

Online eOrdering

How-To Guide

Welcome to eOrder!



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

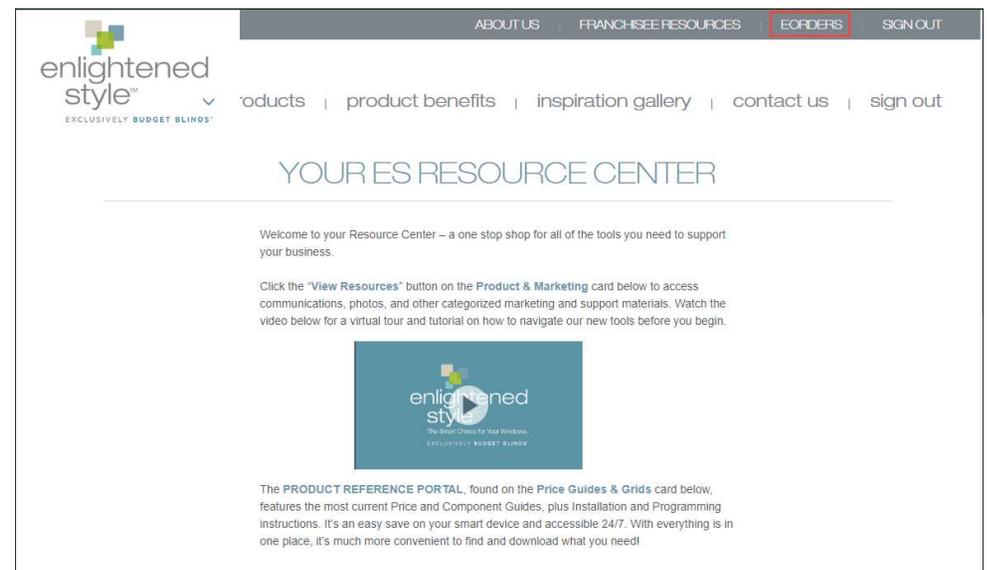
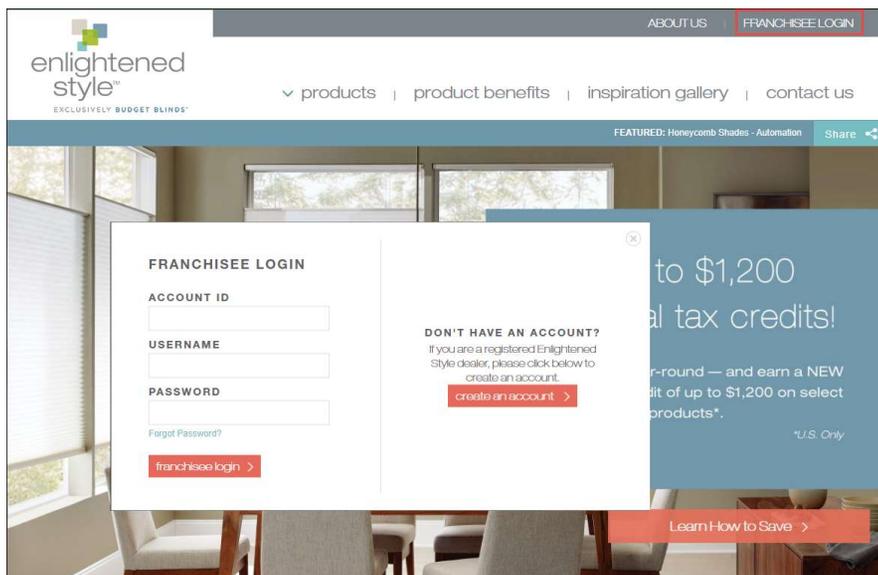
How to Login



Login URL <https://www.enlightenedstyle.com/>

Click FRANCHISEE LOGIN on the upper right. A window will pop up to enter login credentials.
Click EORDERS

We recommend using Chrome browser.



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
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
[User] (master)		
Settings & Defaults		
Company Settings		
Logins		
My Login		
Report Defaults		

Clients & Order | Clients

Select Clients to view all saved clients

Navigation menu:

- Clients & Orders (selected)
- Tools
- Pricing Setup

Managing Clients

- Clients (highlighted)

Managing Quotes & Orders

- Scenarios
- Quotes
- Parts
- Order Status

Clients > Manage Clients

Buttons: Add Client, Client Report

Display 15 rows per page

Search: 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*	1004_First
Last Name*	1004_Last

Client Information	
Type*	Individual/Household
Client Account*	Customer_1004

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

Primary Location Information	
Location Description	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](#)

Select an existing client from the list below to Manage Scenarios for that client or click "Add Client" above to create a new client. [CLOSE](#)

Display 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 rows per page [Search](#) Filter by Location:

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

1 records
Page 1 of 1

Clients & Order | Scenarios

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

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

2 records
Page 1 of 1

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

CLIENT SCENARIO FOR 1004_Last, 1004_First

Date
07/22/2024

Salesperson
Test Account - Do Not Build

Email:

Sold To:
1004_Last, 1004_First

H:

Units	Scenario	Price
3.000	Scenario HC	1451.22
3.000	Scenario Roller	898.03

Clients & Order | Scenarios



A new quote can be generated from scenario.

Select the scenario > View Scenario

ID	Location	Scenario Name	Date Created	# Windows Covered
5089896	Test Location	Scenario HC	04/26/2024	3/3
<div style="display: flex; justify-content: space-around;"> View Scenario Clone Delete </div>				
5104187	Test Location	Scenario Roller	05/14/2024	3/3

2 records Page 1 of 1

Select Generate Quote to create a quote.

