



**Create Custom Reports  
With Our Secondary Glazing  
Online Estimator**

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# Quickly & Easily Provide Your Customers With Prices

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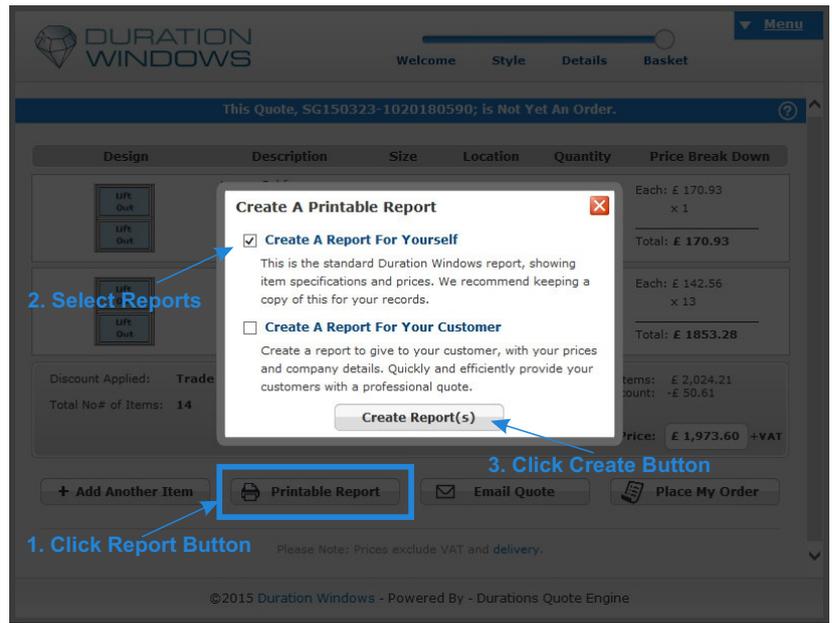
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# Create A Custom Quotation Report

## How To Create A Custom Report

If you have received a trade price through the Secondary Glazing online Estimator, when you click the 'Printable Report' button, at the bottom of the basket page you will see a pop up.

The pop up gives you two options; 'Create A Report For Yourself' and 'Create A Report For Your Customer'. You can select, which of the reports you wish to create by clicking on the tick boxes; you can even select both. The report for yourself produces a Duration Windows branded report in a new window, that shows all of the item specifications along with our prices. We recommend that you keep a copy of this report for your records.



Selecting the 'The report for your customer' will take you to a page to start designing your own report that is branded with your company name, corporate colour and company details. This customisable report has been designed to enable you to quickly and efficiently provide your customers with professional quotations.

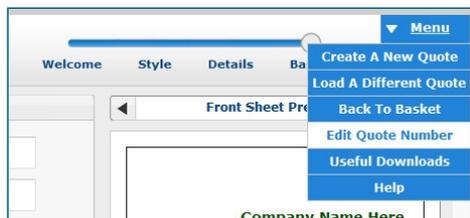
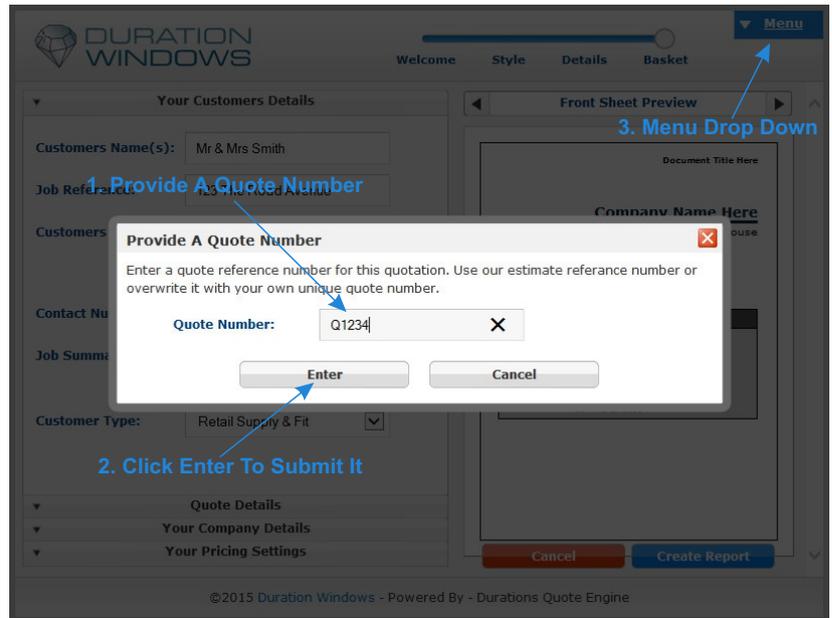
Select the report(s) you would like to create and click the 'Create Report(s)' button.

## Getting Started

If you opt to create a custom report you will be redirected to a page to start entering the information you would like to display on your report.

If there are no reports that have been saved against this job you will be asked to provide a quote number for this new quotation report. This is number needs to be unique and is required, to help identify this quote / report from any other quotes / reports, that you create.

