following:
 - a. Comsense setup of EDI settings in your system.
 - b. Setup subscription for the new Comsense VI catalog.
 - c. Provide instructions for submission of sign-on credentials for VT Industries. Each user who will be utilizing this electronic quoting and ordering facility will require sign-on credentials for access this service.
 - d. Provide users with training material.
2. Download catalog update for 'VI' and set this manufacturer as 'Selected for Search' for each division in the Tools\System Administration\Manufacturer Selection window.
3. Schedule a training session with Comsense Support.
 - a. Review Enterprise 'System Options' EDI settings with system administrator:
 - i. User master:
 1. Check 'Create EDI when Releasing PO
 2. Add 'Contact' record
 - ii. EDI configuration.
 - iii. Supplier master:
 1. Profile tab – Populate 'Supplier Customer Account #' with Comsense account code.
 2. Manufactures tab – Populate 'Manufacturers EDI configuration' field.
 3. PO Reports tab – Populate 'EDI Configuration' field.
 - iv. Security - Inventory/Purchasing, Purchase Order:
 1. Assign access for 'Create an EDI file for a Purchase Order'
 2. Assign access for 'Process an EDI file for a Purchase Order'
 - b. Review divisional default property settings.
 - c. Instruct on re-definition of any existing VT Industries stocking managed product.

Estimating and Detailing:

1. There are only a few differences from your normal estimating, detailing and purchasing processes as noted in the following points.
2. Project Master – Project Estimates require a customer and ship-to. We recommend that a 'dummy' customer be setup named 'Pending' with your ship-to address information.
3. Project 'Property Defaults':
 - a. Each new project will have the 'Property Defaults' automatically populated from the 'Division Property Defaults'.
 - b. These properties should be reviewed and modified as required by the project specifications. These properties may be modified at any time during the takeoff process but will only take effect when the 'Door Takeoff' window is opened and will only effect new openings or


attribute changes for existing doors (These changes to the property defaults will NOT change existing door takeoff definitions.)

4. Door takeoff:
 - a. The Door Takeoff window includes a section at the bottom of the window to provide for entry and editing of extended door attribute definitions which we refer to as 'Properties'. This section has a check box to show/hide these properties to help minimize window 'clutter'.
 - b. As each door attribute is entered for a specific door, the property section will display any properties required as defined by the Comsense VI catalog. If the 'Property' value has been populated automatically from the project 'Property Defaults', this property will remain hidden unless viewed manually by 'dragging' the section open manually or 'unchecking' the hide check box.
5. There is also a new tool bar icon, 'Replace Properties', which displays a window of all properties for all openings and allows for global search & replace operations.
6. The following are a few points of special consideration during the takeoff process:
 - a. Opening Type:
 - i. When defining Transoms, Bifolds, Bi-Parting, Bi-Passing and Pocket openings, choose 'Opening Type' = SG and choose the appropriate definition in the 'DESC' column.
 - ii. Do not use 'Opening Types' RM' or 'OT'
 - b. EDGE – This is an optional entry and is only required where VT standard edges are not suitable.