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

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 > **Quotes**

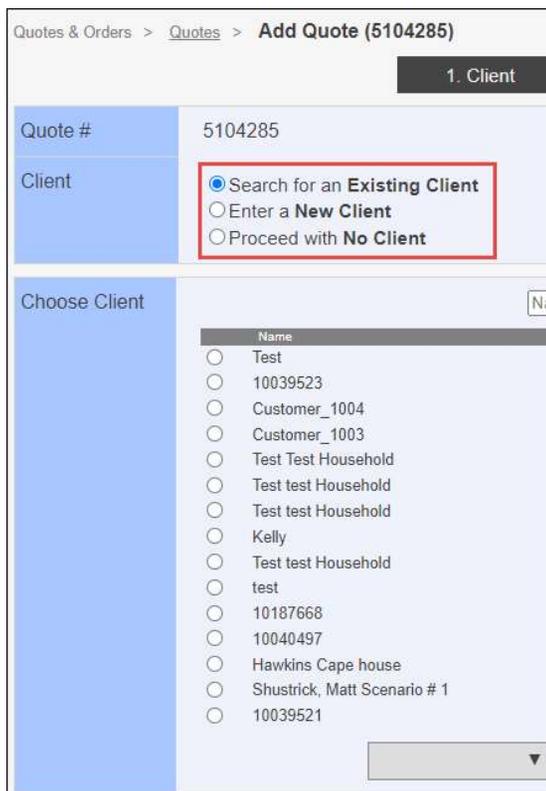
[New Product Quote](#) [New Parts Quote](#)

Display 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

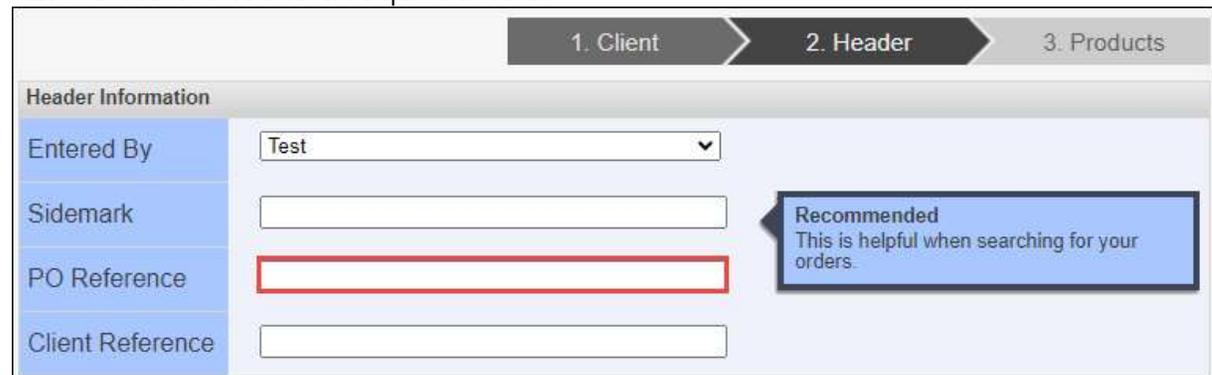
Client

- Search for an Existing Client
- Enter a New Client
- 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 Test

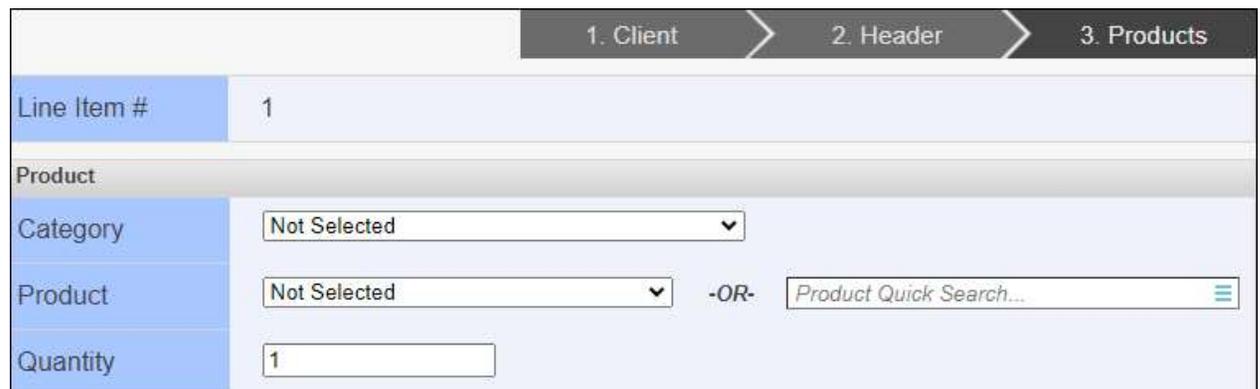
Sidemark

PO Reference

Client Reference

Recommended
This is helpful when searching for your orders.

