

Vendor Set up & how to guide

Installer Logo Here

A user-friendly software tool which simplifies quoting and ordering online and helps you win more business.



Ve For Installers

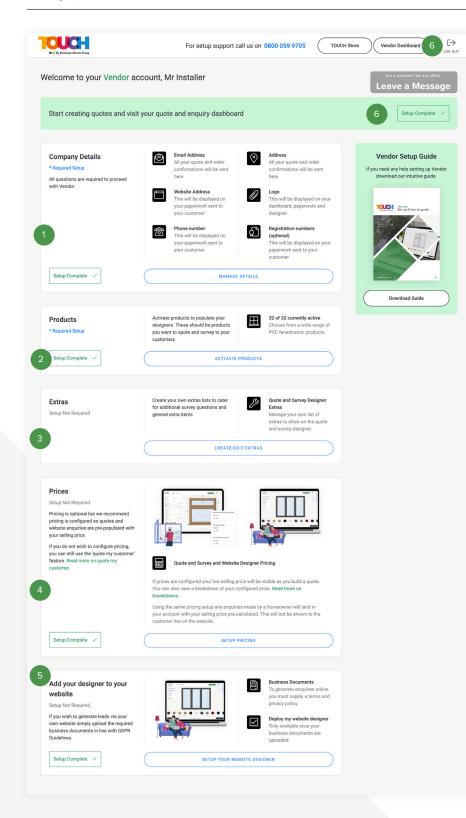
Vendor helping installers sell more easily in today's world.

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Setting up Vendor



Once you enter your new Vendor account you will be presented with the following screen, follow the steps below:

Set up steps

1. Click manage details to enter your business details, these are required to continue with Vendor.

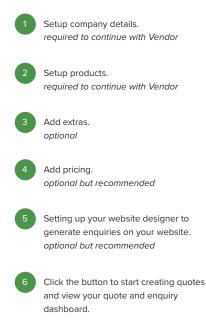
2. You then need to choose which products you want to offer your customers with the Activate Products button. These products will then be shown on the designers.

 Once you have completed the above steps you can then continue to:
 a) Set up prices, these prices will allow you to live price with the quote and survey designer and any enquiries made by your customers on the website designer will land in your dashboard with your selling price pre-calculated.

b) Apply additions and extras to your quotes, Create your own pre-set extras lists to cater for additional survey questions, fitting and general extra items.

c) If you wish to generate leads via your own website simply click setup website designer and upload the required business documents, this will then give you a link to add the designer to your website.

c) If you skip steps 'a' and 'b' and go straight to your dashboard, there will be no live pricing on your quote and survey designer and your website designer cannot be deployed to your website.





Company Details

You must setup your company details first, these will be the details that are used on all paperwork and be viewable by your customers.

	to a customer.
Email Address *	Your address * EDIT ADDRESS
lee@businessmicros.co.uk	Driver & Vehicle Licensing Agency, Vcs V5s, Driver & Vehicle Driving Centre, Swansea, West Glamorgan, SA99 1BA
All your quote and order confirmations will be sent here.	This will be displayed on your paperwork that will be sent to a customer.
Website address * https:// www.businessmicros.co.uk This will be displayed on your paperwork that will be sent to a	Would you like to apply a tax rate to your quotes?
sustomer. Phone number *	Company Registration Number
01848 330588	This will be displayed on your paperwork that will be sent to a customer.
This will be displayed on your paperwork that will be sent to a ustomer.	VAT Registration Number
.ogo	1234
This will be displayed on your dashboard, paperwork and designer. Drag and drop image file 2	This will be displayed on your paperwork that will be sent to a customer.
or SELECT IMAGE	FENSA Registration Number
Decommended file time: Transported DNC	1234
Recommended file type: Transparent PNG. Maximum file size 1mb. Recommended size: 440px by 220px	This will be displayed on your paperwork that will be sent to a customer.

Website address

This will be the website address that is used on your Web Designer to direct your customers back to your website after completing their designs. It will also be used on the paperwork produced by your Web Designer and Quote & Survey Designer.

