

# Online eOrdering

## How-To Guide

# Welcome to eOrder!



- + How to Login
- + Menu Tree
- + Clients & Order
- + Tools
- + Pricing Setup
- + Settings

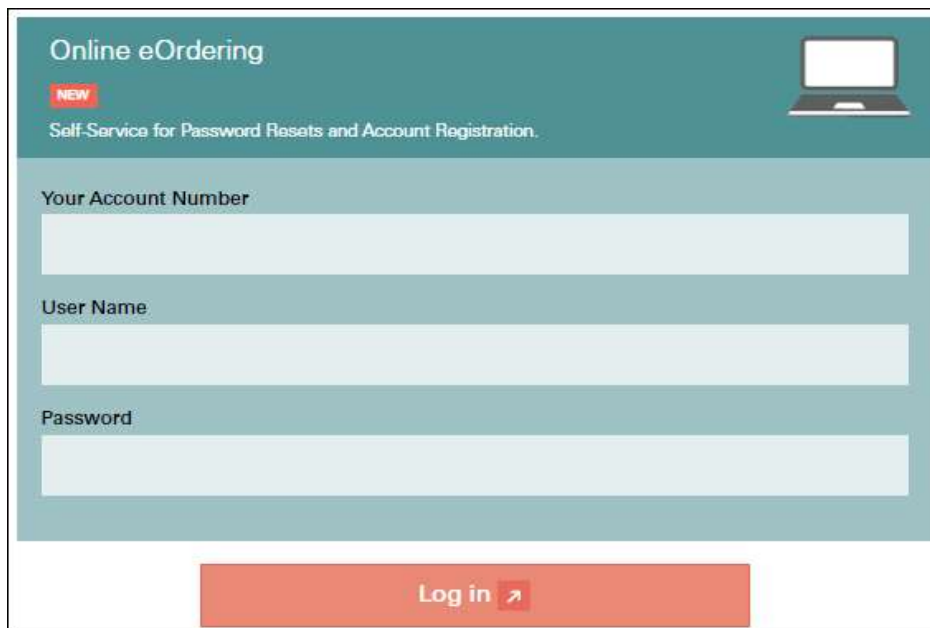
# How to Login

Two ways to login

<https://alta.picbusiness.com/Maintenance/LoginID/Authenticate/Alta/login.pic>

<https://dealer.altawindowfashions.com/dealer-login/>

We recommend using Chrome browser.



Online eOrdering

**NEW**

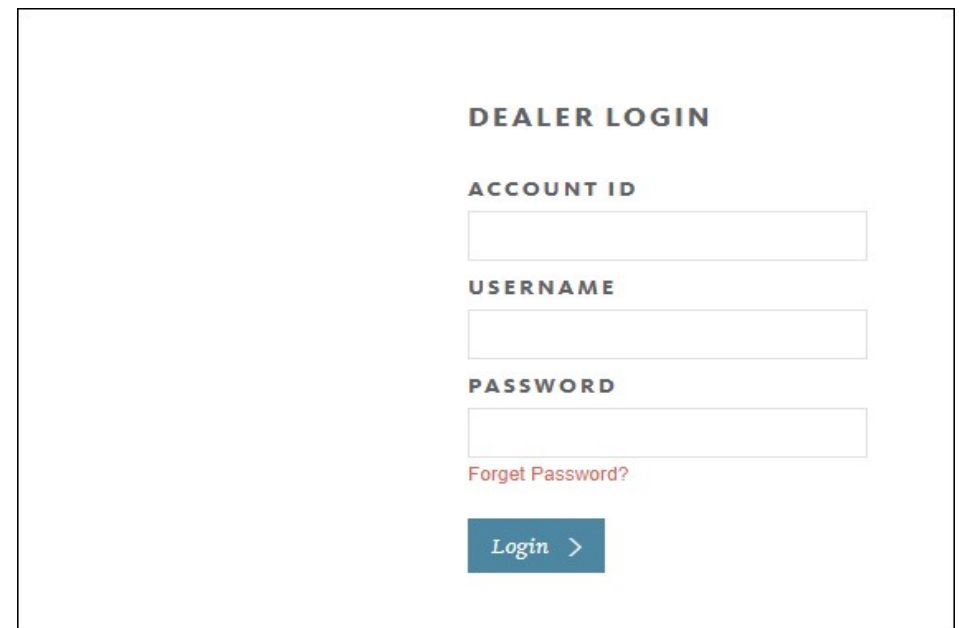
Self-Service for Password Resets and Account Registration.

Your Account Number

User Name

Password

Log in ➔



**DEALER LOGIN**

**ACCOUNT ID**

**USERNAME**

**PASSWORD**

[Forget Password?](#)

Login ➔

# Menu Tree

These are all available options. Access can be personalized per user in Settings > Logins

Clients & Orders	Tools	Pricing Setup
▲	▼	▼
Managing Clients		
Clients		
Managing Quotes & Orders		
Scenarios		
Quotes		
Parts		
Order Status		

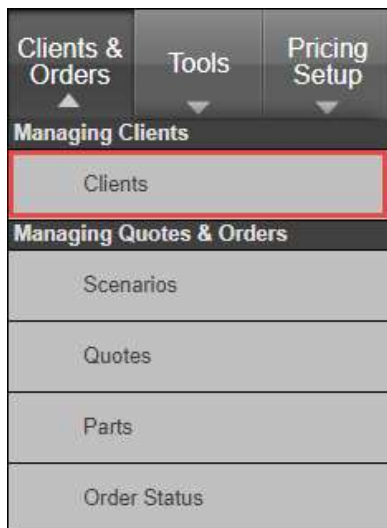
Tools	Pricing Setup	Settings
▲	▼	▼
Tools		
Price Comparisons		
Account Balance		
Remake Request		
Swatch Order		
Activity Reports		
Sent Emails		

Pricing Setup	Settings	Home
▲	▼	Home
Dealer Cost		
Cost Factor Letter		
Client Cost		
Pricing Groups		
Discount / Margin / Mark-Up		
Installation & Freight Charges		
Additional Service Charges		
Miscellaneous Products		
Promotions		
Rounding		

Settings	Home	Chat
▲	Home	Chat
(master)		
Settings & Defaults		
Company Settings		
Logins		
My Login		
Report Defaults		

# Clients & Order | Clients

Select Clients to view all saved clients



Clients > **Manage Clients**

[Add Client](#) [Client Report](#)

Display  rows per page  [Search](#) [Advanced Search...](#)

ID	Client Account	Primary Contact	City	State	Locations	Windows	Scenarios
▼ 397280	Customer_1003	1003_First 1003_Last			0	0	0
▼ 396484	Test Test Household	Test Test			0	0	0
▼ 396265	Test test Household	Test Test			0	0	0
▼ 396264	Test test Household	Test test			0	0	0

# Clients & Order | Clients

Select Add Client to add client information.