Our estimate reference (SG Number) is used by default, but you can type over type it with your own number. Click enter to submit the number or cancel to return to the basket page.



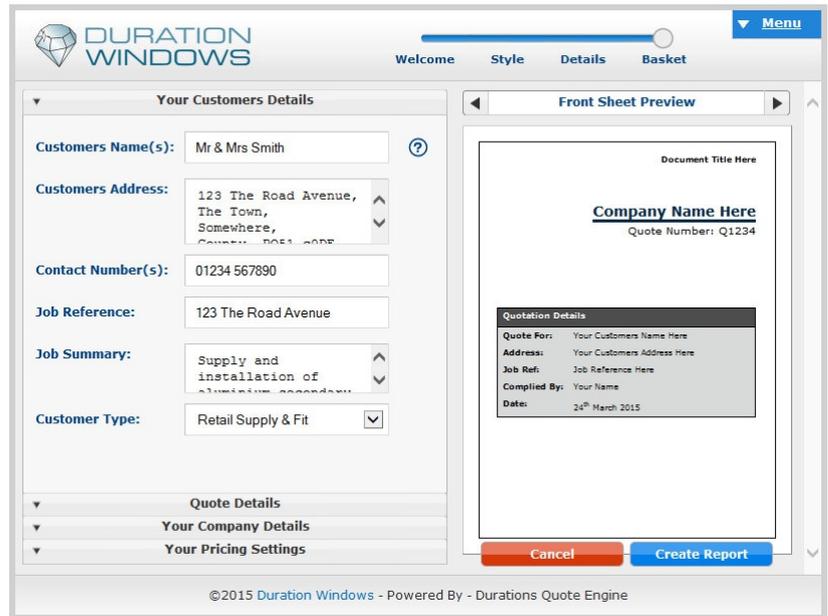
The pop up will close and you will find yourself on the custom report designer page. If you wish to change the quote number at any time you can hover/click the blue 'Menu' button in the top right hand corner and select 'Edit Quote Number' from the drop down menu.

# Customise Your Report

## How Custom Reports Work

On the left hand side of the page is the input panel, on the right hand side is the a preview of what the report will look like. The input panel is an accordion style collapsible input form. Click the silver grey headers to expand each of the panels and input the information for your report.

There are four panels in the collapsible form; 'Your Customer Details', 'Your Quote Details', 'Your Company Details' and 'Your Pricing Details'. You need to complete each of these before you can create your report. When you create a report you can choose to save the report against the job and to save your settings for use on future jobs.

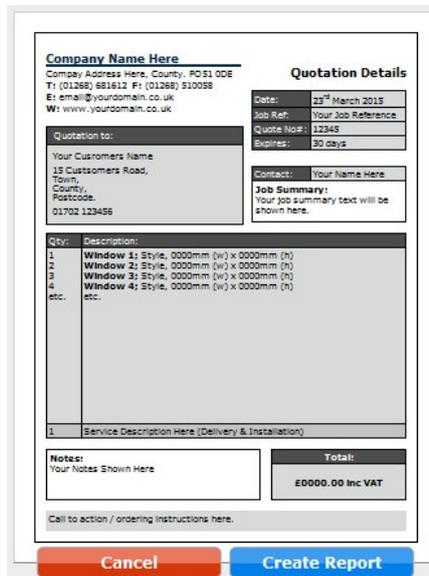


The preview panel shows a representation of what the custom report will look like. The bar and arrows at the top can be used to cycle through the preview of each of the sections of your custom report. The three sections of the report are the Front Sheet, the Quotation Summary and the Manufacture Details.

### Front Sheet



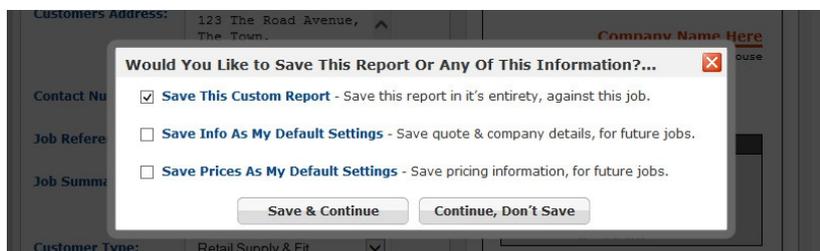
### Quotation Summary



### Manufacture Details



There are two buttons underneath the report preview panel; 'Cancel', which is red and 'Create Report', which is blue. Click the cancel button to return to the basket page, and click the create report button to submit the information you have provided and create your report. Once you click the 'Create Report Button' a pop up will appear, the pop up asks, 'Would you like to save, this report or any of this information?...'. Simply select the tick boxes that apply to your requirements.

