

Online eOrdering

How-To Guide

Welcome to eOrder!



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

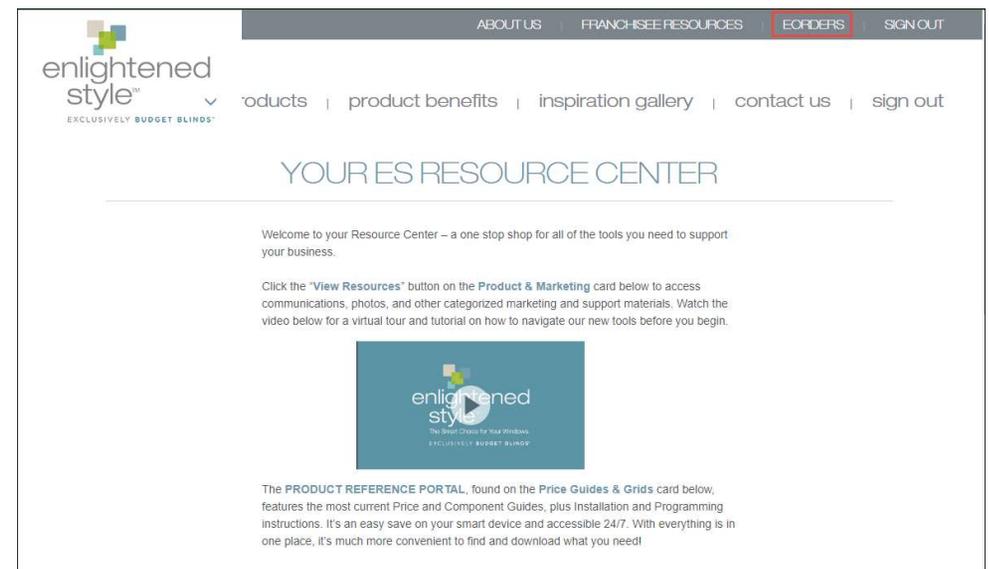
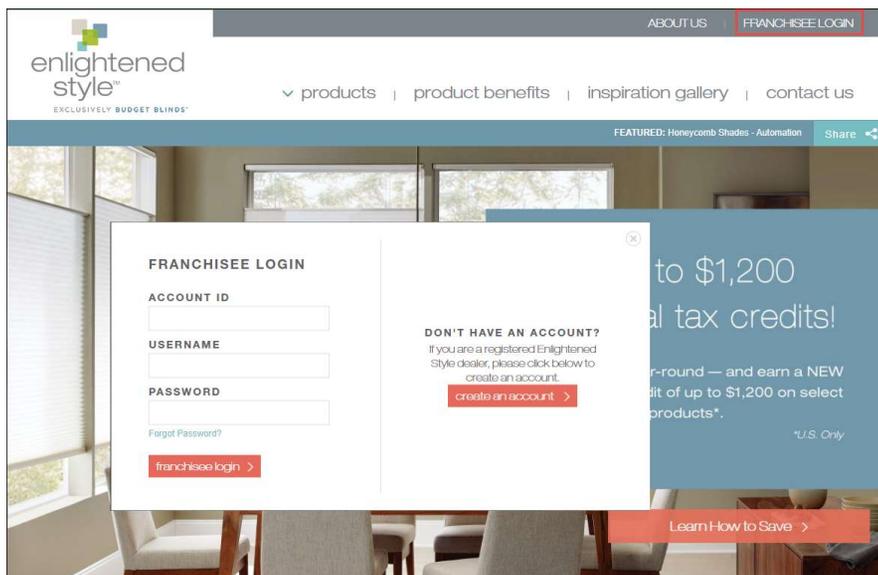
How to Login



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		
Order Status		

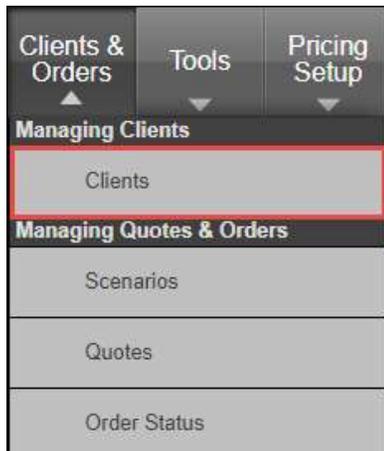
Tools ▲	Pricing Setup ▼	Settings ▼
Tools		
Account Balance		
Activity Reports		
Sent Emails		