Logo

You will need to upload your company logo; this will be displayed on your Web Designer and on any paperwork produced by your Web Designer and Quote & Survey Designer. If you don't have a logo, your company name will appear in it's place.

Add tax to your quotations

Choose to add a tax rate to your quotes, once 'yes' is selected a free type box will open to allow you to add a percentage tax rate.

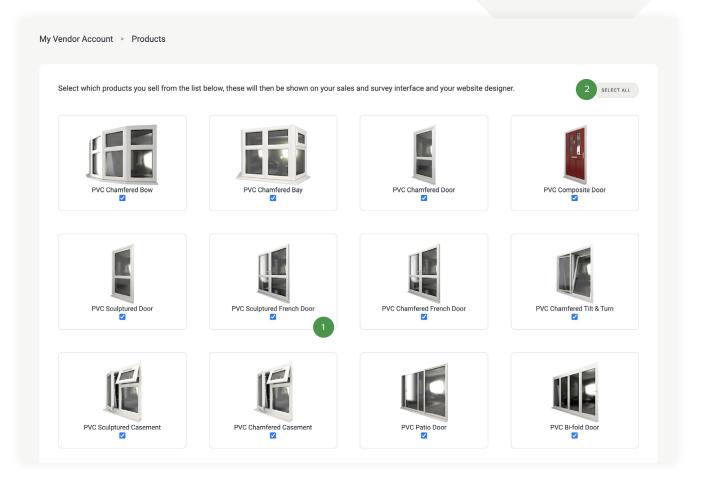
Fensa, VAT, Company Registration numbers

These fields are optional and allow you to input your various registration numbers, which will be displayed on the paperwork produced by your Web Designer and Quote & Survey Designer.



Your products

Select from a wide range of PVC, Aluminium and Timber products. Products can be turned on and off depending on the products you want to sell and show in both designers.



Select a product

Simply select the check boxes to activate and de-activate a product. These can be changed at anytime to always stay up to date with your range. Remember to save after you make a change.

Products include:

Upvc Products

Composite Doors Casement Windows Flush Sash Windows Tilt & Turn Windows Vertical Sliding Windows Bay Windows Bow Windows Single Doors French Doors Bi Folding Door Sliding Patio Door

Timber Products

Casement Windows Tilt & Turn Windows Sash Windows Single Doors Solid Doors Double Doors Coupled Products

Aluminium Products

Casement Windows Single Doors Double Doors Patio Doors Bi-Fold Doors



Select all products

If you wish to show all products to your customers click 'select all' to quickly activate all products.