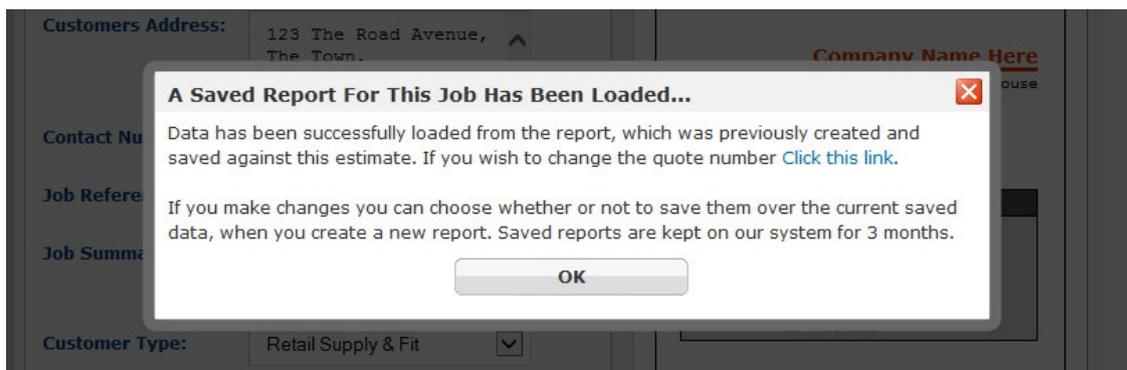


# Save Your Report

## Save Reports & Default Settings

The Pop up, which is entitled 'Would You Like to Save This Report Or Any Of This Information?...', displays three save options each with a tick box, so that you can select multiple options, if applicable. These options are 'Save This Custom Report', 'Save Info As My Default Settings' and 'Save Prices As My Default Settings'.

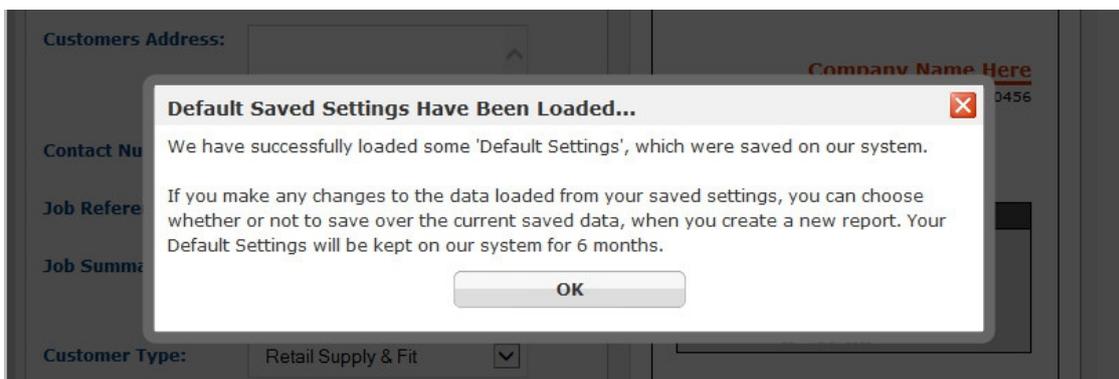
'Save This Custom Report' is selected by default. This option saves the report and all the information you have entered against this job. The next time you load this job, click the 'Printable Report' button (on the Basket page) and select 'Create A Report For Your Customer'... the system will re-load all the data previously entered and saved. Your saved data will be re-loaded into the input panel and you can then amend, edit and re-create the report. A pop up will appear on the Report Designer page when you first land on it. This pop up lets you know that a saved report has been loaded (see below).



Select 'Save Info As My Default Settings' to save the quote and company details as your default settings. These will then be loaded when you create a new report, for all future jobs. Customer details will not be saved. This will save you having to name the report, write a job summary and enter your company name, corporate colour and contact details each time you create a new report.

Select 'Save Prices As My Default Settings' to save the pricing information you have entered as your default settings. These will then be loaded when you create a new report, for all future jobs. This will save you time re-entering this information each time. This is useful, if for instance, you always mark up all items on a job by 40% and always charge £50 for delivery.

Only the computer / device that saved the default settings will be able to access and load these settings when a report is created. This makes these settings very secure. It does mean that you need to set the default setting to each computer individually, which will regularly be used to get prices from our online estimator. This is because these settings are specific to each machine, you will therefore also need to check these settings for inconsistencies. These Settings are saved on our system for up to 6 months. Each time you create a new report a pop up will appear, letting you know that your saved default settings have been loaded. (see Image Below)

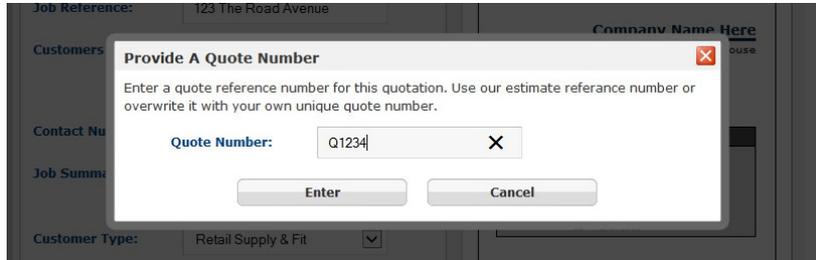


When your settings are loaded you will only need to provide your customers details before creating a new quotation report. This will dramatically reduce the time it takes for you to create custom quotes, using our online estimator.