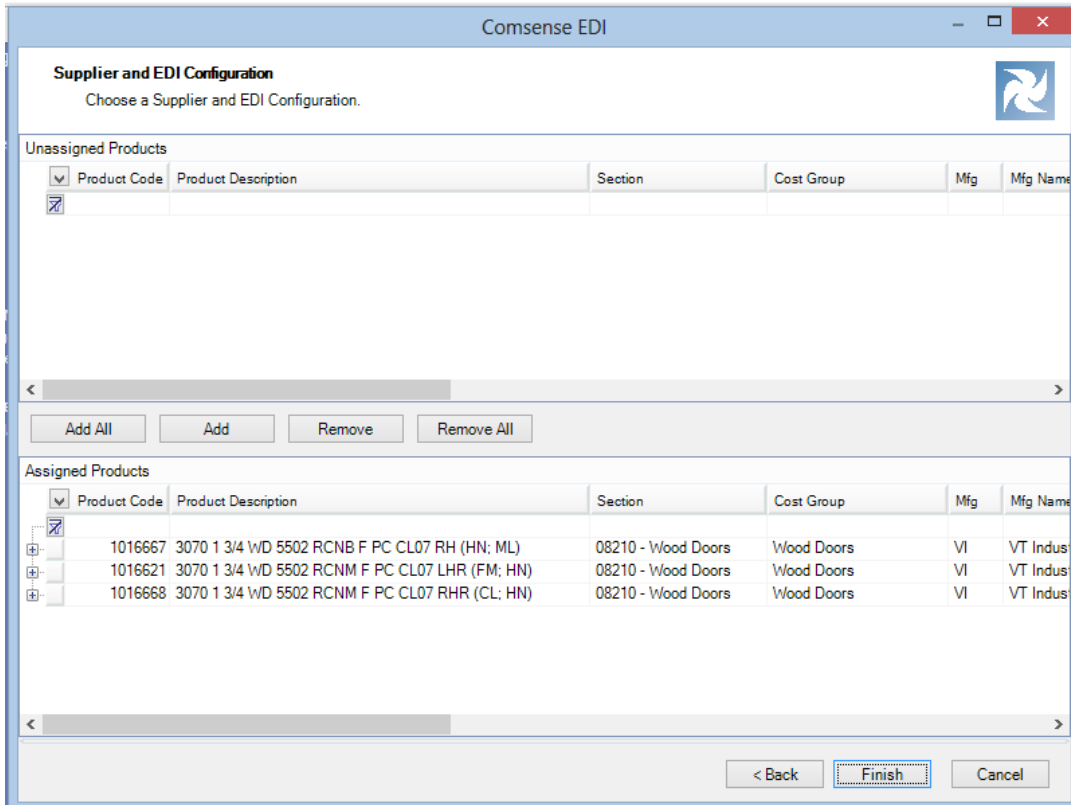
Hardware prep special conditions:

1. Non-standard hinge locations:
 - a. Where hinge locations are not standard, a hinge prep code must be selected for each hinge and the hinge location and ordinal position (position from top of door) must be entered.
2. Electric Hinge:
 - a. Select standard hinge prep as normal with appropriate quantity.
 - b. Select electric hinge prep and enter position of hinge (First position is from top of door)
3. Flush Bolts:
 - a. Automatic flush bolts – choose FA prep.
 - b. Manual flush bolts – Select FM prep twice – Once for top and once for bottom and enter appropriate rod length.

Submitting Estimate for quote request:

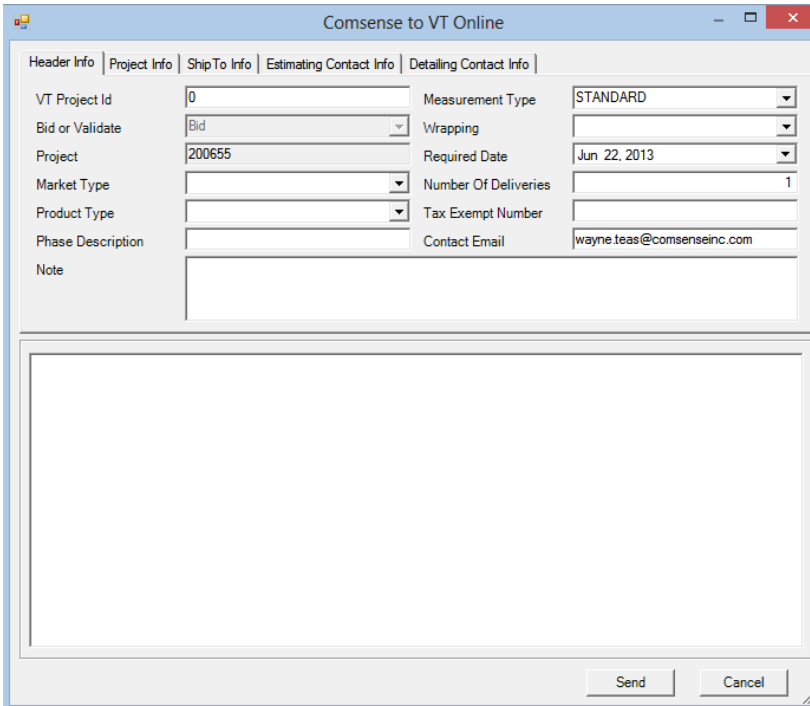
1. In the Estimating 'Pricing' window, and in either of the 'Component Costing' tabs, click the tool bar icon  for 'Create EDI'. This will launch the 'Comsense EDI' window where you can select products to be included in the submission. (Any products not yet assigned an 'Adj Cost' will be automatically