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

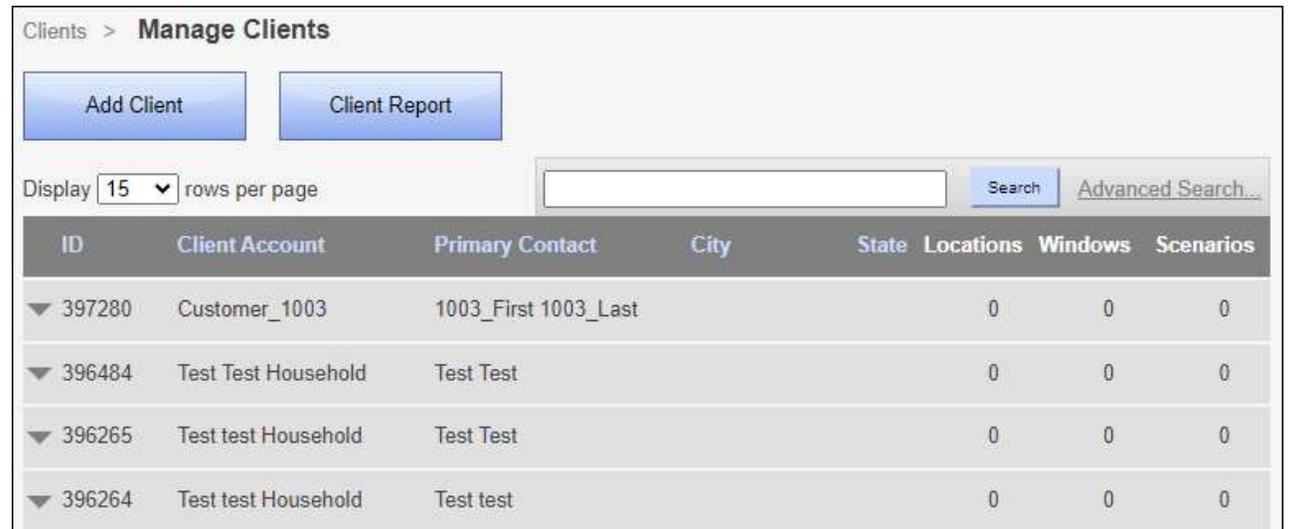
Settings ▲	 Home
[Redacted] (master)	
Settings & Defaults	
Company Settings	
Logins	
My Login	
Report Defaults	

Clients & Order | Clients

Select Clients to view all saved clients



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



Manage Clients interface showing a list of clients with columns for ID, Client Account, Primary Contact, City, State, Locations, Windows, and Scenarios. Includes buttons for Add Client and Client Report, and a search bar.

Buttons: Add Client, Client Report

Display 15 rows per page

Search bar: 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		
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

◀◀ 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.

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

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
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)

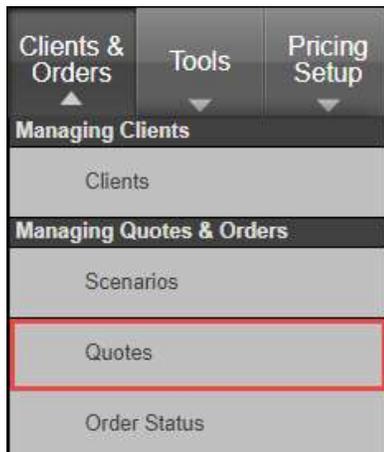
Buttons: Edit..., Pricing..., Delete, **Generate Quote**, Reports..., Clone, Add Scenario, Client View, Dealer View

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.

