DEALER HOW-TO

Create a customer quote

Illustrated, step-by-step instructions for the ES Glass Garage Door Pricing form. The screen drawings below are simplified guides to where each task appears; use the live form labels and available choices.

Start: Sign in to the dealer portal and open the quote form. Have the customer details, installation location, door measurements, requested glass/frame choices, and opener information ready.

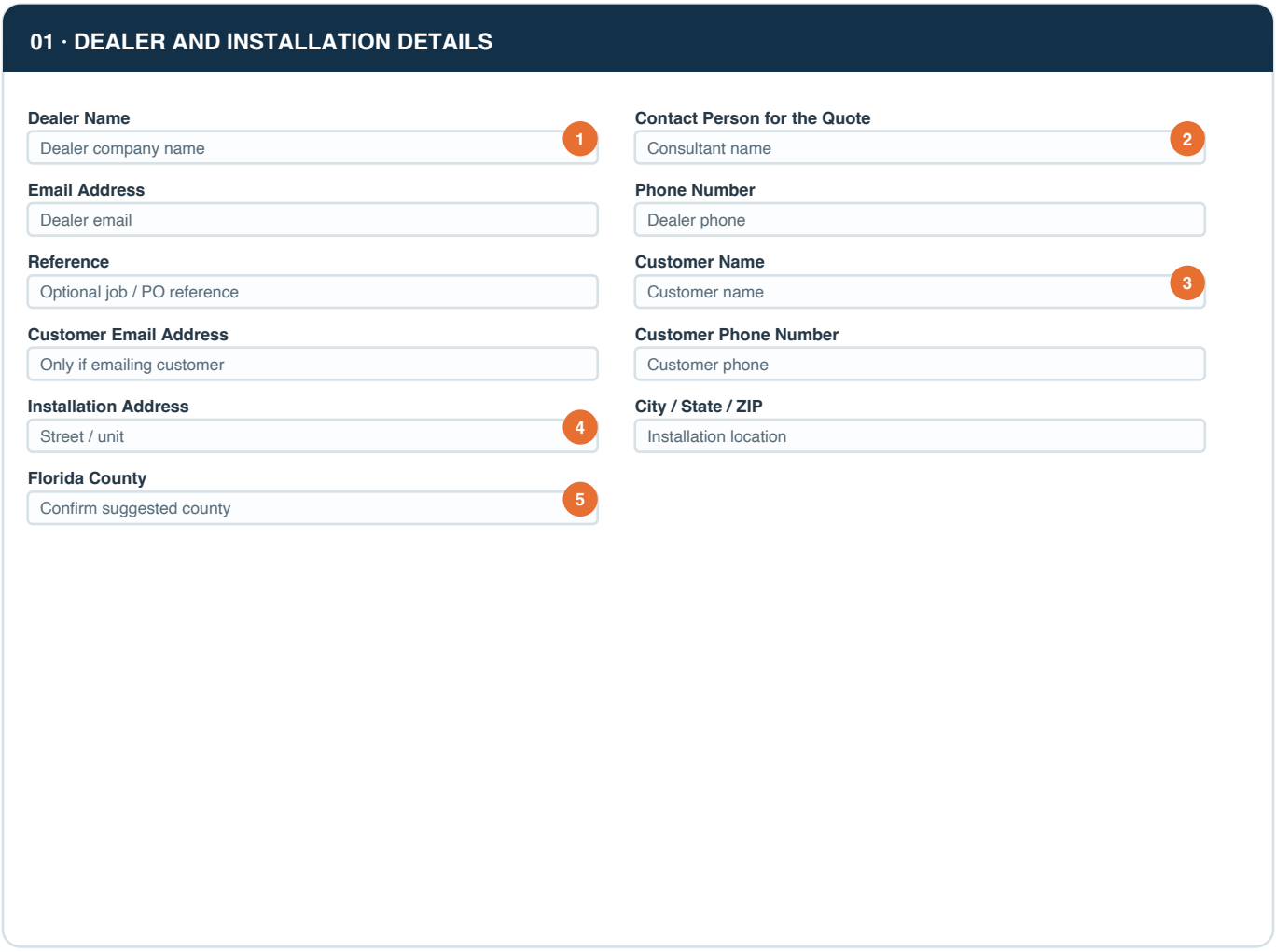
The quick sequence

1	Fill dealer and installation details
2	Set markup or margin
3	Configure each unique door
4	Check the live drawing and recap
5	Print or submit the quote