placed in this bottom pane.)



2. The next window presented is 'Comsense to VT Online':
 - a. This requires entry of Market Type, Product Type, Wrapping, Project Info and Ship-to Info (minimum information required is city and zip code). Estimating Contact Info and Detailing Contact Info are optional.
 - b. The 'Contact Email' is automatically populated from the users contact email address as defined in the Enterprise 'User' master. This may be changed to a different email address in this window and will remain as the default email address for this project unless changed manually. Subsequent automated emails from VT relating to this VT Project ID will utilize this email address.
 - c. Note the 'VT Project ID' is set to '0'. For the first submission, this is the normal setting. Any subsequent submission for a quote request will have this VT Industries project ID automatically populated. (There may be special circumstances where VT Industries Customer Service personnel may direct you enter a specific number, otherwise do not change this value.)

3. Click 'Send' when all required information has been entered. Notice that the 'Bid or Validate' field is auto-populated with 'Bid' as there is no 'Validate' option for project estimating.



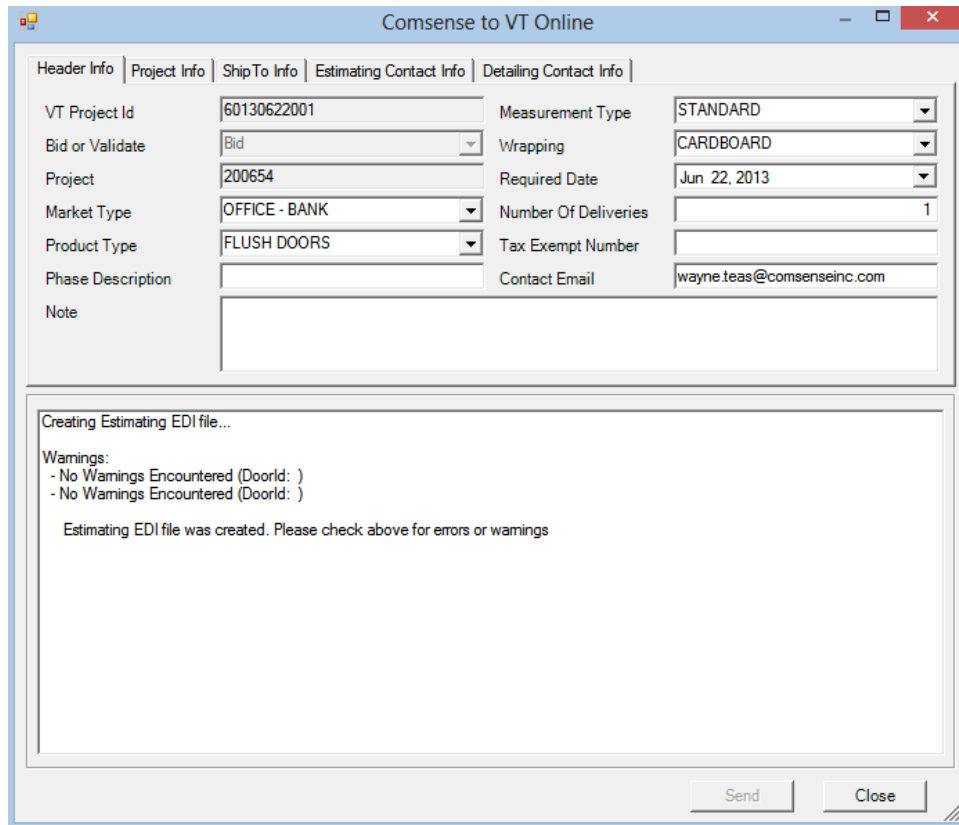
The screenshot shows a web application window titled "Comsense to VT Online". The window has a tabbed interface with the following tabs: "Header Info", "Project Info", "Ship To Info", "Estimating Contact Info", and "Detailing Contact Info". The "Project Info" tab is active. The form contains the following fields:

VT Project Id	0	Measurement Type	STANDARD
Bid or Validate	Bid	Wrapping	
Project	200655	Required Date	Jun 22, 2013
Market Type		Number Of Deliveries	1
Product Type		Tax Exempt Number	
Phase Description		Contact Email	wayne.teas@comsenseinc.com
Note			

At the bottom of the window, there are two buttons: "Send" and "Cancel".

4. The next window will present you with any errors detected as a result of a submission failure or errors reported by VT Industries automated validation processes.
 - a. Notice that this process assigns a 'VT Project ID' that will be associated with this project throughout the detailing (including change orders) and final purchase order process.
 - b. The body of the window will provide details on errors and warning messages. Any messages designated as 'Error' will result in a failed submission and will require the user to make appropriate changes to the door takeoff entry and a repeat of this EDI creation process.
 - c. See 'Trouble Shooting' section later on in this document for examples of error messages and recommendations on how to manage those conditions.
 - d. An email will be sent within a few minutes of clicking the 'Send' button to confirm VT's receipt of this 'Bid' request.

- e. Click 'Close' on this window.



The screenshot shows a web application window titled "Comsense to VT Online". It has several tabs: "Header Info", "Project Info", "ShipTo Info", "Estimating Contact Info", and "Detailing Contact Info". The "Header Info" tab is active, displaying the following fields:

VT Project Id	60130622001	Measurement Type	STANDARD
Bid or Validate	Bid	Wrapping	CARDBOARD
Project	200654	Required Date	Jun 22, 2013
Market Type	OFFICE - BANK	Number Of Deliveries	1
Product Type	FLUSH DOORS	Tax Exempt Number	
Phase Description		Contact Email	wayne.teas@comsenseinc.com
Note			


Below the form is a message box with the following text:

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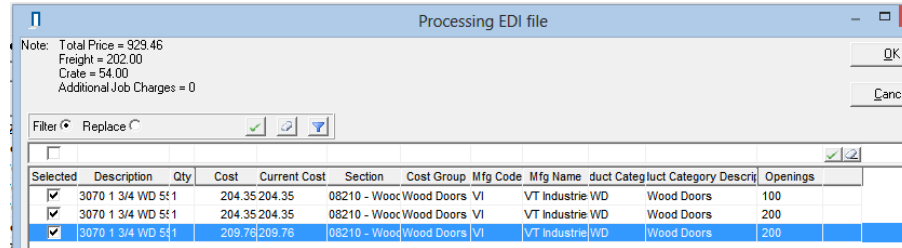
Creating Estimating EDI file...
Warnings:
- No Warnings Encountered (DoorId: )
- No Warnings Encountered (DoorId: )

