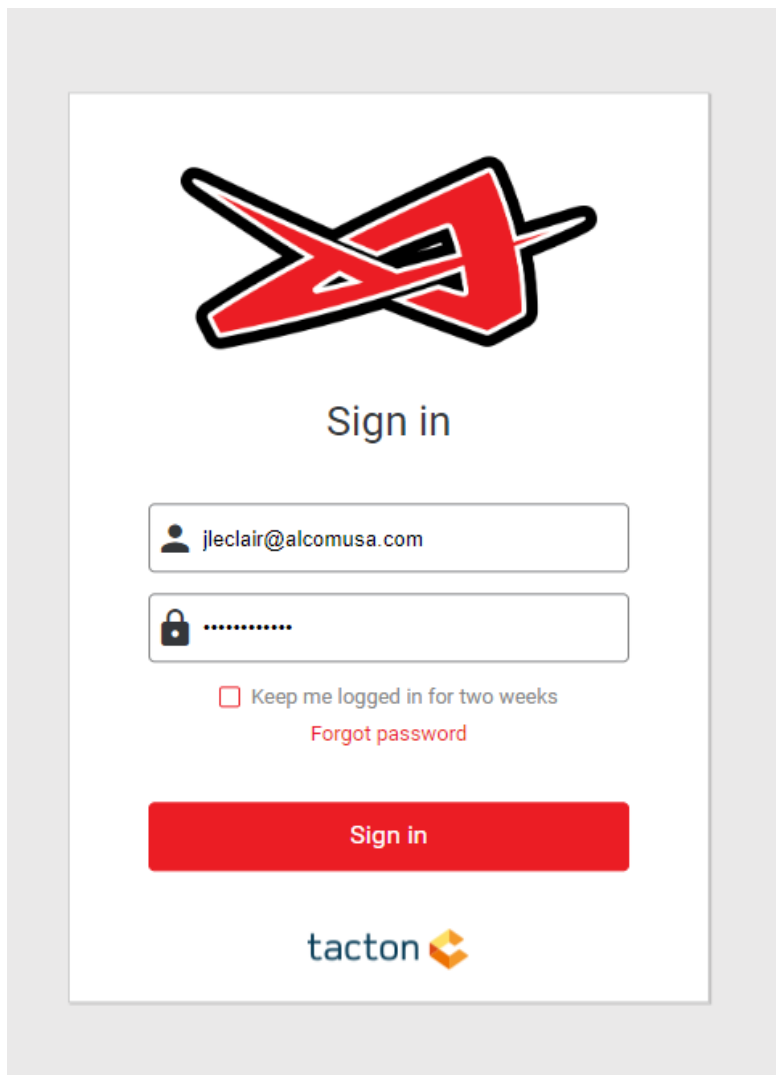


Tacton SOP Guide – Create and Edit Quotes

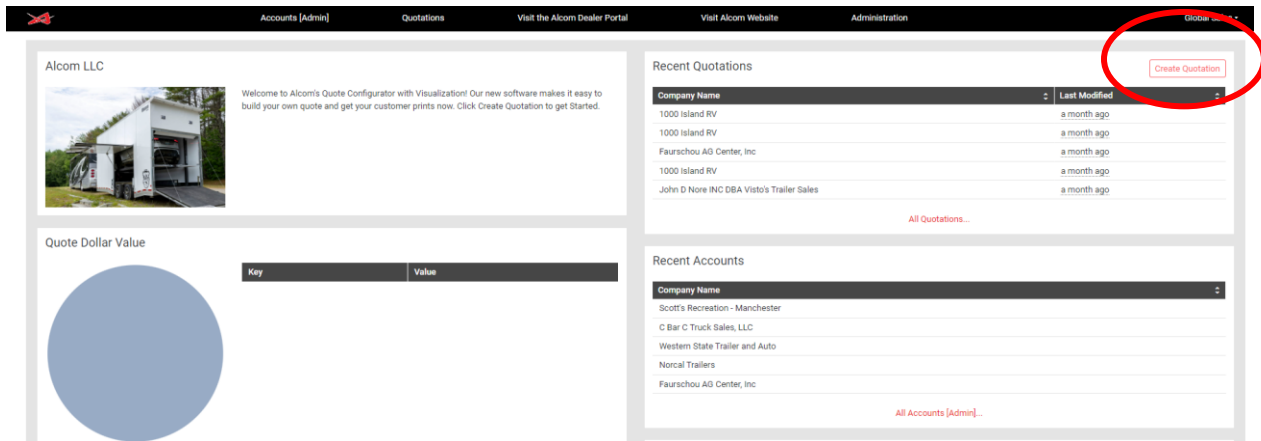
Creating A Quote

- Go to <https://alcom.tactoncpq.com/home>
- Login with your username and password
 - You will have to reset your password the first time you login. The password reset email will most likely go to a junk/spam folder.
 - If you do not have a login, please reach out to your sales representative or email Jonny at jleclair@alcomusa.com to get that set up.

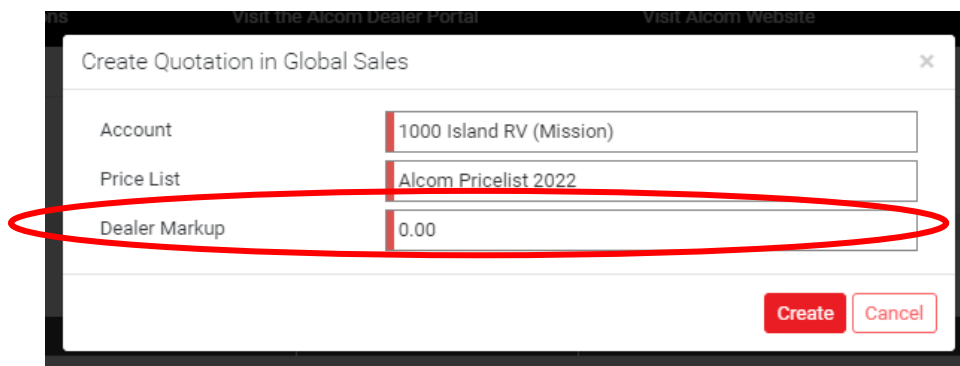


The image shows a screenshot of the Tacton login interface. At the top center is a large red logo consisting of a stylized 'A' with a diagonal slash through it. Below the logo, the text 'Sign in' is centered. There are two input fields: the first contains the email address 'jleclair@alcomusa.com' and the second contains a masked password '.....'