

WINDOWwizard

ONLINE ORDERING & QUOTATION SYSTEM

EXPERIENCE THE MAGIC OF ONLINE ORDERING



the first

the fastest

the easiest

Welcome to simplicity.

Atrium Windows and Doors is proud to offer you the WindowWizard, an online quote generating and ordering system that simplifies every aspect of purchasing and selling top-quality windows and patio doors. We make quoting and ordering easy and hassle-free.

atriumwizard.com



The Industry Original

In 1999, Atrium developed and launched the WindowWizard, the industry's first online quoting and ordering system. That ground breaking innovation can be seen through our system's real-time access and the fastest, most intuitive navigation on the market. The same cutting-edge approach that first launched the Wizard still drives our process today, through constant assessment of our customer's needs and refinement of our system. As the industry evolves, so does the WindowWizard.

Unparalleled Innovation

Although others have attempted to replicate the ingenuity of the WindowWizard, it remains an unparalleled system in the industry. The design and ease of use was originally developed by the very people who would be using it, the Atrium customer. One of the greatest enhancements of the WindowWizard allows our customer's to pass on the same convenience and ease of use to their customers, creating a paperless cycle. Because the core functionality was created by the user, the Wizard can instantly perform complicated tasks and price even the most complex of configurable units within seconds.



The Online Advantage

With access 24 hours a day and 7 days a week, our customers can generate a quote or submit an order when it is convenient for them. This cloud-based system, requires no downloads and keeps all your information readily available. With this simple paperless system, there are no faxes to be misinterpreted or lost. The WindowWizard gives you access to the Atrium operating system around the clock. You can quickly and easily get a new quote, update quotes, place a new order, or check the status of an existing order. The Wizard answers your questions with the most up-to-date accuracy whenever you need the information, not just when the phones are manned.

Flexible Quoting

The WindowWizard calculates quotations and orders for you and your customers to fit your individual sales strategy and needs. This flexible feature allows you as the distributor to price your quote in three convenient ways: as a percentage markup, a discount off dealer list or by gross profit margin. All pricing is customizable and provides cost-hidden options only visible to your dealers.

Security

With state-of-the-art security, only users with the correct user name and password can access the Wizard. This means all of your information is securely protected and available when you need it.

We're Here For You

You can count on our team to be available to answer any questions or provide assistance. Contact us at **800-866-9556**.



Launching WindowWizard and logging in

- To access the WindowWizard website:
- Type **atriumwizard.com** in your Web address box, then press **Enter**.
The log-on screen appears.
- Enter your **User ID** and **Password**, then click **Log On**.

The launch screen appears. The WindowWizard will always default to the "News" screen when you first log in. From this launch screen, choose your task from the options outlined below.

Creating a New Order or Quote

To create a new order or quote:

In the main menu at the top of the screen, click **Create Order**.

- Click the cursor arrow into each field and type the requested information. (Once you click into the first field, you may use the tab key to move into the other fields.)
- To generate a quote or an order, you must fill in at least one of the following fields:
1) Purchase Order 2) Customer 3) Job Name
- Indicate your desired pricing structure. Remember that when you select **Show Customer Price** you must also select a calculation method.
- The **Special Instructions** field is where you can include such information as shipping or delivery specifics.
- When you have finished entering information on this screen, click **Continue**.



Order/Quote Information

Customer : ATRIUM TEST
Account: WINDOW WIZARD TEST/ATRIUM - AA0108
Brand: Atrium

Purchase Order:
Customer: Entered By:
Job Name: Created On:

- ☒ Show List Price
☐ Show Customer Price
☐ Show Distributor Cost

Cost Calculation for Customer Price:
☒ Cost Plus 0.00 Percent
☐ Gross Margin Points
☐ Discount off List Percent

Special Instructions

> CONTINUE
> CANCEL

Adding an Item

To add an item to an order or quotation:

- Click **Add Item** (red tab).
 - Click your product choices, which are listed by series.
 - You may click on the **Product Feature Sheets** for a product description.
 - Click the desired window or door style.
 - At this point an **Options Menu** appears for the chosen product. Highlighted options reflect standard default features of the product; if options other than the default options are desired, you must select those specific options by clicking on them. Enter desired quantities, sizes, room location and any special instructions for that line.
- Click the **Save Line to Order** tab to save all requested information.

Quick Tips

To enter an item for the same product with different options or a different style of the same series, or to enter a totally different product, click **Add Item** (red tab) and repeat the same sequence.

The WindowWizard will automatically price your quote upon saving the lines to order.

To add the Lifetime Glass Breakage Warranty coverage to your replacement series order, click the **Price** button and answer "yes" to the prompt regarding the warranty.

You can add or delete the extended Lifetime Glass Breakage warranties at any time prior to submitting your order to Atrium by clicking the **Price** button and answering the prompt accordingly.

Once you have entered and saved your lines to your order, your quote is saved in the WindowWizard. You can delete any line that needs to be removed by clicking the **Delete** button to the right of that line.

Note: An unsubmitted quote will be listed on your quote list for 90 days. At the end of this period, the quote will be permanently deleted from your list.


Completing an Order

- Click **Printable View** to print a copy of your order information.
- Click **PDF Icon** to email a copy of your order.
- Click **Submit to Atrium** to send your order to Atrium. You may also submit the order from the quote list by clicking the **Order** button on the quote list page.