Door quantity rule: Quantity is for multiple identical doors. If a door has a different size or selection, enable the next “Add another door” section and configure it independently. Each door has its own glass, track configuration, and motor.

STEP 1 · Enter dealer and job details

Complete the first section before selecting door options. These values identify who prepared the quote and where the door will be installed.



Field-by-field

Dealer Name, Contact Person, Email, Phone: identify the company and quote preparer. Dealer name may be prefilled from the account. **Reference:** optional job identifier. **Customer Name, Email, Phone:** fill in the customer's details; customer email is needed only if you choose to email them. **Installation Address, City, State, ZIP:** enter where the door will be installed. State defaults to Florida. **Florida County:** ZIP suggests a county when available, but confirm the correct county because it can affect out-of-area labor charges.

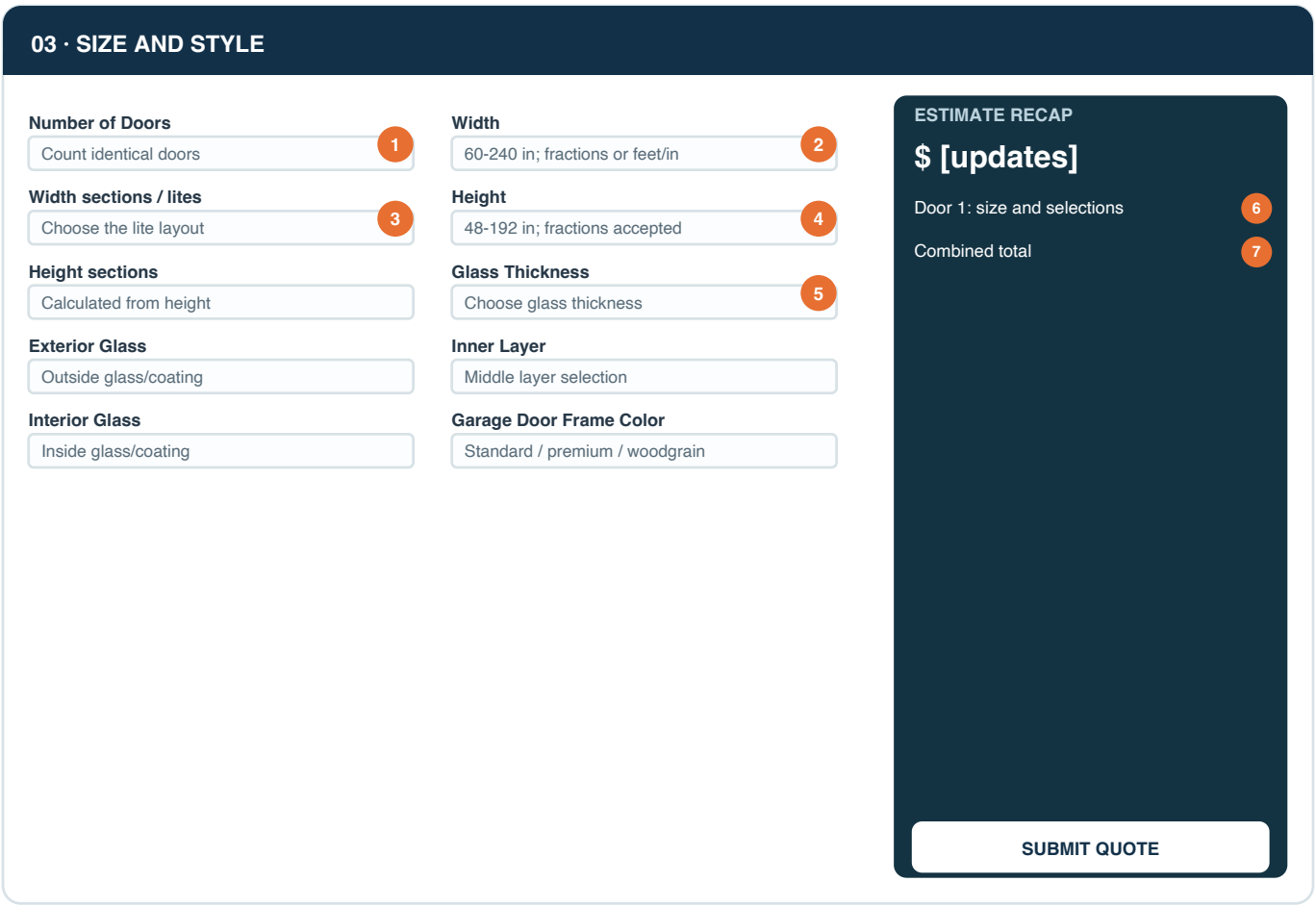
Customer email checkbox: choose it only when you want the customer to receive the marked-up quote and door drawings. The internal cost form is excluded.