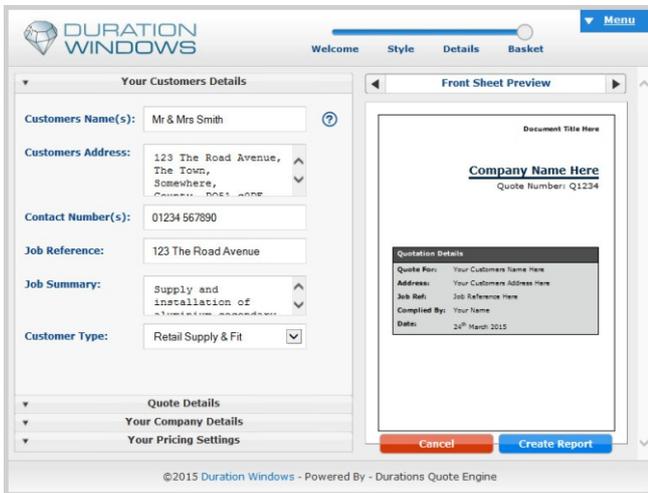
# Completing The Report Designer

## Filling Out The Customer Details

A Quote Number is required, and will be shown on every page of your report. On the front sheet it is displayed underneath your company name. On the Quotation Summary page it is displayed under the Quotation Details heading below the Job Reference at the top right hand side of the page. The quote number is also shown in the top right corner of each of the Manufacture Details pages.



### The first panel is for your customers details

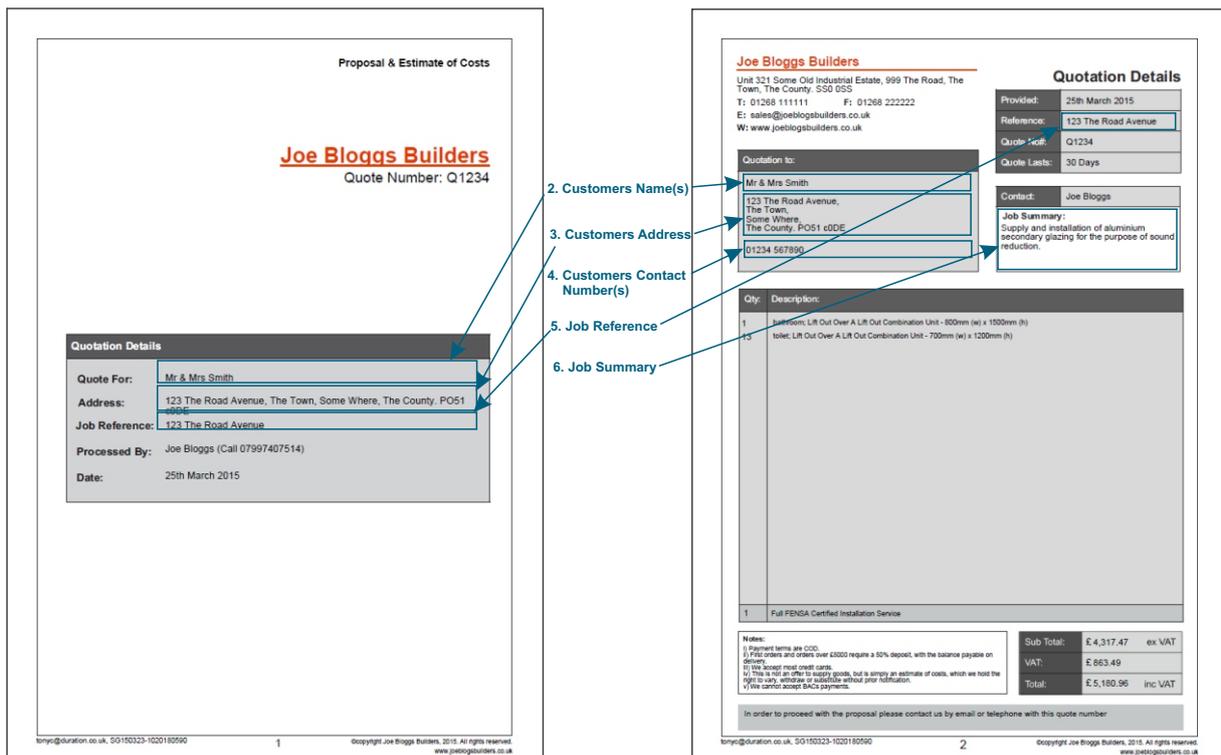


All the information on this panel is required:

- 2. Customers Name(s)
- 3. Customers Address
- 4. Customers Contact Number(s)
- 5. Job Reference
- 6. Job Summary
- 7. Customer Type

When you place your mouse cursor or select an entry box a help icon (?) will appear next to the box. You can hover over or click this icon for help and information about the sort of thing that you are expected to provide in entry box.