Estimating EDI file was created. Please check above for errors or warnings
  
```

At the bottom right of the window are "Send" and "Close" buttons.

5. Within a short time (a few minutes for common product configurations to possibly hours for complex product and/or exotic material), an email will sent from VT showing quoted costs. Upon receipt of this email, you may proceed with the next step to retrieve those quoted costs into your project.
6. The next step is to retrieve VT's quoted door costs into your project. NOTE: THIS STEP CAN ONLY BE PERFORMED AFTER YOU HAVE RECEIVED AN EMAIL OF QUOTED COSTS FROM VT.
 - a. In the Pricing window, on either 'Component Costing' tab, click the Process EDI icon . This will present you with the following 'Processing EDI file' window.
 - b. You will normally click OK on this window which will populate you 'Component Costing' 'Adj Cost' field with the quoted costs from this window. This process will also populate the 'Quoted Concession Discounts' window, 'Manufacturer's Quote Reference' field with the VT Project ID #.
 - c. NOTE: ADDITIONAL CHARGES ARE LISTED IN THE TOP LEFT CORNER OF THIS WINDOW. These charges are NOT included in the line item costs. We suggest that these charges be entered in the 'Freight Cost' field in the 'Pricing Window'. (You will also find these charges listed in the emailed quoted costs from VT).
 - d. If the component costing window, 'Adj Cost' field, is already populated from a previous quoted cost, this window show that value in the 'Current Cost' column.

- e. If you choose not to retrieve the 'Adj Cost' in your component costing, simply uncheck the 'Selected' column check box.



Selected	Description	Qty	Cost	Current Cost	Section	Cost Group	Mfg Code	Mfg Name	duct	Categ	luct	Category	Descr	Openings
<input checked="" type="checkbox"/>	3070 1 3/4 WD 51		204.35	204.35	08210 - Wood	Wood Doors	VI	VT Industrie	WD			Wood Doors		100
<input checked="" type="checkbox"/>	3070 1 3/4 WD 51		204.35	204.35	08210 - Wood	Wood Doors	VI	VT Industrie	WD			Wood Doors		200
<input checked="" type="checkbox"/>	3070 1 3/4 WD 51		209.76	209.76	08210 - Wood	Wood Doors	VI	VT Industrie	WD			Wood Doors		200

Project Detailing:

1. There are three operations relating to the VT EDI process within Project Detailing:
 - a. The primary VT EDI related operation in project detailing is to verify that the wood door product passes all VT manufacturing validation rules. The 'Bid or Validate' field in the 'Comsense to VT Online' window will be set to 'Validate' by default.
 - b. Secondary, you will utilize the same 'Project Estimating' process for 'Change Order' quote requests from VT as well as the validation process defined in step (i.) above.
 - c. Lastly, as a result of extensive detailing refinements, you may want to re-submit the revised list of doors for re-quoting to ensure that your original quoted costs are not significantly higher than your estimate costs.
2. When using the 'Creating EDI' process where the 'Bid or Validate' field is set to '**Validate**' purposes only, there will be no revised quoted costs available for retrieval. If you want to 'Create EDI' for the purpose of requesting a quote from VT, change the 'Bid or Validate' setting from 'Validate' to 'Bid'. NOTE THAT THIS '**Bid**' OPTION DOES NOT INITIATE THE PRODUCT VALIDATION RULE PROCESS – YOU WILL NEED TO DO ANOTHER SUBMISSION WITH THE 'Bid or Validate' OPTION SET TO '**Validate**' TO TRIGGER THE VALIDATION PROCESS.
3. You will follow the same process as defined in Step 5 above (Submitting Estimate for quote request) – with the following exceptions:
 - a. With the 'Bid or Validate' field set to '**Validate**':
 - i. The process with return and errors or warnings associated with the submitted product.
 - ii. There are NO quoted costs provided with this option (therefore, the 'Process EDI' function has no purpose and will not retrieve any information.)
