

Online eOrdering

How-To Guide

Welcome to eOrder!



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

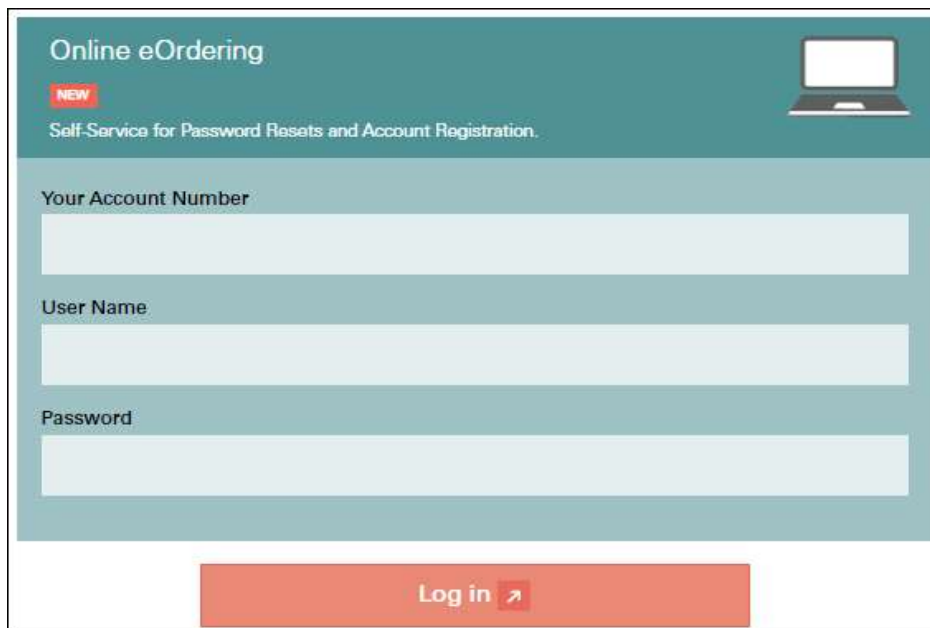
How to Login

Two ways to login

<https://som.picbusiness.com/Maintenance/LoginID/Authenticate/SOM/login.pic>

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

We recommend using Chrome browser.



Online eOrdering

NEW

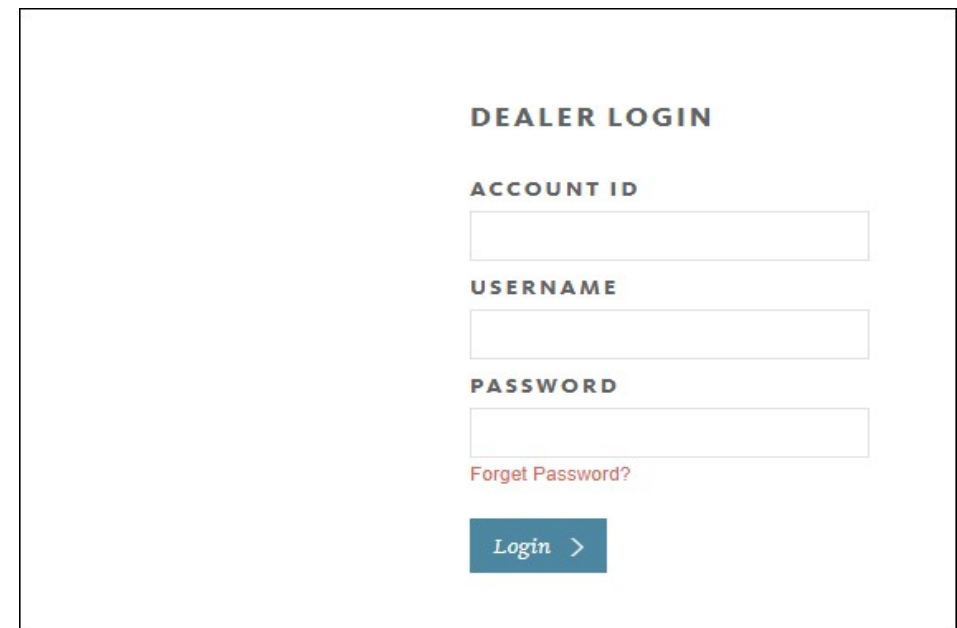
Self-Service for Password Resets and Account Registration.