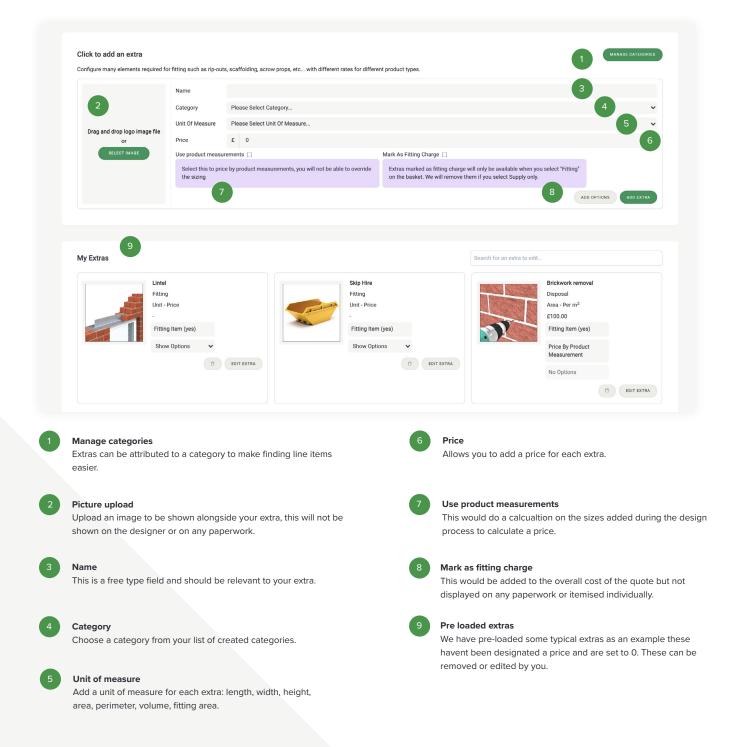
Fitting Rate

Add a fitting rate this may be an hourly, daily or fixed cost that can then be calculated against the extras added below.

You will select one fitting rate f	for all products. This	nay be an hourly cost, daily cost or a fix	ked fitting cost you may have.			
When you create an extra that r	relates to your fitting	cost you will be able to add a multiplier.	. So if you've added an hourly rate, y	you can setup a `Fit Door + SideLig	it` which you could mark as a 3 h	our task.
Set enter your fitting rate.	£ 200	SAVE FITTING RATE				

Extras & Fitting

Create your own extras lists to cater for additional survey questions, fitting and general extra items.





Pricing

Pricing is optional but always recommended. Adding pricing will allow you to live price using the sales and survey designer which is only visible to you. You can also turn pricing on for your website designer which will then be visible to the customer. For more info on ways to use pricing (see page 15 for more details)

Note: Any products that are turned off will still show in the pricing table.

icing Search	an item to e	dit a price		How to set up your pricing.
now/Hide products PVC Z	Aluminium	☑ Timber ☑ Other ☑ 2	Show unpriced items only (grid excluded) Unpriced	Window / Tilt Turn / Single / Double Door
Diseas poter Drising shows all pr		only those enabled - You don't need to fill in every bo		Bifold door
Flease note. Friding shows an pro	Juucis - Hor	only those enabled - roll don't need to him in every bo.	A, rghore the ones you druh cenaule.	Patio door
Pricing Categories		Grid	s (Width x Height Format)	
Grids (Width x Height Format)	(34)	PVC Casement Frame Grid	(W x H) EDIT	Vertical Slider
Product	(10)	PVC Casement Sash Grid	(W x H) EDIT	Bay and Bow
Profiles	(35)	PVC Flush Casement Frame	(W x H) EDIT	Composite Doors
Ancillary Profiles	(20)	PVC Flush Casement Sash Grid	(W × H) EDIT	
Ventilators	(3)	PVC Tilt & Turn Frame Grid	(W x H) EDIT	
Casement Hardware	(16)	PVC Tilt & Turn Sash Grid	(W x H) EDIT	
Tilt & Turn Hardware	(9)	PVC Single Door Frame Grid	(W x H) EDIT	Test your pricing
Door Lever Handles	(10)	PVC Single Door Sash Grid	(W x H) EDIT	Process a a quote using the quote and survey designer. Select the Price Calculation Breakdown icon next to the
Door Pull Handles	(23)	PVC Double Door Frame Grid	(W x H) EDIT	price as shown below.
Door locks, keeps & cylinders	(8)	PVC Double Door Sash Grid	(W x H) EDIT	~
Door hinges & restrictors	(11)	PVC Vertical Slider Grid	(W x H) EDIT	Item Price: £100.00 Exc Vat Q
Door letterplates	(5)	PVC BiFold Frame Grid	(W x H) EDIT	SAVE TO QUOTE
Door chains & night-latches	(10)	Timber Casement Frame Grid	(W x H) EDIT	
Door spyholes & numerals	(10)	Timber Casement Sash Grid	(W x H) EDIT	Process a Test Quote
Sliding Door Handles	(5)	Timber Sash Window Frame Grid	(W x H) EDIT	
Vertical Slider Hardware	(17)	Timber T&T Frame Grid	(W x H) EDIT	
Vertical Slider Locks	(10)	Timber Tilt & Turn Sash Grid	(W x H) FDIT	
Glass	(28)	Timber Single Door Frame Grid	(W x H) EDIT	
Glass Decorations	(25)	Timber Double Door Frame Grid	(W x H) EDIT	
Integral Blinds	(6)	Timber Single Door Sash Grid	(W x H) EDIT	
Composite Door	(11)			

Search

Search for keywords to quickly jump to the right line item to add your sell price.