. Below the password field is a checkbox labeled 'Keep me logged in for two weeks' and a link for 'Forgot password'. A prominent red button with the text 'Sign in' is located below the login fields. At the bottom of the page is the Tacton logo, which includes the word 'tacton' and a small yellow cube icon.

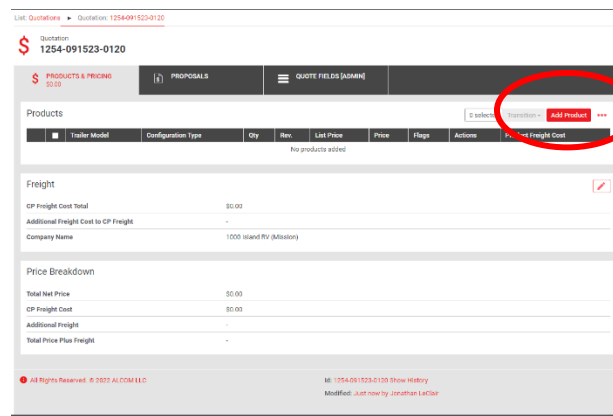
- Select “Create Quotation”





- Set your dealer markup (MSRP pricing) for the quote and then click the “Create” button. **Always** add a dealer markup here when generating the quote with a customer or else they will be able to see dealer cost when creating the quote.



- Click the “Add Product” button.



- Select the brand of trailer you are looking to quote.

Image	Product Id	Description
	EZ-Hauler Trailer	EZ-Hauler Trailer
	Mission Cargo and Car Hauler Trailers	Mission Cargo and Car Hauler Trailers

- Select the trailer model you are looking for.

Primary usage

What will the trailer primarily be used to haul?

