Administrative User Manual

For

CBUSA-National Contracts Program

(CBUSA-NCP)

Prepared for:

CBUSA

Authored by:

Medullus Systems

E-mail: marketing@medullus.com

Website: www.medullus.com

An Introduction

CBUSA-National Contracts Program (NCP) is a web-based contract management system that facilitates effective handling of builder contracts and surveys. It offers a closed-loop mechanism that allows CBUSA admin users to bring together the buying group of builders by creating contracts, rolling out surveys and generating NCP reports, in compliance with NCP guidelines.

At a glance, this is what CBUSA-NCP does:

- Records all contracts and surveys created by the admin user.
- Keeps records of these contracts and surveys including information of builders who participate in the surveys.
- Streamlines and expedites the entire line of buying and selling building goods.

The entire module is comprehensive and well-segregated into several sections and sub-sections. So, keeping in mind the diverse screens and functionalities incorporated, this document has been prepared to walk you through the each and every screen of the CBUSA-NCP portal such that you can employ all the functionalities effectively and with ease.

Table of Content

A. Portal Access

CBUSA admin users can access the CBUSA NCP portal by typing the following URL in any web browser's address bar: http://cbusa.azurewebsites.net/. The home screen appears as shown below:

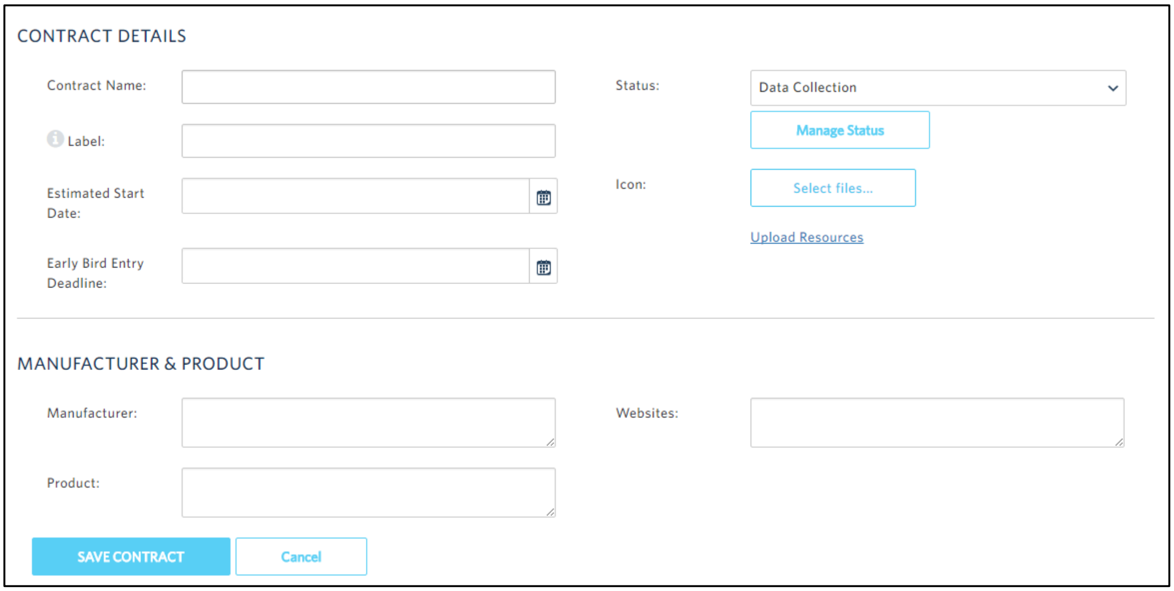
B. Contracts

This section allows you to add new contracts and manage the same.

B.1. Add Contract

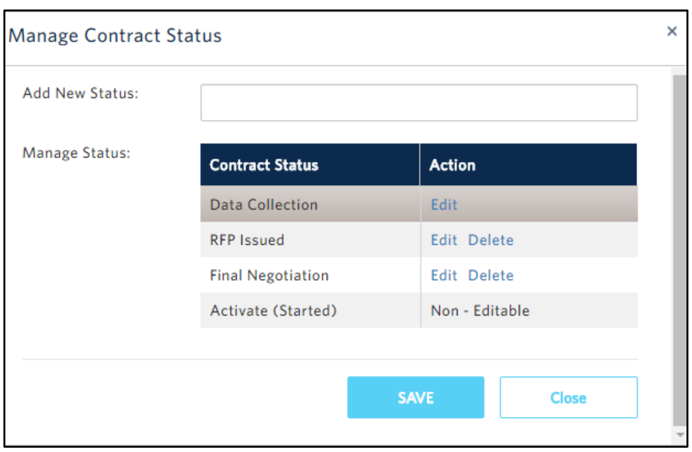
Mouse-over the "**Contracts**" tab and click on "**Add Contract**".

The following screen appears:



Enter the following details:

1. Contract Name
2. Label: A short name for the contract. Can be the same as contract name
3. Status: specify the status of the contract, as necessary and appropriate.
    - Click on "**Manage Status**" to add a new contract status or edit and/ or delete the existing ones. A pop-up screen appears:



To add a new contract status, enter the name of the new status and click on **'Save'**.

Contract status name(s) thus added are displayed in a view grid. Click on '*Edit*' or '*Delete*' to perform the necessary actions.

Clicking on **'Close'** will close the pop-up screen without saving any changes, if any are made.

NOTE: *'Activate (started)' is a system-defined contract status that **CANNOT** be edited or deleted.*

4. Estimated Start Date: the start date for the contract. It should be a future date.

5. Early bird entry deadline: if a builder enrolls before this date then he's eligible to get better rebate percentages. It should be a date that is prior to the estimated start date.
    - If selected contract status is 'Activate (started)', then the above date fields are replaced by:
        a) Contract Term: the start date and end date during which the contract remains active
        b) Contract Deliverables: specify the list of benefits the builders get if they sign up for the contract.
6. Icon: Upload any image file representing the contract (optional field)
7. Upload Resources: Any document, video, image or additional information associated with the contract that the builders might be interested in knowing (optional field). Please refer to Section E.1: Upload Resources for details.
8. Manufacturer: Enter name(s) of vendors who are bidding in the contract
    - If selected contract status is 'Active (started), then systems lets you select a single manufacturer only i.e. the winning manufacturer. List of existing manufacturer are populated from CBUSA portal.
9. Website: Website of vendor(s) entered in "Manufacturer" field.
10. Product: Enter the name of product(s), as necessary and appropriate.

Click on "**Save Contract**" to save the entered information. Information once saved, a success message appears on-screen and you'll be redirected to the "**Manage Contracts**" screen in the "Active Contracts" or Pending Contracts" tab, based on the status of the contract thus created.

NOTE:
- *Contracts can be edited from "**Manage Contracts**" screen.*
- *There is no option to delete contracts from the system.*
- *Contracts that have ended for more than 30 days are automatically archived by the system.*
- *Link to view archived contract is available at the bottom of the "Manage Contracts" screen.*

B.2. Manage Contracts

This section allows an admin user to view and manage the list of all existing (active and pending) NCP contracts. Mouse-over the "**Contracts**" tab and click on "**Manage Contracts**".

The following screen appears:

Active Contracts | Pending Contracts

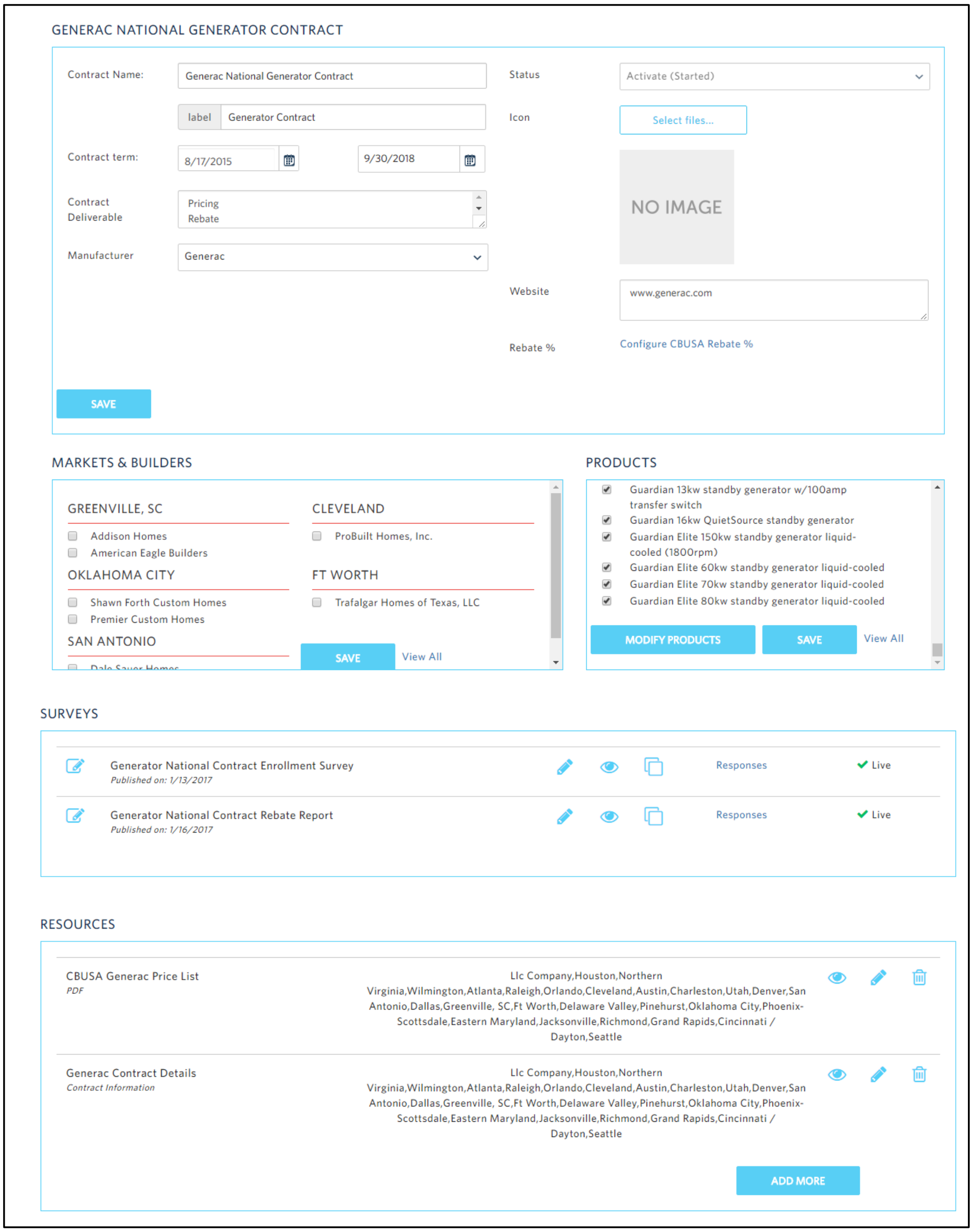
Contract	National Contract Partner	Product Category	Builders Joined	Status	Contract Term
Generac National Generator Contract	Generac	Baldor,Briggs & Stratton,Coleman,Guardian	7	Started	08/17/15 to 09/30/18
Jeld-Wen National Clad Wood Windows Contract	Jeld-Wen	Transom	2	Started	01/01/16 to 01/31/17

The manage contract screen features the following two tabs (refer to screen shot above):

a) *Active Contracts*: displays the list of active contracts **ONLY** i.e. contracts with status 'Activate (started)'.

b) *Pending Contracts*: displays the list of pending contracts i.e. contracts with status other than 'Activate (started)'.

Whether in the active tab or the pending tab, clicking on manufacturer name opens up the manufacturer website, clicking on counters displayed against "Builders joined", brings up the list of builders who've signed up for the contract and clicking on contract name brings up the "Add Contract" form, segregated into several sections, in an editable mode, as shown below:



<u>Contract Details Section</u>: you can edit/ modify the following:

- Contract name
- Label
- Status (**ONLY** for pending contracts).

- Contract Term and Contract Deliverable (in case of activated contracts)
- Estimated Start Date and Early bird entry deadline (in case of pending contracts)
- Contract icon
- Manufacturer(s)
- Website(s)
- Rebate % (Refer to Section E.2: Configure CBUSA Rebate % for details)

Click on '**Save'** to save the entered information.