 - b. Where the detailed project has been created from a sold estimated project and the VT EDI process was applied to that estimate, The 'Comsense to VT Online' window 'VT Project ID#' will be set to same value as the estimate. Otherwise, the VT Project ID# will be set to '0' (Do not change this value unless directed by VT Customer service personnel.)
 - c. For 'Change Orders', you will perform two submissions. Once for quote request and secondly to validate product configuration.
 - d. **NOTE: IT IS VERY IMPORTANT THE VALIDATION PROCESS BE PERFORMED AND ERRORS CORRECTED AND RE-SUBMITTED BEFORE SELLING/APPROVING A CHANGE ORDER AND BEFORE PROCEEDING WITH SOURCING THIS PRODUCT TO A PURCHASE ORDER.**

Submitting a Purchase Order:

- e. A purchase order is created in the normal manner, the only difference is when setting the PO to 'Released', the system will automatically trigger the 'Create EDI' function and present you with the 'Comsense to VT Online' window. You will be required to enter the few required fields and then click 'Send' to submit.
- f. This process will perform a final product validation check and present you with any remaining error or warning messages. If any 'Error' designated messages are encountered, the purchase order will NOT be submitted in which case your only two options are to remove the offending PO line items or delete the entire PO, make the appropriate corrections in your takeoff, re-submit as 'Validate' and re-source the PO once the product is fully validated. **Again, the emphasis is on making sure that a final 'Validate' EDI process be performed before attempting to source to a purchase order.**
- g. VT will send an email to you as confirmation of order and final quoted costs. Upon receipt of this confirmation, you may open the purchase order window and click the 'Process EDI' to retrieve the confirmed product costs from VT. This replaces the purchase order line items costs with the newly retrieved costs. The 'Processing EDI' window will show additional charges (as will the emailed confirmation). We suggest that these charges be noted in the Purchase Order window internal notes field for subsequent verification by your Payables processing personnel.

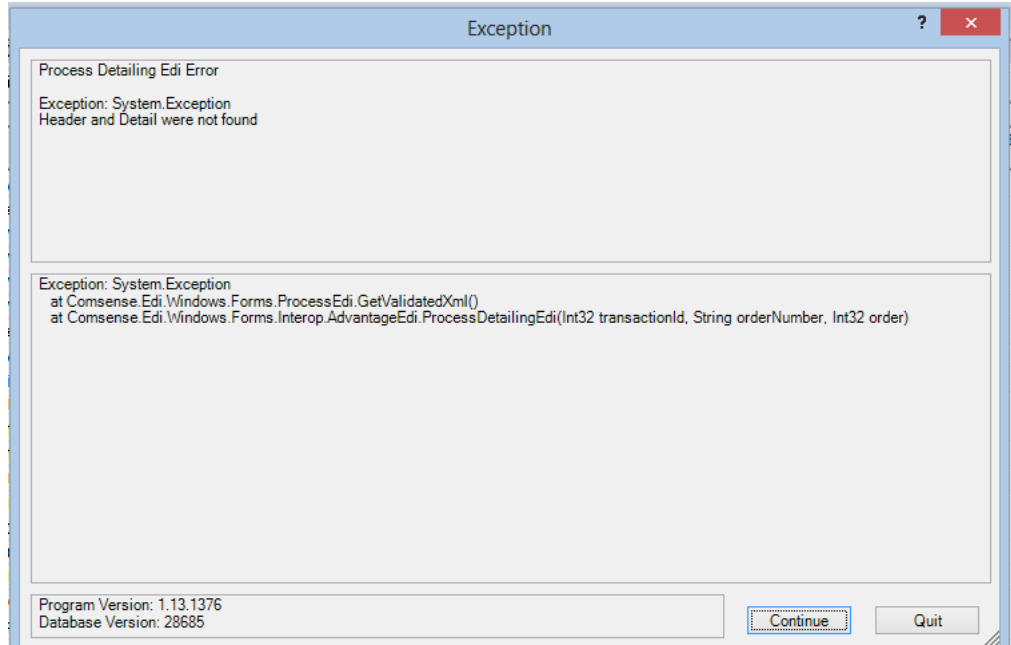
Enterprise Quote and Sales Order window:

1. The 'Quote' window has the same process functions as with project estimating.
2. The 'Sales Order' window has the same process functions as with project detailing. **NOTE: IT IS VERY IMPORTANT THE VALIDATION PROCESS BE PERFORMED AND ERRORS CORRECTED AND RE-SUBMITTED BEFORE PROCEEDING WITH SOURCING THIS PRODUCT TO A PURCHASE ORDER.**
3. NOTE: THE 'Openings' TAB MUST BE POPULATED WITH FOLLOWING MINIMUM INFORMATION:
 - a. Size.
 - b. Opening Type.
 - c. Hand

Troubleshooting/Error messages:

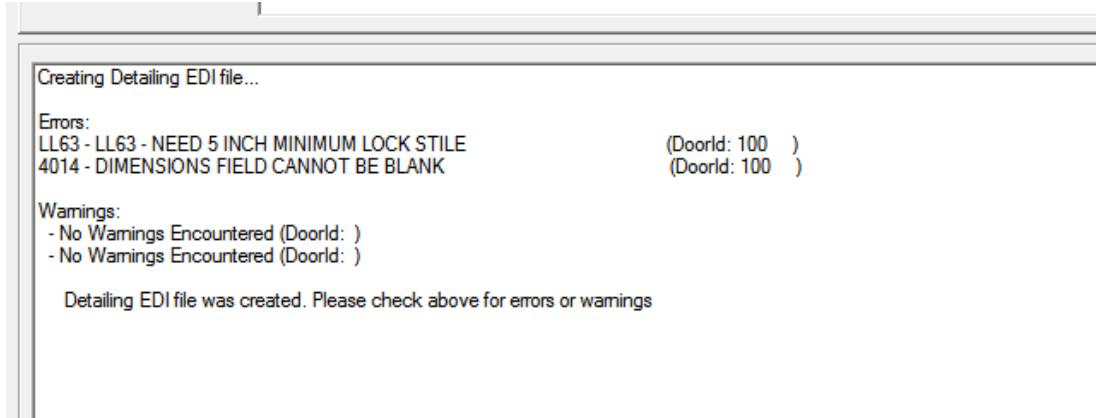
1. Condition/Resolution:
 - a. Contact email is not being populated in the 'Comsense to VT Online' window.
 - i. Enterprise\System Options\User – Contact and/or Email address is missing from the 'Contact' master record.

- b. 'Process EDI' returns immediate errors as follows



- i. User has attempted to retrieve quotes costs before receiving email confirming costs are available for retrieval OR user attempted to retrieve costs for a 'Validate' only submission. **Click 'Continue' on the this window. If you have received notification of quoted costs, contact your VT customer service representative.**
- c. Submission Error examples:

- i. Missing dimension for lite kit. Both error messages are referring to missing lite dimensions and invalid dimensions for a lite defined in opening 100.



- ii. Fire label is not valid for opening 102. All three error messages are due to the fire label defined for this opening. There are too many rules associated with fire rating to list in the message box. If you are unable to determine to proper configuration, please contact

your VT customer service representative.