- Once you select a trailer model, you will be brought to the quote configuration page.
- On the left-hand side of the page, you will see this list. This is where all our available options are sorted into different categories.

Model Options

- Exterior Options
- Interior Options
- 110V - 12V Electrical & Lighting
- Package Options

Model Options

Primary usage: Cargo

Model length (feet):

Model width (feet) **:

Sloped top V-Nose **: No

Front construction: V-Nose Front 24"

Box height adjustment: None

Box width adjustment: None

Axle(s):

Brake system: None

Axle Degree **: 4" Drop

Deck height (inches):

Axle configuration: Single Axle Configuration

Gross vehicle weight rating (pounds):

Galvanized Axle: No Yes

Upgrade to Straight Axle: No Yes

Wheel Assembly

Wheel diameter / width:

Spare(s) **: None

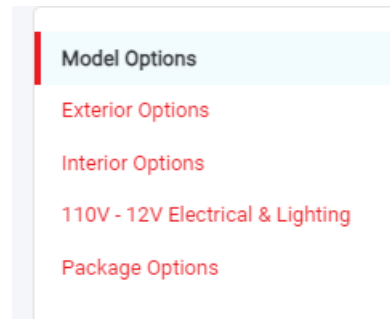
Wheel material: Silver Mod

Spare mount **: None

Pricing 3D VIEW

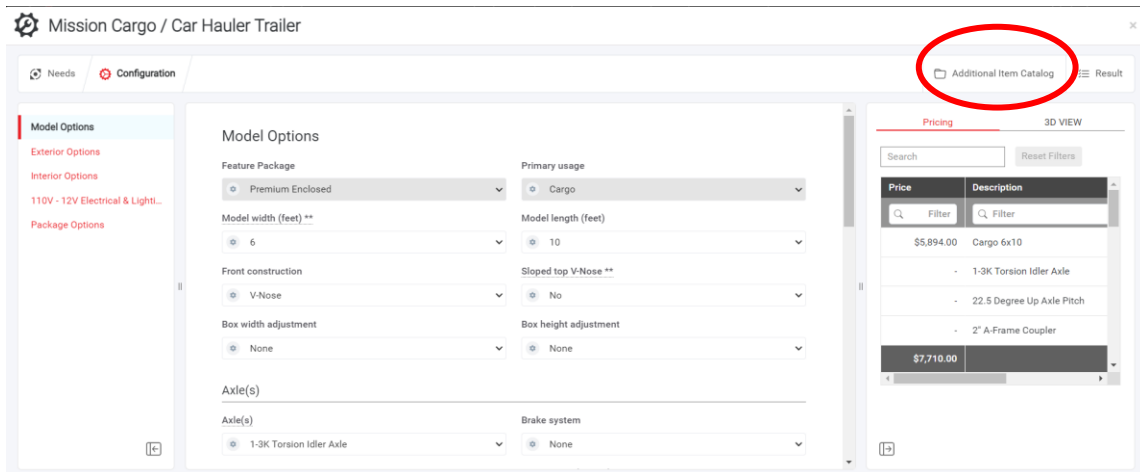
Search

Price	Description
\$4,710.00	Cargo 6x10
-	- 1-3K Leaf Idler Axle
-	- 4" Drop Axle
-	- 2" A-Frame Coupler
-	- 5/8" Water Resistant Decking
-	- Rear Ramp w/ Spring Assist w/ Aluminum Hard
-	- 2x48" Locking Bars
-	- 32" x66" Side Door
-	- V-Nose Front 24"
\$4,710.00	



- What you will find for options under “Model Options”
 - Model length, width, front build, axles, wheels, frame upgrades, height upgrades, spare tires and mounts, tongue upgrades, coupler upgrades, stabilizer jacks, etc..
- What you will find under “Exterior Options”
 - Skin color, skin upgrades, two tone, powder coat package, trim upgrades, ladder racks, catwalks, canopy, awnings, door options, windows, and vents.
- What you will find under “Interior Options”
 - Flooring, walls, ceilings, tie down systems, drings, cabinets.
- What you will find in the “110V – 12V Electrical & Lighting”
 - Various interior ad exterior lighting options, 110 power packages, air conditioner, heater, outlets, motor base plugs, etc..
- What you will find under “Package Options”
 - Heater package, safety package, bathroom packages, sink packages, stacker package, etc.. (most packages are restricted to premium model trailers)