3. Select Category and Product to expand order configuration



1. Client 2. Header 3. Products

Line Item # 1

Product

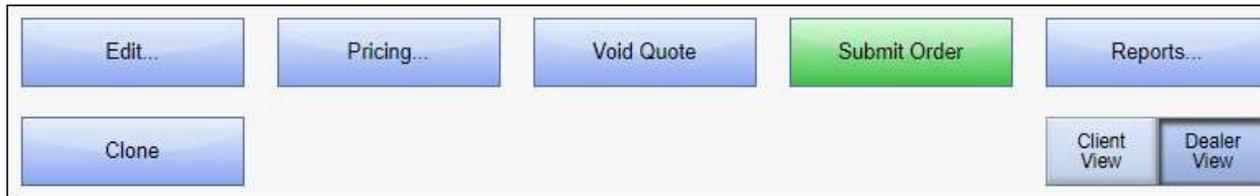
Category Not Selected

Product Not Selected -OR- Product Quick Search...

Quantity 1

Clients & Order | Quotes – View Quote

Select an existing quote to 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

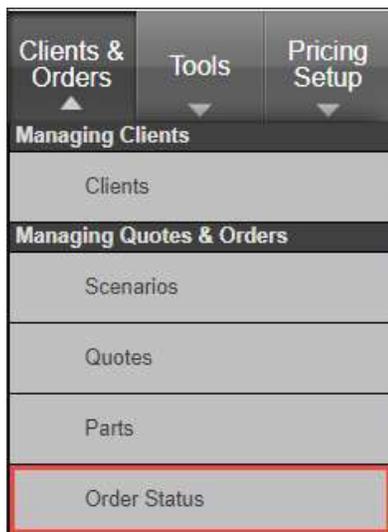
Displays order status/progress.

Select Order Status

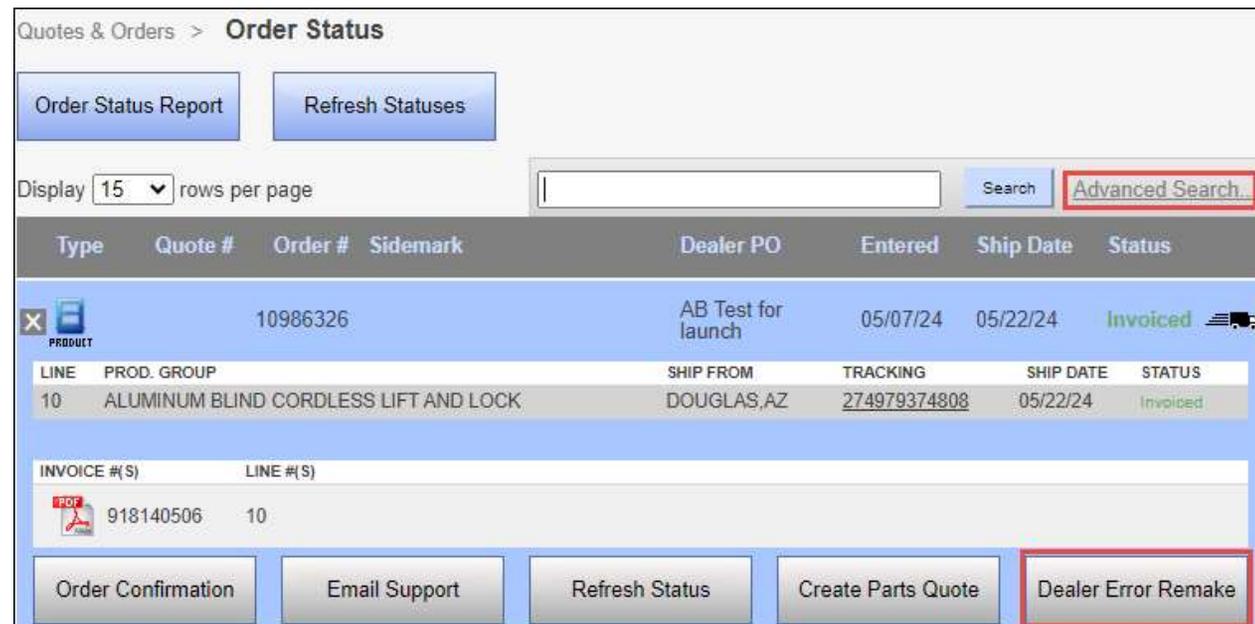
Click 'Advanced Search' to narrow down the list.

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

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



Navigation menu with three main sections: Clients & Orders, Tools, and Pricing Setup. Under Clients & Orders, there is a sub-section 'Managing Clients' with 'Clients' and 'Order Status' (highlighted with a red border). Under Tools, there is a sub-section 'Managing Quotes & Orders' with 'Scenarios', 'Quotes', 'Parts', and 'Order Status' (highlighted with a red border).



Order Status screen showing a table of orders. The table has columns: Type, Quote #, Order #, Sidemark, Dealer PO, Entered, Ship Date, and Status. A row is highlighted with a blue background, showing an order for 'AB Test for launch' with status 'Invoiced'. Below the table, there is an 'INVOICE #(S)' section with a PDF icon and the invoice number 918140506. At the bottom, there are several buttons: 'Order Confirmation', 'Email Support', 'Refresh Status', 'Create Parts Quote', and 'Dealer Error Remake' (highlighted with a red border). The 'Advanced Search...' button is also highlighted with a red border.