Quotes & Orders > **Quotes**

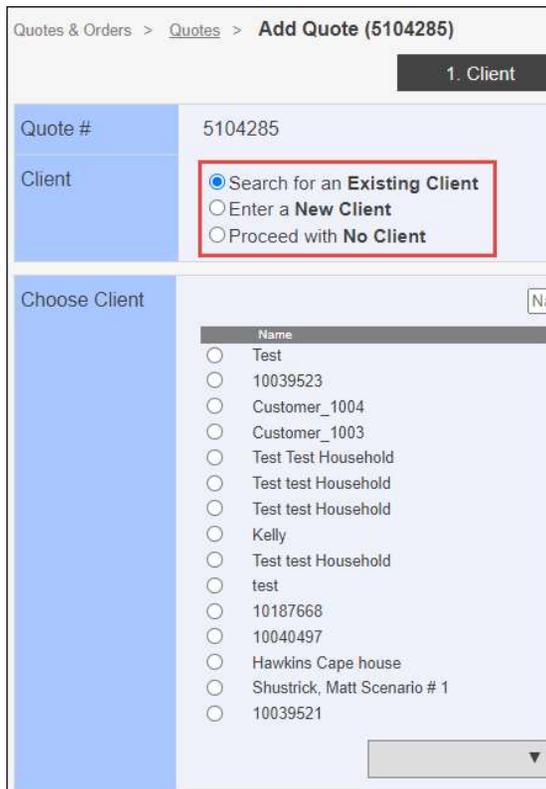
[New Product Quote](#)