Markets & Builders Section: displays the list of markets and builders associated with the contract. If builder(s) wish to terminate a contract in a pre-mature stage, you can remove them by check marking the corresponding check box and "**Save**" the same.

NOTE: *List of markets and builders will appear **ONLY** if:*

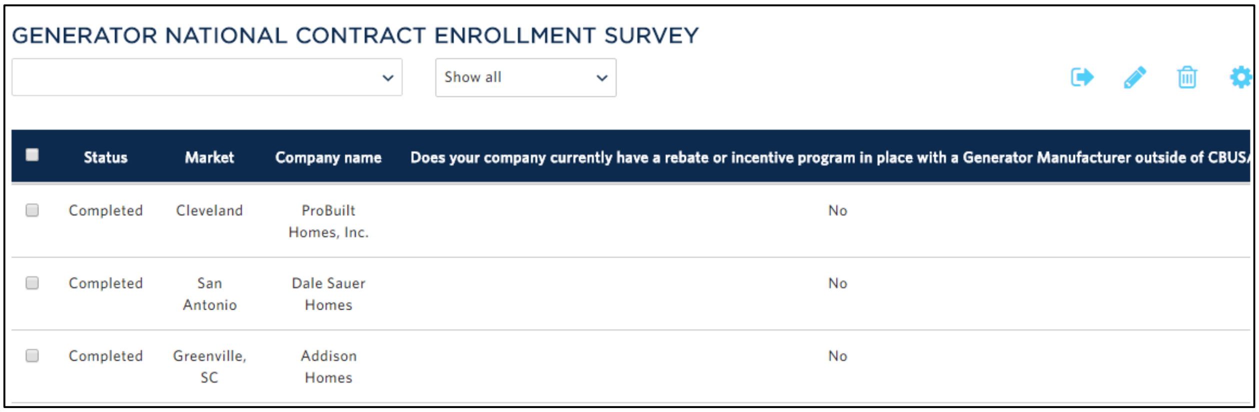
- *The contract has been activated*
- *Survey has been created and published (refer to* Section C.1: Create Survey *for details)*
- *Builders have responded to the survey*

If the list of markets and builders is exhaustive, click on "**View All**". A pop-up appears displaying the entire list in alphabetical order. Clicking on "Download" button featured at the bottom of the pop-up screen lets you download the list in a PDF format.

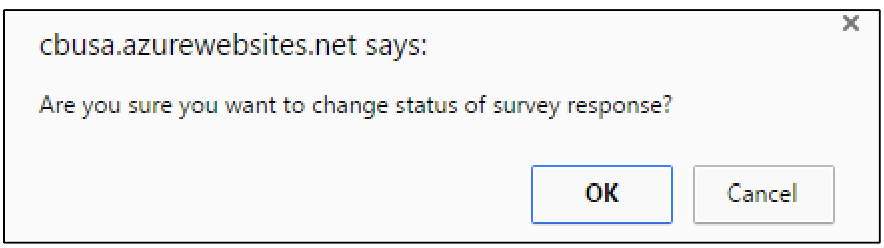
Products Section: displays the of product categories and the products associated with the contract.

- To add new product categories and products, click on "**Modify Products**". A pop-up appears that lets you select the product category(s) and product(s) to be added.
- To remove an existing product category or product, uncheck the check box(es) corresponding to the product(s) and "**Save**".
- If the product list is exhaustive, click "**View All**" button to view complete list in alphabetical order

Surveys Section: displays the list of all surveys – live, unpublished and closed – associated with the contract. To Edit, preview or copy a survey, click on , and , respectively. Clicking on Responses corresponding to a survey, brings up the list of builders who've responded to the survey (refer to screen shot)



The screen lets you filter responses by their status – complete or incomplete. To change the status of any response from complete to incomplete or vice-versa, select the response by check marking the corresponding check box and click . A warning message appears:



Say "**Ok**" and the status of the selected response changes instantaneously.

You can also download the responses to excel, edit or delete the same by clicking on , and , respectively. To go back to the actual screen (add contract form in editable mode), click on browser back button.

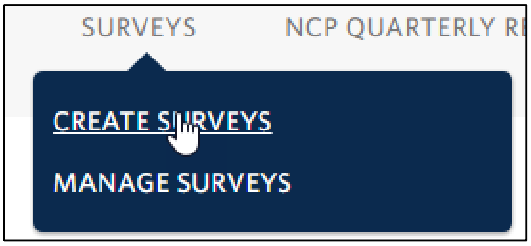
Resources Section: displays the list of resources uploaded into the system at the time of adding the contract. You can view, edit or delete the same by clicking on the respective action icons. To add/ upload more resources, click "**Add More**". The interface to upload resources appear in a pop-up.

C. Surveys

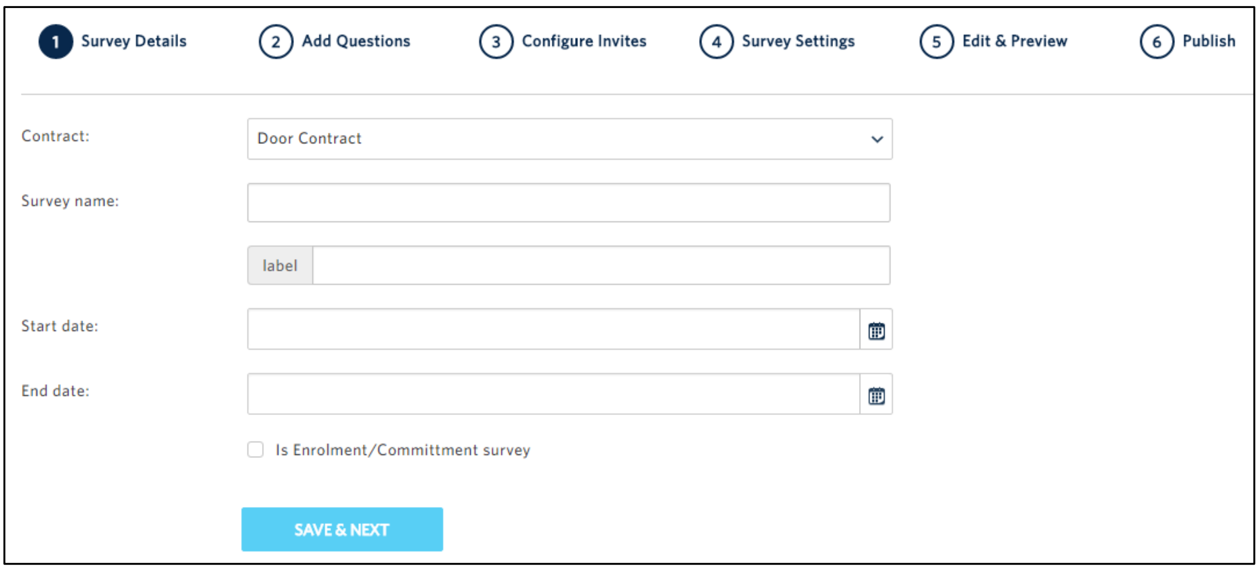
This section allows you to create normal surveys as well as enrollment surveys and manage the same.

C.1. Create Surveys

Mouse-over the “**Surveys**” tab and click on "**Create Surveys**".



The following screen appears:



Creating survey is a 6-step process that involves entering survey details, adding survey questions, adding invitees, configuring survey settings, editing and previewing the survey and finally, publishing it.

a) <u>Survey Details</u>

To create a new survey, enter the following survey details:

- **Contract**: select the contact (list of all activated and pending contracts is available) for which the survey will be created.
- **Survey name**
- **Label**: short name for the survey
- **Start date**: date on which the survey will be automatically published, and (optional field)
- **End date:** the due date or the close date of the survey (optional field)

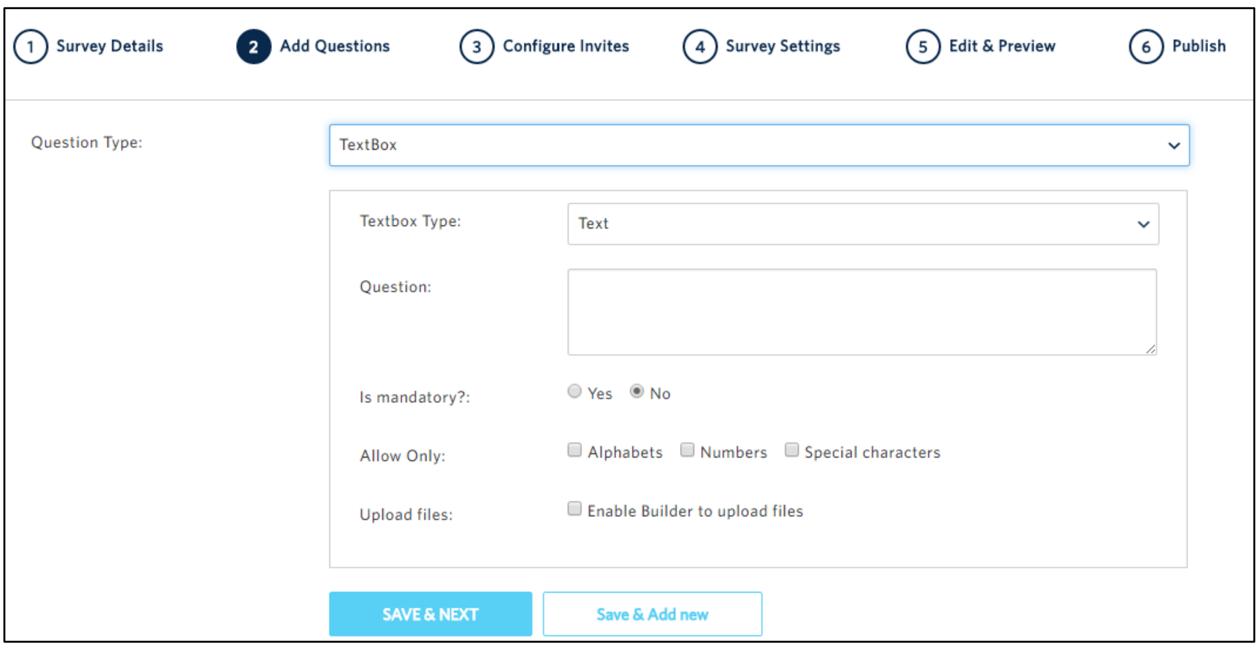
- **Is Enrollment/ Commitment Survey**: Check mark the box to mark this survey as an enrollment or commitment survey for this contract (optional field)

NOTE:

- *There can be **ONLY ONE** enrollment survey for each active and pending contract.*
- *The last question of enrollment survey should always be a DropList asking a builder whether or not he's interested to join the contract.*

Click on "**Save & Next**". You'll be taken to the "**Add Questions**" tab.

b) Add Questions



To add questions for your survey, enter the following details:

- **Question Type**: select the type of question to be added – TextBox, DropList or Grid. TextBox is selected by default. Based on selected "Question Type", entry fields are displayed.