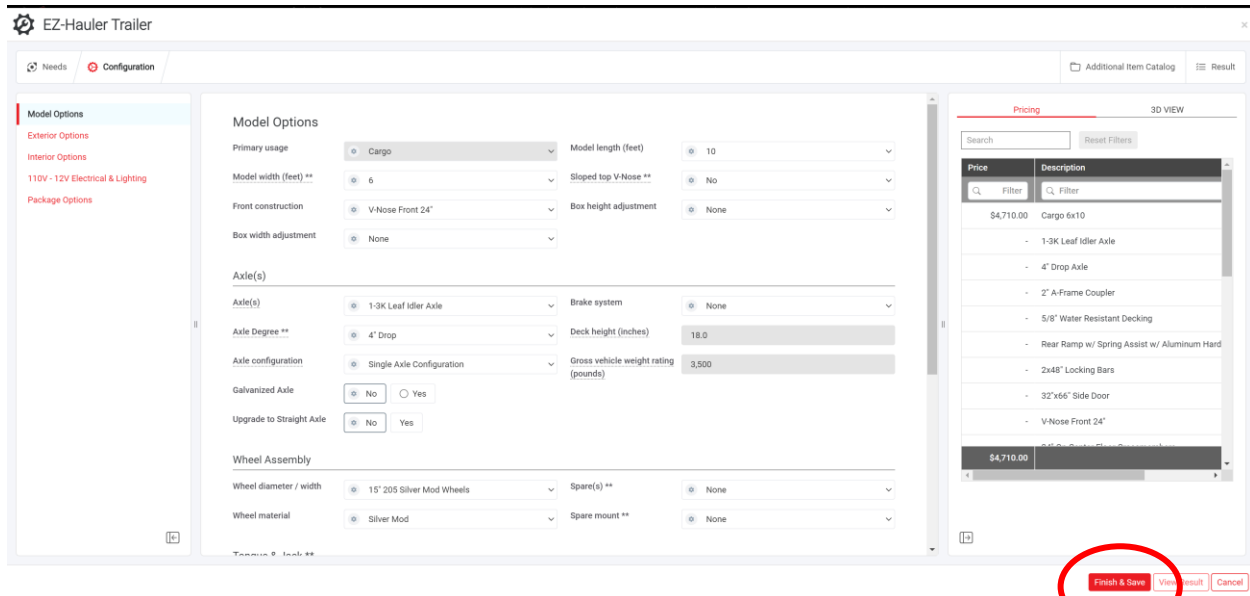
- Any Items that are not found in the categories above will be found in our “Additional Item Catalog” in the top right corner of the screen.



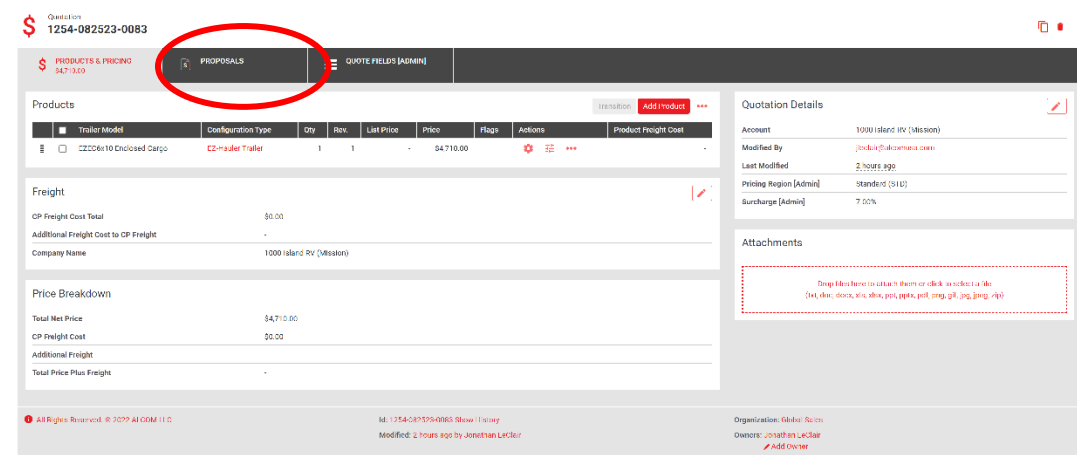
- Also, on the right-hand side of the screen directly under the Additional Item Catalog, there is a display where you will have a “Pricing” selection and a “3D View” selection.
 - The “Pricing” selection will update the price of the trailer in real time as you are creating the quote.
 - The “3D View” will give you a 3-dimensional model that will update in real time to display your trailer as you quote it. If you click the square in the top right corner above the visual, it will make it a full screen display where you can change the angle of the view to see all aspects of the trailer.
 - **Disclaimer: Not all options have a visual.**