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

- 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

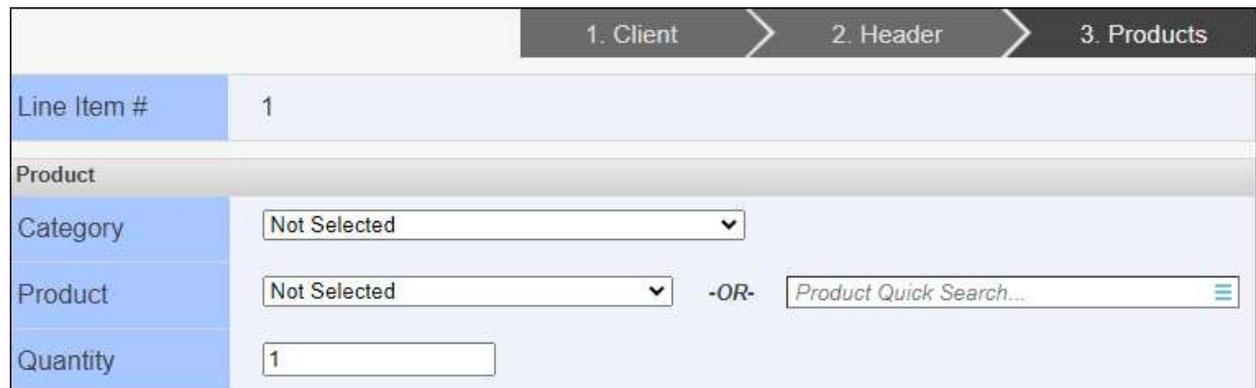
Sidemark

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

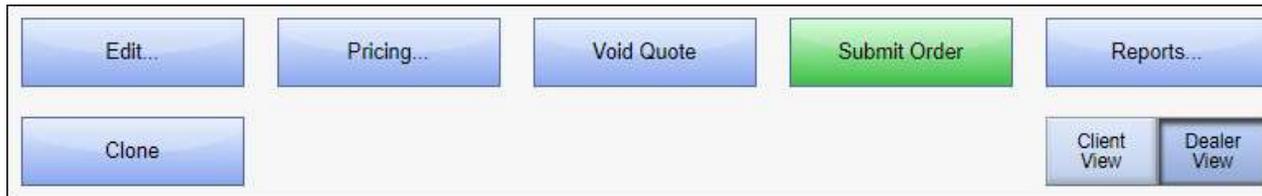
Category Not Selected

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

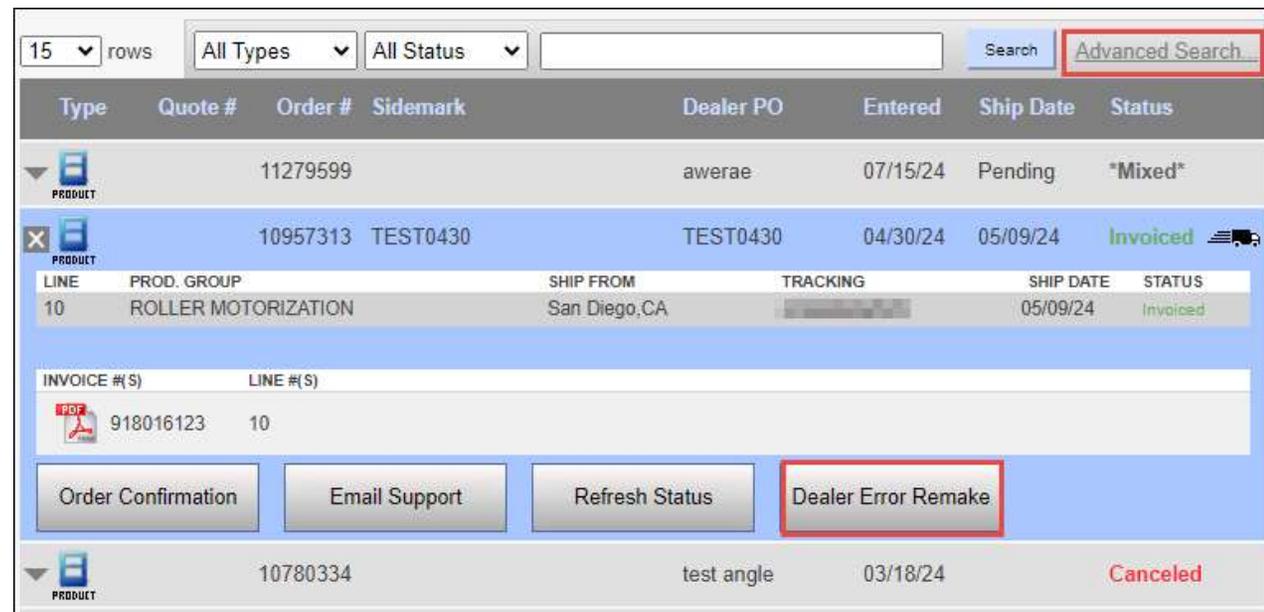
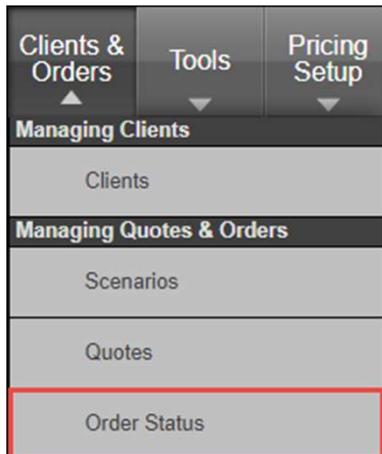
Clients & Order | Order Status

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.



The screenshot shows the Order Status interface. At the top, there are filters for '15 rows', 'All Types', and 'All Status'. A search bar contains 'Advanced Search' (highlighted with a red border). Below the filters is a table with columns: Type, Quote #, Order #, Sidemark, Dealer PO, Entered, Ship Date, and Status. The table contains three rows. The second row is highlighted in blue and has a 'Dealer Error Remake' button (highlighted with a red border) next to it. Below the table, there is an 'INVOICE #' section with a PDF icon and the text '918016123 10'. At the bottom, there are buttons for 'Order Confirmation', 'Email Support', 'Refresh Status', and 'Dealer Error Remake' (highlighted with a red border).