### The images below indicate where this information will be shown in the report.



The customer type is not displayed on the report but does affect what options are shown. For example if the customer type is Trade Supply only a fitting charge will not be applied.

# Completing The Report Designer

## Filling Out The Quote Details

The second panel is for your quote details

The following information is required:

- 8. Quote Created By
- 10. Document Title
- 11. Quote Expires
- 12. Instructions
- 14. Service Description

The following information is optional:

- 9. Direct Dial
- 13. Notes

The images below indicate where this information will be shown in the report.

10. Document Title

8. Quote Created By

9. Direct Dial

11. Quote Expires

12. Instructions

13. Notes

14. Service Description

Qty	Description
1	bathroom: L/Rt Out Over A L/Rt Out Combination Unit - 800mm (w) x 1500mm (h)
13	toilet: L/Rt Out Over A L/Rt Out Combination Unit - 700mm (w) x 1200mm (h)

Sub Total:	£ 4,317.47	ex VAT
VAT:	£ 863.49	
Total:	£ 5,180.96	inc VAT

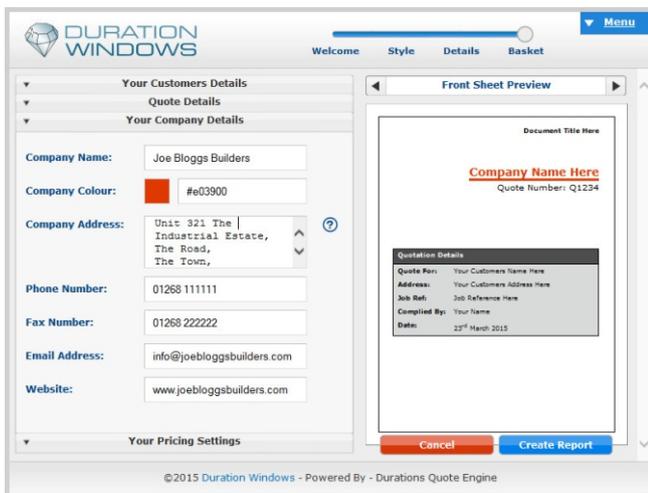
Any optional input fields, which are left blank will not be included on the report. Some of these optional entry boxes, if left blank will not leave an empty space and will not notice, such as Company Fax Number and Website, for example. When these entry boxes are left blank the **F:** and/or **W:** headings on the Quotation Summary Page that indicates a fax number (F:) or a website (W:) will also be left off of the report.

See completing company details panel for more details. (page 8)

# Completing The Report Designer

## Your Company Details

The third panel is for your quote details



The following information is required:

- 15. Company Name
- 16. Company Colour
- 17. Company Address
- 18. Phone Number
- 20. Email Address

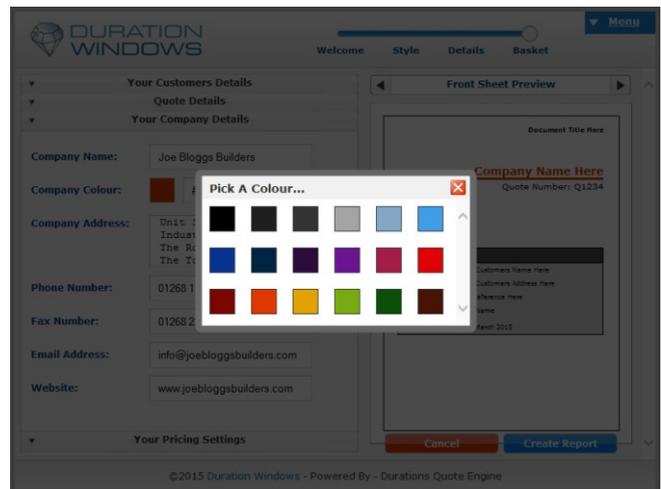
The following information is optional:

- 19. Fax Number
- 21. Website

### Providing A Company Colour

Most of the elements in the report are very neutral black text with dark and light grey boxes, but some elements on the page are coloured (in a single colour). These are dark blue by default, but you can change the colour used. There are two ways of picking a company colour.