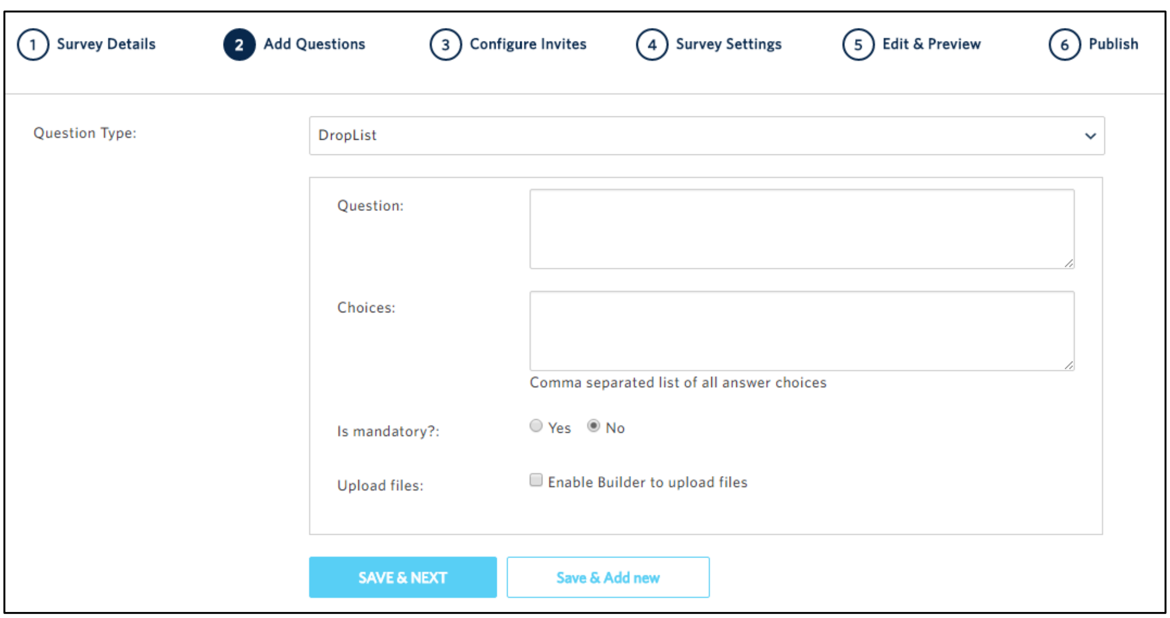
  ➢ **For "TextBox" question type, enter the following**:

- **Textbox type**: select the text box type to enter your survey question – text, number, email or phone number. Text is selected by default. Refer to the table below to understand details of information to be entered for each textbox type:

Details	Text	Number	Email	Phone

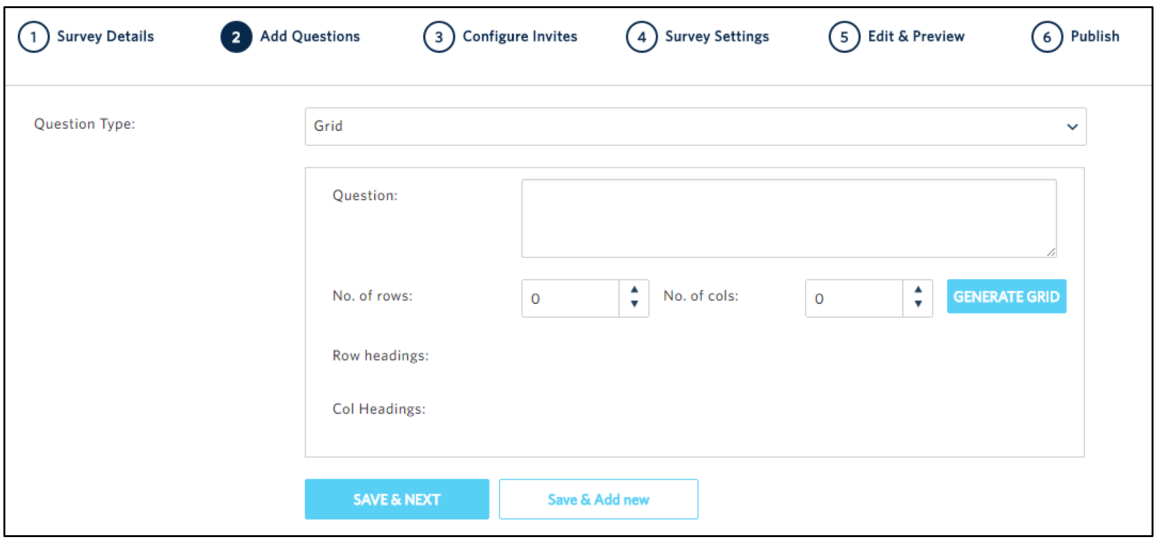
Question	Enter the survey question	Enter the survey question	Enter the survey question	Enter the survey question
Is mandatory	select radio to specify if the question is mandatory or not	select radio to specify if the question is mandatory or not	select radio to specify if the question is mandatory or not	select radio to specify if the question is mandatory or not
Allow Only	check mark the box and specify whether the answer will accept only alphabets or numbers or special characters or all or a combination of any two	using ▲ and ▼, specify the number range so that builders **CANNOT** enter a number beyond the said range when answering the question.		
Upload Files	check mark the box if you want builders to upload files in response to your survey (optional field)	check mark the box if you want builders to upload files in response to your survey (optional field)	check mark the box if you want builders to upload files in response to your survey (optional field)	check mark the box if you want builders to upload files in response to your survey (optional field)

➢ **For "DropList" question type, enter the following**:

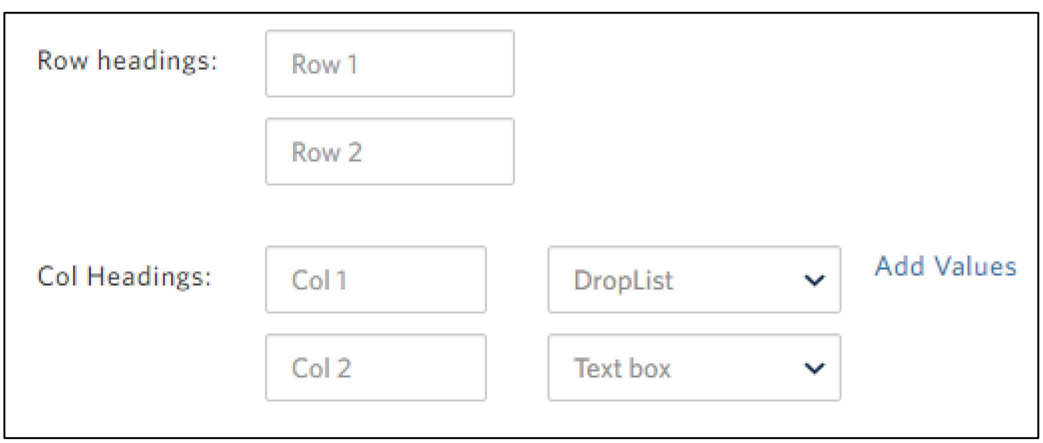


- **Question**: enter the survey question
- **Choices**: enter the answer options separated by a comma
- **Is mandatory**: select a radio to specify whether the question is mandatory or not
- **Upload Files**: check mark the box if you want builders to upload files in response to your survey (optional field).

➢ **For "Grid" question type, enter the following**:



- **Question**: enter the survey question
- **No. of rows/ No. of cols:** using ▲ and ▼, define the number of rows and columns required and click "**Generate Grid**". The specified number of rows and columns appear (refer to screen shot)



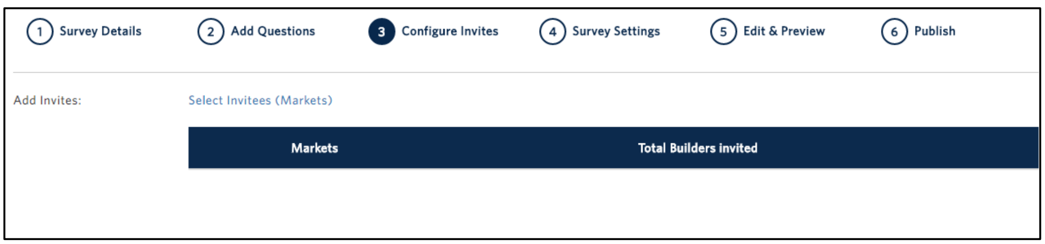
- **Row Heading**: enter the row headings

- **Col Headings**: enter your questions here and also select the response types – text box or drop list. In case of drop list, click on “**Add Values**”. A pop-up appears. Enter the answer options using comma separator and click on “**Save**”.

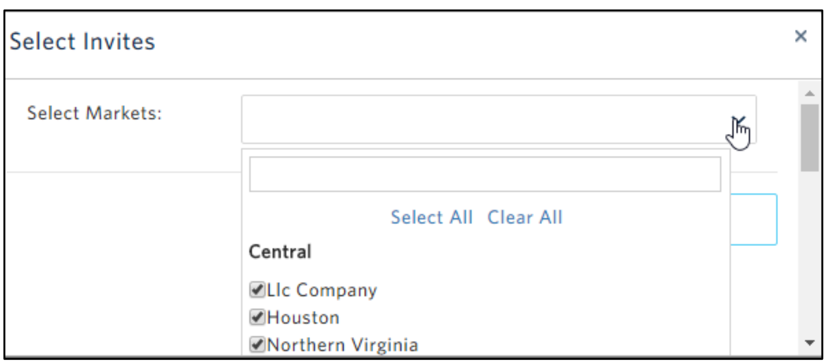
You can add multiple survey questions by clicking on “**Save & Add New**”. Once you’re done with entering all survey questions, click on “**Save & Next**” to go to the next section – “**Configure Invites**”.

c) Configure Invites

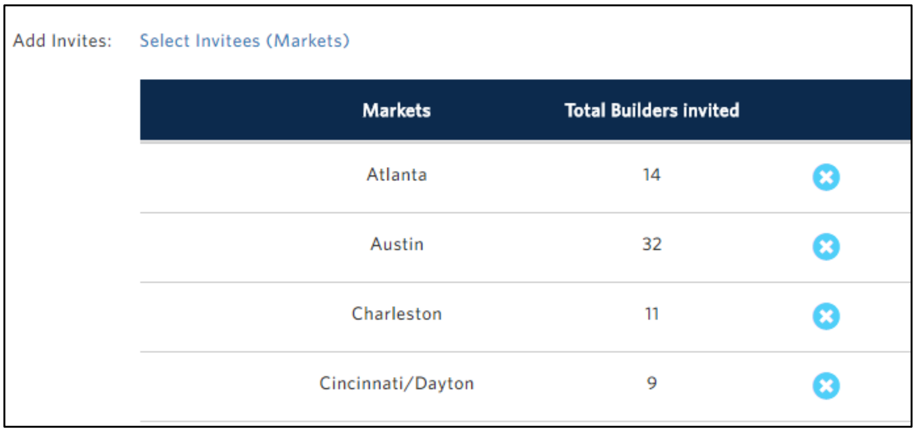
From here you can add invites who’ll be taking your survey.



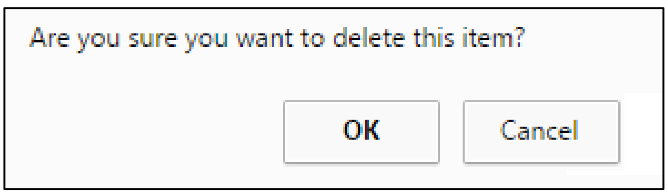
To add invites, click “**Select Invitees (Markets)**”. The selection screen appear as shown below:



Clicking on the down arrow brings up the list of markets available in CBUSA database. All markets are selected by default. To remove a particular market, uncheck the corresponding check box and click “**Save**”. List of selected market(s) is displayed:



To remove a market from the invitee list, click . The system asks for a confirmation.

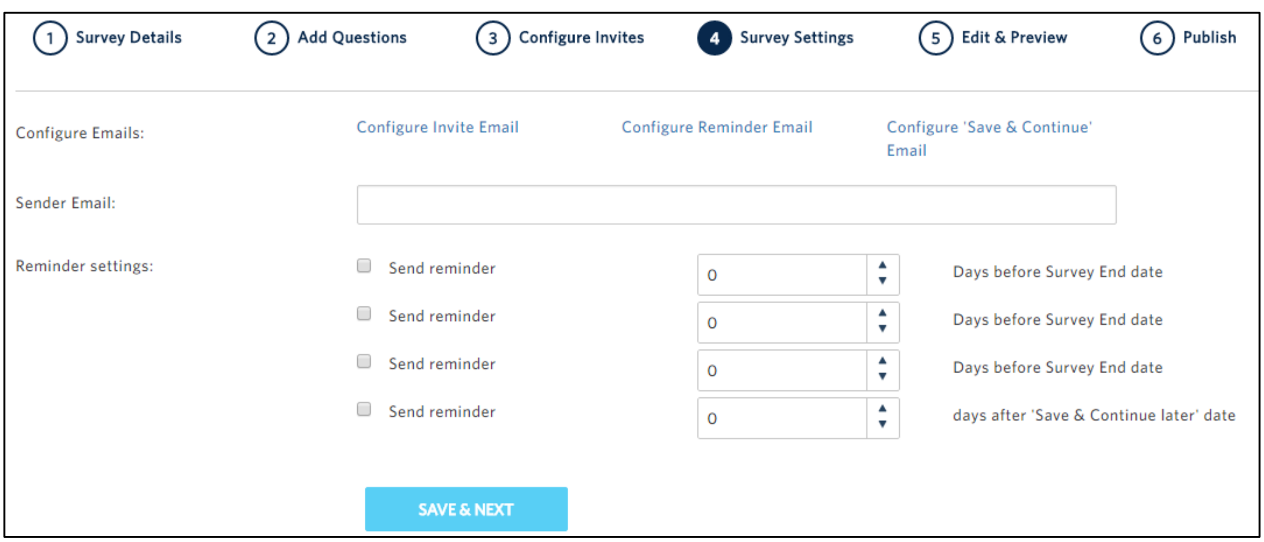


To confirm click “**Ok**”, or else select “**Cancel**”.