Primary Contact Information	
First Name*	<input type="text" value="1004_First"/>
Last Name*	<input type="text" value="1004_Last"/>

Client Information	
Type*	<input type="text" value="Individual/Household"/>
Client Account*	<input type="text" value="Customer_1004"/>

After adding Location Description, you will be able to add Windows. Done button will then change to Add Windows.

X Primary Location Information	
Location Description	<input type="text" value="Test Location"/>

 Save	Done ▶
--	--------

 Save	Add Windows ▶
--	---------------

# Clients & Order | Scenarios

## Select Scenarios

Scenarios is fast and easy quote pricing for multiple product combinations for client's home.

Clients & Orders	Tools	Pricing Setup
Managing Clients		
Clients		
Managing Quotes & Orders		
Scenarios		
Quotes		
Parts		
Order Status		

Click Add Client to start new client scenario or click existing client to add or view/edit scenario.

Add Client

CLOSE

Select an existing client from the list below to Manage Scenarios for that client or click "Add Client" above to create a new client.

Display 

15

 rows per page

Search

Advanced Search...

ID	Name	City	State	Phone	Locations	Windows	Scenarios
398643	Customer_1004				1	1	1

Add Scenario

Scenarios Report

Display 

15

 rows per page

Search

Filter by Location: 

All Locations

ID	Location	Scenario Name	Date Created	# Windows Covered
▼ 5089896	Test Location	Scenario HC	04/26/2024	1/1

◀ First

◀ Previous

1 records  
Page 1 of 1

Next ▶

Last ▶

# Clients & Order | Scenarios

Scenarios feature allows customer to compare different products for same window, room or the whole house.

Add Scenario

Scenarios Report

15 rows

Search

Filter by Location: All Locations

ID	Location	Scenario Name	Date Created	# Windows Covered
▼ 5089896	Test Location	Scenario HC	04/26/2024	3/3
▼ 5104187	Test Location	Scenario Roller	05/14/2024	3/3

◀ First

◀ Previous

2 records  
Page 1 of 1

Next ▶

Last ▶▶

After multiple scenarios are created, click Scenarios Report to view all entered scenarios and totals together.

CLIENT SCENARIO FOR 1004\_Last, 1004\_First

**Alta Test Account - Do Not Build**  
 111 N Apollo RD  
 Salt lake city, UT 84116  
 Phone: (801) 712-7569 Fax:  
 Email:

Date
07/18/2024
Salesperson
Alta Test Account - Do Not Build

Sold To:  
 1004\_Last, 1004\_First  
 H:

Units	Scenario	Price
3.000	Scenario HC	1451.22
3.000	Scenario Roller	898.03

Print

Close



# Clients & Order | Scenarios

A new quote can be generated from scenario.

Select the scenario > View Scenario

15 rows

Search

Filter by Location: All Locations

ID	Location	Scenario Name	Date Created	# Windows Covered
5089896	Test Location	Scenario HC	04/26/2024	3/3
<div>View Scenario</div> <div>Clone</div> <div>Delete</div>				
5104187	Test Location	Scenario Roller	05/14/2024	3/3

2 records

Page 1 of 1

Quotes & Orders > Scenarios > Manage Scenarios (Customer\_1004) > View Scenario (Scenario HC)

Edit...

Pricing...

Delete

Generate Quote

Reports...

Clone

Add Scenario

Client View

Dealer View

Floor	Room	#	Product	Qty	MSRP	Surcharge	Cost Factor	Unit	Extended
G	Bedroom	1	Honeycomb Cordless Lift	1	534.00	0.00	0.3500	186.90	186.90
G	Bedroom	1	Honeycomb Cordless Lift	1	699.00	0.00	0.3500	244.65	244.65
G	Office	2	Honeycomb Cordless Lift	1	545.00	0.00	0.3500	190.75	190.75
Total Qty 3									
Product Total									622.30
Handling Fees									43.00
Dealer Total									665.30

Select Generate Quote to create a quote.





# Clients & Order | Quotes

## Select Quotes

This function is best utilized when pricing only a few windows as it will be necessary to enter the window sizes anytime you work with 'Quotes'.

Click New Product Quote or click existing quote to view/edit quote.  
Tip: Use Advanced Search to narrow down the search.

Clients & Orders	Tools	Pricing Setup
▲	▼	▼
Managing Clients		
Clients		
Managing Quotes & Orders		
Scenarios		
Quotes		
Parts		
Order Status		

Quotes & Orders > <b>Quotes</b>							
New Product Quote		New Parts Quote					
Display 15 rows per page				Search	Advanced Search...		
Type	Quote #	Entered	Client Name	PO	Sidemark	Items	Status
 PRODUCT	5104148	05/14/2024		TEST ONLY bcrs	CY 5/14 12:16p PST	1	Quote
 PRODUCT	5104030	05/14/2024		NONE	Test	1	Quote
 PRODUCT	5103934	05/14/2024		test	test	0	Quote
 PRODUCT	5103925	05/14/2024		LISA SHEFFER 2	test/LISA	1	Quote

# Clients & Order | Quotes – New Quote

1. New quote is created by selecting Existing, New or No Client.

Quotes & Orders > Quotes > **Add Quote (5104285)**

**1. Client**

Quote #	5104285
Client	<input checked="" type="radio"/> Search for an <b>Existing Client</b> <input type="radio"/> Enter a <b>New Client</b> <input type="radio"/> Proceed with <b>No Client</b>

