User Manual

For

CBUSA-National Contract Program Builder Interface

(CBUSA-NCP)

Prepared for:

CBUSA

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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 the builder interface of 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.

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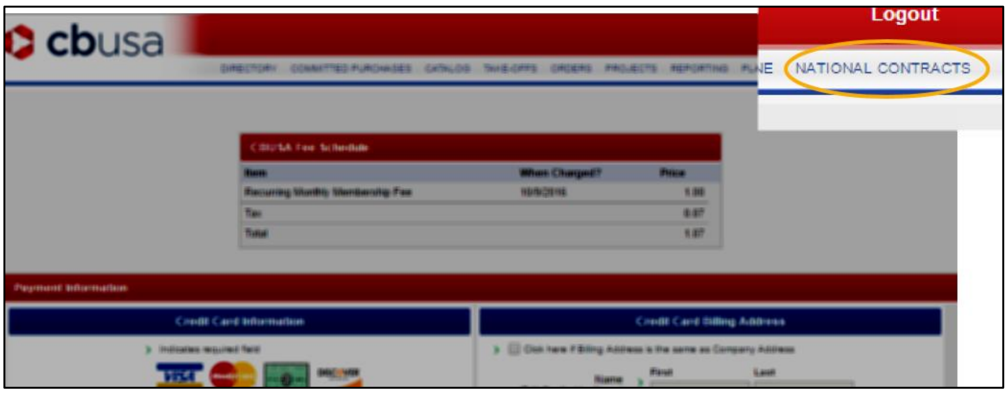
A. Portal Access

Logged into the CBUSA portal as a builder (https://cbusa-updates.idevdesign.net/default.aspx), the NCP module can be accessed by clicking on the "National Contracts" action link featured on the top right-hand side of the task navigation panel.



Clicking on the link, the CBUSA-NCP home screen appears:

B. My Contracts

This section displays the list of “active” and “pending” contracts for which you’ve signed up. Active contracts are the ones that have been awarded to a specific vendor, and for which the contract terms, pricing, deliverables and all have been negotiated. Pending contracts, on the other hand, are the ones that have not yet been awarded to any specific vendor. They're still in the data collection/ negotiation stage with multiple potential vendors.

Click on “**My Contracts**”. The following screen appears:

ACTIVE CONTRACTS

Contract	National Contract Partner	Product	Contract Term	Contract Deliverables	Compliance	Resources
HVAC National Contract	Lennox	4" Fresh Air Intake w/ Automatic Damper system,50 CFM Standard Exhaust Fan, Each, Installed,80 CFM B... More...	09/30/14-09/30/17	✔ Quarterly Rebate ✔ Contract Pricing Through CBUSA Preferred HVAC Vendor ✔ Pricing Lock ✔ Pricing Cap ✔ Model Home Program	Not Submitted %	

PENDING CONTRACTS

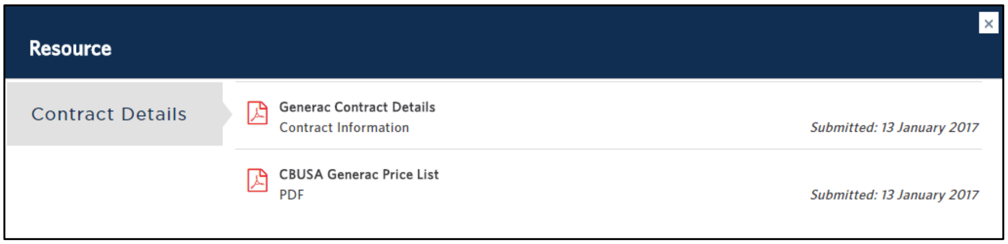
Contract	Manufacturers Invited	Product	Estimated Start	Status	Action	Resources
Garage Overhead Door National Contract	✔ LP Building Products ✔ Godrej ✔ Electrolux ✔ KP Enterprise ✔ Wayne and Delton Garage Doors	Custom Wood - Stain Grade Cedar Carriage Doors- Full Overlay 1x4 T/G Cedar Boards w/ 1x6 Square Edg... More...	07/05/18	Data Collection	All Done	

For **active contracts**, you can view the following:

- Contract name
- Contract partner i.e. the manufacturer who've been awarded the contract
- Product(s) to be dealt with; the product list can be expanded and collapsed using the "**More**" and "**Less**" links, respectively.
- Contract term
- Contract deliverables, and,
- The compliance percentage, which represents the portion of your contract commitment that you have already fulfilled based on your previous quarters' reports, if the same is configured by the CBUSA staff. The compliance percentage is computed as the Actual Value you've made during the quarter/ Estimated Value committed annually *100.