Show/Hide products

Use the filters to turn off materials to make it easier to find the line items you are looking for. Turning off a material here will not effect the designer.

Show unpriced items

Check this feature to show all items that have yet to be priced.

Test your pricing

Once you have added your pricing you can then use the price breakdown calculator within the sales and survey designer by clicking the magnifying glass, as pictured in the test your pricing example.

How to set up your pricing.

Window / Tilt Turn / Single / Double Door 🔺

Your frame is calculated using: 1. Outerframe Grid

<u>Sash Grid</u>
 <u>Transom / Mullion / Midrail</u>

Then add your extra pricing:

4. Colour group uplift

5. Glass 6. Ancillary Profiles

7. Hardware

Important Information:

Retail enquiries use the following default options:

Windows

Small profiles

- Tilt/Turn and Doors
- Large Outerframe
- Medium Transom/Mullion

5 Ho Alc

How to setup pricing

Alongside the pricing we have a small help guide showing how each product price is calculated. Selecting the dropdown will highlight the necessary items in the table on the left.

Click the drop down to show how each product is calculated.

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How to set up pricing

Use the help box on the right, this shows you which components make up a complete product.

price		How to set up your pricing.
Timber 🗹 Other 🗹 Sho	w unpriced items only (grid excluded) Unpriced 🗆	Window / Tilt Turn / Single / Double Door 🔹
those enabled - You don't need to fill in every box, ignore the ones yo	u didn't enable	Bifold door 👻
nose enabled - rou don't need to hin in every box, ignore the ones y		Patio door 👻
Grids (Width x Height	Format)	
VC Casement Frame Grid	(W x H) EDIT	Vertical Slider 👻
VC Casement Sash Grid	(W x H) EDIT	Bay and Bow -
VC Flush Casement Frame	(W x H) EDIT	
VC Flush Casement Sash Grid	(W x H) EDIT	Composite Doors -
PVC Tilt & Turn Frame Grid	(W x H) EDIT	
Window / Tilt Turn / Single / Double Door Your frame is calculated using: Outerframe Grid Sash Grid Transom / Mullion / Midrail Then add your extra pricing: Colour group uplift Glass Ancillary Profiles Hardware Important Information: Retail enquiries use the following default options: Windows Small profiles Tilt/Turn and Doors Large Outerframe Medium Transom/Mullion	Bi Fold Door Your frame is calculated using: Bifold Frame Grid Per Bifold Sash Then add your extra pricing: Colour group uplift Glass Ancillary Profiles Hardware	Patio door Your frame is calculated using: Patio Door Grid Per Patio Sash Then add your extra pricing: Colour group uplift Glass Ancillary Profiles Hardware
Vertical Slider Your frame is calculated using: Vertical Slider Grid	Composite Door Your frame is calculated using: Frame	Bay and Bow Retail enquiries use the following default options:
Vertical Slider Sash	Sidepanel Frame Transom / Midrail	Small Sashes
Then add your extra pricing:		
Colour group uplift Glass	Then add your extra pricing: Door Style / Glass	
Ancillary Profiles	Door Colour	
Hardware	Ancillary Profiles Hardware	
Important Information:		
Retail enquiries use the following default options: Small Sashes	Important Information: Retail enquiries use the following default options:	

Medium Transom



Website designer set up

To launch the website designer you need to upload the following documents, once this has been completed you will have access to your deployment URL.