Choose Client

Name
<input type="radio"/> Test
<input type="radio"/> 10039523
<input type="radio"/> Customer_1004
<input type="radio"/> Customer_1003
<input type="radio"/> Test Test Household
<input type="radio"/> Test test Household
<input type="radio"/> Test test Household
<input type="radio"/> Kelly
<input type="radio"/> Test test Household
<input type="radio"/> test
<input type="radio"/> 10187668
<input type="radio"/> 10040497
<input type="radio"/> Hawkins Cape house
<input type="radio"/> Shustrick, Matt Scenario # 1
<input type="radio"/> 10039521

2. PO Reference is a required field.

**1. Client** > **2. Header** > **3. Products**

**Header Information**

Entered By	Alta Test Account - Do Not Build
Sidemark	Fredericksen, Carl
PO Reference	<input type="text"/>
Client Reference	<input type="text"/>
Sales Area	Custom Brands Group Retail Product

**Recommended**  
This is helpful when searching for your orders.

**How does this work?**  
This determines what products can be added to this scenario/quote. If the scenario/quote already has products, this list will only show compatible Sales Areas.

3. Select Category and Product to expand order configuration

**1. Client** > **2. Header** > **3. Products**

Line Item #	1
-------------	---

**Product**

Category	Not Selected
Product	Not Selected -OR- <input type="text" value="Product Quick Search..."/>
Quantity	1

# Clients & Order | Quotes – View Quote

Select an existing quote to view

Edit...	Pricing...	Void Quote	Submit Order	Reports...
Clone				Client View   Dealer View

Edit: Change Client, Header or Products

Pricing: Recalculate quote price, Adjust Client Price (price adjustment, tax, deposit, discount)

Void Quote: Void quote

Submit Order: Review then submit order

Reports:

- + Client Proposal: customizable client proposal
- + Client Invoice: customizable client invoice
- + Measure Copy: customizable measure copy
- + Installer Copy: customizable installer copy
- + Dealer Copy: customizable dealer copy

Clone: Copy quote into a new Quote #

Client View: shows client total

Dealer View: shows dealer total including surcharges, cost factor and promotion

# Clients & Order | Order Status

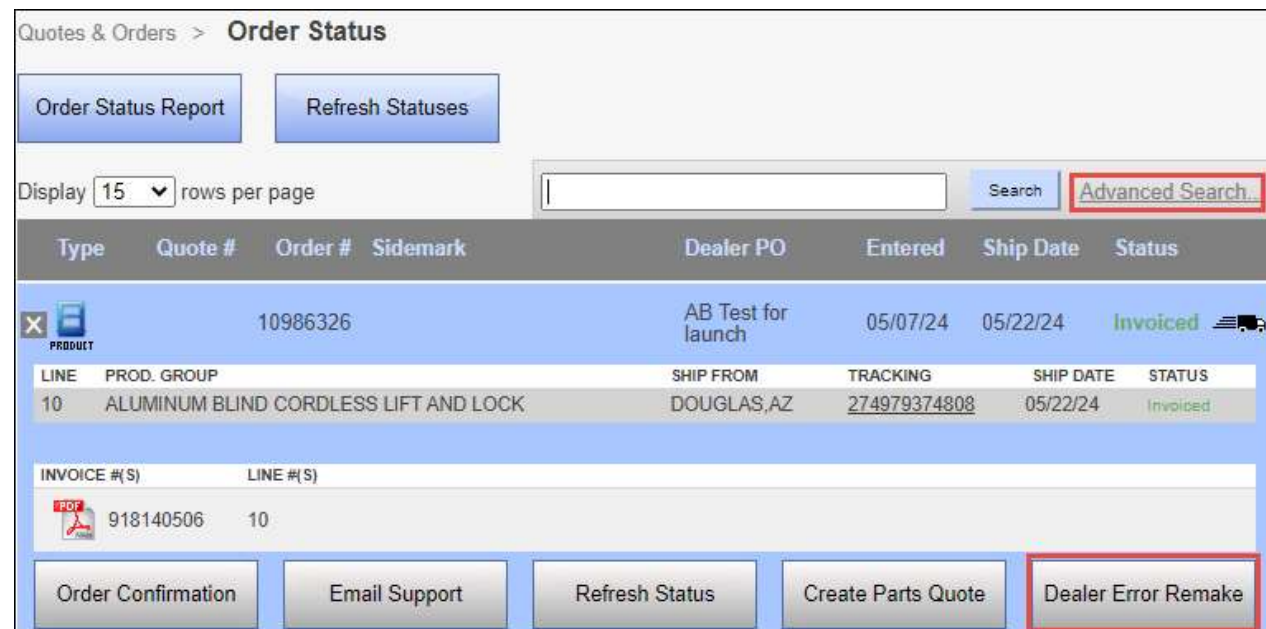
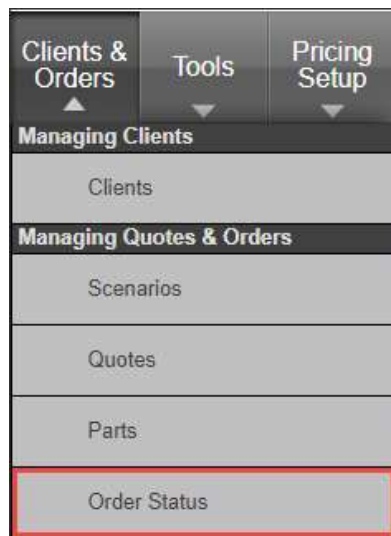
Displays order status/progress.

Select Order Status

Click 'Advanced Search' to narrow down the list.