The actual and estimated purchase values are taken from the responses of your NCP rebate report and enrollment surveys, respectively.

Clicking on corresponding to a given record brings up a pop-up wherein you can view the list of resources uploaded for your market in association to a particular contract.



Clicking on "PDF icon" downloads the selected content on to your PC in the form of a PDF file.

PENDING CONTRACTS

Contract	Manufacturers Invited	Product	Estimated Start	Status	Action	Resources
Garage Overhead Door National Contract	LP Building Products, Godrej, Electrolux, KP Enterprise, Wayne and Delton Garage Doors	Custom Wood - Stain Grade Cedar Carriage Doors- Full Overlay 1x4 T/G Cedar Boards w/ 1x6 Square Edg... More...	07/05/18	Data Collection	All Done	

Since pending contracts have not yet been awarded, so the set of information displayed in this particular section is a bit different.

- National contract partner is replaced by the list of manufacturers have been invited to bid.
- The contract term is replaced by the estimated start date
- The "Status" column displays whether the contract is in the data collection stage or RFP stage or final negotiation stage etc., and
- The "Action" column displays whether all surveys (enrollment as well as regular surveys) associated with the contract has been taken by you or now. Link to surveys not taken, if any, will be featured out here.

Apart from these, information pertaining to the contract name, products and resources are the same as active contracts.

C. **Contracts** I Can Join

This particular screen also displays the list of "active" and "pending" contracts floated out in your market that you – as a builder – can join. Clicking on "**Contracts I Can Join**" brings the screen as shown below:

ACTIVE CONTRACTS

Contract	National Contract Partner	Product	Joined contract	Contract Term	Contract Deliverables	Action
Mainstream Appliance National Contract	Electrolux	2 x 4 - 16' #2 Spruce	7	01/01/15-04/01/18	✔ Quarterly Rebate ✔ Contract Pricing Through Designated Dealer ✔ Pricing Lock ✔ Pricing Cap ✔ Model Home Discount ✔ Design Center Program	ENROLL

PENDING CONTRACTS

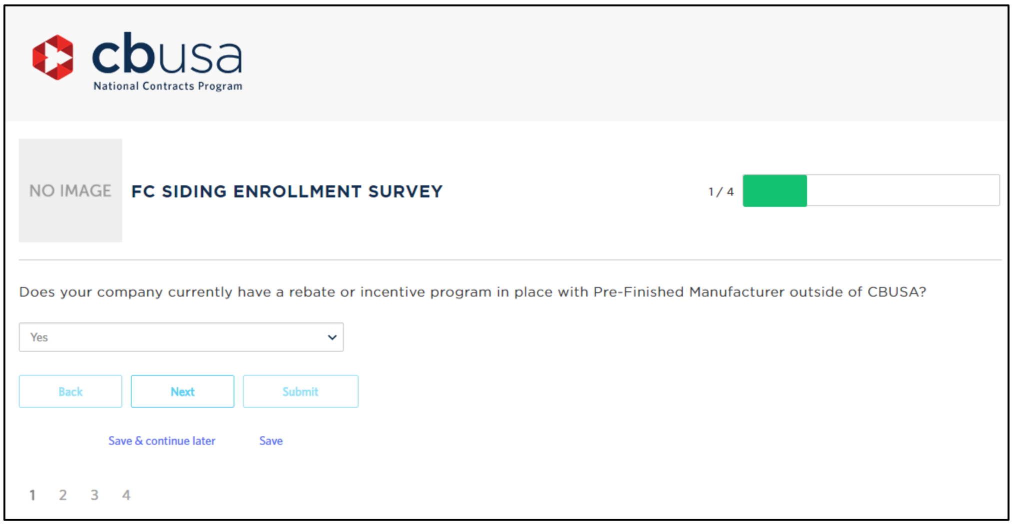
Contract	Manufacturers Invited	Product	Joined contract	Estimated Start	Early entry Deadline	Status	Action
Door Lock National Contract	✔ KP Building Products ✔ Wayne/ Delton Garage Door Openers and Locks	Louver Round 3" (Soffit Vent),Venicia Product Multiplier	0	05/01/17	03/31/17 1day to go	Data Collection	ENROLL

* View archived contracts here. Contracts ended for more than 30 days are archived automatically.