Type	Quote #	Order #	Sidemark	Dealer PO	Entered	Ship Date	Status
PRODUCT		11279599		awerae	07/15/24	Pending	*Mixed*
PRODUCT		10957313	TEST0430	TEST0430	04/30/24	05/09/24	Invoiced
LINE	PROD. GROUP	SHIP FROM	TRACKING	SHIP DATE	STATUS		
10	ROLLER MOTORIZATION	San Diego, CA		05/09/24	Invoiced		

INVOICE #(S) LINE #(S)

918016123 10

Order Confirmation Email Support Refresh Status Dealer Error Remake

Tools | Account Balance

Select Account Balance

Tools Pricing Setup Settings

Tools

- Account Balance
- 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 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]	2024-05-13	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

Checking Account ending in (XXXX-XXXX)

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 | Activity Reports

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

Tools ▲
Pricing Setup ▼
Settings ▼

Tools

Account Balance

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:

Entered Date: From

Sent Date: From

Entered by:

Pricing Group:

Sent to Fabricator Only? Yes
 No

EXAMPLE:

Dealer Bookings Report				
PROJECT / CATEGORY	DATE <- TO >-	QTY	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	5,400.00
HERFANCE CAFE SHUTTERS		3	1,386.68	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	6,045.10	11,000.00
HERFANCE BALCONY/WINDOW SHUTTERS		8	2,781.03	6,800.00
HERFANCE ARCH TOP SHUTTERS		4	6,312.00	10,000.00
HERFANCE SHUTTERS				
		37	31,095.53	64,800.00
QUETTE				
QUETTE STANDARD		36	6,683.50	12,200.00
QUETTE TOP/DOWN BOTTOM/LR		1	90.00	200.00
QUETTE EAST/WEST		24	5,240.91	8,800.00
QUETTE EAST/WEST 2 ON 1		1	420.07	900.00
QUETTE LEASE		100	1,001.00	3,400.00
QUETTE ENCLITE		1	630.00	800.00
QUETTE POWERBILT		47	16,484.00	24,800.00
QUETTE				
		174	24,669.00	67,800.00
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 SPRING (ARCH ONLY)		1	100.00	400.00
PALM BEACH SHUTTERS				
		12	7,247.50	15,800.00
SLAQUETTE				
SLAQUETTE STANDARD WITH 8-1/2" WIRE		3	823.00	1,800.00
SLAQUETTE 4" WITH 8-1/2" WIRE		4	1,271.00	2,700.00
SLAQUETTE 4" WITH 8-1/2" WIRE 2 ON 1		4	2,088.00	5,200.00
SLAQUETTE				
		11	4,681.00	9,700.00
NEWHOLE HYBRID STANDARD SHUTTERS				
NEWHOLE HYBRID STANDARD SHUTTERS		3	576.00	1,200.00
NEWHOLE HYBRID FRENCH DOOR SHUTTERS		1	320.00	700.00

◀ 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

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**

Dealer Cost

- Cost Factor Letter

Client Cost

- 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)

Date: 07/21/2011

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

Account #: 2300000

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	0.400	Lightweight 1 1/2" Wood Blinds	0.400
Roller Shades	0.400	Lightweight Heavy Shades	0.400
Vertical Blinds	0.400	2 1/2" Tilted Roller Shades	0.400
Window Shades	0.400	2 1/2" Tilted Roller Shades	0.400
Window Shadings	0.400	2 1/2" Tilted Roller Shades	0.400
Woven Woods	0.400	2 1/2" Tilted Roller Shades	0.400

Use Effective Date:

CBG Custom Brands Group

Date: 06/11/2024

Account #: [REDACTED]

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	0.400	Polymer Faux Wood Blinds	0.400
2" Wood Blinds	0.400	Roller Basics	0.400
Aluminum Blinds	0.400	Roller Shades/Roman Shades/Panel Track	0.400
Automation	0.400	Vertical Blinds	0.400
Dual Shades	0.400	Vertical Shades	0.400
Faux Wood Basics	0.400	Window Shadings	0.400
Honeycomb Shades	0.400	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.

