Deliver Differently

The future of configurable, connected, on-demand customer experience

Table of Contents

Why customer experience is the differentiator in a commoditizing market

Product differentiation in the windows, doors, and glass industry is getting harder. What separates manufacturers today is **how effectively they deliver mass customization – and how easy they make it to do business**.

Mass customization isn't new. What's changed is the expectation that it should be **easy to buy, easy to adjust, and easy to track digitally**. As channels and tools continue to expand, trusted delivery remains important – but it's the baseline.

Dealer portals, in-home selling tools, and digital ordering experiences influence where customers place their volume. Without **catalog ownership and a single source of truth**, complexity increases and confidence drops.

This guide explores how manufacturers can **do more with intelligent operations to redefine customer experience through mass customization that scales**.
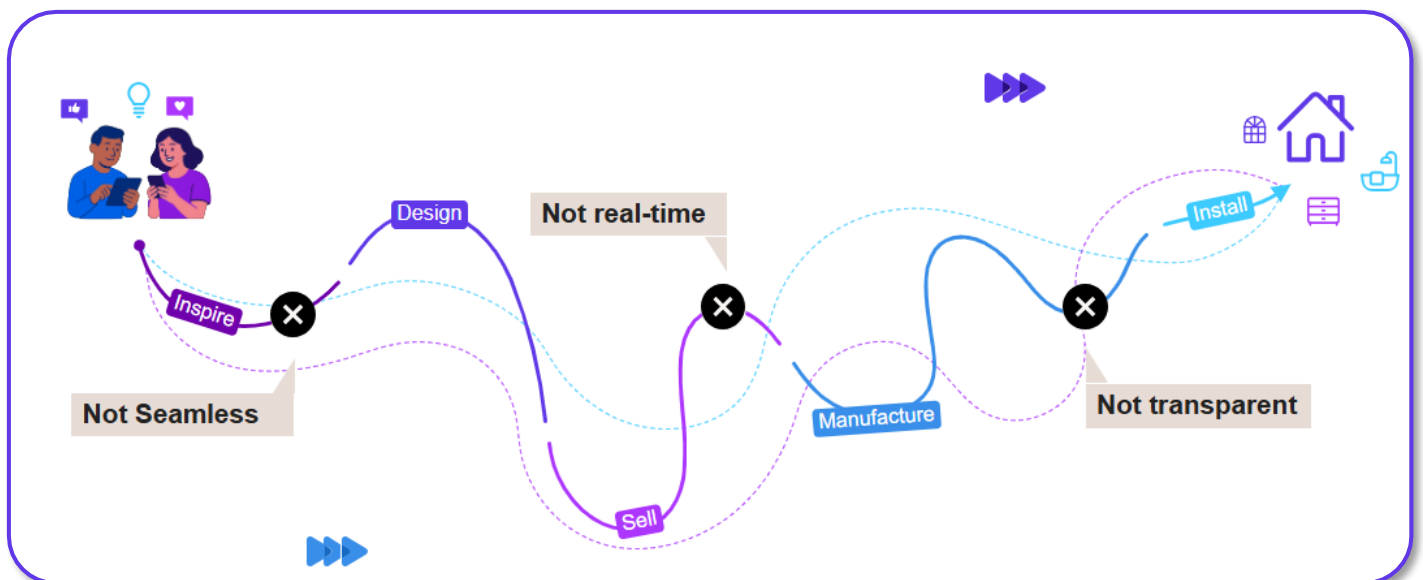
The most common blockers (and why they persist)

These are the issues that stop Customer Experience improvements from sticking:

1   **Portals are launched like a project,** so adoption stalls once the initial build is complete.

2   **Marketplace tools mix multiple catalogs,** so dealers can't trust pricing or configuration rules.

3   **Self-service configuration is too complex,** so users revert to email and phone.

4   **Internal teams fear they'll be replaced,** so they resist the portal unless it reduces workload.