STEP 2 · Choose markup or margin



Enter one field: Markup is calculated from cost; margin is calculated from selling price. The other percentage updates automatically. A markup percentage and the same margin percentage produce different results. Confirm the combined estimated total in the recap.

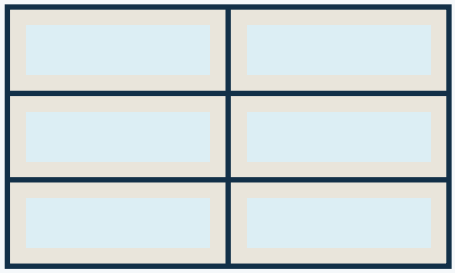
STEP 3 · Set up the first door



Width and height: enter inches; width also accepts feet-and-inches. Fractions are accepted. Width range is 60″–240″; height range is 48″–192″. **Width lites:** choose the layout allowed for that size. Widths under 8′ allow up to 3 lites; widths over 11′ require at least 2. Lite count does not change price. **Height sections:** calculated automatically; equal panels in the target range are used when possible.

Glass: choose thickness, exterior glass, inner layer, and interior glass for this door. Follow any automatic thickness guidance shown by the form. **Frame color:** select the requested finish. Premium and woodgrain pricing increases apply to that door subtotal as calculated by the form.

STEP 4 · Review the drawing and finish door options



LIVE DRAWING PREVIEW 3

Shows selected lite layout and frame color.

Enter final dimensions before reviewing.

Illustrative view - verify job specifications.

The preview updates from door width, height, lite layout, and frame selection. Use it as a visual check; it is illustrative, not a shop drawing.