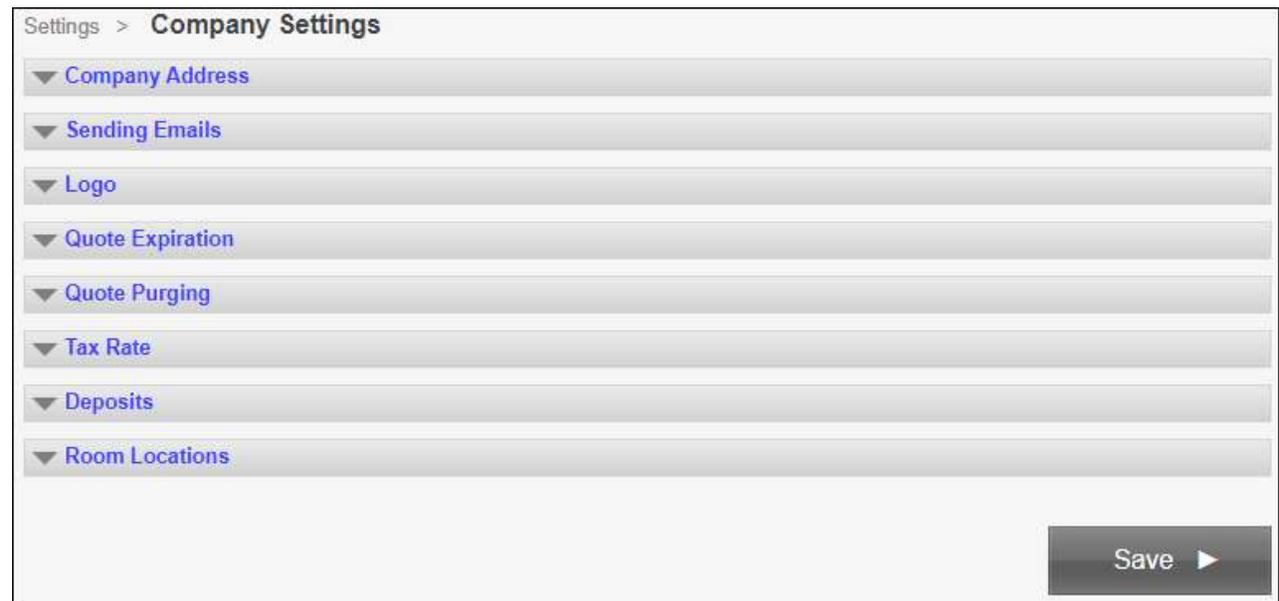
Page 1 of 1
Custom Brands Group, 12800 Center Court, Dr. S, Ste. 100, Carrizo, CA 90703-9332

Settings | Company Settings

Select Company Settings



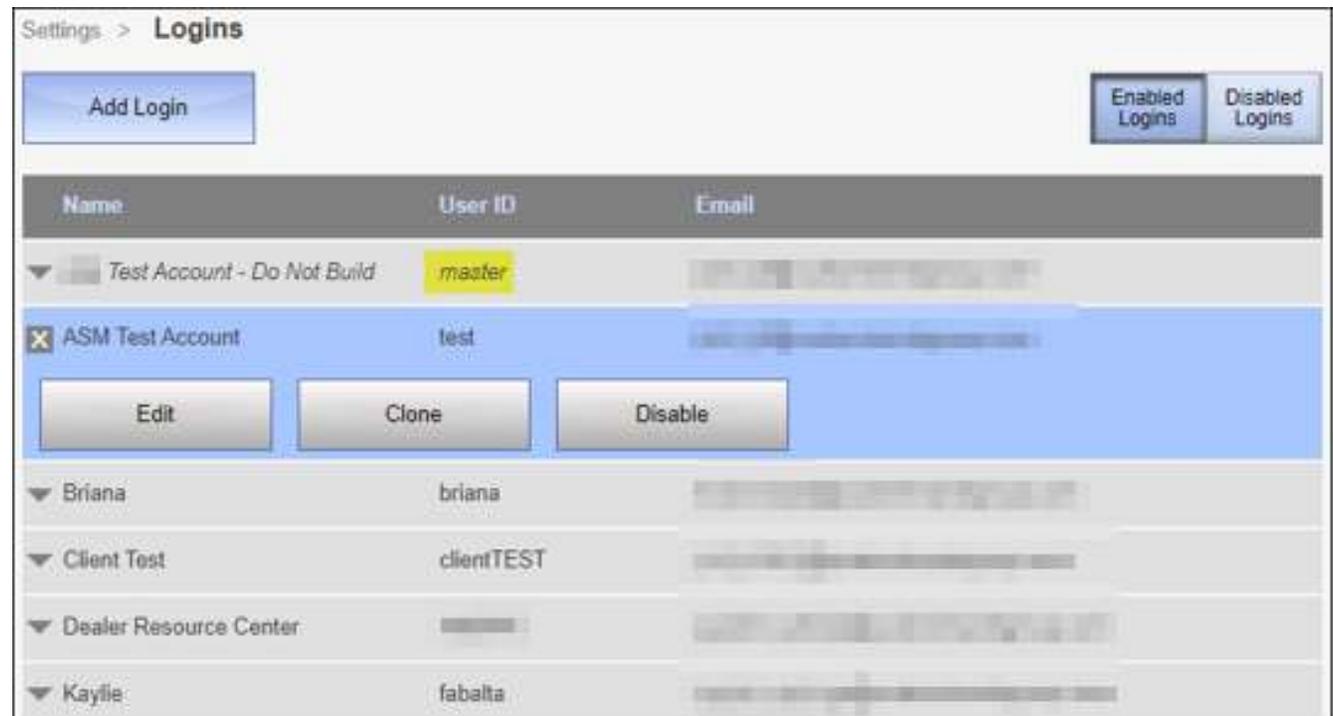
Expand each setting to view and modify.