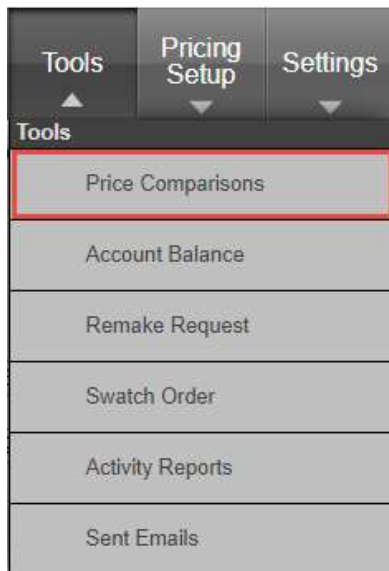
Click 'Dealer Error Remake' to request remake on invoiced order.

*\* For 'Non-Dealer Error Remake Request', please see Tools > Remake Request (slide 19).*

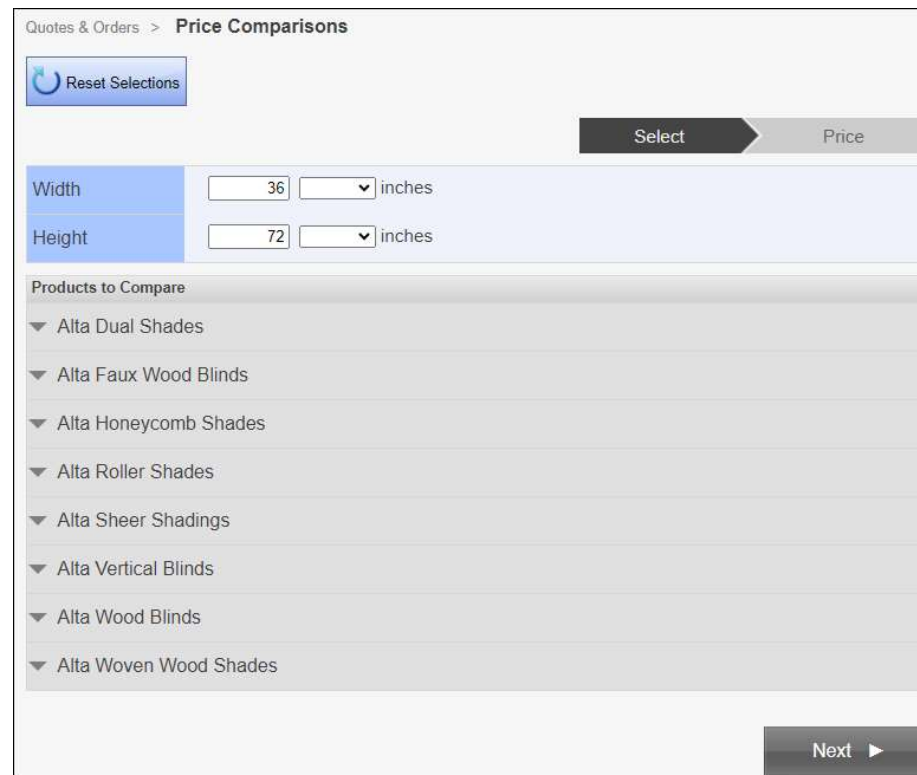


# Tools | Price Comparisons

Select Price Comparisons



Size defaulted to 36x72. Change size as needed.  
Click each product line to view product system and select to compare.  
Select Next to proceed

A screenshot of the 'Price Comparisons' screen. At the top, it says 'Quotes & Orders > Price Comparisons'. Below this is a 'Reset Selections' button. To the right, there are two buttons: 'Select' and 'Price'. Below these are two input fields: 'Width' with a value of '36' and 'Height' with a value of '72', both followed by a dropdown arrow and the word 'inches'. Below the input fields is a section titled 'Products to Compare' which contains a list of product lines with expandable arrows: 'Alta Dual Shades', 'Alta Faux Wood Blinds', 'Alta Honeycomb Shades', 'Alta Roller Shades', 'Alta Sheer Shadings', 'Alta Vertical Blinds', 'Alta Wood Blinds', and 'Alta Woven Wood Shades'. At the bottom right, there is a 'Next' button with a right-pointing arrow.

# Tools | Price Comparisons

Select color(s).

Switch between Client View and Dealer View to check the pricing.

Click Back to select different product or click Quote Selected to create a quote based on the selected colors.

Quote Selected

Client ViewDealer View

Alta Faux Wood Blinds: 2" Polymer Cordless Lift

Material	MSRP	Surcharge	Cost Factor	Dealer Price
<input checked="" type="checkbox"/> S1000 - Cotton	276.00	125.00	0.3500	140.35
<input type="checkbox"/> S1001 - Blooming Jasmine	276.00	125.00	0.3500	140.35
<input type="checkbox"/> S1002 - Silhouette	276.00	125.00	0.3500	140.35
<input type="checkbox"/> S1003 - Gray Owl	276.00	125.00	0.3500	140.35
<input type="checkbox"/> T901 - Textured Pearl	276.00	125.00	0.3500	140.35
<input type="checkbox"/> T903 - Textured Pearl	276.00	125.00	0.3500	140.35

Alta Honeycomb Shades: Honeycomb Cordless Lift

Material	MSRP	Surcharge	Cost Factor	Dealer Price
<input checked="" type="checkbox"/> HF6 - Radiance	366.00	0.00	0.3500	128.10
<input type="checkbox"/> H40 - 3/8" Opulence	381.00	0.00	0.3500	133.35
<input type="checkbox"/> H44 - 3/8" Marcella	381.00	0.00	0.3500	133.35
<input type="checkbox"/> H24 - 3/4" Tranquility	699.00	0.00	0.3500	244.65
<input type="checkbox"/> H25 - 3/4" Tiffany	699.00	0.00	0.3500	244.65
<input type="checkbox"/> H96 - 3/4" Peaceful	699.00	0.00	0.3500	244.65
<input type="checkbox"/> H78 - 1-1/4" Bella Vista BO	710.00	0.00	0.3500	248.50

◀ Back




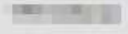


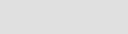



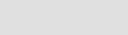











# Tools | Account Balance

Select Account Balance

Tools	Pricing Setup	Settings
Tools		
Price Comparisons		
Account Balance		
Remake Request		
Switch Order		
Activity Reports		
Sent Emails		

View list of invoices along with printer friendly format (PDF) to download or print

Make Payment	Payment History	View Statements	Invoice Total: 55,444.31			
Display 50 rows per page		<input type="text"/>		Search	Advanced Search...	
Invoice #	Due Date	Sidemark	Order #	PO Reference	Amount	Due
	03/14/2024				41.91 USD	41.91
	04/22/2024				0.33 USD	0.33
	04/22/2024				10.72 USD	10.72
	06/25/2024				1754.23 USD	1754.23
	06/25/2024				1271.57 USD	1271.57



# Tools | Account Balance - Payment

[Make Payment](#)[Payment History](#)[View Statements](#)

Select Make Payment to select invoice(s). As invoice(s) are selected, total amount is calculated at the bottom right of the screen. Select Next to proceed.