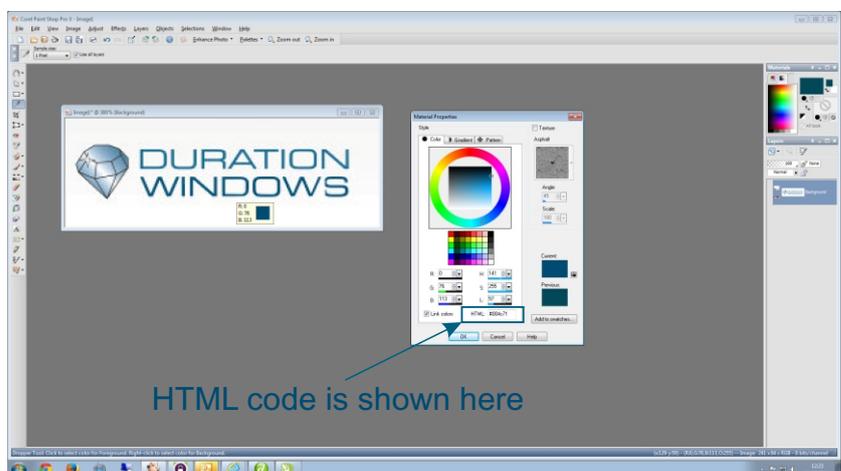
The easiest way to pick a colour is by using the supplied colour picker menu (shown in the image on the left). To open this menu simply click on the **coloured** box next to the entry box. The other option is to enter a hexadecimal html colour code into the entry box. If you have a colour that you want to use but you do not know the html code for the colour, you can get the code by sampling it from an image. (see below)



### Find The Hexadecimal Colour Code Of A Colour

If you have professional image editing computer software, you can use the paint dropper tool to sample the colours in an image and get the HTML colour code. In the image (right) the dark blue from our logo, has been sampled. RGB colour code R:0, G:71, B: 103, which has a HTML code, in this case **#004c71**.

If you do not have image editing software, you may still have Microsoft paint or equivalent on your computer, which should provide the RGB code. An colour converter can then be used



HTML code is shown here

on the web to get the HTML colour code. HTML is the language that web browsers understand and is required for online applications to read colours. If this is a little bit complicated for your liking you can simply use one of the 18 colours we have provided in the colour picker menu or you can send us an image. We will sample the colour for you and provide you with the HTML colour code.

# Completing The Report Designer

## Your Company Details

The images below indicate where this information will be shown in the report.

**15. Company Name**

**16. Company Colour**

**17. Company Address**

**18. Phone Number**

**19. Fax Number (if applicable)**

**20. Email Address**

**21. Website**

**The Date The Report**

**Your Email Address, Our Estimate Reference**

**Your Email Address, Our Estimate Reference**

**Your Email Address, Our Estimate Reference**

**15. Company Name**

**21. Website**

**15. Company Name**

**21. Website**

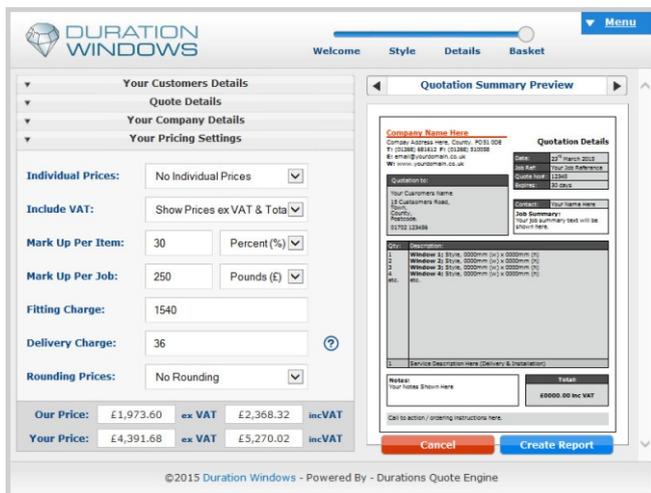
By branding our report with your company details, along with a professional front sheet and your own prices you will be able to quickly and easily provide your customers with well presented prices. Increasing your productivity and accumulating more business.

Your email (the email address used to create the estimate) is displayed at the bottom of the report along with the SG number (Estimate Reference) in small print. This way the source of the report is always identifiable. And you will always have the information you need to re-load a quote on our online estimator, even if you are unsure who created the report.

# Completing The Report Designer

## Pricing Details

The final panel is for your pricing details



The following information is required:

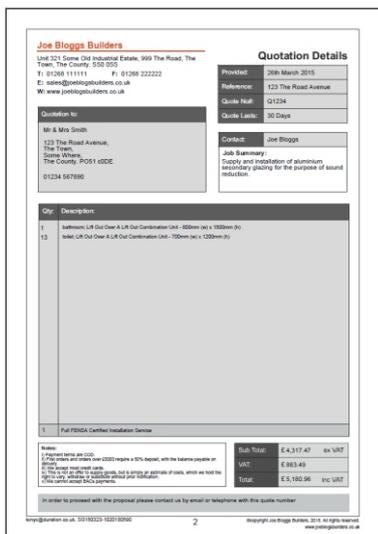
- 22. Individual Prices
- 23. Include VAT
- 24. Mark Up Per Item
- 25. Mark Up Per Job
- 27. Delivery Charge
- 28. Rounding Prices

The following may be required:

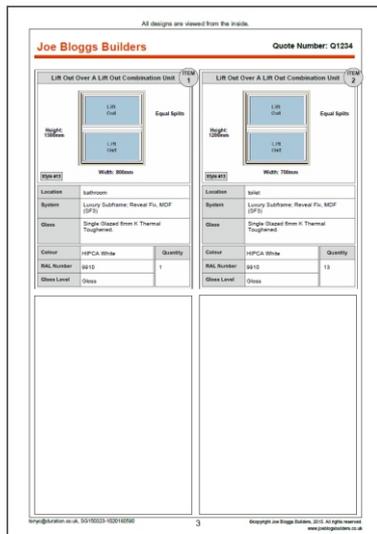
- 26. Fitting Charge (if applicable)

22. The **Individual Prices** drop down is used to give you the option to show a price breakdown for each individual item or not. Not showing individual prices will result in the report looking like the images below:

### Quotation Summary



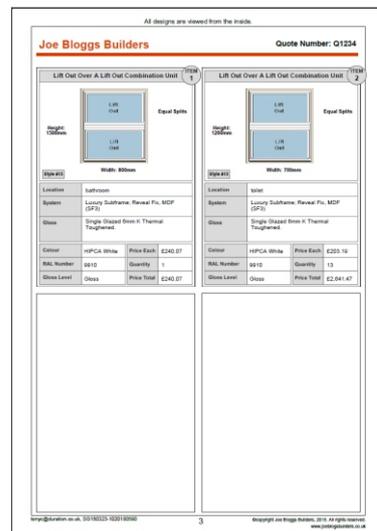
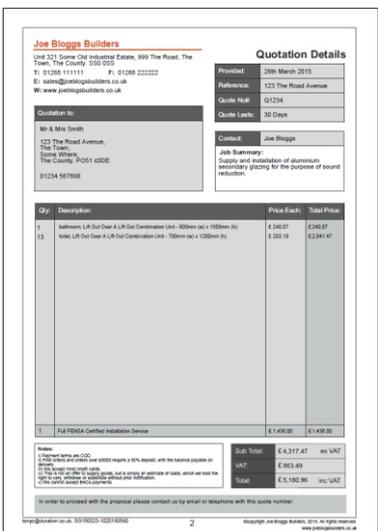
### Manufacture Details



The quotation summary page will simply show a list of the different items on the quote and there will be a total displayed in the bottom left hand corner.

The Manufacture details pages will show the specifications of each item in detail, along with a quantity, but no prices will show against each of the items.

If you choose to show individual prices the report will look like the images below:



The quotation summary page will show a list of the different designs each of which will show a 'Price Each' and a 'Total Price'. There will also be a cumulative total of all the items in the bottom left hand corner.

The Manufacture details pages will show the specifications of each design, prices for each item, a quantity and a total for the quantity of items for each of the designs.

# Completing The Report Designer

## Pricing Details

**Your Pricing Details**

**Individual Prices:** Show Individual Prices

**Include VAT:** Show Prices inc VAT   
 Show Prices ex VAT & Total inc VAT   
 Show All Prices ex VAT   
 Include VAT On Duration Price Only   
 Ignore VAT

**Mark Up Per Item:**

**Mark Up Per Job:** 250  Pounds (£)

**Fitting Charge:** 1400

**Delivery Charge:** 36

**Rounding Prices:** No Rounding

<b>Our Price:</b>	£1,973.60	<b>ex VAT</b>	£2,368.32	<b>inc VAT</b>
<b>Your Price:</b>	£4,251.68	<b>ex VAT</b>	£5,102.02	<b>inc VAT</b>

23. The **Include VAT** drop down is used to set out how you would like to calculate your uplift on the prices.

There are five options in this drop down 'Show Prices inc VAT', 'Show Prices ex VAT & Total inc VAT', 'Show All Prices ex VAT', 'Include VAT On Duration Price Only' and 'Ignore VAT'

If you select '**Show Prices inc VAT**', all prices will include VAT.

If you select '**Show Prices ex VAT & Total inc VAT**', to show all prices exclusive of VAT, with a subtotal which is exclusive of VAT, a VAT cost and a final total that includes the VAT. It will be clear to the customer exactly how much VAT they will pay.

If you select '**Show All Prices ex VAT**', all prices will exclude VAT. It will be up to your customer to work out the total inclusive of VAT.

If you select '**Include VAT On Duration Price Only**', our price will be calculated inclusive of VAT and then your mark up will be applied exclusive of VAT. This option is available for people who pay VAT, but do not charge VAT to their customers (Companies that are not VAT registered, for example).

If you select '**Ignore VAT**', all prices will completely ignore VAT and there will be no ex VAT or inc VAT shown anywhere. This option is for people who don't have to pay VAT and do not charge VAT. (Companies in Jersey, for example)

### But What Effect Does This Have On The Prices Shown?

If for example, you created a small job with two fixed secondary glazing units on it, each costing £100 ex VAT (from Duration Windows) and you applied a mark up of £50 per item, plus £120 fitting charge, then the prices for each of these options would be calculated as shown below:

#### Show Prices inc VAT

Total
£504 inc VAT

$$(\text{£}100 \times 2) + (\text{£}50 \times 2) + \text{£}120 = \text{£}420$$

$$(\text{£}420) \times 1.2 = \text{£}504$$

#### Show Prices ex VAT & Total inc VAT

Sub Total	£420 ex VAT
VAT	£84
Total	£504 inc VAT

$$(\text{£}100 \times 2) + (\text{£}50 \times 2) + \text{£}120 = \text{£}420$$

$$(\text{£}420) \times 0.2 = \text{£}84$$

$$\text{£}420 + \text{£}84 = \text{£}504$$

#### Show All Prices ex VAT

Total
£420 ex VAT

$$(\text{£}100 \times 2) + (\text{£}50 \times 2) + \text{£}120 = \text{£}420$$

Charge to the customer would actually be £504, but if they are a trade customer they can claim back the VAT anyway.