NOTE: *Option to remove a market from invitee list will not appear in case of published surveys.*

With the list of invites configured, click on the next section “**Survey Settings**”.

d) <u>Survey Settings</u>



This section lets you configure the following – invite, mail, reminder mail and 'Save and Continue' mail.

Invite mail is the first mail sent out to builders that lets them take the survey; reminder mail is the mail to remind builders to take the survey; 'Save and Continue' mail is the mail that is sent out when builders have started taking the survey but did not submit it.

To configure the invite mail, click on "**Configure Invite Mail**", and key in the following:

- Subject Line, and
- Email content, using the rich text editor. To include a link in your survey email using which builders can take the enrollment survey, click on </> and key in the word "Link" using hashtags like this ####Link####. Once done, click on "**Save**" featured in the pop-up.

Next, key in the "Sender Email": the email id from which the mails would be sent and also set "Reminder Settings" i.e. specify the number of days before the survey end date when the reminder mail should be triggered (optional field).

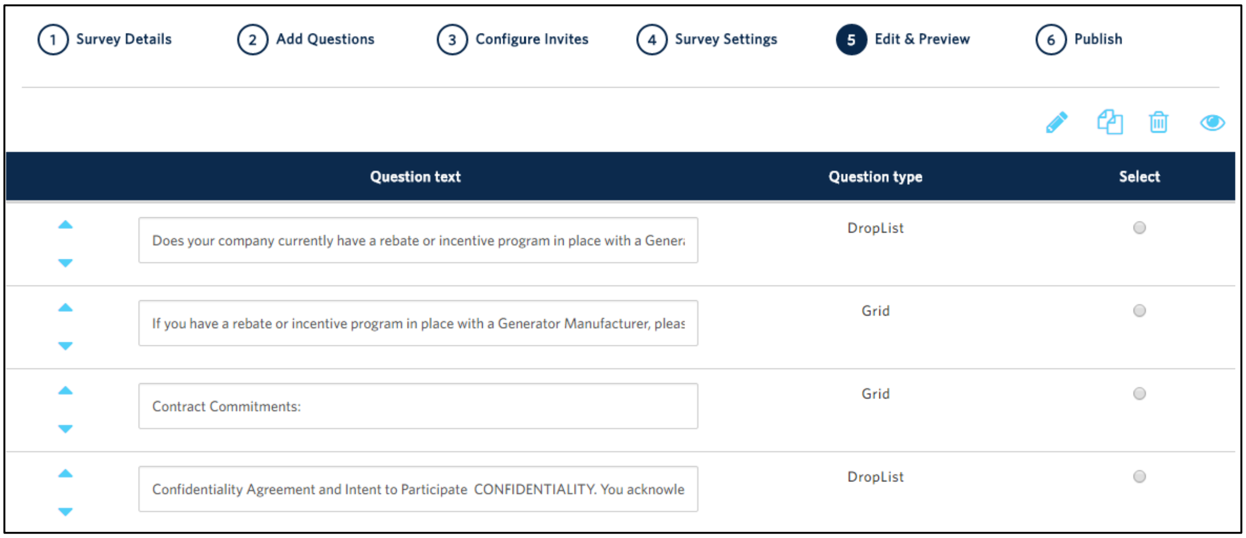
The reminder and 'save and continue' emails can be configured the same way, by clicking on "**Configure Reminder Email**" and "**Configure 'Save and Continue' Email**", respectively. Reminder mail, if configured, is sent out based on the reminder settings.

NOTE:

- ***ONLY*** *the invite and reminder emails will have the 'Take Survey' link. The 'Save and Continue' email will have the 'Save and Continue' link.*
- *Configuring invite mail is mandatory. You may or may not configure the other two mailers.*

Click on "**Save & Next**" to be taken to the "**Edit & Preview**" section.

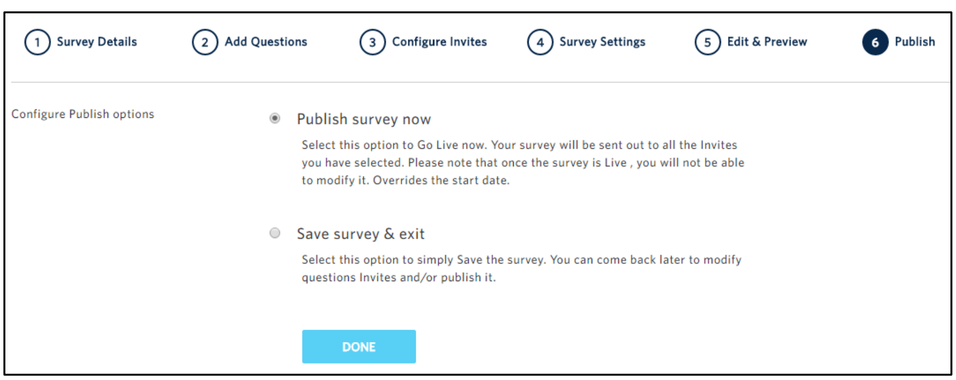
e) Edit & Preview



To edit, copy or delete a survey question, select it by clicking on the corresponding radio button, and then click on , and , respectively. Clicking on and corresponding to a given record will let you change the display order of that question. Clicking on will open up the preview survey screen in a separate tab.

f) <u>Publish</u>

Click on "**Publish**". The following screen appears:



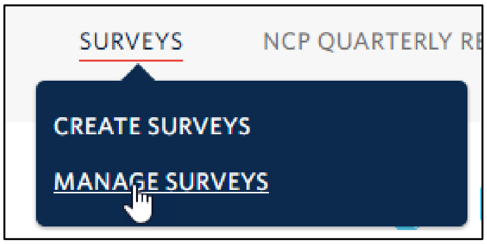
Here you get two options:

- *<u>Publish survey now</u>*: this lets you publish the survey right away. As soon as a survey is published, the invite mail is sent out to the list of invitees as configured in sub-section c: Configure Invites and the status of the survey becomes '**Live**'.
- *<u>Save Survey & exit</u>*: lets you save the survey as is so that you can modify or publish it sometime later.

Select your preferred option and click “**Done**” to be taken to “**Manage Surveys**” screen.

C.2. Manage Surveys

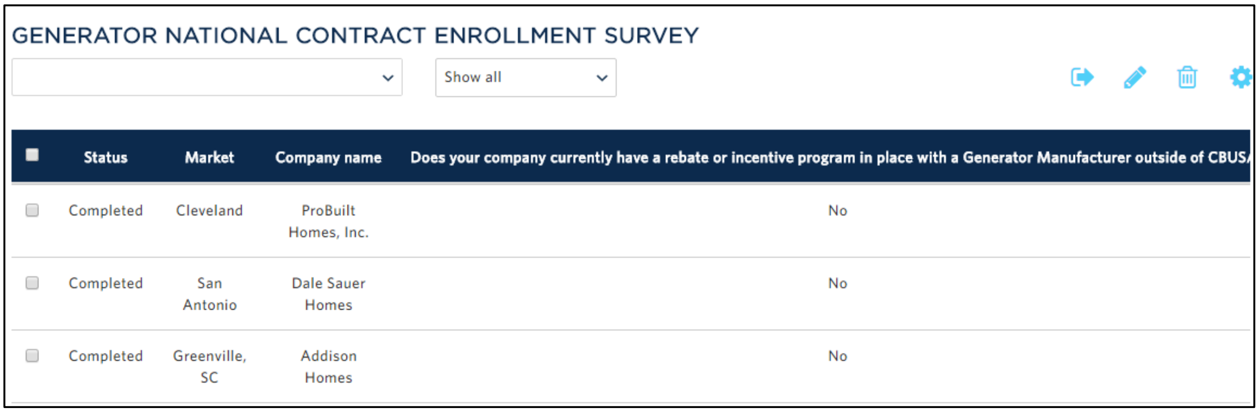
This section allows you to view and manage the list of all existing surveys. Mouse-over the “**Surveys**” tab and click on "**Manage Surveys**".



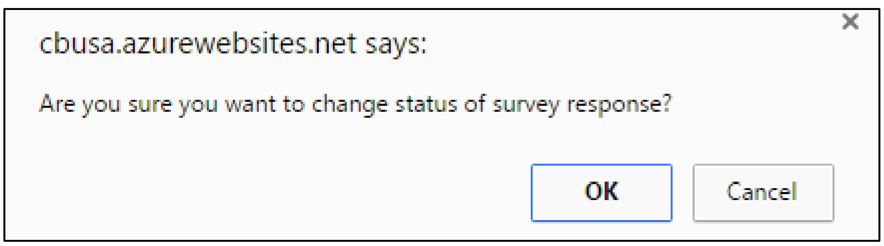
The following screen appears:

List of all surveys – live, closed, published and unpublished – available in the system are displayed. You can filter them by contracts using the drop list featured atop the grid.

Click on the counters featured against responses (complete). List of builders who’ve completed the survey appears; again, clicking on counters featured against responses (incomplete) brings up the list of builders who’ve taken the survey but left it incomplete (refer to screen shot below):



You can filter responses by status – complete or incomplete. To change the status of any response from complete to incomplete or vice-versa, select the response by check marking the corresponding check box and click . A warning message appears:



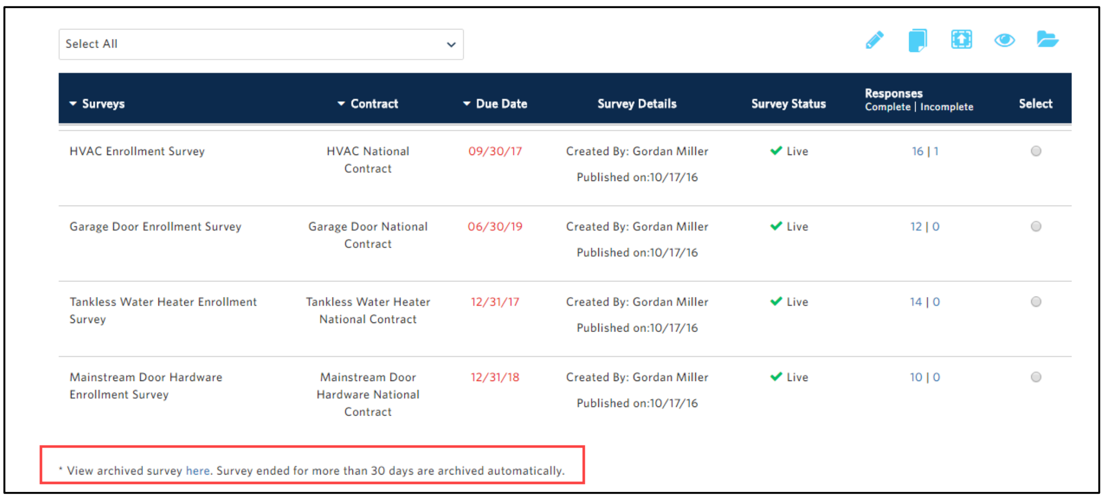
Say "**Ok**" and the status of the selected response changes instantaneously. To download the responses in an excel file, edit the survey response or delete the same, select the record and click on , and , respectively.

Back to the survey listing screen, you can edit, copy, publish, view and archive surveys from here.

- To edit a survey, select it by clicking on the corresponding radio button and then click on featured atop the display grid. If the selected survey is already published, a warning message – "*You are about to Edit a Live & Published survey. Are you sure you want to proceed?*" – appears on screen. Click "**Ok**" to proceed. In the edit mode, you can modify survey details, add new markets in from "Configure Invites" section and modify the survey settings. If new market is added, then "Publish" the survey once again, so that builders in the newly added market get the invitation mail to take the survey.

NOTE: Questions of published surveys **CANNOT** be edited or deleted. The list of markets for which the surveys have already been published **CANNOT** be removed from the survey.