How To Save a Quote

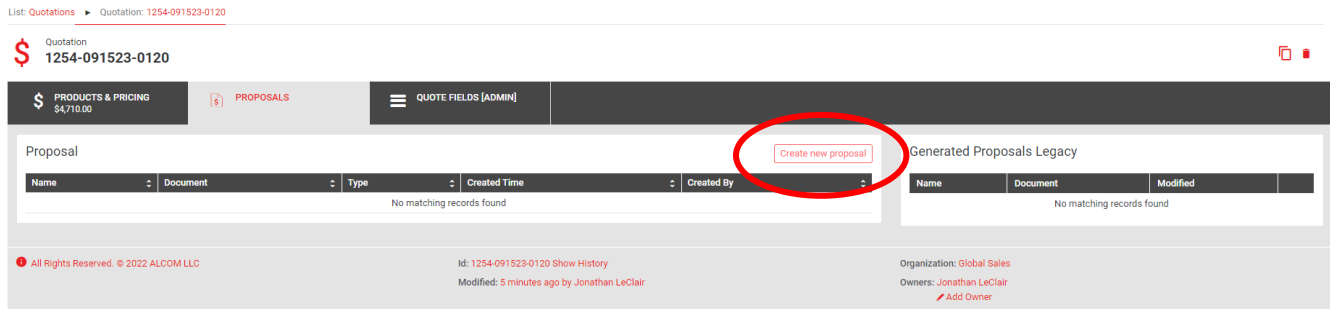
- Once you have added all the options to the quote, you are going to click the “Finish & Save” button in the bottom right-hand corner of the screen.



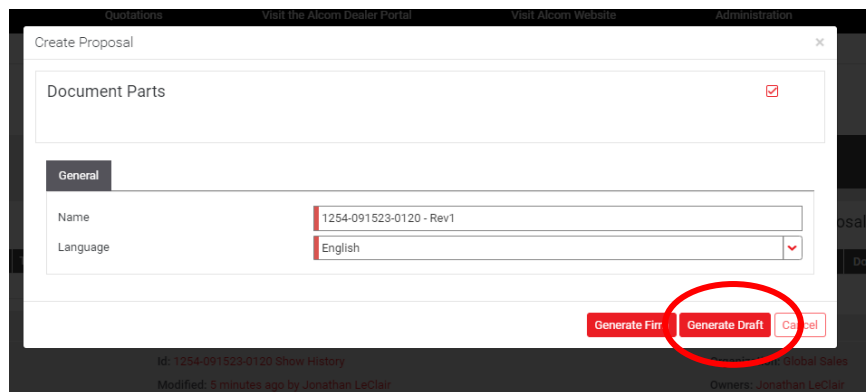
- Clicking the “Finish & Save” button is going to close the quote configuration page and bring you back to the Products & Pricing page.
 - Once you are back on this page, to save the quote to your computer, you are going to click the “Proposals” tab inside the red circle above.