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		
Order Status		

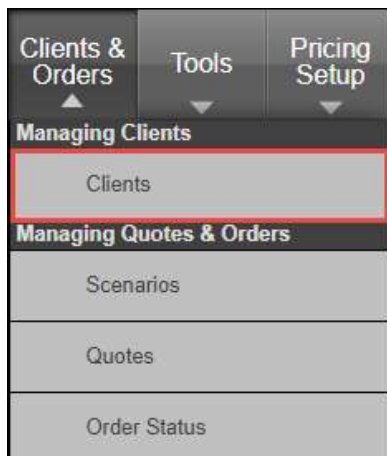
Tools	Pricing Setup	Settings
▲	▼	▼
Tools		
Account Balance		
Activity Reports		
Sent Emails		

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

Settings	Home
▲	
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		
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

Date

07/18/2024

Salesperson

Test Account - Do Not Build

Sold To:

1004_Last, 1004_First

H:

Email:

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

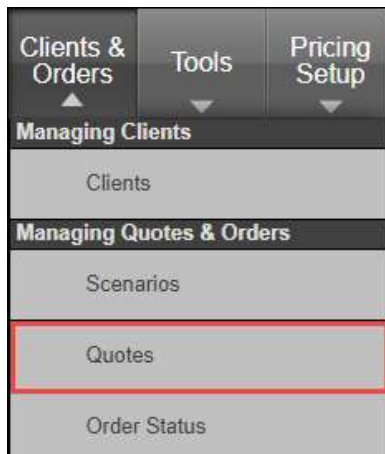
Select Generate Quote to create a quote.

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.



Quotes & Orders > **Quotes**

[New Product Quote](#)

15 rows [Search](#) [Advanced Search...](#)

Quote #	Entered	Client Name	PO	Sidemark	Items	Status
3325914	12/19/2016		DO NOT FABRICATE	TEST ONLY	2	Ordered
475315	07/17/2024	TEST	111	TEST	0	Quote
475313	07/17/2024		Test	Test	0	Quote
475249	07/17/2024		test		0	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 Existing Client <input type="radio"/> Enter a New Client <input type="radio"/> Proceed with No Client

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

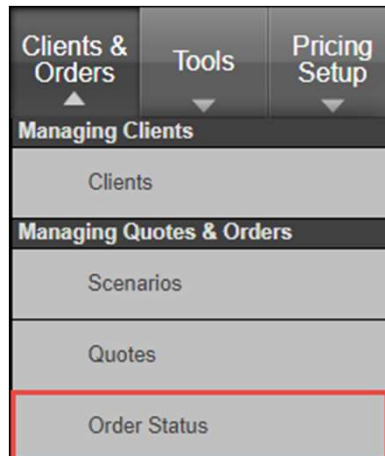
Clients & Order | Order Status

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.