5   **Order data is scattered across systems,** so the portal creates more work instead of less.

6   **Dealers lack order visibility,** so they call constantly instead of using the portal.

7   **No adoption plan or incentives exist,** so portal usage never becomes a habit.

8   **Portals don't match real-world workflows,** so the experience feels like extra work.

That last point matters. If you want adoption, you need both enablement and incentives.

Cyncly

A 7-part framework to deliver a modern dealer and retailer experience

Design the experience first, then map the workflow behind it

Dealers and retailers abandon portals when the workflow is confusing or the rules are hidden.

What to do

- ✓ Define channel structure
- ✓ Identify transparency level
- ✓ Define the customer journey
- ✓ Identify actions after order status is uploaded
- ✓ Define exception and escalation rules

Products to consider

- **FeneVision WEB:** Dealer portal with controlled multi-channel access.

- **V6 Advantage Dealer:** Dealer portal with engineering review capabilities.

- **Window Designer Cloud Retailer:** Built for your online retail stores.

☆ Best Practices

Create distinct dealer, contractor, in-home selling , retailer paths, with shared validation rules.

Define what's visible at each level (quotes, orders, status, delivery dates).

Set rules for uploads vs. review and map escalation paths early.

Request a Demo

Cyncly

Make visualization and ease-of-use non-negotiable

Customers give up when configurations are hard to find, hard to understand, or produce errors.

What to do

- ✓ Simplify product discovery
- ✓ Group and reorganize options
- ✓ Enable visualization early
- ✓ Make validation visible
- ✓ Group dependent questions or enable dynamic re-evaluation
- ✓ Reduce rework

Products to consider

- **FeneVision WEB:** Image-based product selection with grouped questions and visual option codes.

- **V6 Advantage Dealer :** 3D visualization with guided configuration and validation.

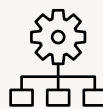- **Window Designer Cloud Retailer:** Guided retail portal with instant visualization.

☆ Best Practices

Make it easy to find the right model, series, or profile; first impression drives adoption.

Show a real-time preview as options are selected to reduce uncertainty and revisions.

Prevent invalid configurations by either grouping related options re-checking rules as selections change.

Cyncly

Create one source of truth for configuration and pricing

Without one configuration and pricing source, dealers, contractors, and in-home tools quote differently and slow sales.

What to do

- ✓ Standardize configuration rules
- ✓ Create a single pricing structure
- ✓ Set quote expiration (30 days)
- ✓ Enable one shared configuration
- ✓ Build favorites and defaults
- ✓ Set update cadence
- ✓ Maintain channel control

Products to consider

- **FeneVision WEB:** Dealer portal with controlled multi-channel access.

- **FeneVision WEB Contractor Mode:** Contractor-facing portal for direct quoting and ordering.

- **FeneVision WEB CONNECT:** API to in-home selling tools, bringing your configuration and pricing to the kitchen table.

- **V6 Advantage Dealer:** Dealer portal with engineering review capabilities.

- **Window Designer Cloud Retailer:** Built for your online retail stores.

Industry insight

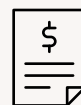"66% of [manufacturers] plan to invest in customer portals this year," which signals how central connected digital services have become.

☆ Best Practices

Centralize configuration rules and pricing so every channel quotes consistently.

Set quote validity windows and a regular update cadence to prevent outdated pricing.

Use defaults and favorites to simplify repeat orders and speed quoting.

Cyncly

Fix revisions, accountability, and trust in the quote lifecycle

When quotes aren't trusted or accountable, rush reorders disrupt production and damage customer confidence.

What to do
- ✓ **Assign quote ownership**
- ✓ **Track who entered the quote and who uploaded it**
- ✓ **Track changes and activity**
- ✓ **Enable feedback loops**
- ✓ **Support CSR-assisted quoting Standardize quote approvals**

Products to consider
- **FeneVision WEB:** Dealer portal with quote ownership and activity tracking.