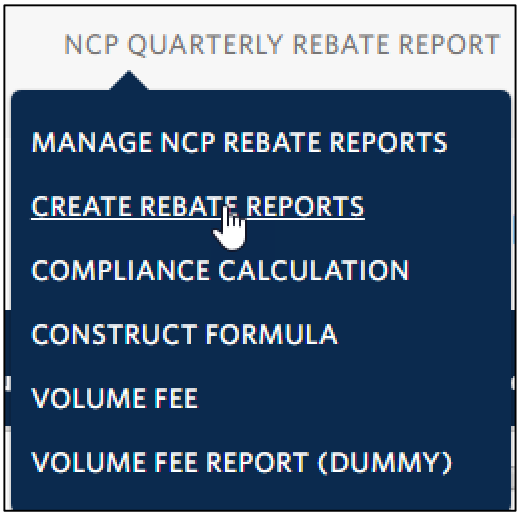
- To copy an existing survey, select the survey and click on . A new survey with the same name followed by "_Copy" gets created and displayed on-screen. All you need to do is edit the record, rename it, configure the invites list (if the need be) and publish the same.
- To publish an unpublished survey, select the same and click on .
- To view the questions of an existing survey, select the survey and click on . The preview mode opens up in a new window.
- To archive surveys that are not live/ published, select the survey and click on . A warning message "*<u>Are you sure you want to archive the selected survey?</u>*" Click "**Ok**" to proceed. The selected record gets removed from "Manage Surveys" screen and the same can be viewed from archived surveys screen. A link to view the list of archived surveys is featured towards the end of the "Manage Surveys" screen:



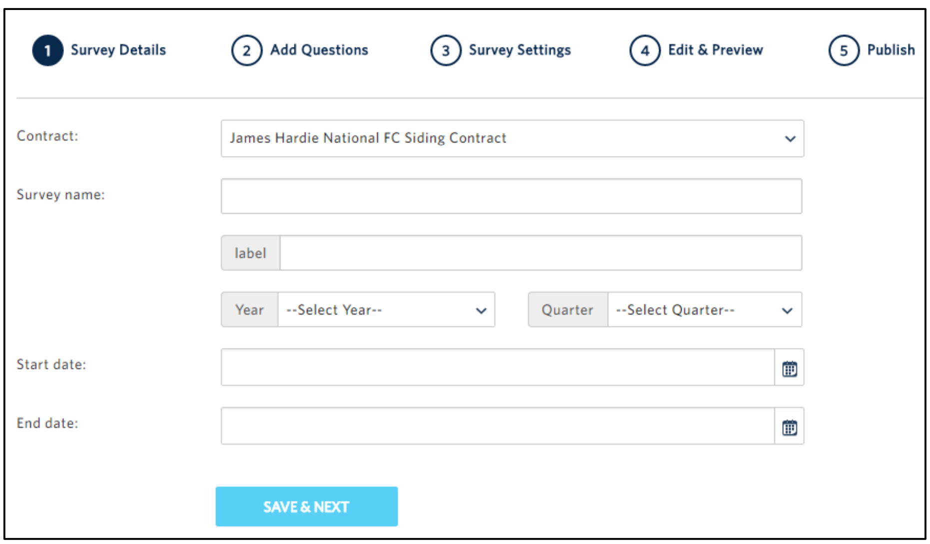
D. NCP **Quarterly** Rebate Report

D.1 Create Rebate Reports

This section allows you to create NCP rebate report surveys to be sent out to builders who have signed up for the contract and taken the enrollment survey. Mouse-over the "**NCP Quarterly Rebate Report**" tab and click on "**Create Rebate Reports**".



The following screen appears:



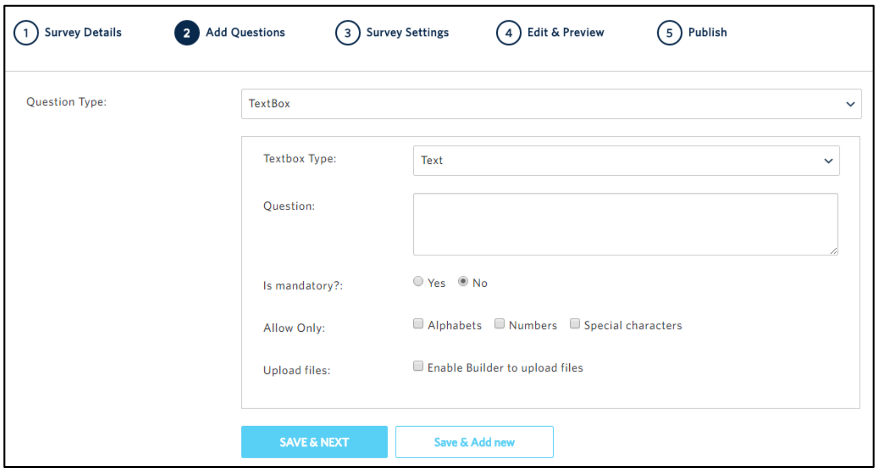
The screen is similar to the one of creating regular surveys, except the "Configure Invites" section, which is not here. Since rebate report surveys are sent out to **ONLY** those builders who have responded to the regular survey, so the invite list is automatically taken up by the system.

To create a rebate report survey, enter the following details:

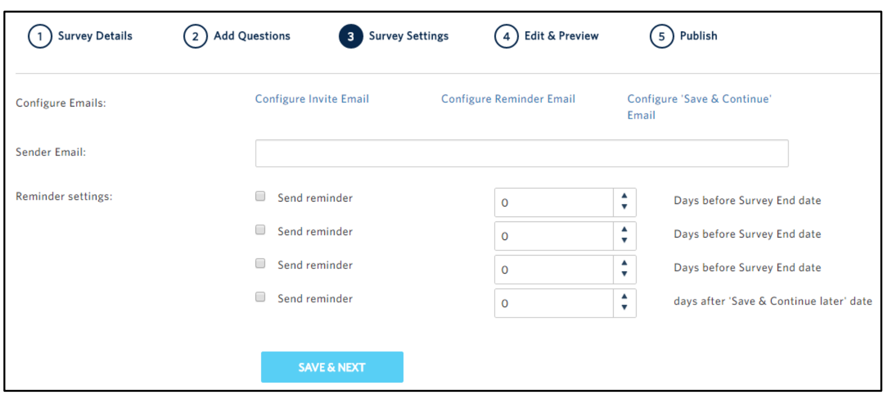
- **Contract**: select the contract for which the rebate report survey will be created. **ONLY** the list of active contracts is displayed
- **Survey name**: enter a survey name
- **Label**: enter a short name for the survey
- **Year**: select the financial year for which the survey is being created

- **Quarter**: select the quarter of the financial year
- **Start Date**: date on which the survey will be automatically published, and (optional field)
- **End date:** the due date or the close date of the survey (optional field)

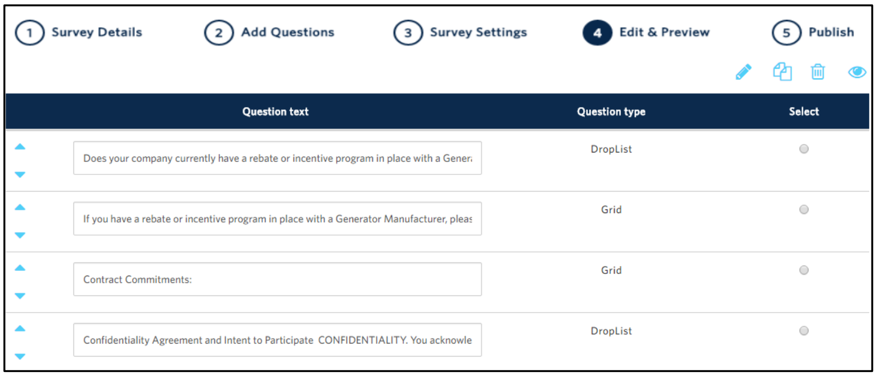
Click on "**Save & Next**". The next section – "**Add Questions**" – appear:



You can add questions the same way as discussed in sub-section b: Add Questions. With rebate report survey questions added, click on "**Save & Next**" to go to "**Survey Settings**":

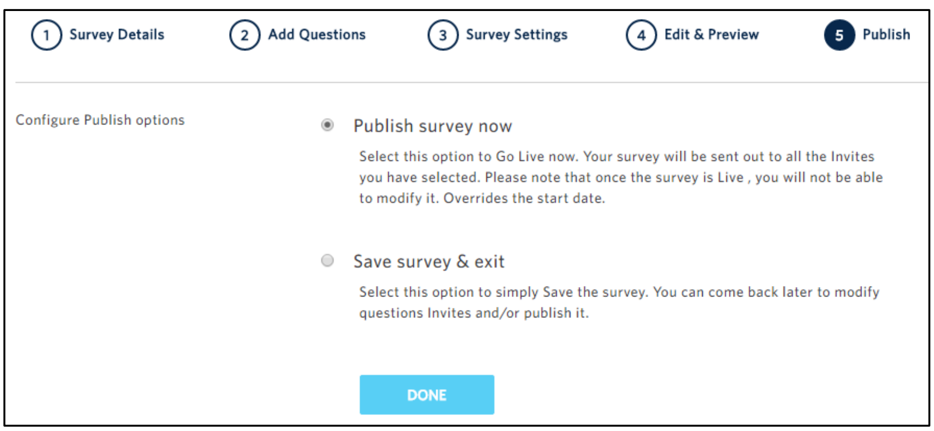


Configure invite and reminder emails, and also the reminder trigger settings the same way as discussed in sub-section d: Survey Settings. To edit and preview the complete survey click on "**Save & Next**".



From here you can edit, copy, delete, preview survey questions or even shuffle their order of display, by selecting a record and then clicking on the respective action icon. For details, please refer to sub-section e: Edit & Preview.

To publish the survey or save it to be modified or published at a later point of time, go to the "**Publish**" tab. Here you'll be presented with the following two options:

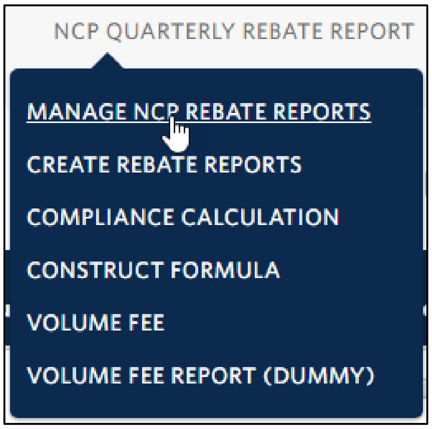


- Select "**Publish Survey now**" to publish the survey instantaneously, or
- Select "**Save survey & exit**" to save the survey so that you can modify/ publish it later.

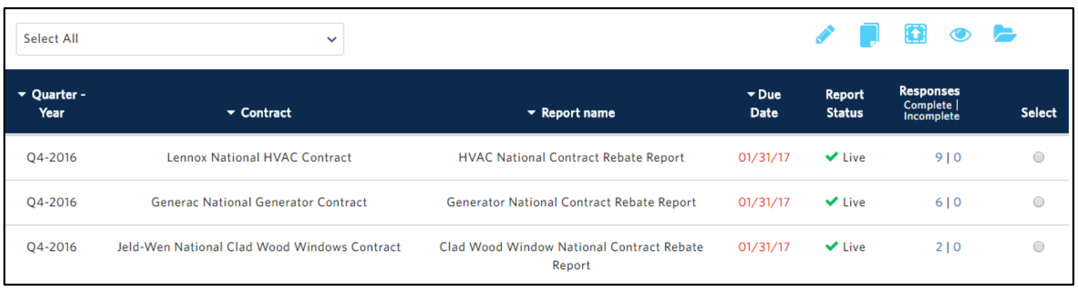
Clicking on "**Done**" will take you to the "**Manage NCP Rebate Reports**" screen.

D.2 Manage NCP Rebate Reports

This section lets you view and manage the NCP rebate report surveys available in the system. Mouse-over the "**NCP Quarterly Rebate Report**" tab and click on "**Manage NCP Rebate Reports**".