Vendor Account > Website Des	signer				
Pricing Display Would you like to display a live price on y Yes ONo	rour website designer? Set u quote	ng Setup p pricing now, once prices are o e using the quote & survey tool crive setup		price will be visible as you build a rs using the website designer.	
Upload your GDPR Documents Add your business documents below for	access to your website designer l	ink.			
Name Terms and Conditions	http://www.bo.com 2	Upload / Edit	Name Privacy Policy	http://www.bo.com	Upload / Edit
Deploy your Website Designer Follow the instructions below to deploy y Would you like to personalise the w select		signer will be hosted? (This	is usually your company	y name)	
How to deploy 1) Copy your designer link using the buttr 2) Click the 'Copy URL' button below. 3) Your designer will then be accessible 4) You can also post the copied URL on s	by customers from your current w				
Any updates you make to your settings w				ate your website with the new URL.	



Live Pricing - Yes or No

You have two options to set up your website designer with a live price or lead generation. If you choose live pricing the homeowner will be able to see your selling pricing, configured in the pricing section.

Terms and conditions

Here you will need to upload a copy of your standard business Terms and Conditions, these will then be available for your customers to view when they are using your Web Designer.



Privacy policy

Under General Data Protection Regulations you are required to display a Privacy Policy to your customers to agree to before they submit their personal information to you. This document needs to detail clearly how you plan to use and store their information, as well as information regarding their rights. The ICO provide further information on this, including a template here: ico.org.uk/fororganisations/make-your-own-privacy-notice



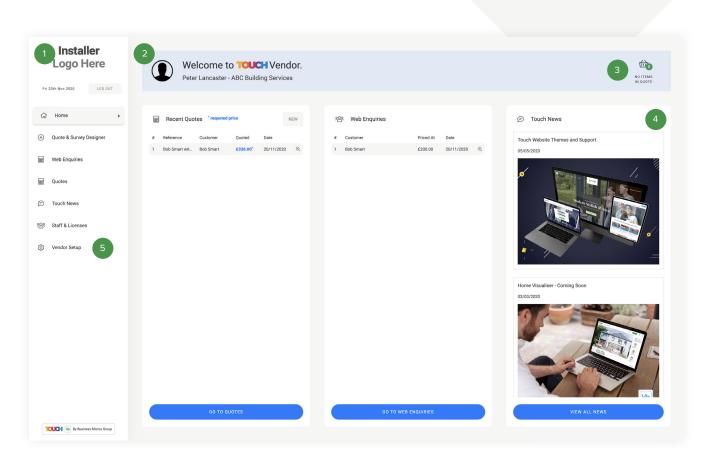
Deploy your website designer

You can personalise your website address to match your company name. Once you are happy, make sure you click to Save Changes and you can then pass this URL to your website developer who can then add links to your website designer.



Vendor dashboard explained

Now you have setup your company details you will be given access to your Vendor dashboard.





Your company logo

The logo you uploaded in your company details will pull through onto your personalised dashboard.



Your avatar

Personalise your dashboard with your own avatar, this can be uploaded in the staff and licenses section.



Need to jump back to a quote? We will store your quote for quick access from your dashboard.

TOUCH News

Look out for more product releases and all the latest news from TOUCH and the TOUCH Store.

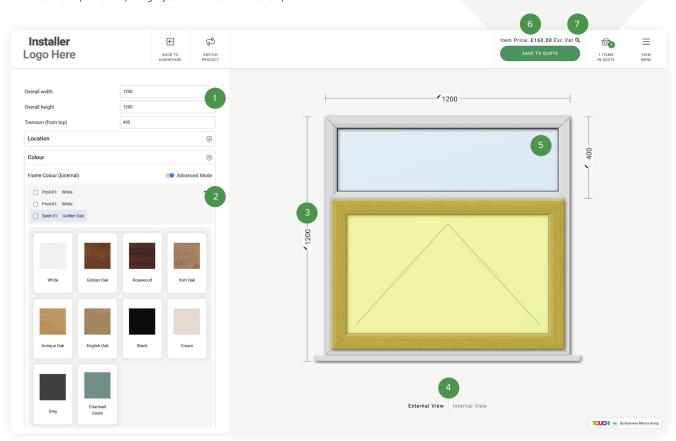
Vendor Setup

If you wish to edit any of your company details, product range, prices or your website interface settings, click the vendor setup button.