- **FeneVision WEB CSR Mode:** CSR-assisted quoting using manufacturing logins with tracked changes and feedback.

- **V6 Advantage Dealer:** Dealer portal with manufacturer review and engineering feedback.

- **Window Designer Cloud Retailer:** Retail quoting with tracked activity and approval workflows.

⭐ **Best Practices**

Assign clear quote ownership and track who enters and uploads each quote.

Track changes and activity to create accountability and reduce disputes.

Enable manufacturer feedback and CSR-assisted quoting for complex orders.

Cyncly

Enable dealer independence, and give them a reason to adopt it

Dealers won't adopt portals if they feel forced to change workflows without clear value.

What to do

- ✓ **Offer flexibility, not mandates**
- ✓ **Enable downstream selling**
- ✓ **Support 24/7 self-service**
- ✓ **Reduce dealer effort**
- ✓ **Use adoption incentives**
- ✓ **Pair enablement with adoption mechanisms**
- ✓ Roll out in phases

Products to consider

- **FeneVision WEB:** Dealer portal with self-service ordering, real-time order status, and upload-based incentives.

- **V6 Advantage Dealer:** Dealer portal enabling self-service quoting, ordering, and order tracking.

- **Window Designer Cloud Retailer:** Retail portal providing self-service configuration, ordering, and status access.

⭐ **Best Practices**

Lead with flexibility and clear dealer value, not mandates.
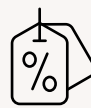
Incentivize adoption with limited-time discounts on uploaded orders.

Pilot with advanced dealers before scaling broadly.

Request a Demo

Cyncly

Turn self-service into a premium sales channel

Market portals often feel like generic marketplaces. Dealers and retailers want a premium, manufacturer-branded experience that reinforces trust and accuracy.

What to do

✓ Build a branded, manufacturer-specific portal

✓ Customize the portal experience Enable multi-channel downstream Use guided configuration with smart defaults

✓ Add reporting, document repositories, and targeted communications

Products to consider

• **FeneVision WEB:** Branded dealer portal with self-service ordering, status tracking, and reporting.

• **V6 Advantage Dealer:** Customizable dealer portal with guided CPQ, visualization, and analytics.

• **Window Designer Cloud Retailer:** Retail portal with branded experience, visualization, and reporting.

☆ Best Practices
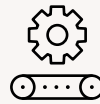
Deliver a white-labeled portal that reinforces manufacturer brand and control.
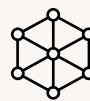
Enable multi-channel downstream access while keeping content in one place.

Use guided configuration, visualization, reporting, and documents to create a premium experience.

Cyncly

Solve the internal adoption problem like it is part of the product

Portals fail when adoption is treated like a rollout, not a product launch – leading to low usage, internal resistance, and stalled value.

A relevant finding from a peer-reviewed adoption review: *"Clear platform benefits, easy usability... are adoption drivers, whereas a lack of management support is... a major barrier."*

What to do

✓ Treat the portal like a product launch

✓ Determine who owns onboarding and adoption

✓ Use reports to track each dealer's adoption rate.

✓ Offer incentives to sellers

✓ Communicate future work for data-entry teams as portal usage grows.
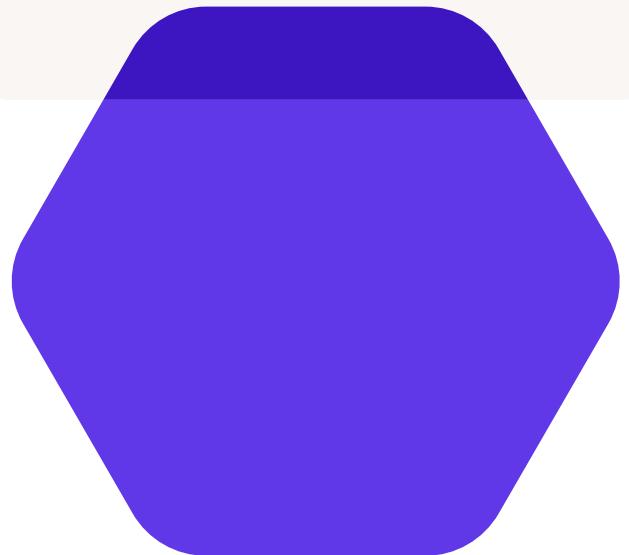
☆ Best Practices