Settings | Logins

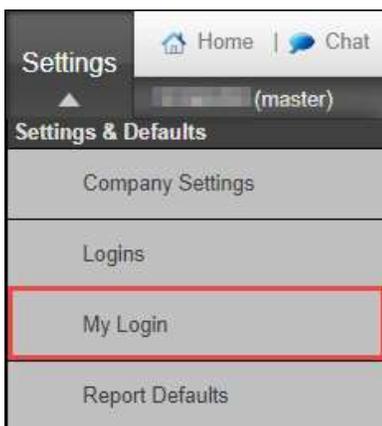
Select Logins

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.

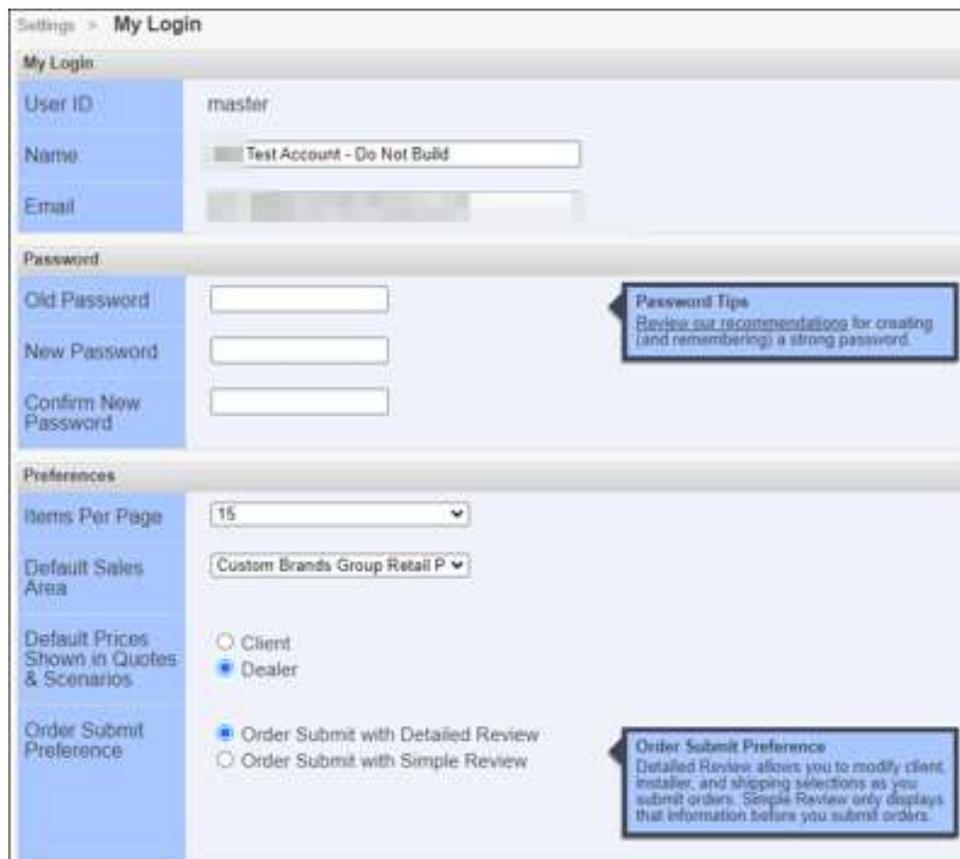


Settings | My Login

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 includes the following sections and fields:

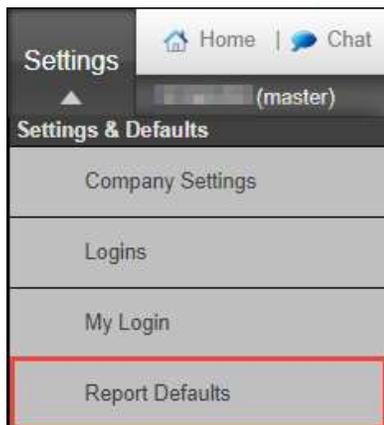
- My Login**
 - User ID: master
 - Name: Test Account - Do Not Build
 - Email: [Redacted]
- Password**
 - Old Password: [Input field]
 - New Password: [Input field]
 - Confirm New Password: [Input field]
- Preferences**
 - Items Per Page: 15
 - Default Sales Area: Custom Brands Group Retail P
 - Default Prices Shown in Quotes & Scenarios: Client, Dealer