Sales and survey designer explained

This designer allows you to generate detailed quotes for your customers with more technical options and pricing if you have chosen to set this up.





Detailed product questions

The sales and survey designer comes with a comprehensive list of technical questions, including measurements, glass, hardware, cills, vents and much more.

Advanced mode

Advanced mode allows you to separately configure sections of your product with different colours, glass etc.



Measurements

Quick access to edit measurements with the product render automatically updating in scale.

Switch views

Switch the view of the product to view the inside, outside and plan view (plan view only available for bi fold doors and bay/bow windows).



High resolution, accurate product imagery

All products are based on standard fenestration products, giving homeowners a realistic look at the products they want to buy.



Live pricing

As each and every option is chosen your price will automatically update to show your sales price.

Price Calculation Breakdown

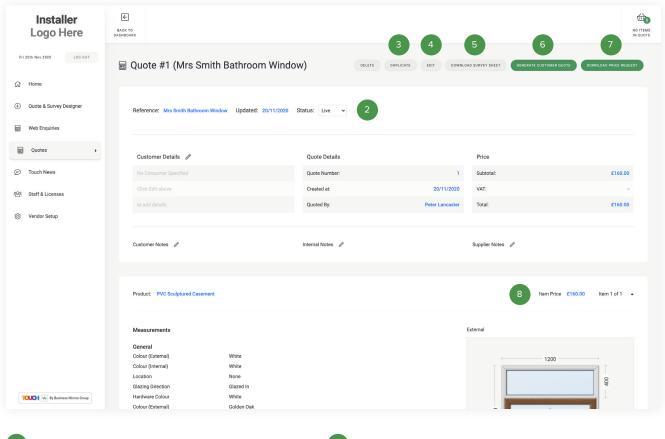
Once you have added your pricing you can then use the price breakdown calculator within the sales and survey designer by clicking the magnifying glass. This allows you to test your pricing and edit as applicable.



Quotes

This is where any converted enquiries and quotes will show.

						V QUOTE
# Date	e Created	Reference	Pricebook	Requoted Price	Status 🍸	
1 20/1	1/2020	Mrs Smith Bathroom Window	£160.00		• Live	Ð
1 20/1	11/2020	Bob Smart with Install	£200.00	£336.00	• Live	Ð



Quote list

All quotes that are created will land here along with any enquiries that are converted to a quote.

Quote details

All details of the quote will be listed here including editable status, customer details, price if added via vendor setup, product summary and an internal and external view of the product.

Download survey sheet

If you wish to carry out a survey, you can download and print a copy of the quote to add technical details. These can then be added to the quote via the edit button.

Duplicate

You can duplicate the same quote to allow you to make slight amendments and then send this back to the customer. Ideal if a customer wants a quote for the same product with some small amendments.

Edit

Edit allows you to re-open the quote and make any amendments to the product specification.



Generate customer quote & and adding additional prices to a quote.

This allows you to add a price uplift to your quote, this can be added to the overall quote or to each product line item. You can also add a fitting cost. You can then download the quote with these prices to send to your customer. (see page 15 for more details)

Download price request

If you wish to send a full summary of a quote to your supplier to request a price, simply click download and email a copy to your supplier.

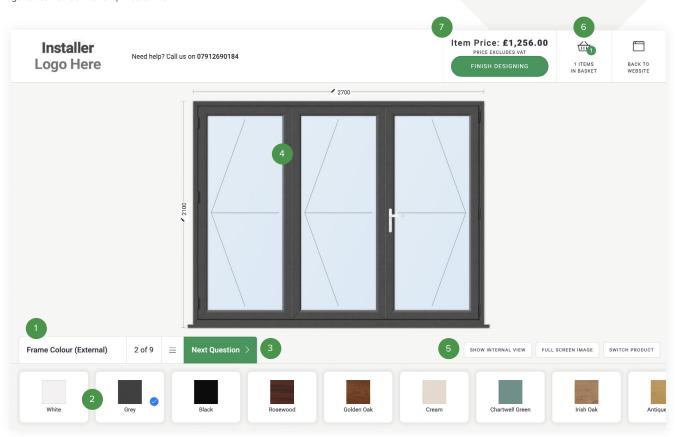
Item price

If you have added prices in the vendor setup section, each quote will be created with your selling price to your customer.