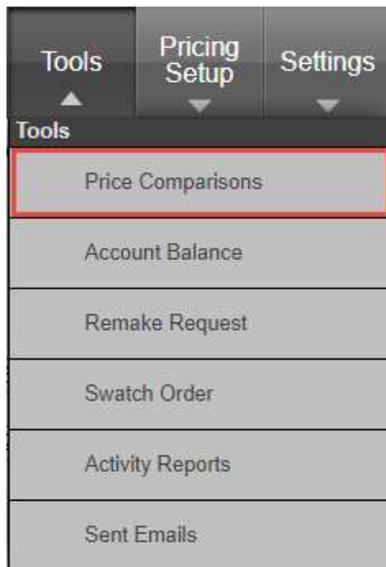
Type	Quote #	Order #	Sidemark	Dealer PO	Entered	Ship Date	Status
		10986326		AB Test for launch	05/07/24	05/22/24	Invoiced
LINE	PROD. GROUP	SHIP FROM	TRACKING	SHIP DATE	STATUS		
10	ALUMINUM BLIND CORDLESS LIFT AND LOCK	DOUGLAS,AZ	274979374808	05/22/24	Invoiced		

INVOICE #(S) LINE #(S)

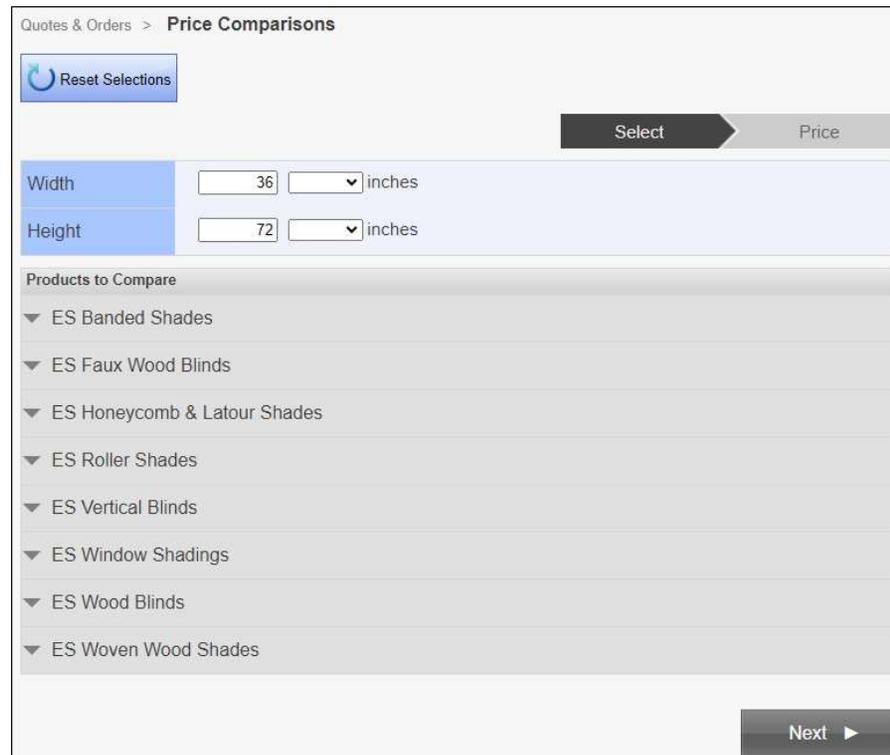
918140506 10

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' configuration screen. At the top, it says 'Quotes & Orders > Price Comparisons'. There is a 'Reset Selections' button. Below that, there are two input fields: 'Width' with a value of 36 and 'Height' with a value of 72, both in inches. To the right of these fields are 'Select' and 'Price' buttons. Below the input fields is a section titled 'Products to Compare' with a list of product categories, each with a dropdown arrow: ES Banded Shades, ES Faux Wood Blinds, ES Honeycomb & Latour Shades, ES Roller Shades, ES Vertical Blinds, ES Window Shadings, ES Wood Blinds, and ES 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 View
Dealer View

ES Faux Wood Blinds: 2" Polymer Cordless Lift					
Material	MSRP	Surcharge	Cost Factor	Dealer Price	
<input checked="" type="checkbox"/> CP1001 - Luster White	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1002 - Bright White	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1003 - Buttermilk	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1004 - Vanilla Cream	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1007 - Textured White	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1015 - Neutral Grnd/Namib	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1016 - Gray Dawn	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1017 - Maverick	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1021 - Textured Buttermilk	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1100 - Cotton	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1101 - White Dove	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1102 - Simply Almost White	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1103 - Shadow	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1104 - Dreamscape	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1105 - Morning Fog	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1106 - Textured Cotton	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1107 - Textured Shadow	311.00	133.00	0.3000	133.20	
<input type="checkbox"/> CP1108 - Textured Dreamscape	311.00	133.00	0.3000	133.20	

ES Banded Shades: Enlightened Style Banded Shades Cordless Lift					
Material	MSRP	Surcharge	Cost Factor	Dealer Price	
<input checked="" type="checkbox"/> FE003 - Quintessence	536.00	130.00	0.3000	189.80	
<input type="checkbox"/> FE004 - Utopia	536.00	130.00	0.3000	189.80	
<input type="checkbox"/>	655.00	130.00	0.3000	225.50	
<input type="checkbox"/>	655.00	130.00	0.3000	225.50	

◀
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 <input type="text" value="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
[blurred]	2024-03-06	2024-03-14	[blurred]	[blurred]	41.91 USD	41.91	<input checked="" type="checkbox"/>
[blurred]	2024-04-17	2024-04-22	[blurred]	[blurred]	0.33 USD	0.33	<input checked="" type="checkbox"/>
[blurred]	2024-04-17	2024-04-22	[blurred]	[blurred]	10.72 USD	10.72	<input type="checkbox"/>
[blurred]	2024-05-11	2024-06-25	[blurred]	[blurred]			
[blurred]	2024-05-11	2024-06-25	[blurred]	[blurred]			
[blurred]	4-05-13	2024-06-27	[blurred]	[blurred]	5.44 USD		

Invoice Total	42.24
Credit Total	-0.00
Balance	42.24

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: Want to use a different account? Please call the Credit Department to add new payment accounts.