1. Select Invoices2. Payment Info3. Review4. Payment Sent

Un-paid Invoices							
Invoice #	Invoice Date	Due Date	Order #	PO Reference	Amount	Due	Pay
	2024-03-06	2024-03-14			41.91 USD	41.91	<input checked="" type="checkbox"/>
	2024-04-17	2024-04-22			0.33 USD	0.33	<input checked="" type="checkbox"/>
	2024-04-17	2024-04-22			10.72 USD	10.72	<input type="checkbox"/>
	2024-05-11	2024-06-25					
	2024-05-11	2024-06-25					
	4-05-13	2024-06-27			5.44 USD		

Invoice Total42.24

Credit Total-0.00

**Balance42.24**

Back

Next

## Tools | Account Balance - Payment



Select payment method then click Next.

Review payment method, invoice(s) and amount.  
Select Pay Now to submit payment.

1. Select Invoices

2. Payment Info

3. Review

4. Payment Sent

Payment Information

Payment Method


Checking Account ending in (XXXX-XXXX)

▼

Want to use a different account?

Please call the Credit Department to add new payment accounts.

Bank Account



Checking Account

Account Number

XXXXXXX-XXXX

	Invoice #	PO Reference	Sidemark	Invoice Amount
Invoices Selected	10000000000000000000	10000000000000000000	10000000000000000000	41.91 USD
	10000000000000000000	10000000000000000000	10000000000000000000	0.33 USD

Payment Total

42.24

◀ Back

Next ▶

**1. Select Invoices**   **2. Payment Info**   **3. Review**   4. Payment Sent

Please review the information below

<b>Payment Information</b>	Checking Account ending in (XXXX)			
<b>Invoices Being Paid</b>	Invoice #	PO Reference	Sidemark	Invoice Amount
				41.91 USD
				0.33 USD
<b>Payment Total</b>	42.24			

◀ Back      Pay Now ▶

# Tools | Remake Request

Select Remake Request, this will open a page with a link to open new tab to fill out request form.

*\* For 'Dealer Error Remake Request', please see Order Status > Dealer Error Remake (slide 13).*

Tools	Pricing Setup	Settings
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Remake Request		
Switch Order		
Activity Reports		
Sent Emails		

Submit your Remake Request online.

[Go to the Remake Request Form](#)  
(opens new tab)

A thumbnail image of the 'Remake Request Form' from Custom Brands Group. The form includes fields for 'Your Account #', 'Original Line #' (with a dropdown arrow), 'Please provide the sizes of the units that need to be remake' (with 'Width' and 'Height' sub-fields), 'Email Address', and a section for 'What type of error is this?' with radio button options: 'Vendor Error', 'Dealer Error', and 'not sure'.

CBG Custom Brands Group

### Shades and Blinds Remake Request Form

Your Account #

First Name \*  Last Name \*

Email Address: \*

Please provide shipping information for this remake.  
Street Address to SHIP THIS REMAKE TO: \*

Address Line 2

City \*  State/Province/Region \*

# Tools | Swatch Order

Select Swatch Order, this will open a page with a link to open new tab to fill out request form.

Tools	Pricing Setup	Settings
Tools		
Price Comparisons		
Account Balance		
Remake Request		
Swatch Order		
Activity Reports		
Sent Emails		

Submit your Swatch Order online.

[Go to the Swatch Request Form](#)  
(opens new tab)

**Product Swatch Order Form**

Swatch samples are available for most product categories; these are ideal for virtual consultations, contract projects and working with your favorite local interior design communities.

1st 10 swatches are FREE; each additional swatch is \$2.  
All orders shipped via USPS. \$5 additional to ship FedEx.

Account #: \*

Account Name: \*

First Name: \*

Last Name: \*

**ALTA**  
WINDOW FASHIONS

**Product Swatch Order Form**

Swatch samples are available for most product categories; these are ideal for virtual consultations, contract projects and working with your favorite local interior design communities.

1st 10 swatches are FREE; each additional swatch is \$2.  
All orders shipped via USPS. \$5 additional to ship FedEx.

Account #: \*

Account Name: \*

First Name: \*

Last Name: \*

# Tools | Activity Reports

Select Activity Reports. Each reports are customizable to users needs.

Tools

Pricing Setup

Settings

Tools

Price Comparisons

Account Balance

Remake Request

Swatch Order

Activity Reports

Sent Emails

Quotes & Orders > Activity Reports

Dealer Bookings Report

Order Listing by Employee

Margin Report

DC Order Export File

Quotes & Orders > Activity Reports > Dealer Bookings Report

Type

Format

Category

Entered Date

Sent Date

Entered by

Pricing Group

Sent to Fabricator Only?