Website designer explained

This is the website designer which will be linked up with your own website to generate homeowner enquiries online.





Limited product questions

To help a homeowner, questions have been limited to make the process quick and not to confuse.

Homeowner friendly thumbnails

Large homeowner friendly thumbnails help the user to make quick choices and give the designer a friendly feel.



Easy to use interface

Intuitive buttons guide the homeowner through the process from start to finish.

High resolution, accurate product imagery

All products are based on standard fenestration products, giving homeowners a realistic look at the products they want to buy.



Switch views

Switch the view of the product to view the inside, outside and plan view. You can also hide the menus to view a larger image of your chosen product.



Multi product basket

Homeowners can add multiple quantities and products to a single basket allowing you to quote for multiple products.

Optional live pricing

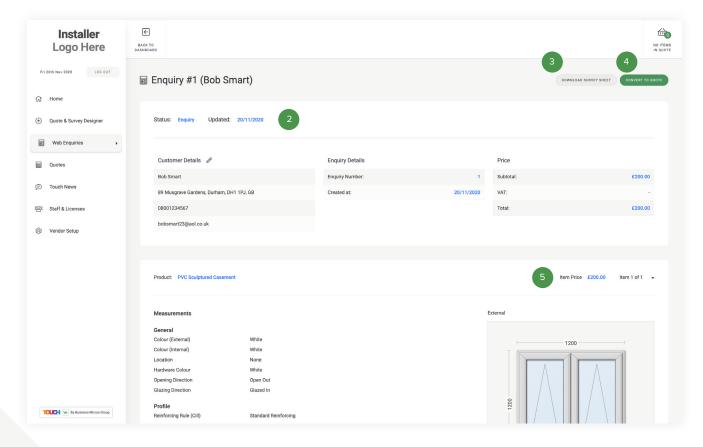
Turn pricing on and off to allow homeowners to see your selling price live.



Website enquiries

This is where any enquiries made through your website designer will land.

🖩 Rece	nt Enquiries					
#	Date	Name	Postcode	Email	Phone	
2	20/11/2020	Jane Smith	DH1 3HN	janesmith@yahoo.co.uk	07912690184	Ð
1	20/11/2020	Bob Smart	DH1 1PJ	bobsmart23@aol.co.uk	08001234567	€
			« < 1 of 1 、) > »>		



Website enquiries list

All enquiries that are made through your Vendor website designer will land here.



Website enquiry details

All details of the enquiry will be listed here including status, customer details, price if added via vendor setup, product summary and an internal and external view of the product.

Download survey sheet

If you wish to carry out a survey, you can download and print a copy of the enquiry to add technical details. These can then be added to the system once you have converted the enquiry to a quote.



Convert to quote

You can convert the enquiry to a quote to edit, duplicate, generate a customer quote PDF or download a price request PDF.

Item price

If you have added prices in the vendor setup section, each enquiry will come through with a selling price to your customer. This price can be edited once converted to a quote. The customer will not have seen this price.



No pricing

- 1. create a quote/convert an enquiry to a quote
- 2. download price request pdf
- 3. email to supplier for a price
- 4. generate customer quote add override price
- 5. email to customer

Price on Sales & survey designer (this should be the price you want to sell to your customers)

1. go to vendor setup

- 2. complete pricing setup any new quotes created will display a live price
- 3. test pricing green help box to the right of pricing page
- 4. create a quote with live price
- 5. generate customer quote add override price if needed
- 6. email to customer

Price on Website designer (this will automatically use the pricing from the vendor setup)

You will need to have already setup the prices in vendor setup and tested using the sales & survey designer.