Bank Account:

Account Number: xxxxxxxx-XXXX

Invoices Selected	Invoice #	PO Reference	Sidemark	Invoice Amount
	123456789	PO123456	enlightened style	41.91 USD
	987654321	PO987654	enlightened style	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

Payment Information:

Invoices Being Paid	Invoice #	PO Reference	Sidemark	Invoice Amount
	123456789	PO123456	enlightened style	41.91 USD
	987654321	PO987654	enlightened style	0.33 USD
Payment Total				42.24

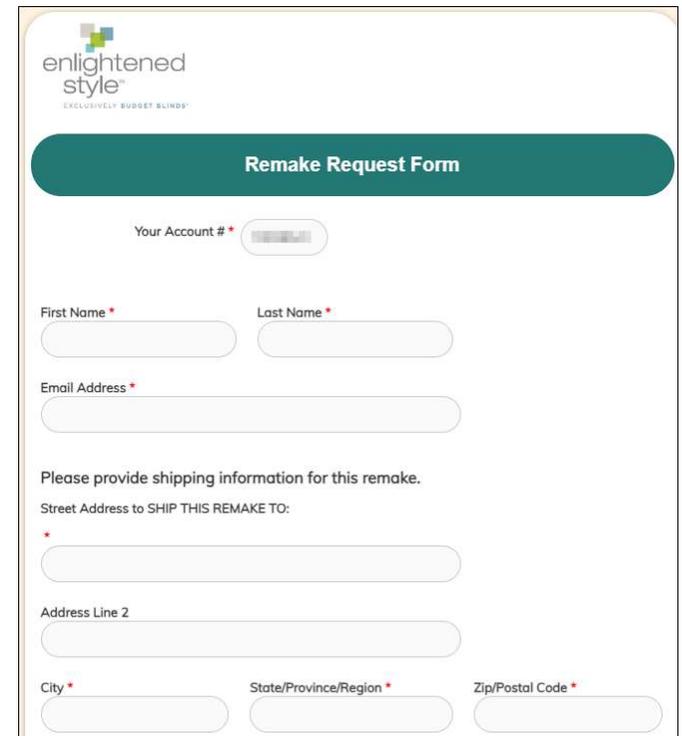
Back Pay Now

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
Tools		
Price Comparisons		
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Remake Request		
Swatch Order		
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enlightened style™
EXCLUSIVELY BUDGET 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 * Zip/Postal Code *

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)



EXCLUSIVELY BUDGET BLINDS®

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.

(Canadian customers: each additional swatch is \$2.60. Standard free shipping with Purolator. \$32 flat shipping fee for FedEx Express 2-Day Service)

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 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:

PROJECT / CATEGORY	DATE -- TO --	QNTY	DEALER COST	CLIENT TOTAL
HERFANCE SHUTTERS				
HERFANCE STANDARD SHUTTERS		11	4,863.52	10,000.00
HERFANCE FRENCH DOOR SHUTTERS		1	875.00	1,400.00
HERFANCE DOUBLE HUNG SHUTTERS		4	2,853.00	5,450.00
HERFANCE CAFE SHUTTERS		3	1,386.44	2,900.00
HERFANCE SEVEN T-POST SHUTTERS		2	3,064.23	5,700.00
HERFANCE EQUAL T-POST SHUTTERS		2	1,814.08	3,700.00
HERFANCE Bifold TRACK SHUTTERS		2	3,326.00	7,200.00
HERFANCE Bifold TRACK SHUTTERS		3	6,046.10	11,000.00
HERFANCE BALCONY/SCREEN WINDOW SHUTTERS		8	2,781.03	6,800.00
HERFANCE ARCH TOP SHUTTERS		4	8,312.00	10,000.00
HERFANCE SHUTTERS				
		37	31,095.09	64,800.00
QUETTE				
QUETTE STANDARD		26	6,683.20	12,200.00
QUETTE TOP-DOWN/BOTTOM-UP		1	96.50	200.00
QUETTE EAST/WEST		24	5,240.91	8,800.00
QUETTE EAST/WEST 2 ON 1		1	420.07	900.00
QUETTE LIT/SLIP		10	1,001.00	3,400.00
QUETTE ENCLITE		1	630.00	800.00
QUETTE POWER/SLIP		47	16,484.69	24,800.00
QUETTE				
		114	24,606.56	47,000.00
PALM BEACH SHUTTERS				
PALM BEACH STANDARD SHUTTER		8	1,400.00	2,500.00
PALM BEACH UNEVEN T-POST SHUTTER		3	2,270.00	4,700.00
PALM BEACH EQUAL T-POST SHUTTER		1	631.00	1,800.00
PALM BEACH Bifold TRACK SHUTTER		1	1,884.00	3,100.00
PALM BEACH Bifold TRACK SHUTTER		1	1,426.50	2,800.00
PALM BEACH SPECIALTY SHAPES - CONTINUOUS OPENING (ARCH ONLY)		1	100.00	400.00
PALM BEACH SHUTTERS				
		12	7,247.00	10,800.00
SLAQUETTE				
SLAQUETTE STANDARD WITH 8-1/2" W/SLIP		3	823.00	1,800.00
SLAQUETTE 4" WITH 8-1/2" W/SLIP		4	1,271.00	2,700.00
SLAQUETTE 4" WITH 8-1/2" W/SLIP 2 ON 1		4	2,088.00	5,200.00
SLAQUETTE				
		11	4,891.00	9,700.00
NEWHYLA				
NEWHYLA HYBRID STANDARD SHUTTERS		3	576.00	1,200.00
NEWHYLA HYBRID FRENCH DOOR SHUTTERS		1	320.00	700.00

◀ Back
Generate ▶

Tools | Sent Emails

Select Sent Emails.