*Note: Once an order is submitted, you can view it by clicking **Order List**.*



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Best Window Co.
Anywhere, USA

Quote Information - Quote 10110591 - Buyer

Company Name: ATRIUM TEST

Sales Order:

Purchase Order:

Contractor: BEST WINDOWS

Job Name: 123 ELM ST

Account: AA2108

Account Name: WINDOW WIZARD TEST/ATRIUM

Entered By: 601um

Status: Quote

Created On: June 16, 2017

All prices subject to change without notice

Line	Qty	Description	Size	Customers		
			(W x H)	Unit	Est.	
1	2	Configuration: Mullied Unit XX Twin w/ HR (Opening Size: 48 W x 72 1/4 H, Exact Size: 47 1/2 W x 71 3/4 H, Rgross Opening Size: 19.65 W x 10.81 H (2.57 SQ.FT))				
						
		New Series 150 Single Hung - White - Clear - Ultra Low E/Glass - 3/4 Colonial - 19x17 1/2x17 1/2 (White) - 3X - Screen - Standard Weath - Factory Mut	2 0' x 4 0' NS			
		(U Factor: 0.28, SHGC: 0.20 Meets ENERGY STAR in regions: (NORTH CENTRAL) (SOUTH CENTRAL) (SOUTHERN)				
		New Series 150 Single Hung - White - Clear - Ultra Low E/Glass - 3/4 Colonial - 19x17 1/2x17 1/2 (White) - 3X - Screen - Standard Weath - Factory Mut	2 0' x 4 0' NS			
		New Series 150 Half Round - White - Clear - ULTRA LOW-E/GLOSSON - Double Strength - 3/4 Colonial - H2 (White) - Factory Mut	47 1/2' x 25 3/4' RS			
		(U Factor: 0.28, SHGC: 0.21 Meets ENERGY STAR in regions: (NORTH CENTRAL) (SOUTH CENTRAL) (SOUTHERN)				
Sub Totals					1058.88	
Totals					1058.88	

A blank price indicates that the price of an item has not yet been retrieved by the system.
Select **Price Quote** to retrieve prices for items which have not yet been priced by the system.

Special Instructions:

Sign Here to Order
X

Viewing or Editing Quotes

To view a complete listing of existing quotes you have generated with the WindowWizard (but have not yet submitted as completed orders):

- Click **View Quote List** in the main menu.

To add items or to make changes to existing information:

- Click **Edit** for the particular quote you want to edit.
- Click **Order Information** to add a **Purchase Order** or make changes to the **Job Name**, Customer or Special Instruction field.
- Once the information has been typed in, click **Continue**.
- Click the **Edit** button next to the individual line to change additional information.

Note: You can move through the fields either by tabbing or by clicking the cursor in a field.

To submit the edited quote:

- Click **Submit** to Atrium from the entry screen or click **Order** from your quote list.

*Note: A **Purchase Order** is required before a quote can be submitted.*

Deleting an Existing Quote

To cancel an existing quote entirely:

- Click **View Quote List**.
- Click **Delete** in the last column of the particular quote you want to delete.
- Confirm the deletion on the confirmation window that pops up.

Note: Only an unsubmitted quote can be edited or deleted. Once an order is submitted, you can only view its status. Any changes you need to make to a submitted order must be handled by telephone request to Customer Service at 800-866-9556.

Status	Destination			Arrival Date	Arrival Time	Departure Time	Scheduled Date	Scheduled Time
Enroute	CUSTOMER NAME	Location	State	6/16/2017	2:57:00 PM	2:57:00 PM	6/16/2017	11:14:00 AM
If "status" is "Enroute" or "Loading"; Arrival/Departure Dates and Times are estimates.								

Reviewing an Existing Order

To check the real-time status of an existing order:

- Click **Order List**.
- Click **View** in the last column of the particular order or quote you want to review.
- Click **Order Information** to view pricing structures.
- Click any blue-underlined text for delivery status.

*Note: To copy an existing order, click **Copy** on the last column of the specific order you are copying. Then, select the lines you would like to copy to a new order/quote and click enter and a new quote will be created.*

Viewing the Last Saved Order or Quote

To view the last order or quote you saved:

- Click **Current Order**.

Adding or Deleting New Buyers

- A Buyer may click **Administration** to edit his/her personal information such as passwords.
- A Manager may click **Administration** to add, edit or delete buyers as needed.

Note: New buyers must be set up by a branch manager or other authorized principal of the branch.

Help

At any time during your use of the WindowWizard, you may click the **Help** tab for detailed information about any command or function.

Exiting WindowWizard

To exit the WindowWizard program:

- Click **Exit** from the main menu at the top of the screen.

*Remember, you can count on our team to be available to answer any questions or provide assistance. Contact us at **800-846-9556**.*



> VIEW ORDER LIST	> CREATE ORDER	> ADMINISTRATION
> VIEW QUOTE LIST	> CURRENT ORDER	> HELP > EXIT

Service - Change password - myWinWizard - Search - News

Purchase Order -

Company Name:	Account:	Account Name:
Order:	Created On:	Status:
Customer:	Entered By:	Est. Due Date:
Job Name:	Submitted By:	

A blue-toned illustration of a wizard's hands and tools. The left hand holds a staff with a glowing orb at the top. The right hand holds a pointed wizard's hat decorated with stars and a cross. Below the hat is a scroll with a cross symbol. The background is a solid blue color.

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