```
Creating Detailing EDI file...

Errors:
DD05 - DD05 - DOOR TYPE / FIRE / OPENING / FRAME / PRESSURE INVALID CONFIGURATION (DoorId: 102 )
DD11 - DD11 - STILE MAT / DOOR / FIRE / OPENING CREATE AN INVALID CONFIGURATION (DoorId: 102 )
DD12 - DD12 - RAIL MAT / DOOR / FIRE CREATE AN INVALID CONFIGURATION (DoorId: 102 )

Warnings:
2004 - FACE MATERIAL AND EDGE MATERIAL DO NOT MATCH (DoorId: 102 )
2004 - FACE MATERIAL AND EDGE MATERIAL DO NOT MATCH (DoorId: 102 )
5024 - VT STD IS SQUARE LKSTILE W/ FLUSHBOLTS-IF OK,PLS CHANGE L/S FIELD TO SQUARE (DoorId: 200 )
5024 - VT STD IS SQUARE LKSTILE W/ FLUSHBOLTS-IF OK,PLS CHANGE L/S FIELD TO SQUARE (DoorId: 200 )

Detailing EDI file was created. Please check above for errors or warnings
```

iii. The following message will be caused by a interruption in your internet service.

```
Loading EDI Mapping information...
Successful

Creating log file...
Successful

Loading EDI data...
Successful

Loading configuration data...
Successful

Loading Market Types...

There was an error loading the VT code files
The remote name could not be resolved: 'docs.vtindustries.com'
```