Tools	Pricing Setup	Settings
Tools		
Price Comparisons		
Account Balance		
Remake Request		
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Sent Emails		

Lists outgoing Email Log.

Quotes & Orders > Sent Emails

Display 15 rows per page

Search Advanced Search

Sent Date	Sent By	From	To	Subject
▼ 06/07/2024	Test Account - Do Not Build			DEALER COPY #5104285, PO HC 1001
▼ 05/16/2024	ASM Test Account			DEALER COPY #5105239
▼ 05/15/2024	ASM Test Account			Melissa - Display Samples #5105239
▼ 05/15/2024	ASM Test Account			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

Cost Factor Letter

Date: 07/21/2011

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

Account #: 2300000

Go to Cost Factor Letter (opens new window)

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 Rollout	0.400
2 3/8" Wood Blinds	0.450	Lightweight 2" Wood Blinds	0.400
Wood Blinds	0.450	Lightweight 1 1/2" Wood Blinds	0.400
Roller Shades	0.450	Lightweight Heavy Shades	0.400
Vertical Blinds	0.450	2 1/2" Translucent Roller Shades	0.400
Window Shades	0.450	2 1/2" Translucent Roman Shades	0.400
Window Shades	0.450	2 1/2" Translucent Roman Shades	0.400
Window Shades	0.450	2 1/2" Translucent Roman Shades	0.400

Use Effective Date:

CBG Custom Brands Group Account #: [REDACTED]

Date: 06/11/2024

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, Carrizo, CA 90703-9332

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

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	0.00% Discount

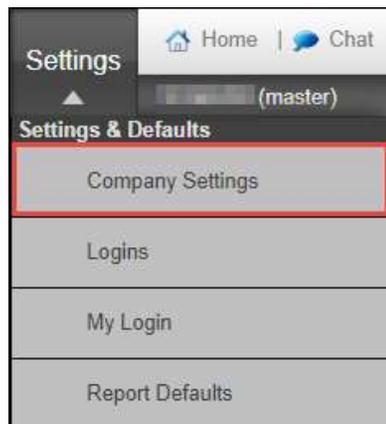
Discount - Mark down from the published retail price

Margin - Percentage of sales dollar that is profit.

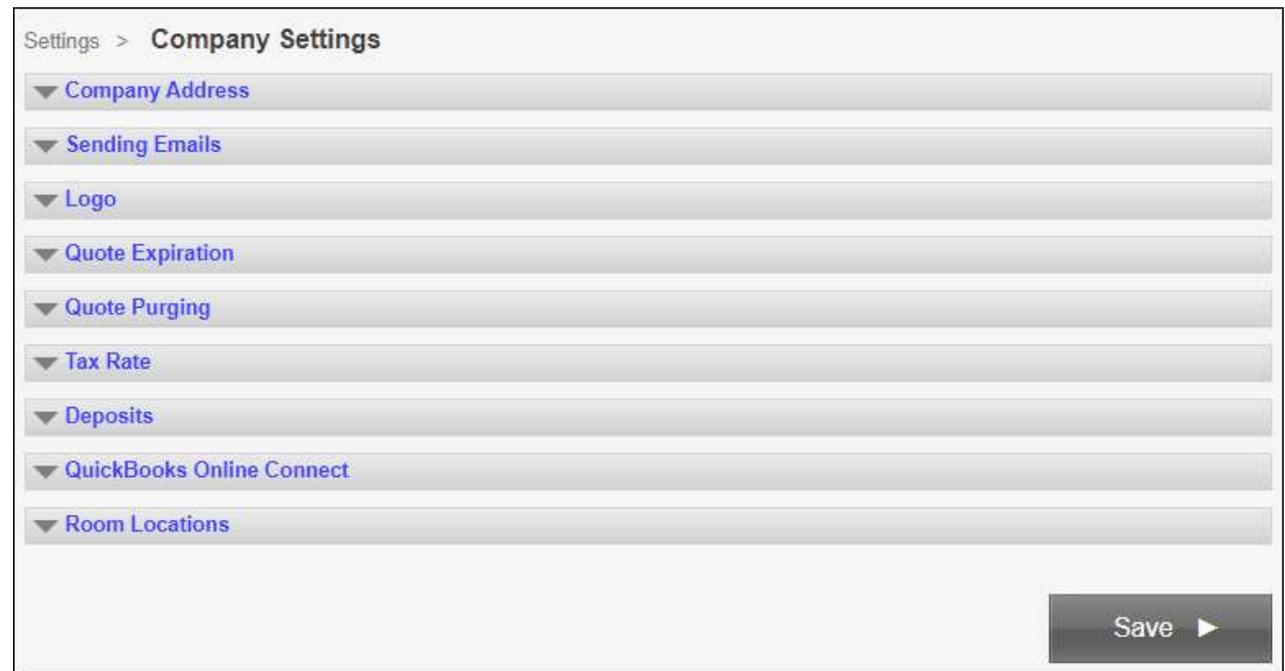
Markup - Percentage of profit from cost price.