#### Include VAT On Duration Price Only

Total
£460

$$(\text{£}100 \times 2) \times 1.2 = \text{£}240$$

$$\text{£}240 + (\text{£}50 \times 2) + \text{£}120 = \text{£}460$$

#### Ignore VAT

Total
£420

$$(\text{£}100 \times 2) + (\text{£}50 \times 2) + \text{£}120 = \text{£}420$$

Prices are calculated at 20% VAT

The method of displaying prices that you chose, will depend on your company, the nature of your business and how your company operates, the type of customer and your geographical location (i.e. companies in Jersey do not pay VAT). It is up to you to decide, how to display / calculate your prices.

# Completing The Report Designer

## Pricing Details

Individual Prices:	Show Individual Prices	▼		
Include VAT:	Show Prices ex VAT & Total	▼		
Mark Up Per Item:	30	None Percent (%) Pounds (£)		
Mark Up Per Job:	250	None Percent (%) Pounds (£)		
Fitting Charge:	1400			
Delivery Charge:	36			
Rounding Prices:	No Rounding	▼		
Our Price:	£1,973.60	ex VAT	£2,368.32	inc VAT
Your Price:	£3,659.60	ex VAT	£4,391.52	inc VAT

24. The **Mark Up Per Job** entry box and drop down is used to apply mark up onto the cost of each item on the job.

25. Likewise the **Mark Up Per Job** entry box and drop down is used to apply mark up onto the total cost of the job.

There are two methods of applying mark up; as a percentage increase or fixed increase. This is selected using the drop down. Simply enter a value into the entry box and then declare whether or not this is a percentage value of fixed value in pounds. To apply a 30% up lift you would type 30 in the entry box and then select 'Percent (%)' from the drop down. Mark Up per item is applied first and then per job afterwards.

For example for a quote with two items at a supply price of £120 + VAT and £215 + VAT consecutively (total supply price of £335 + VAT), if you applied a mark up per item of 30% and mark up per job of £250 (as shown below)...

Mark Up Per Item:	30	Percent (%)
Mark Up Per Job:	250	Pounds (£)

**Please note:** if you apply a percentage mark up per job, this will be applied onto the new total price, which includes any mark up applied to each item.

... the Result would be a total price of £685.50 + VAT, which is a total mark up of £370.50 + VAT.

If you want to make £120 per unit of Secondary Glazing on a job you can easily add £120 fixed mark up on each item. As our item costs do not take into account the £30 we charge for delivery you might then want to add £30 onto the whole job so that the delivery charge doesn't eat into your profits. The combination of fixed and percentage mark ups should cover most all eventualities for pricing.

Individual Prices:	Show Individual Prices	▼		
Include VAT:	Show Prices ex VAT & Total	▼		
Mark Up Per Item:	30	Percent (%)		
Mark Up Per Job:	250	Pounds (£)		
Fitting Charge:	1400	✕		
Delivery Charge:	36			
Rounding Prices:	No Rounding	▼		
Our Price:	£1,973.60	ex VAT	£2,368.32	inc VAT
Your Price:	£4,251.68	ex VAT	£5,102.02	inc VAT

26. The **Fitting Charge** entry box allows you to add a separate fixed amount as a fitting charge. If you choose to show individual prices this will be shown as a separate charge next to the Service Description you provided in the Quote Details panel (delivery charge is also added to the cost shown here).

This charge will simply be added on top of the total cost at the end, and provides an easy way to add another fixed amount onto a job. If your fitting charge has already been included in your mark up then you can simply set this to 0.

If you choose not to show individual prices, this charge will not be displayed, but will still be added to the total price.

27. The **Delivery Charge** entry box allows you to add another separate fixed amount, in the same way as with the Fitting Charge. Despite the fact that both of these costs are added up and simply displayed next to the Service Description on the Summary page (if you opt to show individual prices), the charges are separated into two individual charges. This helps you to clearly lay out your charges in a way that is logical and digestible. The Delivery charge is available to both supply only customers and supply and fit customers, where as the fitting charge is not applicable to supply and fit customers (and will not be shown).

28. The **Rounding Prices** drop down enables you choose to round your prices to the nearest pound, or not. For example the above example with 'No Rounding' is £685.50. If you selected 'Round Up To The Nearest £1' this price would be simply be displayed as £686.