 - Order Submit Preference: Order Submit with Detailed Review, Order Submit with Simple Review

Two callout boxes provide additional information:

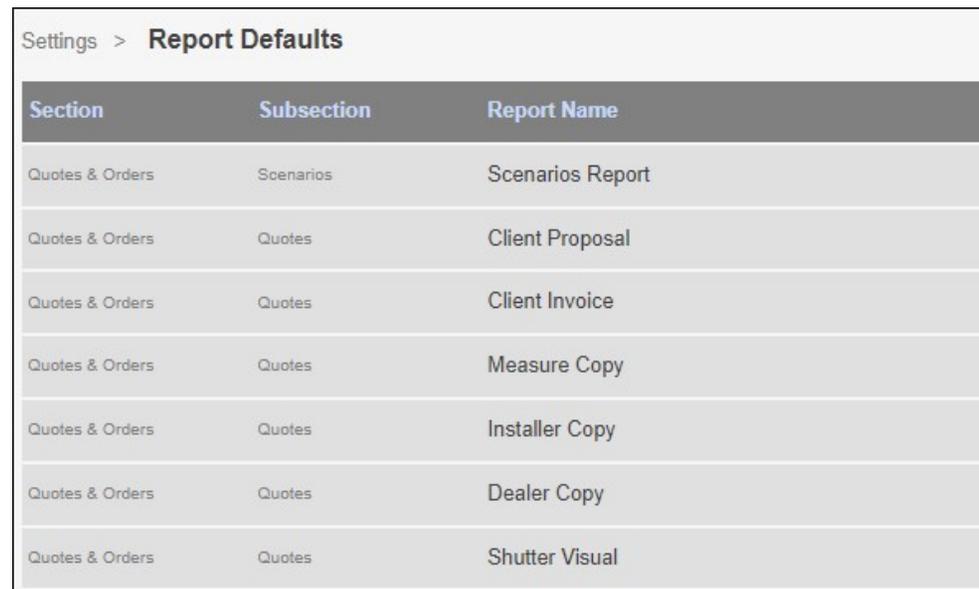
- Password Tips:** Review our recommendations for creating (and remembering) a strong password.
- Order Submit Preference:** Detailed Review allows you to modify client, installer, and shipping selections as you submit orders. Simple Review only displays that information before you submit orders.

Settings | Report Defaults

Select Report Defaults



Select each report to view/modify default settings.



A screenshot of the 'Report Defaults' page in the application. 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