The following screen appears:



Quarter - Year	Contract	Report name	Due Date	Report Status	Responses Complete | Incomplete	Select
Q4-2016	Lennox National HVAC Contract	HVAC National Contract Rebate Report	01/31/17	✔ Live	9 | 0	
Q4-2016	Generac National Generator Contract	Generator National Contract Rebate Report	01/31/17	✔ Live	6 | 0	
Q4-2016	Jeld-Wen National Clad Wood Windows Contract	Clad Wood Window National Contract Rebate Report	01/31/17	✔ Live	2 | 0	

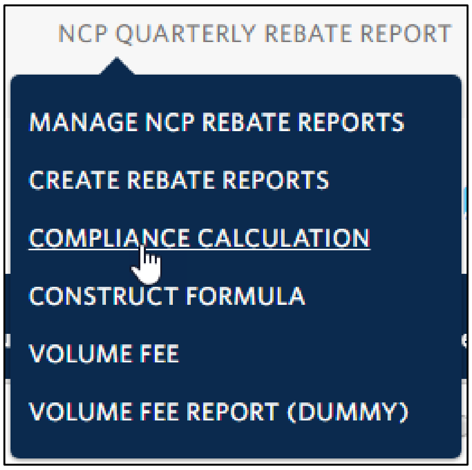
All rebate report surveys – live, closed, published and unpublished – available in the system are displayed. You can filter them by contracts using the drop list featured atop the view grid.

To edit, copy, publish, preview and archive a record, select the same by clicking on the corresponding radio button, and then click on , , , and , respectively. Clicking on the counters featured against the responses (complete and incomplete) will bring up the same screen with the same set of functionalities, as discussed in Section C.2: Manage Surveys.

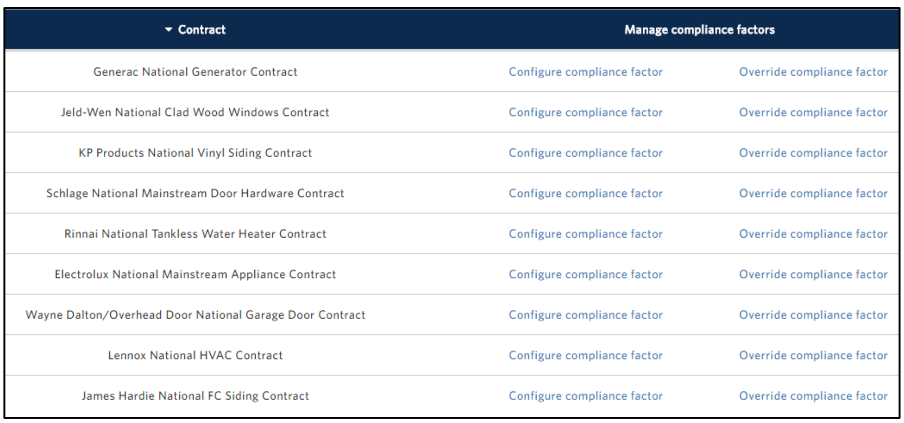
D.3 Compliance Calculation

This section allows you to configure the compliance factors for the builders who've signed up for the contract. Compliance factors of builders is nothing but a comparison between the estimated purchase value placed by builders at the time of enrollment surveys versus the actual purchase values declared in the rebate report surveys. This value will show up as a percentage in the builder dashboard once the same is configured by the admin from here.

In order to configure the compliance factor, mouse-over the "**NCP Quarterly Rebate Report**" tab and click on "**Compliance Calculations**".

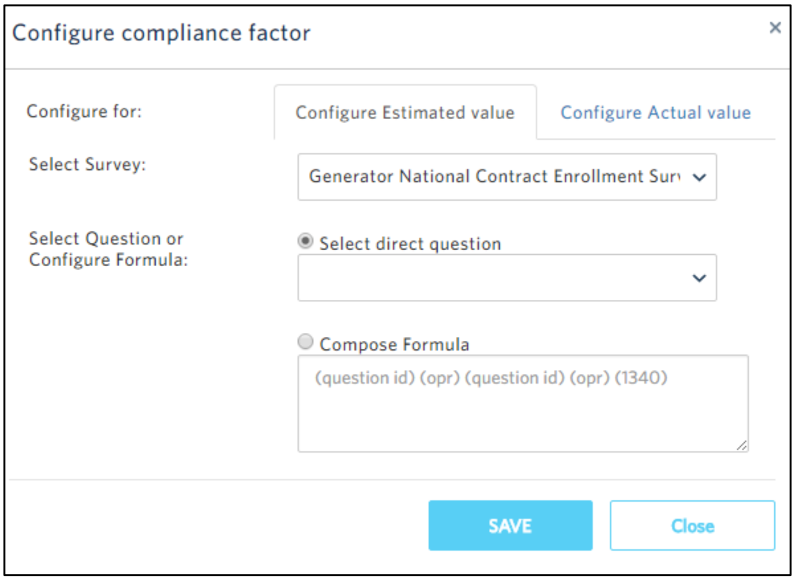


The following screen appears:



Contract	Manage compliance factors	
Generac National Generator Contract	Configure compliance factor	Override compliance factor
Jeld-Wen National Clad Wood Windows Contract	Configure compliance factor	Override compliance factor
KP Products National Vinyl Siding Contract	Configure compliance factor	Override compliance factor
Schlage National Mainstream Door Hardware Contract	Configure compliance factor	Override compliance factor
Rinnai National Tankless Water Heater Contract	Configure compliance factor	Override compliance factor
Electrolux National Mainstream Appliance Contract	Configure compliance factor	Override compliance factor
Wayne Dalton/Overhead Door National Garage Door Contract	Configure compliance factor	Override compliance factor
Lennox National HVAC Contract	Configure compliance factor	Override compliance factor
James Hardie National FC Siding Contract	Configure compliance factor	Override compliance factor

List of active contracts are displayed. Clicking on "**Configure Compliance Factor**" corresponding to a given record brings up the following screen:



The screen comprises of two tabs – Configure Estimated Value and Configure Actual Value. The compliance figures configured for builders out here are reflected in the builder dashboard and NCP rebate reports.

The value is calculated by the system based on numeric fields (i.e. text type question with number-type responses) from Enrollment Surveys and Rebate Report Surveys, and the same can be configured by the CBUSA admin.

To configure the estimated value, select the:

- Survey
- Based on selected survey, the system populates the direct question. Click on "**Save**".

<

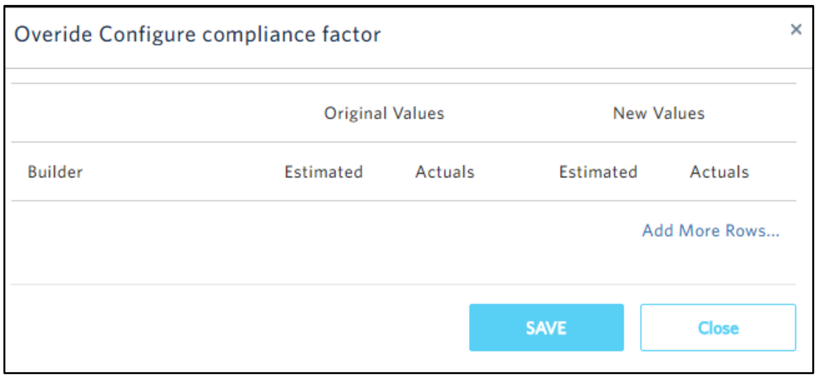
Based on the selected enrollment survey and the response received for the selected survey question, the estimated compliance value for builders who've signed up for the contract will be computed by the system.

Next, go to "Configure Actual Value" tab, and select the:

- Year
- Quarter, and
- Survey
- Based on the selected survey, system populates the direct question. Click on "**Save**".

Based on the selected quarterly rebate report survey question and response received, the actual compliance value will appropriately be calculated by the system.

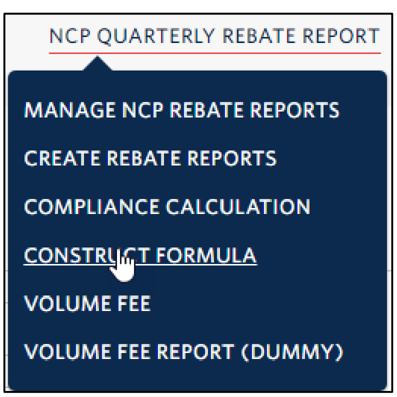
If you want to configure special compliance factors for certain preferred builders, click on "**Override configure compliance factor**". The following screen appears:



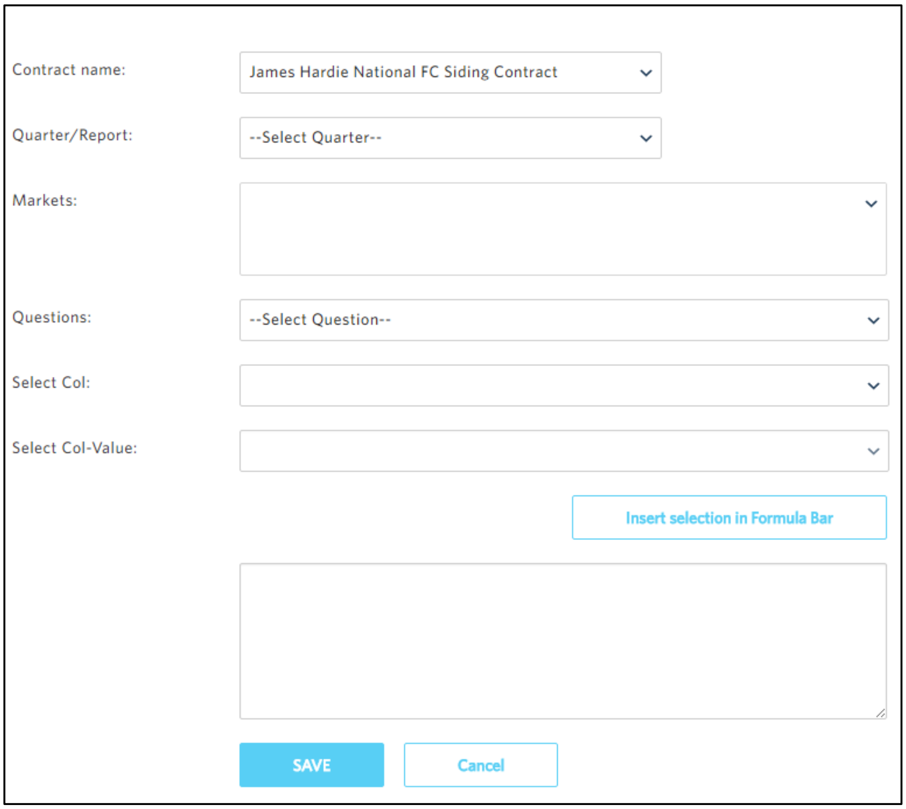
Click on "**Add More Rows…**", and select a builder. Based on your selection, the estimated and actual values based on configurations made in "**Configure Compliance Factor**" screens get populated. Enter the new estimated and actual values, and click on "**Save**". You can configure special compliance values for multiple builders by clicking on "**Add More Rows…**".

D.4 Construct Formula

This particular section allows you to construct formula for NCP rebate report surveys based on which the gross rebate, builder rebate and the CBUSA fee will be automatically calculated by the system. Mouse-over the "**NCP Quarterly Rebate Report**" tab and click on "**Construct Formula**":



The following screen appears:



Enter the following details:

- **Contract Name**: select the contract for which the formula needs to be constructed. The dropdown displays the list of active contracts **ONLY**. Also, formula can **ONLY** be constructed if there is a NCP Rebate Report Survey for the selected contract.
- **Quarter/ Report**: Select the quarter for which the NCP rebate report survey is available.
- **Market**: Select the market(s) for which the formula will be applicable for calculating the gross rebate.
- **Questions**: Based on the selected contract and quarter, list of NCP rebate report questions are displayed. Select the question, responses for which would be needed for formula construction. For example: Please select the garage door series installed along with entering the number of doors and openers installed as well as listing the company name of the installing garage door dealer.

- **Select Col**: Based on the selected question, list of sub-questions (i.e. the column heading in grid-type questions) are displayed. For example: Select the garage door series installed, Enter the number of doors installed, Enter the Number of Genie and OHD Brand Openers etc. Select the sub-question, as necessary and appropriate.
- **Select Col-Value**: Based on the selected sub-question, answer options if any (this will appear **ONLY** if the response type for the selected sub-question is a DropList) are displayed out here. For example: if the selected sub-question is "Select the garage door series installed", then the dropdown for "Select Col-Value" will display the options Merit, Elite, Signature etc. On the contrary, if the selected sub-question is "Enter the number of doors installed", then "Select Col-Value" will not display anything because the response is not system-defined.