Settings | Company Settings

Select Company Settings



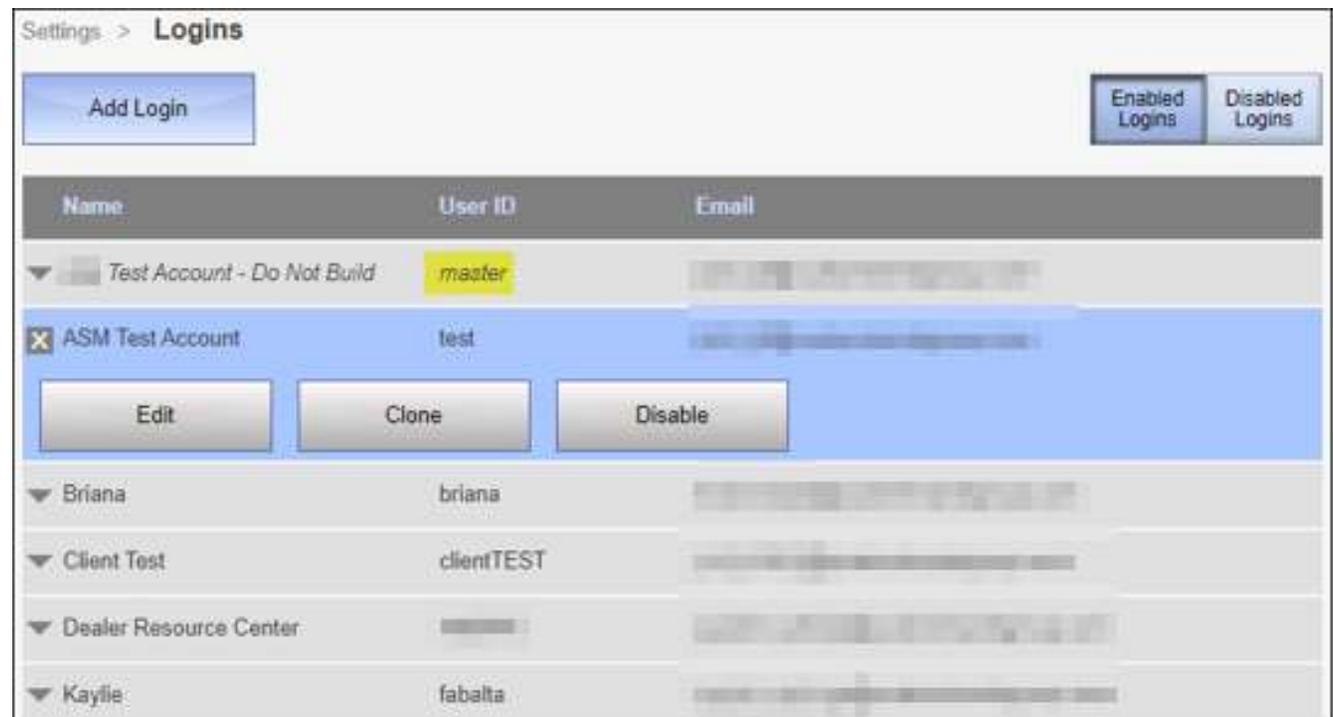
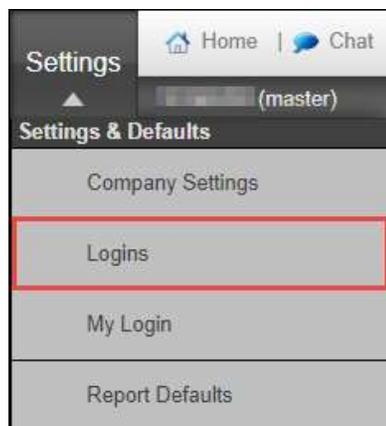
Expand each setting to view and modify.



Settings | Logins

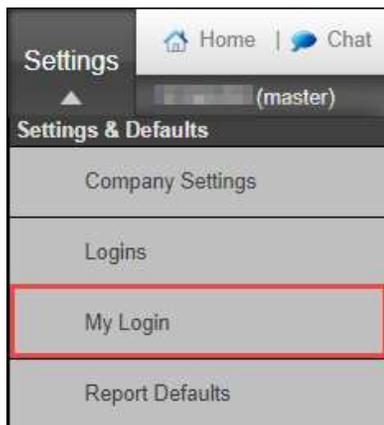
Select Logins

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.