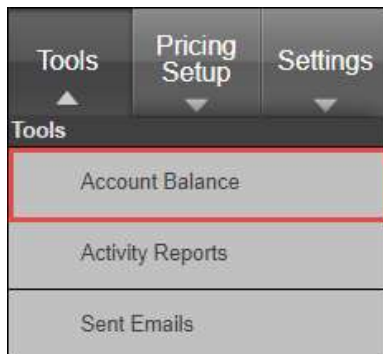


15 rows | All Types | All Status | Search | **Advanced Search**











Type	Quote #	Order #	Sidemark	Dealer PO	Entered	Ship Date	Status												
	11279599			awerae	07/15/24	Pending	*Mixed*												
	10957313	TEST0430		TEST0430	04/30/24	05/09/24	Invoiced												
<table><thead><tr><th>LINE</th><th>PROD. GROUP</th><th>SHIP FROM</th><th>TRACKING</th><th>SHIP DATE</th><th>STATUS</th></tr></thead><tbody><tr><td>10</td><td>ROLLER MOTORIZATION</td><td>San Diego, CA</td><td></td><td>05/09/24</td><td>Invoiced</td></tr></tbody></table>								LINE	PROD. GROUP	SHIP FROM	TRACKING	SHIP DATE	STATUS	10	ROLLER MOTORIZATION	San Diego, CA		05/09/24	Invoiced
LINE	PROD. GROUP	SHIP FROM	TRACKING	SHIP DATE	STATUS														
10	ROLLER MOTORIZATION	San Diego, CA		05/09/24	Invoiced														
<table><thead><tr><th>INVOICE #(S)</th><th>LINE #(S)</th></tr></thead><tbody><tr><td> 918016123</td><td>10</td></tr></tbody></table>								INVOICE #(S)	LINE #(S)	918016123	10								
INVOICE #(S)	LINE #(S)																		
918016123	10																		
<div><div>Order Confirmation</div><div>Email Support</div><div>Refresh Status</div><div>Dealer Error Remake</div></div>																			
	10780334			test angle	03/18/24		Canceled												

Tools | Account Balance

Select Account Balance



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 Invoices

2. Payment Info

3. Review

4. 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			<div>Invoice Total42.24</div> <div>Credit Total-0.00</div> <div>Balance42.24</div>		
	2024-05-11	2024-06-25					
	4-05-13	2024-06-27					

Back

Next

Tools | Account Balance - Payment

Select payment method then click Next.

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: xxxxxxxx-XXXX

Invoice #	PO Reference	Sidemark	Invoice Amount
1000000000	1000000000	1000000000	41.91 USD
1000000000	1000000000	1000000000	0.33 USD

Payment Total: 42.24

Back 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

Please review the information below

Payment Information

Checking Account ending in (XXXX-XXXX)

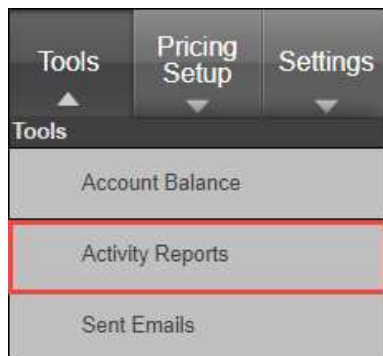
Invoice #	PO Reference	Sidemark	Invoice Amount
1000000000	1000000000	1000000000	41.91 USD
1000000000	1000000000	1000000000	0.33 USD

Payment Total: 42.24

Back Pay Now

Tools | Activity Reports

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



Quotes & Orders > Activity Reports > Dealer Bookings Report

Type

☒ Printable
☐ Excel

Format

☒ HTML
☐ PDF

Category

All

Entered Date

From 06/08/2023
to 06/07/2024

Sent Date

From 06/08/2023
to 06/07/2024

Entered by

All

Pricing Group

All

Sent to Fabricator Only?

☒ Yes
☐ No

EXAMPLE:

Dealer Bookings Report

PRODUCT / CATEGORY	DATE <- TO >-	UNITS	DEALER COST	CLIENT TOTAL
HERNANCE STANDARD SHUTTERS		11	4,883.32	10,080.00
HERNANCE FRENCH DOOR SHUTTERS		1	875.00	1,480.00
HERNANCE DOUBLE HINGE SHUTTERS		4	2,853.00	5,450.00
HERNANCE CARP SHUTTERS		3	1,386.48	2,860.00
HERNANCE UNEVEN T-POST SHUTTERS		2	3,064.23	5,700.00
HERNANCE EQUAL T-POST SHUTTERS		2	1,814.08	3,700.00
HERNANCE BAYFOLD TRACK SHUTTERS		2	3,526.00	7,200.00
HERNANCE B-WING TRACK SHUTTERS		3	6,045.18	11,360.00
HERNANCE BALYCORNER WINDOW SHUTTERS		8	2,781.83	6,880.00
HERNANCE ARCH TOP SHUTTERS		4	5,312.00	10,080.00
HERNANCE SHUTTERS		37	31,093.09	64,860.00
QUETTE STANDARD		30	6,883.32	12,260.00
QUETTE TOP/DOWN BOTTOM/LP		1	96.50	200.00
QUETTE EAST/WEST		34	5,240.91	9,890.00
QUETTE EAST/WEST 2 ON 1		1	420.07	800.00
QUETTE LIT/SLIDE		18	1,861.08	3,400.00
QUETTE DUALITE		1	630.00	860.00
QUETTE POWERING		47	16,484.88	24,880.00
QUETTE		114	24,680.56	57,080.00
PALM BEACH SHUTTERS		12	7,747.08	10,080.00
PALM BEACH STANDARD SHUTTER		8	1,480.00	2,880.00
PALM BEACH UNEVEN T-POST SHUTTER		3	2,275.00	4,700.00
PALM BEACH EQUAL T-POST SHUTTER		1	631.08	1,000.00
PALM BEACH B-WING TRACK SHUTTER		1	1,884.00	3,700.00
PALM BEACH B-WING TRACK SHUTTER		1	1,420.58	2,800.00
PALM BEACH SPECIALTY SHAPES - CONTINUOUS (SPRING ARCH ONLY)		1	150.00	400.00
SLALOUETTE		11	4,881.08	9,760.00
SLALOUETTE STANDARD WITH S&V/SLIDE		3	825.00	1,880.00
SLALOUETTE 4" WITH S&V/SLIDE		4	1,271.08	2,700.00
SLALOUETTE 4" WITH S&V/SLIDE 2 ON 1		4	2,888.00	5,280.00
NEWHITILE		3	570.00	1,280.00
NEWHITILE #1/2ND STANDARD SHUTTERS		3	570.00	1,280.00
NEWHITILE #1/2ND FRENCH DOOR SHUTTERS		1	330.00	760.00

Back

Generate

Tools | Sent Emails

Select Sent Emails.

Tools	Pricing Setup	Settings
Tools		
Account Balance		
Activity Reports		
Sent Emails		

Lists outgoing Email Log.

Quotes & Orders > Sent Emails					
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

Dealer Cost

Client Cost

Cost Factor Letter

Pricing Groups

Discount / Margin / Mark-Up

Installation & Freight Charges

Additional Service Charges

Promotions

Rounding

View your Cost Factors online

Go to Cost Factor Letter
(opens new window)

Use Effective Date:

06/11/2024

PDF

Adobe

Cost Factor Letter

Date: 07/21/2011

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

Account #: 8388888

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

Material Pricing Group	Cost Factor	Material Pricing 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 Heavy Sheers	0.400
6 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	0.400
7 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	0.400
8 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	0.400
9 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	0.400
10 3/8" Wood Blinds	0.450	Lightweight Heavy Sheers	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!

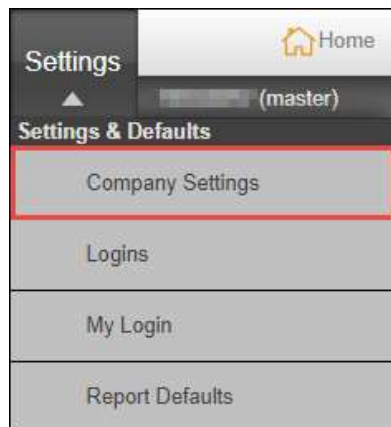
This document and all information contained in this document is confidential and may not be published or otherwise disclosed to or used by anyone other than the dealer listed above.