DOOR OPTIONS · PER DOOR

Wood Bucks 1
Optional accessory

Rain Lip Cut
Optional accessory

Track Configuration 2
Standard / low / high / vertical

Motor 3
Select opener for this door

Wireless Wall Station
Yes adds $125 / No

Track Color Options 4
Shared - applies to all doors

Custom Request
Enter special details

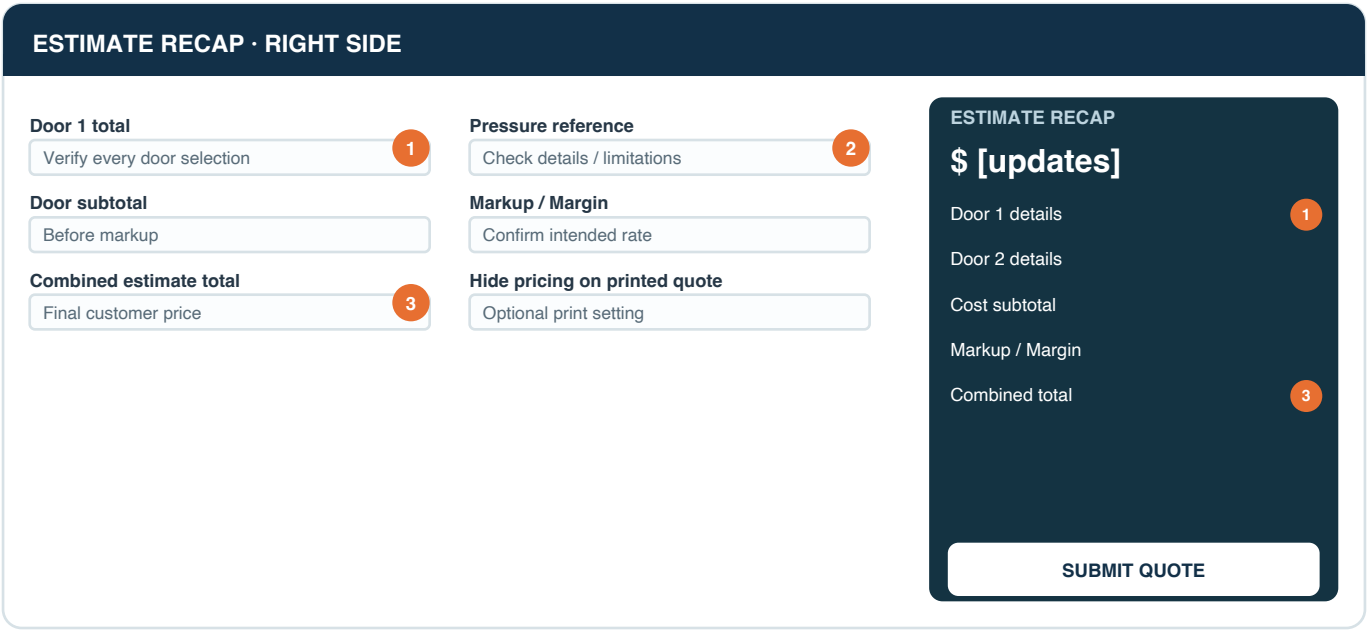
Picture Attachment
Optional image

Per-door fields: Wood Bucks, Rain Lip Cut, track configuration, motor, and wireless wall station belong to the current door. A motor selection is required separately for each included door; choose from options the form enables for its size, weight classification, and track configuration. Wireless Wall Station Yes adds $125 to that door.

Shared Track Color Options: select once; it applies to each included door. **Custom Request / Picture:** note unusual requirements and attach an optional supporting picture.

More doors: enable “Add another door” for a different configuration, then repeat Steps 3-4. Set quantity only for doors that are identical in size and selections.

STEP 5 · Check the recap, then finish



Review each door: confirm size, quantity, glass, frame color, drawing, add-ons, county, track configuration, opener, and per-door total. Confirm markup/margin and the combined estimate total. The design-pressure recap is a reference aid; verify approval, actual glass dimensions, anchorage, and project conditions before relying on a rating.

Choose the action you need

Print Estimate	Opens the print preview on screen. Use Print or Download in the preview. The Hide pricing control determines whether the printed quote shows prices.
Submit Quote	Submits and creates the packet. The dealer receives separate PDFs: customer quote with markup and drawings, plus the internal cost form before markup. Do not send the internal cost form to the customer.
Email customer	If selected earlier and a valid customer email is entered, the customer receives the marked-up quote and door drawings; the internal cost form is excluded.

Before Submit Quote: correct dealer/consultant · customer and installation details · separate configurations for different doors · quantity for identical doors · each door has a motor · county confirmed · recap and total reviewed.

Screens are simplified illustrations for training, not screenshots from the live website. If the form options change, follow the current on-screen form.