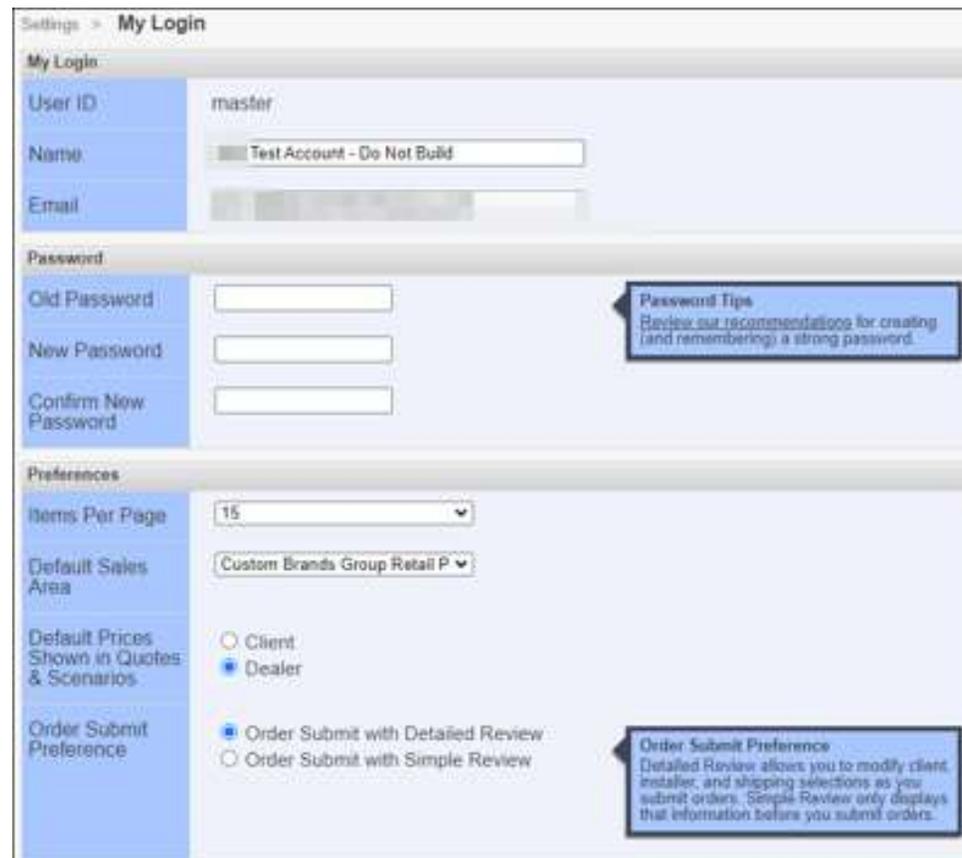


Settings | My Login

Select My Login



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

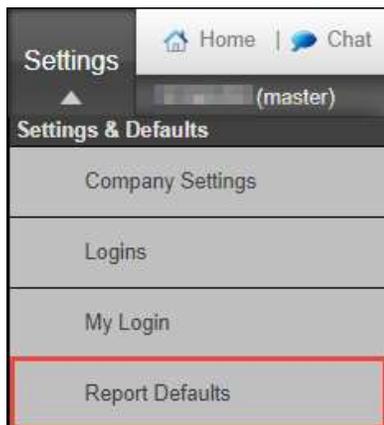


The screenshot shows the 'My Login' settings page. It is divided into several sections:

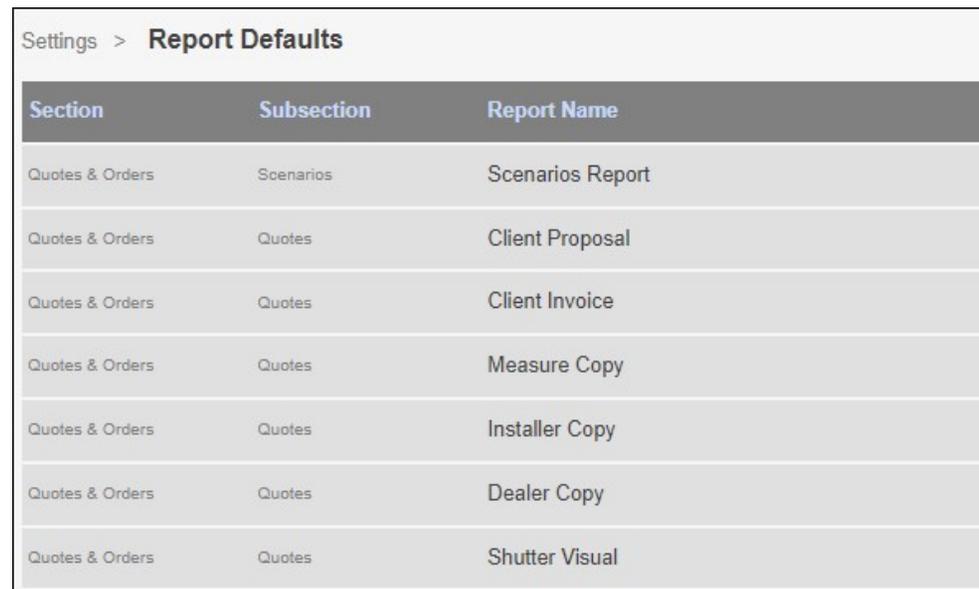
- My Login:** Fields for 'User ID' (value: master), 'Name' (value: Test Account - Do Not Build), and 'Email'.
- Password:** Fields for 'Old Password', 'New Password', and 'Confirm New Password'. A callout box titled 'Password Tips' provides advice on creating a strong password.
- Preferences:** Includes a dropdown for 'Items Per Page' (set to 15), a dropdown for 'Default Sales Area' (set to Custom Brands Group Retail P), and radio buttons for 'Default Prices Shown in Quotes & Scenarios' (Client and Dealer, with Dealer selected).
- Order Submit Preference:** Radio buttons for 'Order Submit with Detailed Review' (selected) and 'Order Submit with Simple Review'. A callout box titled 'Order Submit Preference' explains the difference between the two options.

Settings | Report Defaults

Select Report Defaults



Select each report to view/modify default settings.



A screenshot of a web application's 'Report Defaults' page. The page title is 'Settings > Report Defaults'. Below the title is a table with three columns: 'Section', 'Subsection', and 'Report Name'. The table lists eight different reports, all under the 'Quotes & Orders' section and 'Quotes' subsection.

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