Page 1 of 1

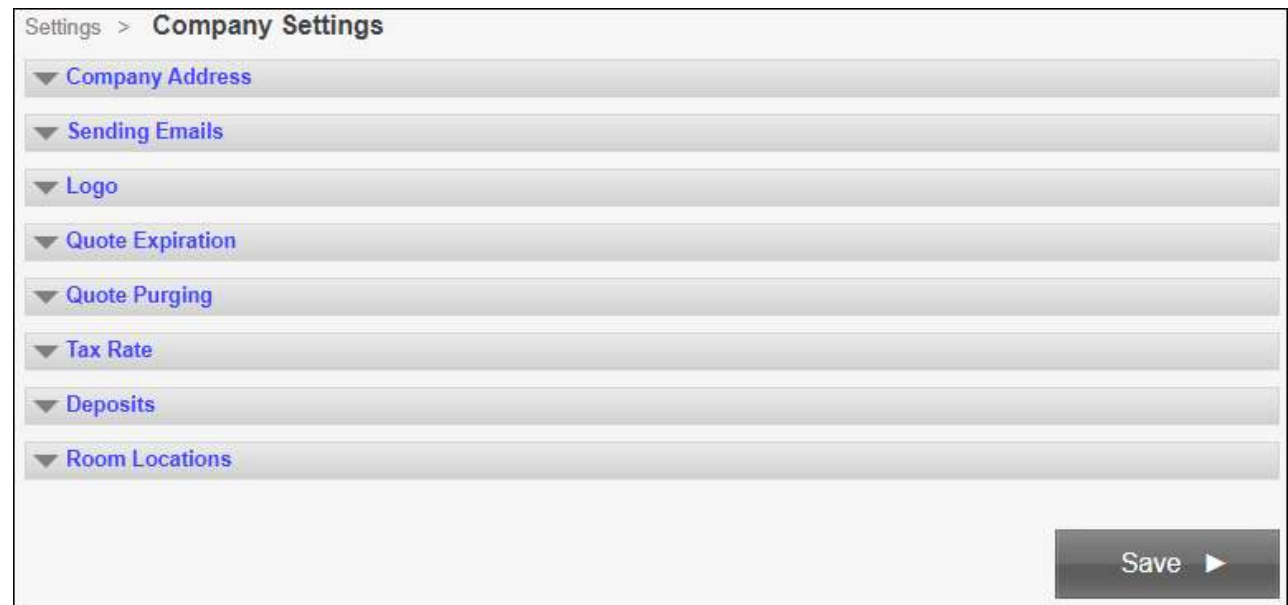
Custom Brands Group, 12800 Center Court, Dr. S, Ste. 100, Carrizosa, CA 95703-9332