Launch the portal like a product with defined ownership and goals.

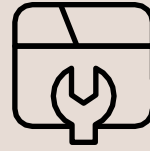Track adoption with reporting and use it to drive action.

Pair rollout with incentives and clear communication to impacted teams.

Request a Demo

Cyncly

Troubleshooting: common mistakes and fixes

	Fix
Dealers don't use the portal after rollout	Improve usability, simplify the workflow, and add a concrete incentive (uploaded-order discount) to drive adoption and increase revenue.
Customers say the portals are out of date	Centralize content and enforce one source of truth to reduce errors, rework, and costly order delays.
Quoting is faster but margin erodes	Embed pricing guardrails and approvals to protect margin while keeping quoting fast and scalable.
Internal teams resist and collaboration breaks down	Treat adoption like a product launch, assign ownership, and track adoption to reduce support load and improve throughput.
Portals feel like a generic marketplace	Make it manufacturer-specific with branded content, rules, and pricing so dealers trust the portal and shift volume from manual channels.

Cyncly

Frequently asked questions

Q: **Why do we need a portal if dealers already order by email?**

A: Email orders require manual data entry, which creates errors and rework. As order volume grows, the only way to scale is adding more staff. A portal automates the process, improves accuracy, and lets you scale without proportional headcount increases.

Q: **How do we ensure dealers actually use the portal?**

A: Portals stick when adoption is treated like a product launch, not a rollout. Assign ownership, define success metrics, track usage, and use incentives like uploaded-order discounts. Start with top dealers and publicize wins to build momentum.

Q: **What makes a portal "premium" vs. basic?**

A: A premium portal is intuitive, visually guided, and manufacturer-branded, with embedded rules and validation. Dealers trust it because it matches the manufacturer's catalog, pricing, and configuration logic, making it feel like a professional selling tool – not a basic order form.

Q: **How do we keep pricing and catalogs accurate across channels?**

A: Accuracy comes from a single source of truth. Centralize content, enforce consistent rules, and automate updates so dealers and retailers always use the latest pricing, product data, and configuration logic. This reduces errors, rework, and margin leakage.

Cyncly

Q: **Can the portal support both dealers and retailers?**

A: Yes. Modern platforms support multi-channel access while keeping rules, pricing, and content centralized. This means dealers, retailers, and contractors can all work in the same system without creating separate workflows or losing control.

Q: **How do we prevent margin erosion from self-service quoting?**

A: Self-service quoting can speed sales, but it can also open the door to uncontrolled discounts and mistakes. Protect margin by embedding pricing guardrails, approvals, and automated validation so quotes remain accurate and profitable without slowing down the process.

Q: **How do we handle exceptions and revisions in the portal?**

A: Exceptions should be routed through defined escalation paths and approval rules. Decide what can be uploaded automatically versus what requires review, and ensure revisions stay controlled so the portal doesn't become a source of confusion or rework.

Q: **What's the best rollout approach to avoid internal resistance?**

A: Pilot with top dealers first, track adoption, and learn what works before scaling. Communicate the benefits to internal teams – especially how the portal reduces manual workload – and offer clear next steps for roles impacted by automation.

Cyncly

Q: **How do we measure portal success and ROI?**

A: Track adoption rates, order volume, error reduction, support call reduction, RMAs, and quote-to-upload ratios. These metrics show whether the portal is improving accuracy, increasing throughput, protecting margin, and driving real business value.