☒ Printable

☐ Excel

☒ HTML

☐ PDF

All

From 06/08/2023

to 06/07/2024

From 06/08/2023

to 06/07/2024

All

All

☒ Yes

☐ No

EXAMPLE: Dealer Bookings Report

PROJECT / CATEGORY	DATE <- TO >-	UNITS	DEALER COST	CLIENT TOTAL
<b>HERNANCE SHUTTERS</b>				
HERNANCE STANDARD SHUTTERS		11	4,883.32	10,080.00
HERNANCE FRENCH DOOR SHUTTERS		1	875.00	1,480.00
HERNANCE DOUBLE HUNG SHUTTERS		4	2,853.00	5,450.00
HERNANCE CAVE SHUTTERS		3	1,386.48	2,860.00
HERNANCE SURE-VU T-POST SHUTTERS		2	3,084.23	5,700.00
HERNANCE EQUAL TARGET SHUTTERS		2	1,814.08	3,700.00
HERNANCE BAYWILD TRACK SHUTTERS		2	3,526.00	7,200.00
HERNANCE B-HUNG TRACK SHUTTERS		3	6,045.18	11,360.00
HERNANCE BAYWILDBIRD WINDOW SHUTTERS		8	2,781.83	5,880.00
HERNANCE ARCH TOP SHUTTERS		4	5,312.00	10,080.00
<b>HERNANCE SHUTTERS</b>		<b>37</b>	<b>31,093.09</b>	<b>64,860.00</b>
<b>QUETTE</b>				
QUETTE STANDARD		30	6,883.30	12,200.00
QUETTE TOP-DOWN BOTTOM-UP		1	96.50	200.00
QUETTE EASTWIND		34	5,240.91	9,890.00
QUETTE EASTWIND 2 ON 1		1	420.07	900.00
QUETTE STORM		18	1,861.08	3,400.00
QUETTE DUALITE		1	630.00	860.00
QUETTE POWERBIRD		47	16,484.89	24,880.00
<b>QUETTE</b>		<b>114</b>	<b>24,696.06</b>	<b>51,080.00</b>
<b>PALM BEACH SHUTTERS</b>				
PALM BEACH STANDARD SHUTTER		8	1,480.00	2,080.00
PALM BEACH UNIVIS T-POST SHUTTER		3	2,279.00	4,700.00
PALM BEACH EQUAL T-POST SHUTTER		1	631.00	1,060.00
PALM BEACH B-HUNG TRACK SHUTTER		1	1,884.00	3,100.00
PALM BEACH B-HUNG TRACK SHUTTER		1	1,420.50	2,000.00
PALM BEACH SPECIALTY SHAPES - CONTINUOUS (SPRING ARCH ONLY)		1	150.00	400.00
<b>PALM BEACH SHUTTERS</b>		<b>12</b>	<b>7,747.00</b>	<b>10,080.00</b>
<b>SLALOUETTE</b>				
SLALOUETTE STANDARD WITH S&V/BS		3	825.00	1,080.00
SLALOUETTE 4" WITH S&V/BS		4	1,271.00	2,700.00
SLALOUETTE 4" WITH S&V/BS 2 ON 1		4	2,880.00	5,200.00
<b>SLALOUETTE</b>		<b>11</b>	<b>4,981.00</b>	<b>9,780.00</b>
NEUSTYLE HYBRID STANDARD SHUTTERS		3	570.00	1,280.00
NEUSTYLE HYBRID FRENCH DOOR SHUTTERS		1	330.00	760.00

Back

Generate

# Tools | Sent Emails

Select Sent Emails.

Tools	Pricing Setup	Settings
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Remake Request		
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Activity Reports		
Sent Emails		

Lists outgoing Email Log.

Quotes & Orders > <b>Sent Emails</b>					
Display 15 rows per page		<input type="text"/>		Search	Advanced Search...
Sent Date	Sent By	From	To	Subject	
▼ 06/07/2024	Alta Test Account - Do Not Build	pam.gill@custombrandsgroup.com	yung.chang@custombrandsgroup.com	DEALER COPY #5104285, PO HC 1001	
▼ 05/16/2024	ASM Test Account	pam.gill@custombrandsgroup.com	micky.spahic@custombrandsgroup.com	DEALER COPY #5105239	
▼ 05/15/2024	ASM Test Account	pam.gill@custombrandsgroup.com	micky.spahic@custombrandsgroup.com	Melissa - Display Samples #5105239	
▼ 05/15/2024	ASM Test Account	pam.gill@custombrandsgroup.com	micky.spahic@custombrandsgroup.com	Melissa - Display Samples #5105239	

# Pricing Setup | Dealer Cost

Select Cost Factor Letter  
Choose Effective Date then pdf icon to generate cost factor

Pricing Setup

Settings

Home

Dealer Cost

Cost Factor Letter

Client Cost

Pricing Groups

Discount / Margin / Mark-Up

Installation & Freight Charges

Additional Service Charges

Miscellaneous Products

Promotions

Rounding

View your Cost Factors online

Go to Cost Factor Letter  
(opens new window)

Use Effective Date:

06/11/2024

Cost Factor Letter

Date: 07/21/2011

Account #: 8388888

My Company  
123 W. Main Street  
New York City NY 10058

We are pleased to provide you with your current cost factors:

Material Price Group	Cost Factor	Material Price Group	Cost Factor
1 3/8" Wood Blinds	0.450	Insulation Blanket	0.400
2 3/8" Wood Blinds	0.450	Lightweight 2" Blind Blinds	0.400
3 3/8" Wood Blinds	0.450	Lightweight 1 1/2" Blind Blinds	0.400
4 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	0.400
5 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400
6 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400
7 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400
8 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400
9 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400
10 3/8" Wood Blinds	0.450	Lightweight Roman Shades	0.400

CBG Custom Brands Group

Account #: 8388888

Date: 06/11/2024

View your Cost Factors online

Go to Cost Factor Letter

We are pleased to provide you with your current cost factors:

Material Pricing Group	Cost Factor	Material Pricing Group	Cost Factor
2 3/8" Wood Blinds	0.450	Polymer Faux Wood Blinds	0.400
2" Wood Blinds	0.450	Roller Basics	0.400
Aluminum Blinds	0.450	Roller Shades/Roman Shades/Panel Track	0.400
Automation	0.450	Vertical Blinds	0.400
Dual Shades	0.450	Vertical Sheers	0.400
Faux Wood Basics	0.450	Window Shadings	0.400
Honeycomb Shades	0.450	Woven Woods/Panel Track	0.400

These cost factors are subject to change without notice. Thank you for your support!

This document and all information contained in this document is confidential and may not be published or otherwise disclosed to or used by anyone other than the dealer listed above.