Here, you'll see that the information displayed for each contract is essentially the same as the contracts shown on "**My Contracts"** screen, excepting a few:

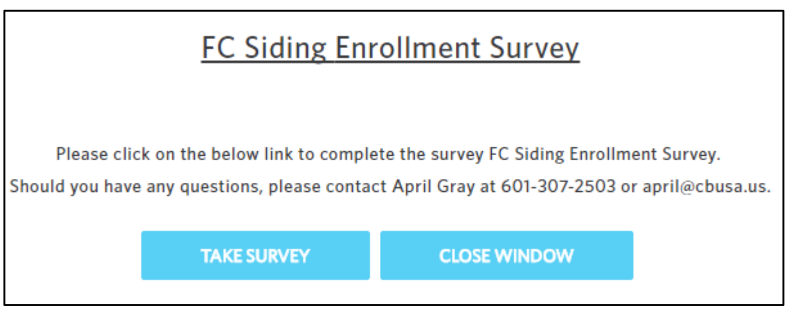
- Under **active contracts**, instead of the "**Compliance**" column, here we have an "**Action"** column that features an "**Enroll**" action link.
- Option to view the number of builders who've joined the contract.
- The "**Resource**" column is missing from both the active and pending contracts section.

To join a particular contract, click on the corresponding "**Enroll**" link. The enrollment survey screen opens up in a new browser tab displaying one question at a time:



Enter your response and click on "**Next**" to be taken to the next question. As you can see, there's also a "**Back**" button that lets you go back to earlier questions and modify your responses, if the need be. The progress bar featured on the top right-hand side corner lets you track your progress with the number of questions displayed at the bottom of the screen.

Once you've responded to all the survey questions, click on "**Submit**". Alternatively, clicking on "**Save and Continue later**" brings up the screen as shown below. With this option, you may opt to save the responses you've entered and take the survey at a later point of time.



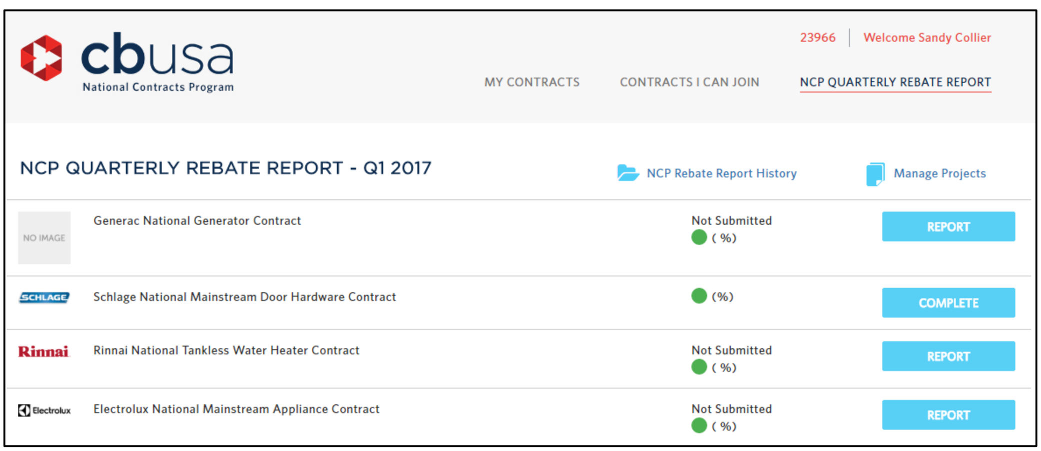
Clicking on "**Take Survey**" brings up the enrollment survey screen once again; alternatively, clicking on "**Close Window**" closes the survey window. If you wish to take the survey at a later point of time, you may do so by clicking on "**Continue Survey**" link featured against the Action column in the "Contracts I Can Join" screen (refer to screen shot below):

Clicking on "**Continue Survey**" brings up the enrollment survey screen in a new browser tab from where you can finish off the survey.

Upon submission, the contract is moved from "**Contracts I can Join**" to "**My Contracts**" screen and will show up in the active or pending section, based on its current status.