NOTE:

- *For text-type questions → nothing appears in "Select Col" and "Select-Col Value".*
- *For DropList questions nothing appears under "Select Col", but the answer options appear under "Select Col-Values".*
- *For grid-type questions, it's the column headings and their related answer type options (if DropList) that appear under "Select Col" and "Select Col-Values", respectively.*

With the appropriate set of questions selected, click on "Insert selection in Formula Bar". The selection appears as follows:

~~~~Please select the garage door series installed along with entering the number of doors and openers installed as well as listing the company name of the installing garage door dealer. ~@$Select the garage door series installed~@$ Overhead Door Series 190 290 391 399 490/Wayne-Dalton Series 5120 9100 9600 8300 8700~~##

This is just a part of formula, wherein the selected values are:

- *Questions*: Please select the garage door series installed along with entering the number of doors and openers installed as well as listing the company name of the installing garage door dealer.
- *Select-Col*: Select the garage door series installed
- *Select Col-Value*: Overhead Door Series 190 209 391 490/Wayne-Dalton Series 5120 9100 9600 8300 8700

NOTE:
~~~~

- *The tilt (~~~~) and hash (##) symbols signify the beginning and ending of a section of the formula.*
- *These are reserved symbols that should not be modified or deleted under any condition.*
- *There are also some other symbols like ~@$ in between. These symbols demarcate the question, select-col and select col-value from each other. They signify the conditional values that'll be evaluated by the system at the time of calculating the formula.*