Page 1 of 1

Custom Brands Group, 12800 Center Court, Dr. S, Ste. 100, Carrizosa, CA 95703-9332



# Pricing Setup | Client Cost

Pricing Setup	Settings	Home
Dealer Cost		
Cost Factor Letter		
Client Cost		
Pricing Groups		
Discount / Margin / Mark-Up		
Installation & Freight Charges		
Additional Service Charges		
Miscellaneous Products		
Promotions		
Rounding		

This organization tool allows clients to be grouped under dealer preferred settings such as an area of town, subdivision, and etc. It's a proactive way of setting customer pricing by assigning price group to a quote.

Select Pricing Groups then Add Pricing Group to create a new Client group.

Clients > Pricing Groups				
Add Pricing Group				
Need Help with Pricing Groups Click here for a diagram showing the order of priority when determining which Pricing Group is applied to a quote.				
Pricing Group	# Logins	# Clients	# Quotes	Quote Override
▼ Cerritos	0	1	0	Yes
▼ HC	0	0	0	Yes



# Pricing Setup | Client Cost

After creating Price Group, select Discount / Margin /Mark-Up or Installation & Freight Charges to set up the dealer pricing for client quotes. Charges can be set at Category, Product or All Products level.

Pricing Setup Settings Home

Dealer Cost

Cost Factor Letter

Client Cost

Pricing Groups

Discount / Margin / Mark-Up

Installation & Freight Charges

Additional Service Charges

Miscellaneous Products

Promotions

Rounding

Pricing Setup > Discount / Margin / Mark-Up

Pricing Group	# Logins	# Clients	# Quotes	Quote Override
▼ Default	9	220	2519	No
✕ Cerritos	0	1	0	Yes

Edit By Category/Product Edit All Products (Bulk) Copy from...

☐ by Category  
☒ by Product

Honeycomb Shades	Base Pricing		Secondary Pricing
Honeycomb Bliss Automation	0.00%	Discount ▼	0.00% Discount ▼
Honeycomb Bliss Automation Top-Down/Bottom-Up	0.00%	Discount Margin Mark-up	0.00% Discount ▼

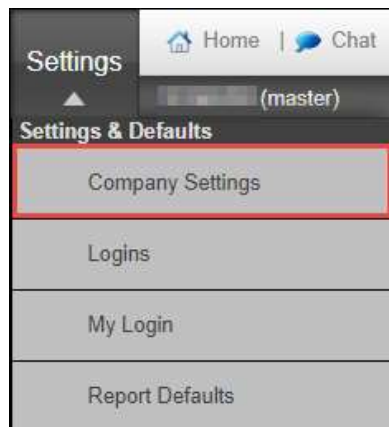
Discount - Mark down from the published retail price

Margin - Percentage of sales dollar that is profit.

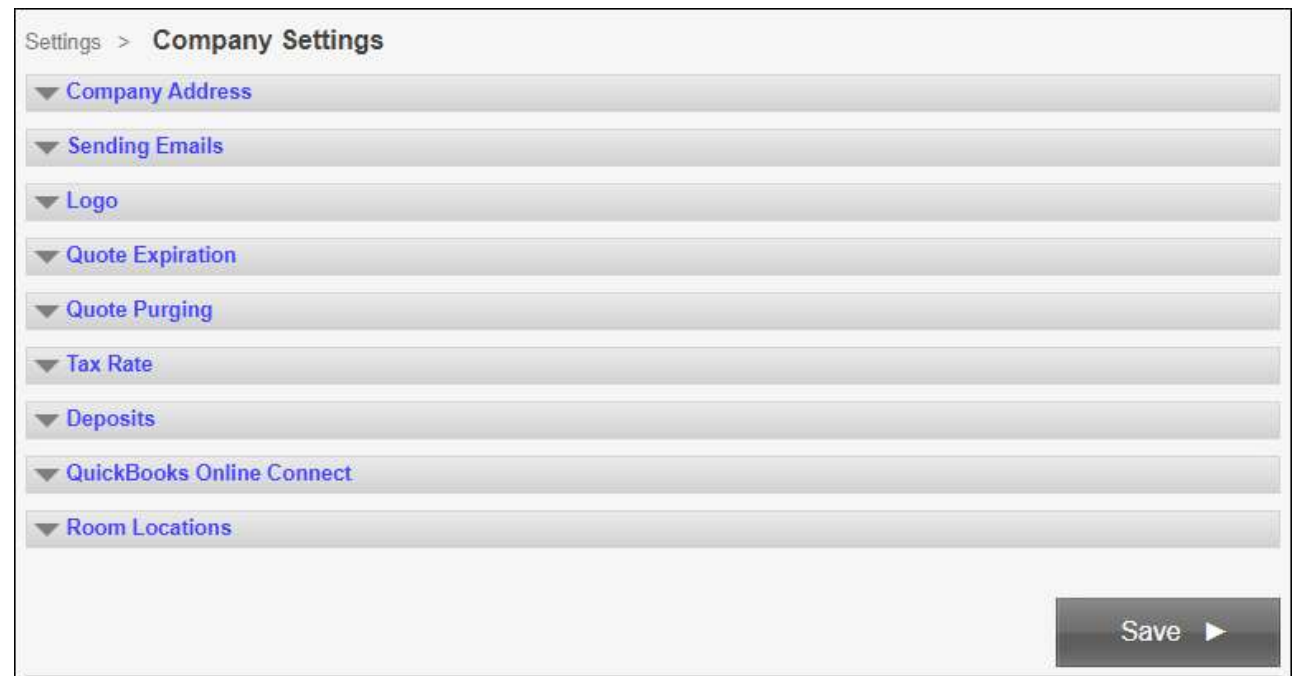
Markup - Percentage of profit from cost price.