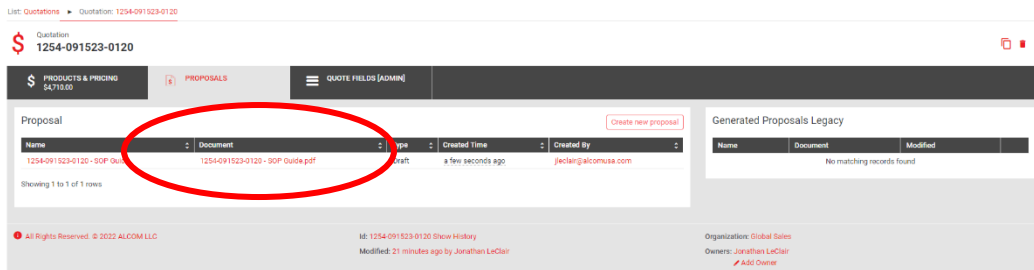
- From here, you will click the “Create New Proposal” button.



- You will then be able to rename the proposal.
 - You do not have to rename the proposal if you do not want to.
 - If you do choose to rename the quote, do not delete the numbers as that is the quote number for this proposal and each set of numbers represents a piece of information. Just add the name after these numbers.
 - A good way to rename your quotes would be to add the name of the salesperson and the name of the customer so you can keep track of who created each quote.
- Once you have renamed the quote, and you are ready to save, click the “Generate Draft” button inside the red circle below.
 - **Disclaimer: Do not click “Generate Firm” unless you are done working on the quote. Generating a firm proposal locks the quote from any further edits being made to the unit and the pricing.**



- Once the proposal has been generated, a downloadable PDF file will be generated. You can download the PDF to your computer by clicking the link in the red circle below.
 - This page will save all proposals that are generated to this page as a downloadable PDF.
 - These are not living documents, so any changes that are made to the quote/pricing will not appear on an existing proposal, you will need to generate another proposal.



- Generating a proposal does not put the unit you configured on order, all it does it create the downloadable PDF file for you to share with your customer.
- If you added a dealer markup to the quote or altered the pricing at all through the pricing editor, only the updated prices will appear on the generated proposal.
 - **Dealer cost will be displayed on the generated proposal if a dealer markup is not added.**


QR Code

- At the bottom of the proposal you just created, there will be a QR code that will prompt you to download the **Tacton CPQ AR** application.
- This application will allow you to use your phone to see a life size visual of the trailer you configured for the quote.

How to Edit a Quote

- To get back into the quote configuration page so you can make changes to a quote, select the quote you would like to edit, and it will bring you back to this page.

The screenshot shows a quote configuration interface. At the top, there's a header with a dollar sign icon, the quote number "1254-082523-0083", and a "PROPOSALS" button. Below this is a navigation bar with "PRODUCTS & PRICING" selected. The main content area is divided into several sections: "Products" (a table with columns for Trailer Model, Configuration Type, Qty, Rev., List Price, Price, File, Actions, and Product Freight Cost), "Freight" (with fields for CP Freight Cost Total, Additional Freight Cost to CP Freight, and Company Name), and "Price Breakdown" (with fields for Total Net Price, CP Freight Cost, Additional Freight, and Total Price Plus Freight). On the right side, there are "Quotation Details" (Account, Modified By, Last Modified, Pricing Region, Surcharge) and "Attachments" (a drop zone for files). A red circle highlights the gear icon in the "Actions" column of the product table.

Trailer Model	Configuration Type	Qty	Rev.	List Price	Price	File	Actions	Product Freight Cost
EZEC6x10 Enclosed Cargo	EZ-Hauler Trailer	1	1	-	\$4,710.00			-

- Once on this page, click on the red gear that is circled in the image above and it will bring you to a new page.
- On this page, select the "Configuration" button and that will bring you back to the quote builder.

The screenshot shows the configuration result page. At the top, there's a navigation bar with "Needs" and "Configuration" buttons. The "Configuration" button is circled in red. Below the navigation bar, there's a "Configuration Result" section with the text "The configuration is based on version 41 of the Product model EZ-Hauler Trailer." At the bottom right, there are "Save" and "Cancel" buttons.

- From here, make the changes you would like to make and then follow the same process of how to save a quote.