To continue constructing the formula, press Shift+6 to key in an atmark symbol (^), select another sub-question (Select Col) like "Enter the number of doors installed. With this type of sub-question selected, you'll not have anything to select from "Select Col-Value". Click on "Insert selection in Formula bar" for the same to appear like this:

```
~~~~Please select the garage door series installed along with entering the number of doors
and openers installed as well as listing the company name of the installing garage door
dealer. ~@$Select the garage door series installed~@$ Overhead Door Series 190 290 391 399
490/Wayne-Dalton Series 5120 9100 9600 8300 8700~~##^~~~~Please select the garage door
series installed along with entering the number of doors and openers installed as well as
listing the company name of the installing garage door dealer.~@$Enter the number of doors
installed~~##
```

Now enter a mathematical operator like say 2.5% or multiply the selection by say 100 and then add 50 to it. This makes a complete formula. You can add n-number of conditional values like this to a single formula by putting plus sign (+) in between each set of complete formula. Once you're done, click on "**Save**".

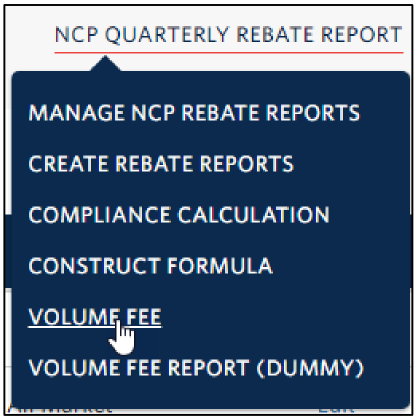
The atmark symbol (^) signify condition i.e. if condition A = abc, THEN the next condition should be considered. In this case, if the installed garage door series is Overhead Door Series 190 209 391 490/Wayne-Dalton Series 5120 9100 9600 8300 8700, then consider the number of doors installed and multiply it 100 and add 500 to the derived value.

Formula Construction Rules:

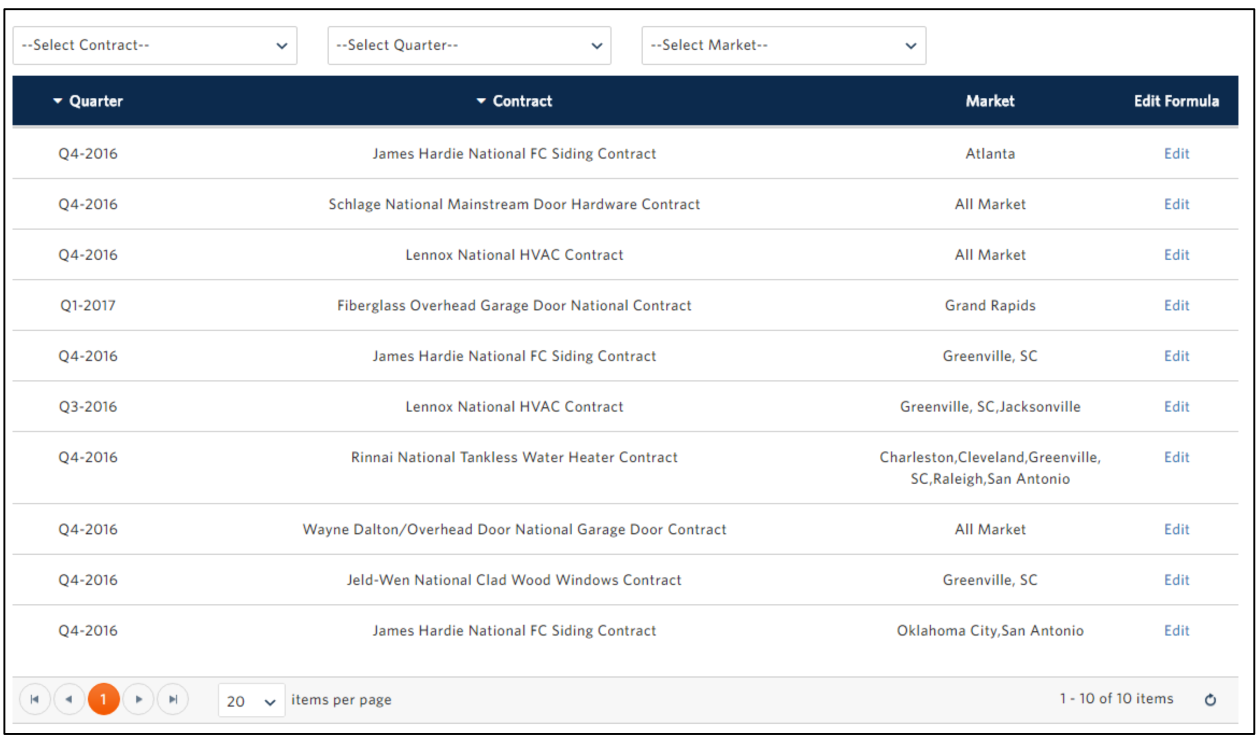
- Multiple conditional question in one part of the formula like if "Condition A=abc" and if "Condition B=xyz", then some mathematical operator will not be accepted by the system. You'll encounter error in formula creation.
- Questions for which responses are entered in characters cannot be used with any kind of mathematical operators.
- The system allows construction of **ONE** formula per contract-per market.
- When using an atmark symbol (^), the succeeding part should be such a question, the response to which is of a numeric value.

D.5 Volume Fee

This is the formula listing screen that displays the list of all formulas created for all contracts and markets.



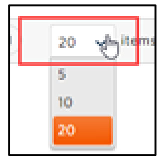
Click on "**Volume Fee**". The following screen appears:



--Select Contract-- --Select Quarter-- --Select Market--

Quarter	Contract	Market	Edit Formula
Q4-2016	James Hardie National FC Siding Contract	Atlanta	Edit
Q4-2016	Schlage National Mainstream Door Hardware Contract	All Market	Edit
Q4-2016	Lennox National HVAC Contract	All Market	Edit
Q1-2017	Fiberglass Overhead Garage Door National Contract	Grand Rapids	Edit
Q4-2016	James Hardie National FC Siding Contract	Greenville, SC	Edit
Q3-2016	Lennox National HVAC Contract	Greenville, SC,Jacksonville	Edit
Q4-2016	Rinnai National Tankless Water Heater Contract	Charleston,Cleveland,Greenville, SC,Raleigh,San Antonio	Edit
Q4-2016	Wayne Dalton/Overhead Door National Garage Door Contract	All Market	Edit
Q4-2016	Jeld-Wen National Clad Wood Windows Contract	Greenville, SC	Edit
Q4-2016	James Hardie National FC Siding Contract	Oklahoma City,San Antonio	Edit

1 | 20 items per page | 1 - 10 of 10 items

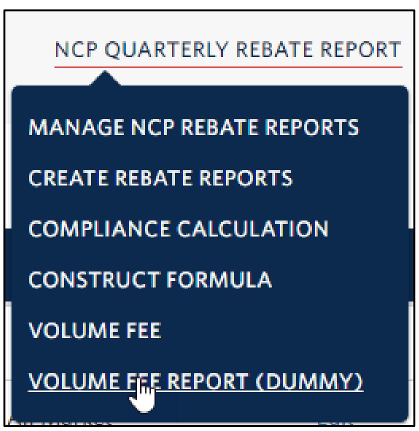
List of all formulas available in the system are displayed here. By default, the screen features 20 records at a time. You can change the number of records to be displayed by clicking on the tiny arrow featured towards the bottom of the screen 

. Click on  and  to be taken to the previous and next pages, respectively. You can filter formula by contracts, quarter and market using the drop list featured atop the view grid.

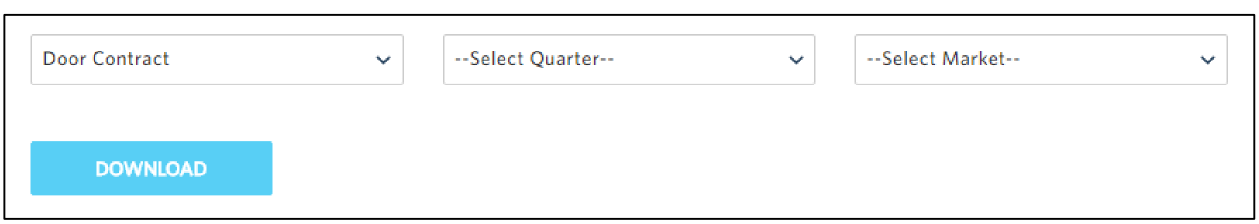
Clicking on Edit corresponding to any given record will take you to the construct formula screen from where you can edit/ modify the selected formula. Once you're done with the edit, click on "**Save**" to save the modified record or else, click "**Cancel**".

D.6 Volume Fee Report

This is the report generation screen. Mouse-over the "**NCP Quarterly Rebate Report**" tab and click on "**Volume Fee Report**":



The following screen appears:



For the volume fee report to be generated by the system, select the contract, the quarter, the market and click on "**Download**". Volume fee report for the selected contract, quarter and market gets downloaded on your computer in an excel format, as shown below:

Market	Company	Project	Project Address	Quarter	Year	Have you	Select the	Enter the	Enter the	Company	Gross Reb	Builder Ra	Builder Re	CBUSA Fee
Cleveland	ProBuilt Homes, Inc.	14 Maple Valley	2532 Maple Hill Dr Willoughby Hills OH 44094 Ohio Cleveland	Q4	2016	Yes	Overhead	2		Diamond I	200	60	120	80
Cleveland	ProBuilt Homes, Inc.	2 Deepwood	8185 Deepwood Blvd Mentor Oh 44060 Ohio Cleveland	Q4	2016	Yes	Overhead	1	1	Diamond I	125	60	75	50
Cleveland	ProBuilt Homes, Inc.	3 Deepwood	8195 Deepwood Blvd Mentor OH 44060 Ohio Cleveland	Q4	2016	Yes	Overhead	1	1	Diamond I	125	60	75	50
Cleveland	ProBuilt Homes, Inc.	3 Lake Breeze	303 Lake Breeze Cove Eastlake Oh 44095 Ohio Cleveland	Q4	2016	Yes	Overhead	1		Diamond I	100	60	60	40
Cleveland	ProBuilt Homes, Inc.	38 Mountainside Farms	10240 Karaboll Trail Concord Oh 44077 Ohio Cleveland	Q4	2016	Yes	Overhead	2		Dimaond I	200	60	120	80
Cleveland	ProBuilt Homes, Inc.	4 Lake Breeze	304 Lake Breeze Cove Eastlake Oh 44095 Ohio Cleveland	Q4	2016	Yes	Overhead	1	1	Diamond I	125	60	75	50

Information displayed in the excel file comprises of some static columns and some dynamic columns. The list of static columns in the volume fee report are:

- **Market**
- **Company**
- **Project**
- **Project Address**
- **Quarter**
- **Year**

Displays project related details

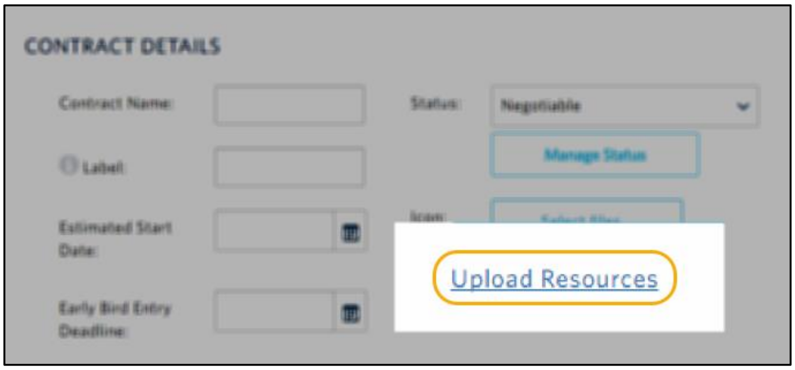
- **Gross Rebate**: displays the rebate value derived from the formula created.
- **Builder Rate**: depending on the stage during which the builder has joined the contract, the report pulls up the rebate % of builder from CBUSA volume fee % entered in "Manage Contracts" > "Configure CBUSA Rebate %".
- **Builder Rebate**: builder rate % of gross rebate
- **CBUSA Fee**: Gross Rebate minus (-) Builder Rebate

Speaking about the dynamic part of the report, the columns that lie in between “Year” and “Gross Rebate” are dynamically populated by the system depending on the number of questions that are there in the NCP rebate report survey. One column is created for every survey question along with responses received from builders. The survey questions form the column header and the responses given by builders are displayed there under.

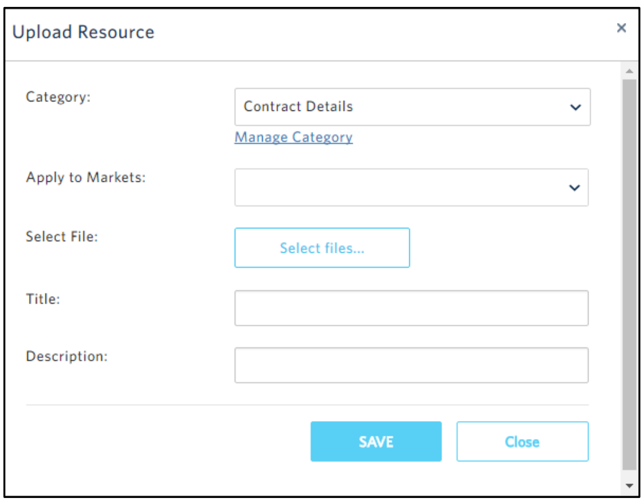
E. Miscellaneous

E.1. Upload Resources

To upload resources associated with the contract, go to “Add Contracts” → Upload Resources.

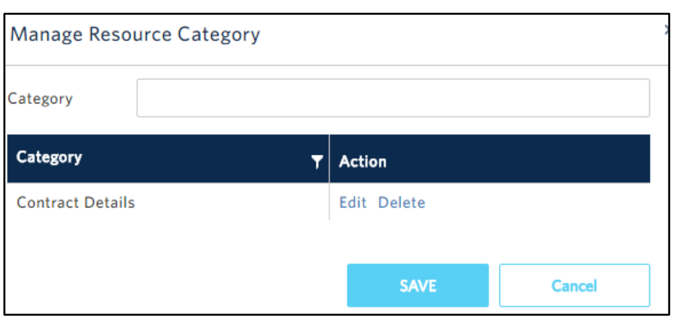


A pop-up appears:



To upload resource(s):

- Select a category
    - To add, edit or delete resource category, click “Manage Category”:

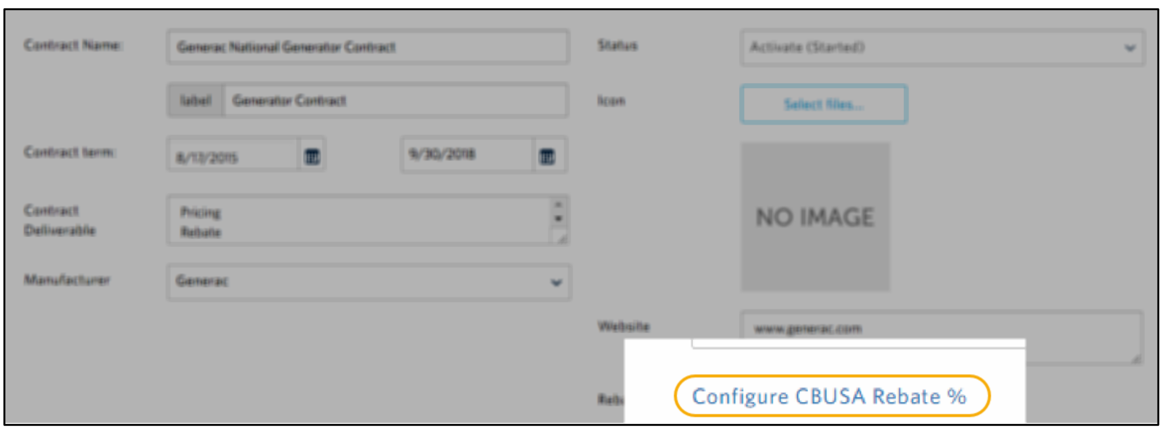


   - Enter the category name and "**Save**" the same. List of categories added, are displayed in the view grid below. You can edit or delete records by clicking on the respective action links corresponding to each record.
   - Click on "**Cancel**" to close the "Manage Resource Category" screen without saving any changes.
- Select the market(s) to which the resource applies. All markets are selected by default. To remove a particular market, uncheck the corresponding check box.
- Upload the actual file by clicking on "Select files"
- Enter the resource title, description and click on "**Save**". Click on "**Close**" to close the "Upload Resource" screen without saving any changes.

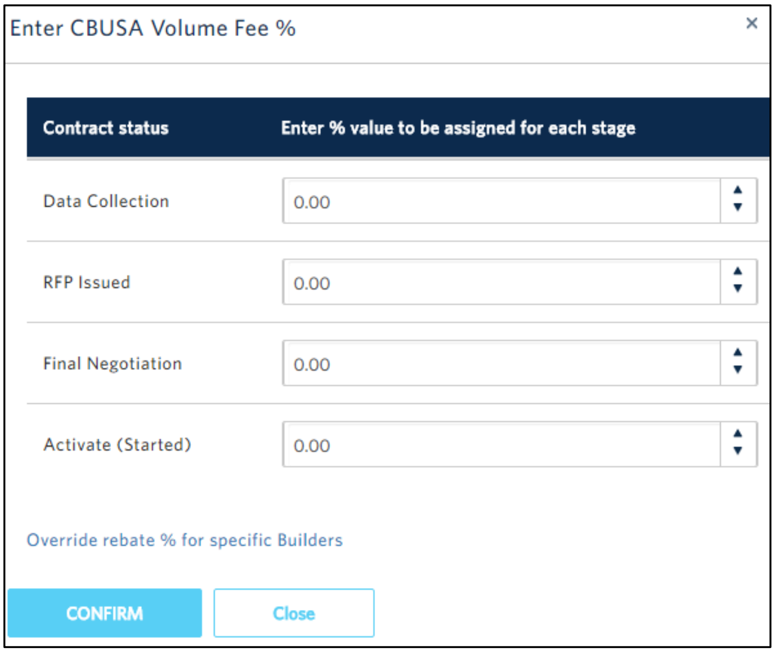
This completes the process of uploading resources into the system. Resources uploaded against contracts out here can be viewed by builders from the builder panel.

E.2. Configuring CBUSA Rebate %

This section allows you to define the CBUSA rebate % for builders at each stage of the contract. To set the rebate %, go to Manage Contracts → Select a contract → Configure CBUSA rebate %.

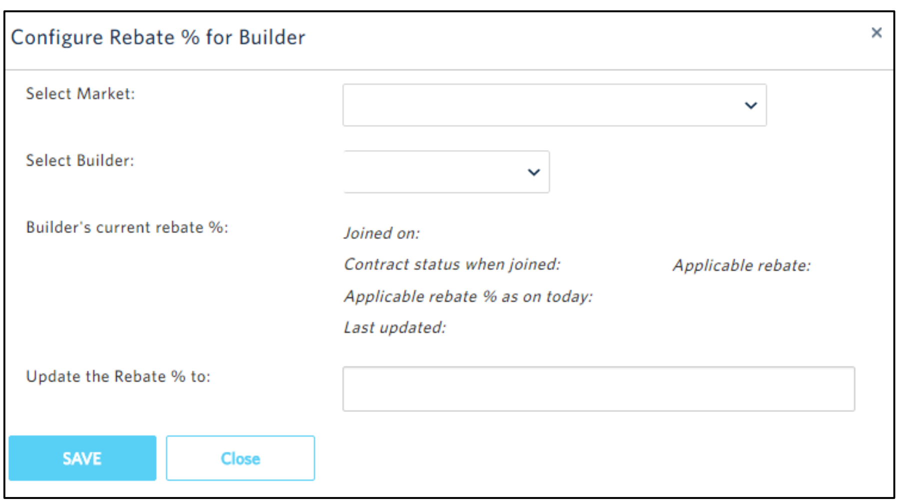


A screen displaying the different stages of the CBUSA contracts appear:



Enter the value of percentage to be assigned to each stage(s), as necessary and appropriate, by clicking on the up (▲) and down arrows (▼).

To define a special rebate percentage for some builders, click on "**Override rebate % for specific Builders**" and enter the following details:



- Select market(s). All markets are selected by default. To remove market(s), uncheck the corresponding check box.
- Select Builder: based on selected market(s), list of builders are displayed
- Enter special rebate percentage and click on "**Save**". A success message appears on-screen.

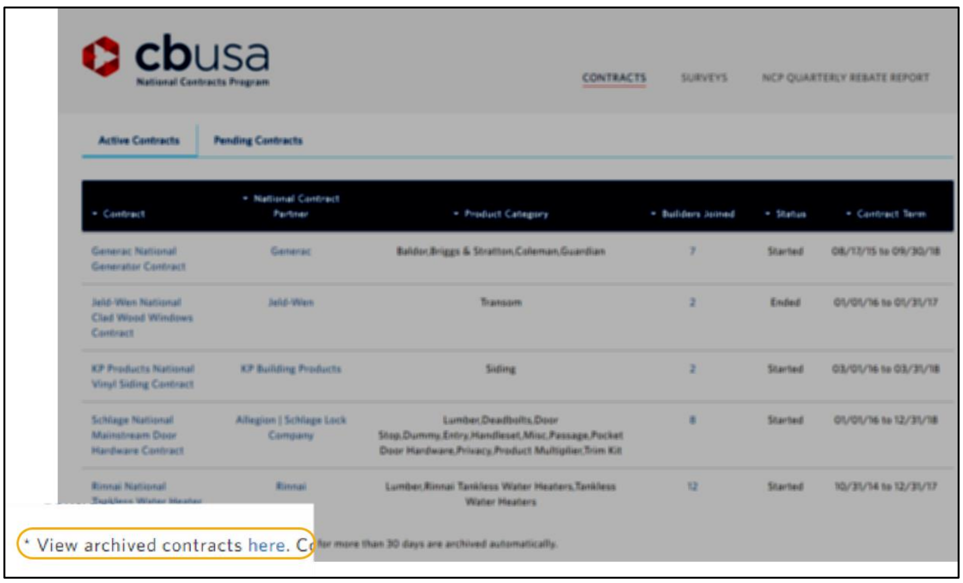
- Finally, click on "**Confirm**" in the 'Enter CBUSA Volume Fee %' to save the entered information.

Based on the CBUSA rebate % defined out here, the builder rebate and the CBUSA fee are calculated by the system and displayed in the Volume Fee Report.

E.3. View archived contracts and surveys

All contracts and surveys are automatically archived by the system after 30 days from their end date. Surveys can also be manually archived from the "Manage Surveys" screen as discussed in section C.2: Manage Surveys.

To view the list of archived contracts, go to Contracts → Manage Contracts (Active Contracts tab) → Screen down to the bottom of the screen. There's a link to view the list of archived contracts (refer to screen shot):



Clicking on the link will open a third tab – "**Archived Contracts**" – next to the active and pending contracts tab.

In a similar way, you can view the list of archived surveys.

F. Conclusion

With this we come to the end of our document. By now you should be able to create and manage your contracts, roll out surveys and create/ configure compliance calculations for your builders. Hope you found this document comprehensive and helpful. Thank You!