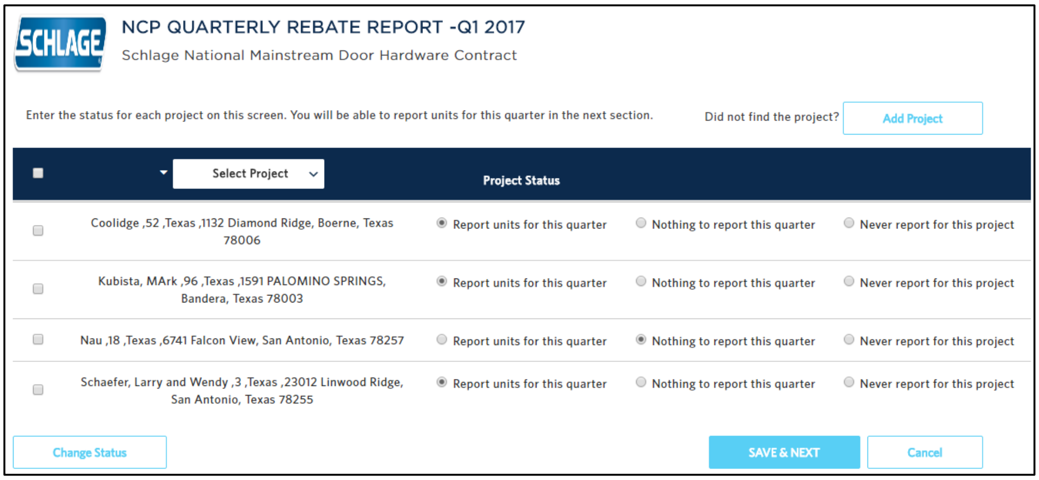
D. NCP Quarterly Rebate Report

This particular section lets the builder submit his quarterly rebate report in order to avail the rebate program. Clicking on "**NCP Quarterly Rebate Report**" brings up the following screen:



The screen displays the list of all active contracts for the current quarter in which you've participated and for which the rebate report survey has been published by the CBUSA admin.

From here you can manage your projects, submit your quarterly rebate reports and view NCP rebate report history. To report for the current quarter, click on "**Report**" corresponding to any given record. A screen appears featuring the list of projects you've worked on:

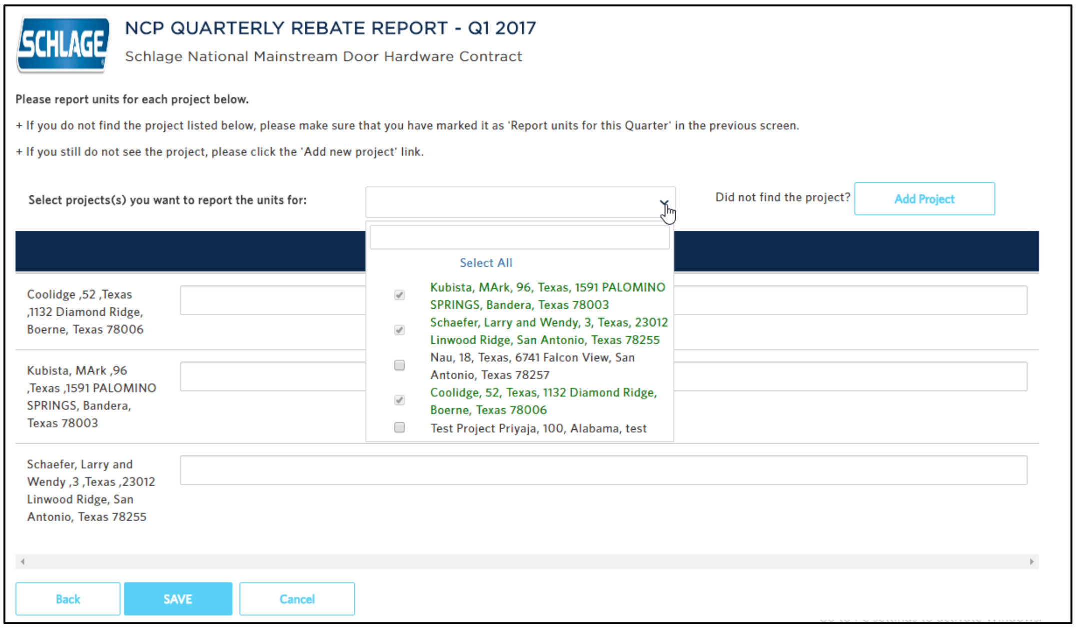


NOTE: *If you are unable to find your project, click on "**Add Project**" button featured atop the display grid.*