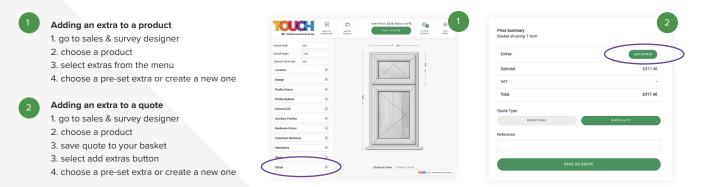
- 1. go to vendor setup
- 2. setup your website designer
- 3. select yes on pricing display
- 4. deploy your Website Designer to your website

Adding additional prices to a quote

	📾 Generate C	ustomer Quote		×
I. go to vendor dashboard	Item	Calculated Price	Alternative Price	
2. go to quotes 3. select a quote	Fitting Price		£0	
4. select generate a customer quote	Item(s) Price	£160.00	£ 160	
			CANCEL DOWNLOAD	

If you wish to add an uplift price to any quote, you can price each product separately or amend the total value of the quote. You can also input costs for fitting. Once you have added your costs, you can download a homeowner friendly quotation including the new costs and email this to the homeowner.

Adding extras





Staff and licenses

This section allows you to add and manage the accounts that have access to your Vendor dashboard.

Installer ← ⇔ Logo Here BACK TO DASHBOARD NO ITEMS IN QUOTE Fri 20th Nov 2020 LOG OUT ℅ Staff & Licenses ∰ Home Quote & Survey Designer 1 of 1 seats used PURCHASE ADDITIONAL SEATS Web Enquiries Duotes Your Seats First Name Last Name Email Mobile License Status Admin Touch News Enabled Peter Lancaster peter+abc@theconsultancy.co.uk Yes 2음악 Staff & Licenses 영 Vendor Setup Inactive Users First Name Last Name Email Mobile License Status Admin TOUCH Ve By Business Micros Group



Your seats

You can add additional seats for members of your staff, so they can create and edit quotes via their own personal login.

Inactive users

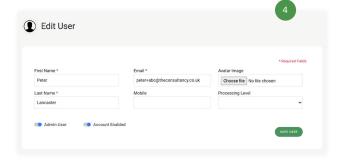
If a staff member leaves your company and/or no longer needs a login you can de-activate it from this screen and a designate their seat to a new user.

Purchase more seats

You can purchase extra seats via the TOUCH Store, simply click purchase additional seats and add seats to your subscription.

Edit user

This allows you to add a users personal and contact details.



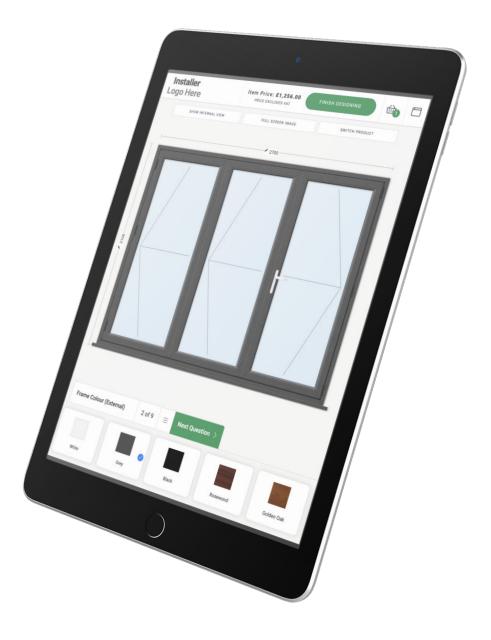
Vendor support

TOUCH Support

If you have any questions on TOUCH Vendor, please contact us via the TOUCH website live chat for fast, friendly advice.

www.bm-touch.co.uk

For more information on Vendor, please call our support team on 0800 059 9705 available 9am-5pm Mon-Fri.







How to purchase Visit the TOUCH website and register to gain access to the TOUCH Store.