Q: **Can we maintain brand control while enabling multi-channel access?**

A: Yes. A manufacturer-specific portal keeps branding, pricing, and rules consistent across all channels. Dealers and retailers can access the same system while the manufacturer retains control over product content, validation, and downstream quoting.

Cyncly

Next steps and advanced techniques

1 Define your **channel strategy and portal ownership**, including who can quote, who can sell, and who manages onboarding. Treat the portal as a **product launch** with clear success metrics from day one.

2 Design the portal experience for the user, focusing on **guided configuration, visualization, and validation**. Make it easy to find products, select options, and complete quotes without needing support.

3 Pilot the portal with **top dealers first**, track adoption, and use reporting to identify gaps. Use incentives and early wins to **build momentum** and prove value before scaling.

4 Scale across your dealer and retailer network, using reporting to **optimize performance** and continuously improve the experience. Reinforce adoption with ongoing training, incentives, and a clear plan for teams impacted by automation.

Cyncly

You have read the theory, now see the practice

You now have a framework for **redefining customer experience through mass customization that scales** – powered by intelligent operations, catalog ownership, and a single source of truth.

The next step is seeing what this looks like in a real workflow: how quoting becomes faster and more accurate, how every quote is tracked by who entered, uploaded, and edited it, and how self-service becomes a **premium sales channel** for dealers, contractors, in-home sellers, and retailers – ensuring consistent, up-to-date content across every sales channel.

Turning these principles into measurable outcomes takes more than tools. It requires the right configuration, governance, and rollout to drive adoption at scale.

If you're ready to move from theory to results, request a demo. We'll walk through real customer journeys, map the right capabilities to your current process, and show how to deliver mass customization at scale–without adding complexity.

Request a Demo
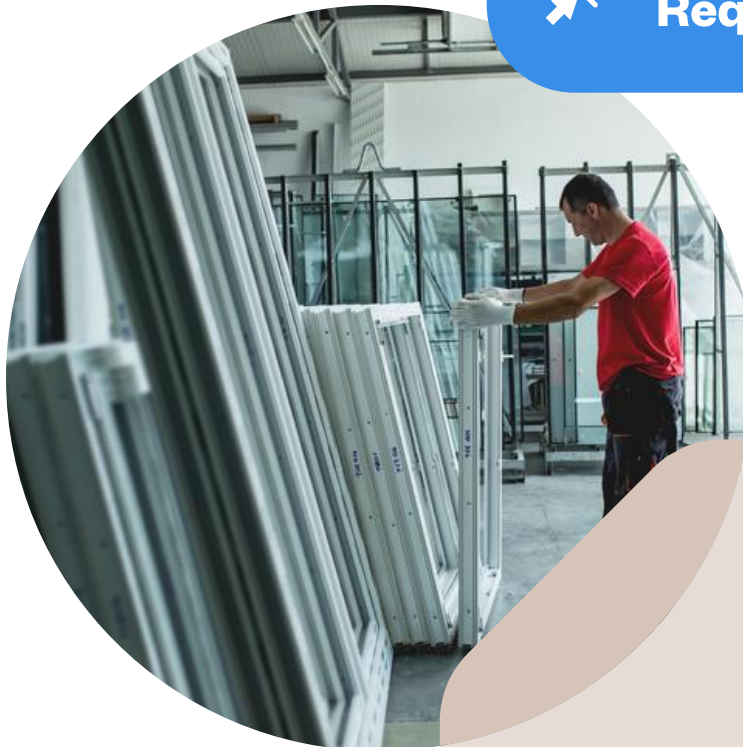
Cyncly

Cyncly

Ready to see how it works?

Request a personalized demo of Cyncly 's Customer Portals today.

Request a Demo

FCR
FeneVision CORE

V6
V6 Advantage

WDr
Window Designer