Select/ add only those projects, the reports for which you would like to submit in the current quarter. As shown on-screen, there are three different reporting status:

- *<u>Report units for this quarter</u>: allows you to report units of a particular project in the current quarter.*
- *<u>Nothing to report this quarter</u>: allows you to report units of a particular project in the next quarter.*
- *<u>Never report for this project</u>: system will never list the selected project in any of the quarters for reporting purpose.*

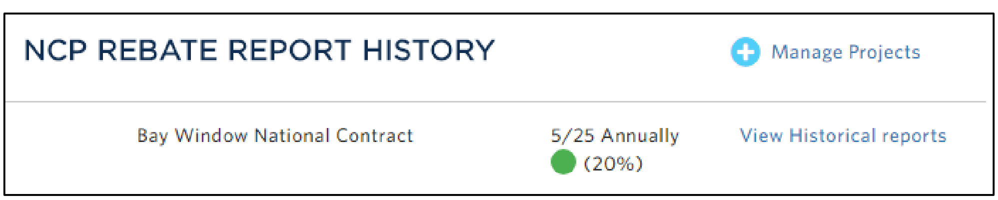
Select the project, its reporting status, and click on "**Save and Next**". You'll be redirected to the rebate report survey screen wherein you can take the survey:



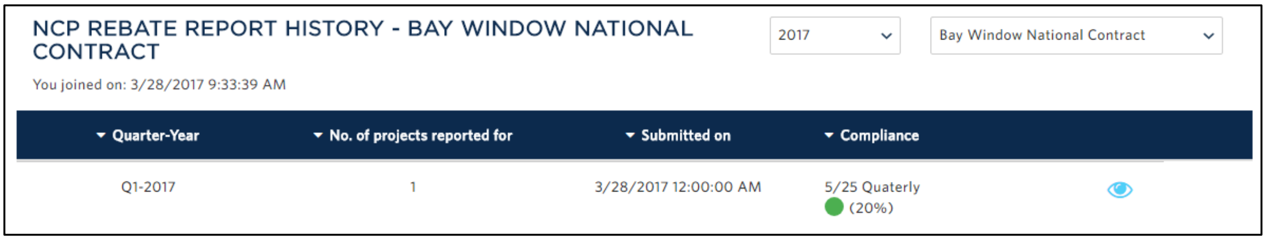
Enter your survey responses against each project in the given area, and click on "**Save**". Clicking on "**Back**" will take you to the previous screen from where you can alter the reporting status of you projects.

Clicking on "Save" will take you to the rebate report listing screen. Status of the contract against which the report has been submitted will show up as "**Completed**". Click on "**Submit NCP Quarterly Rebate Report**" to submit the same.

- "**NCP Rebate Report History**" → lets you view the list of contracts for which you've submitted project reports in the previous quarters.



Corresponding to each contract there's a "**View Historical reports**" link, which when clicked displays the quarter-wise reports submitted.

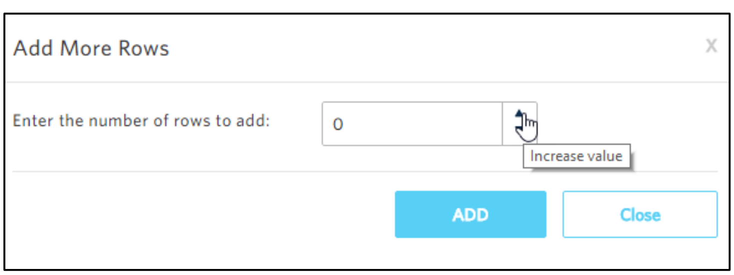


Clicking on corresponding to any of the listed records, brings up the respective rebate report survey responses in a new tab.

- "**Manage Projects**" → allows you to manage your list of projects for the current quarter. To add a new project, click on "Add Project" featured atop the display grid:

The following screen appears:

Click on "Add More":



Depending on the number of projects you want to add, select the number of rows using the "up-arrow" and click on "Add".

Enter your project details. The state and the city remains selected by default. You can change it as per your requirement using the given DropList. Once done, click on "**Save**".

Corresponding to each project, there is a radio button. Using the same, you can select a particular project and "Reopen", "Close" or "Copy" it using the respective action links.

E. Conclusion

With this we come to the end of our document. Hope you found it comprehensive and helpful. Thank You!