The screenshot displays the 'EZ-Hauler Trailer' configuration tool. The interface is divided into several sections:

- Needs / Configuration:** A top navigation bar with 'Needs' and 'Configuration' tabs.
- Model Options:** A central panel with various configuration options:
 - Primary usage:** Cargo
 - Model length (feet):** 10
 - Model width (feet):**** 6
 - Sloped top V-Nose:**** No
 - Front construction:** V-Nose Front 24"
 - Box height adjustment:** None
 - Box width adjustment:** None
 - Axle(s):** 1-3K Leaf Idler Axle
 - Brake system:** None
 - Axle Degree:**** 4" Drop
 - Deck height (inches):** 18.0
 - Axle configuration:** Single Axle Configuration
 - Gross vehicle weight rating (pounds):** 3,500
 - Galvanized Axle:** No
 - Upgrade to Straight Axle:** No
 - Wheel Assembly:**
 - Wheel diameter / width:** 15" 205 Silver Mod Wheels
 - Spare(s):**** None
 - Wheel material:** Silver Mod
 - Spare mount:**** None
- Pricing / 3D VIEW:** A panel on the right showing a table of items and their prices:

Price	Description
\$4,710.00	Cargo 6x10
-	- 1-3K Leaf Idler Axle
-	- 4" Drop Axle
-	- 2" A-Frame Coupler
-	- 5/8" Water Resistant Decking
-	- Rear Ramp w/ Spring Assist w/ Aluminum Hard
-	- 2x48" Locking Bars
-	- 32"x66" Side Door
-	- V-Nose Front 24"
\$4,710.00	

Pricing Editor

- To edit the pricing, instead of clicking the red gear, click the three lines directly to the right of the gear.



Quotation
1254-091523-0120

PRODUCTS & PRICING \$6,123.00

PROPOSALS

QUOTE FIELDS [ADMIN]

Products 0 selected Transition - Add Product

Trailer Model	Configuration Type	Qty	Rev.	List Price	Price	Flags	Actions	Product Freight Cost
EZEC6x10 Enclosed Cargo	EZ-Hauler Trailer	1	1	-	\$6,123.00		 	-

- This will bring you to the pricing editor page.
- At the top of the screen, there is a drop-down tab. This tab allows you to switch between the MSRP View and Dealer Pricing.
 - The pricing editor will open in the MSRP view so you can open this view with your customer and go over the pricing line by line. This will only display the MSRP price if you input a dealer markup when you first generated the quote.

Pricing Editor

Search MSRP View

Item No.	Description	Qty	Discount MSRP Price	Discount MSRP %	MSRP Price	Freight Cost	Total Regional Price (Surcharge and Freight)	Configured Product
EZEC7X12TA-IF	Cargo 7x12	1		%	\$9,304.20	0.00	\$9,304.20	
AXLEL56BRTOTOR68R	Upgrade to 2-3K Torsion Braked Axles	1		%	\$1,019.25	0.00	\$1,019.25	
AXLEL68BRTOTOR106RFR	2-5K Torsion Braked Axles (Includes 15" 225mm Tire, 2"x6" Subframe Upgrades & 16 O/C Floor Crossmembers)	1		%	\$2,965.95	0.00	\$2,965.95	
ELECTRIC_STANDARD	Electric Brake System			%	-	0.00	-	
22UP_STANDARD	22.5 Degree Up Axle Pitch			%	-	0.00	-	
2_56AFRAME_STANDARD	2 5/16" A-Frame Coupler			%	-	0.00	-	
WIDTH77075	Upgrade to 7.5 Wide from 7 Wide	12		%	\$405.00	0.00	\$405.00	
34WR_STANDARD	3/4" Water Resistant Decking			%	-	0.00	-	
24OC_STANDARD	24" On Center Roof Studs			%	-	0.00	-	
RAMP_STANDARD_EZ	Rear Ramp w/ Spring Assist w/ Aluminum Hardware			%	-	0.00	-	
248LOCKBAR_STANDARD	2x48" Locking Bars			%	-	0.00	-	
32_66_STANDARD	32"x66" Side Door			%	-	0.00	-	
VNOSE_24_STANDARD_EZ	V-Nose Front 24"			%	-	0.00	-	
16OC_INCLUDED	16" On Center 2"x3" Box Tube Floor Crossmembers (Included with axle upgrade)			%	-	0.00	-	
				%	\$14,466.60	\$0.00	\$14,466.60	