Settings | Company Settings

Select Company Settings



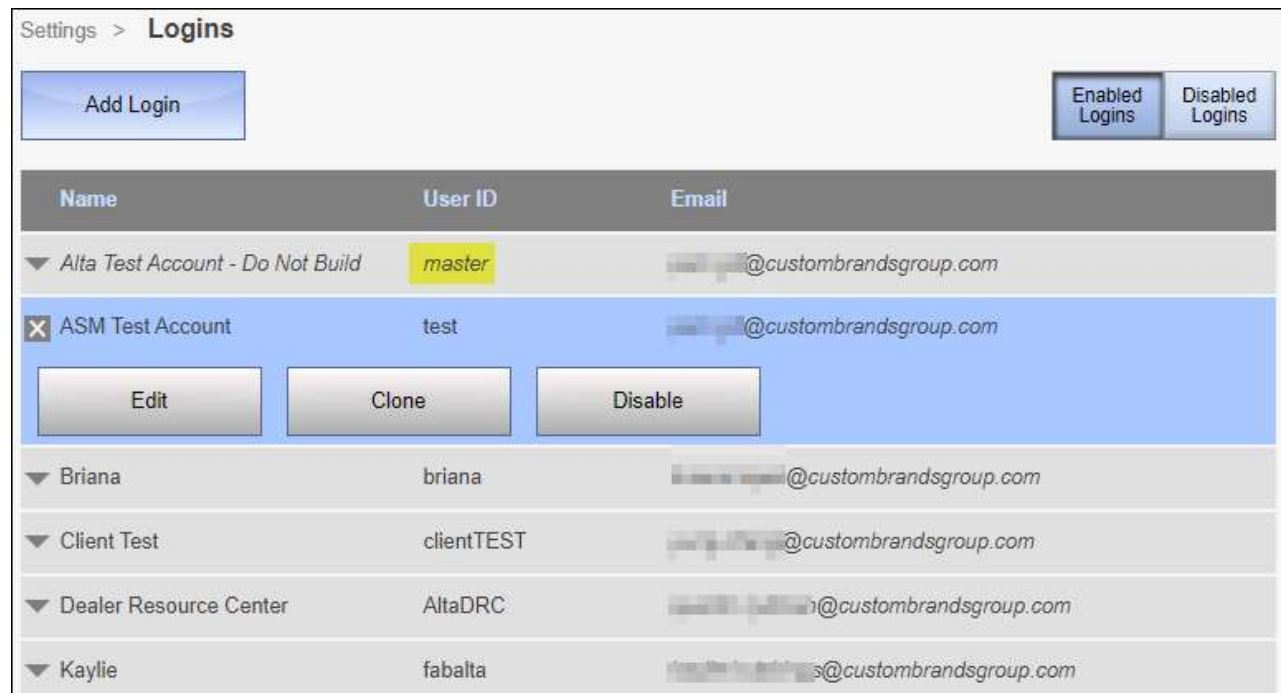
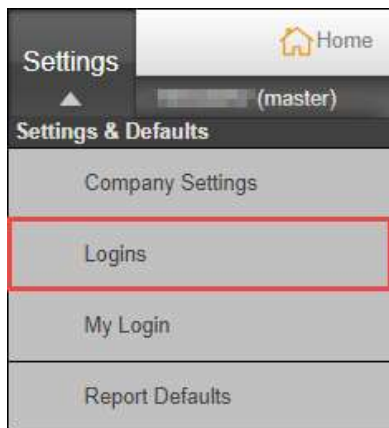
Expand each setting to view and modify.



Settings | Logins

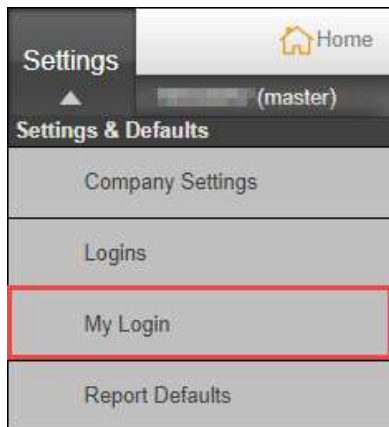
Select Logins

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

Settings > My Login

My Login

User ID	master	
Name	<input type="text" value="Alta Test Account - Do Not Build"/>	
Email	<input type="text" value="master@custombrandsgroup.com"/>	

Password

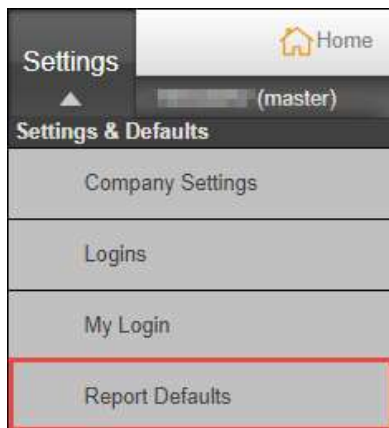
Old Password	<input type="password"/>	Password Tips Review our recommendations for creating (and remembering) a strong password.
New Password	<input type="password"/>	
Confirm New Password	<input type="password"/>	

Preferences

Items Per Page	<input type="text" value="15"/>	
Default Sales Area	<input type="text" value="Custom Brands Group Retail P"/>	
Default Prices Shown in Quotes & Scenarios	<input type="radio"/> Client <input checked="" type="radio"/> Dealer	
Order Submit Preference	<input checked="" type="radio"/> Order Submit with Detailed Review <input type="radio"/> Order Submit with Simple Review	Order Submit Preference Detailed Review allows you to modify client, installer, and shipping selections as you submit orders. Simple Review only displays that information before you submit 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