# Settings | Company Settings

Select Company Settings



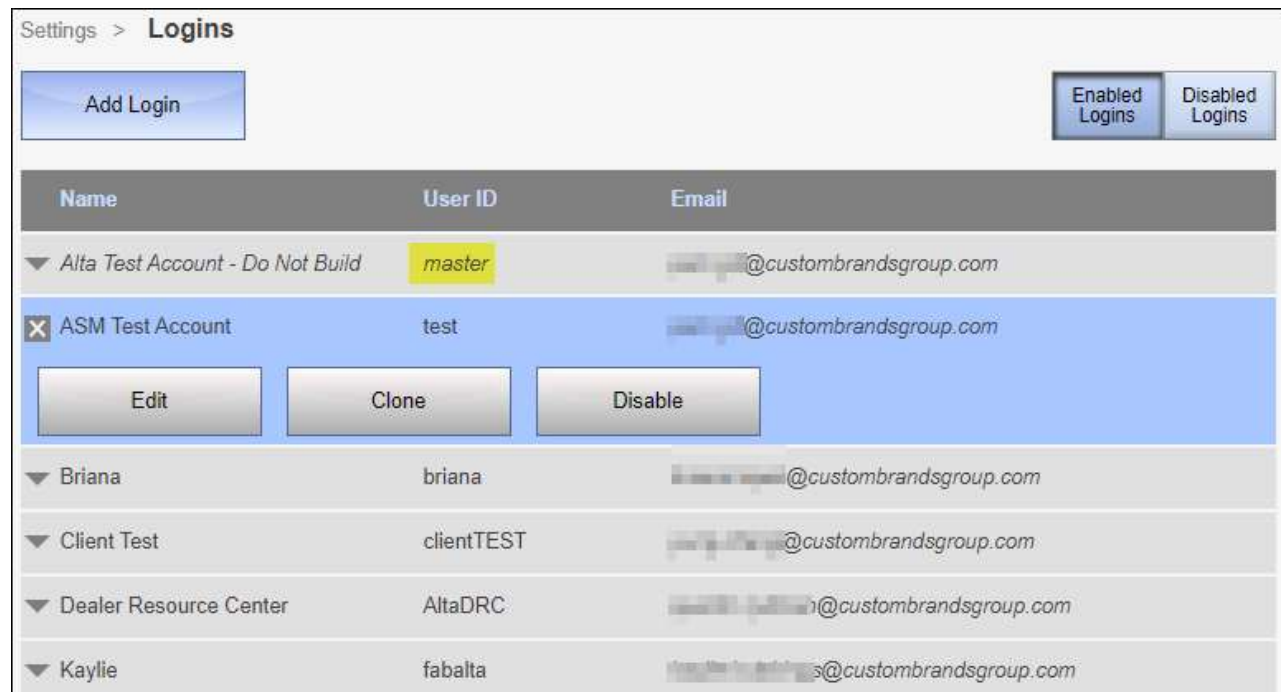
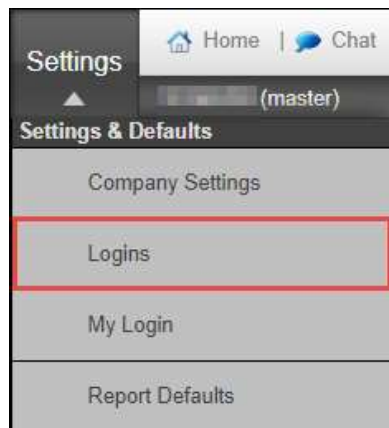
Expand each setting to view and modify.



# Settings | Logins

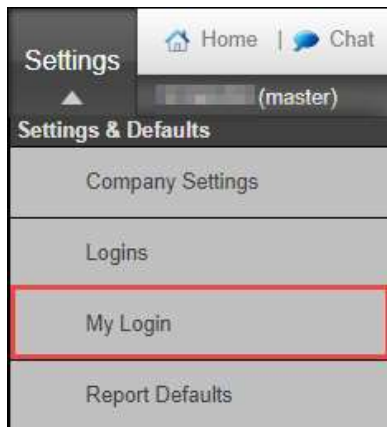
Select Logins

By default, each account is given 'master' user ID at the time of eOrder activation. Additional users can be added with customized permission for each user.



# Settings | My Login

Select My Login

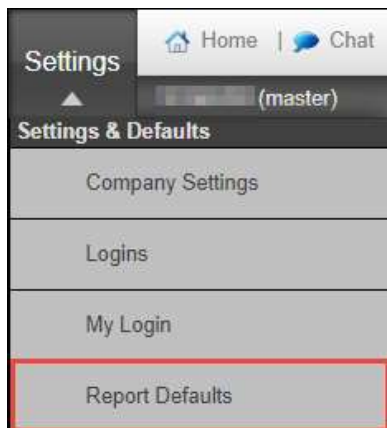


Based on the users permission level, user is able to modify their setting

A screenshot of the 'My Login' settings page. The page title is 'Settings > My Login'. The page is divided into three main sections: 'My Login', 'Password', and 'Preferences'.  
**My Login**  
User ID: master  
Name: Alta Test Account - Do Not Build  
Email: [redacted]@custombrandsgroup.com  
**Password**  
Old Password: [text input]  
New Password: [text input]  
Confirm New Password: [text input]  
**Preferences**  
Items Per Page: 15 (dropdown)  
Default Sales Area: Custom Brands Group Retail P (dropdown)  
Default Prices Shown in Quotes & Scenarios: ☐ Client, ☒ Dealer  
Order Submit Preference: ☒ Order Submit with Detailed Review, ☐ Order Submit with Simple Review  
There are two callout boxes: 'Password Tips' with a link to 'Review our recommendations for creating (and remembering) a strong password.' and 'Order Submit Preference' explaining that 'Detailed Review' allows for modifying client, installer, and shipping selections before submitting orders.

# Settings | Report Defaults

Select Report Defaults



Select each report to view/modify default settings.

Settings > Report Defaults		
Section	Subsection	Report Name
Quotes & Orders	Scenarios	Scenarios Report
Quotes & Orders	Quotes	Client Proposal
Quotes & Orders	Quotes	Client Invoice
Quotes & Orders	Quotes	Measure Copy
Quotes & Orders	Quotes	Installer Copy
Quotes & Orders	Quotes	Dealer Copy
Quotes & Orders	Quotes	Shutter Visual