Save Reset Manual Changes Cancel

- **MSRP Price Column**
 - Displays the MSRP price for each line item.
- **Discount MSRP Price**
 - This column lets you add a dollar amount discount to that line item.
- **Discount MSRP %**
 - This column lets you add a discount to that line item using a percentage.
 - These discount columns will only affect the MSRP price, not the dealer cost.
- **Freight Cost**
 - You can now add the freight cost from within the pricing editor as a dollar amount.
- **Total Regional Price (Surcharge and Freight)**
 - This will display the total MSRP price for the unit including any discounts that are added as well as freight.
 - No surcharge is added to the quotes. This is just to indicate that this is where a surcharge and freight costs would be included in the price calculation.
- The Dealer Pricing view is going to give you a side-by-side comparison of the dealer cost and the MSRP price for you to see your margins on each option.

The screenshot shows the 'Pricing Editor' window with a 'Dealer Pricing' view selected. The table below represents the data shown in the interface:

Upgrade/Selected	Item No.	Description	Dealer Price	MSRP Price	Dealer Markup
					\$5.00
<input checked="" type="checkbox"/>	EZE07X1ZTA-F	Cargo 7x12	\$6,692.00	\$9,304.20	35.00 %
<input checked="" type="checkbox"/>	AXLELSBRTOTOR6BR	Upgrade to 2-3/4 Torsion Braked Axles	\$755.00	\$1,019.25	35.00 %
<input checked="" type="checkbox"/>	AXLETORBRTOTOR10BFR	2.5K Torsion Braked Axles (Includes 15" 225mm Tire, 2" x4" Subframe Upgrades & 16 G/C Floor Crossmembers)	\$2,197.00	\$2,965.95	35.00 %
<input checked="" type="checkbox"/>	ELHTRKICL_STANDARD	Electric Brake System	-	-	35.00 %
<input checked="" type="checkbox"/>	22UP_STANDARD	22.5 Degree Up Axle Pitch	-	-	35.00 %
<input checked="" type="checkbox"/>	2.56AFRAME_STANDARD	2.5/16" A-Frame Coupler	-	-	35.00 %
<input checked="" type="checkbox"/>	WIDTH77075	Upgrade to 7.5 Wide from 7 Wide	\$25.00	\$405.00	35.00 %
<input checked="" type="checkbox"/>	34WR_STANDARD	3/4" Water Resistant Decking	-	-	35.00 %
<input checked="" type="checkbox"/>	24OC_STANDARD	24" On Center Roof studs	-	-	35.00 %
<input checked="" type="checkbox"/>	RAMP_STANDARD_EZ	Rear Ramp w/ Spring Assist w/ Aluminum Hardware	-	-	35.00 %
<input checked="" type="checkbox"/>	24BLOCKBAR_STANDARD	2x4B" Locking Bars	-	-	35.00 %
<input checked="" type="checkbox"/>	32_AH_STANDARD	32"x42" Side Door	-	-	35.00 %
<input checked="" type="checkbox"/>	VNDSL_24_STANDARD_EZ	V-Nose Front 24"	-	-	35.00 %
<input checked="" type="checkbox"/>	16OC_INCLUDED	16" On Center 2"x3" Box Tube Floor Crossmembers (Included with axle upgrade)	-	-	35.00 %
<input checked="" type="checkbox"/>	23K_INCLUDED	2"x4" Subframe tubing (Included w/ Axle Upgrade)	-	-	35.00 %
				\$14,456.00	

- The dealer pricing view also allows you to edit the dealer markup line by line.

Placing an Order

- To order a trailer you have quoted using Tacton, send the finalized proposal to your sales representative and they will get a quote generated for you.
- The proposal that is sent in will be used to create a quote that you will still have to approve through a signature or the dealer portal.
 - We are still creating quotes using our old format for now because there are still some minor bugs that we are working through.