



Online Service Center

Setup & Sample User Guide

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OSC Default Definitions

e-PIC Menu Tree > Online Service Center > Defaults

OSC Defaults

Main Submit Summary Login Message OPP Convenience Fees

Company Title

Home (e.g. "http://www.picbusiness.com")

Discount Margin Setup

Margin Markup

Internet Discount Product 0

Info Contact

Accounting Contact

Logon Header

E-Mail Address

Allow Invoice Payments ☒

Show Commit Date ☒

Show Credit Limit and Available Credit ☒

Show Unapplied ☒

Allow General Comments and Special Instructions ☒

Forward Order Header Comments ☒

Price Comparison ☒

Allow Tablet View ☒

Display Rush Order Options ☒

Manage Customer Ship-To's ☒

Require Customer PO Not Required

Apply Canadian Rates ☒

Allow RGA Entry Yes

Allow Service Request ☒

Invoice Email Attachment ☒

Bypass Status 3 Hold ☐

Order Source Not Selected

Hide Copy on e-PIC Order ☐

OK

1. Company

Is an OSC default for the Company Name.

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore.

2. Company Title

Is an OSC default for the Company Title.

It is used in OSC for the confirmation of shipment email as the From: name.

3. Home

Is an OSC default for the website of the company.

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore.

4. Discount Margin Setup

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore.

5. Margin Markup

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore.

6. Internet Discount Product

If an Internet discount code number is placed in this field, the system will search in the Internet Discount Product database obtaining the maximum rate of customer and/or product, and obtain the total discount of the order.

7. Info Contact

In OSC it refers to the Email of Customer Service in the Internet Quote/Order History.

8. Accounting Contact

Account Balance Online Payment Confirmation is shown as the email of Accounting.

9. Logon Header

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore.

10. Email Address

Text field only and is not used anywhere in OSC besides the default Tab. Please ignore. Visible emails on the OSC are pulled from the Site Code on the order and the Company Defaults.

11. Allow Invoice Payments

Only used with Online Payment Processing. This allows the Dealer to make credit card payments from the OSC.

12. Show Commit Date

If default = checked and the Utilities > Email > Order Confirmation > Body Text is blank, then the system displays a hard coded email message with the Required Date.

13. Show Credit Limit and Available Credit

Displays credit information on the Account Statement menu option in the page filter on the OSC.

14. Show Unapplied

Displays unapplied amounts on the Account Statement menu option in the page filter on the OSC.

15. Allow General Comments and Special Instructions

Allows the Dealer to enter order comments and special instructions.

16. Forward Order Header Comments

If an order is copied the comments will be brought over to the new order.

17. Price Comparison

Displays the Price Comparison menu tree option on the OSC.

18. Allow Tablet View

Allows the Dealer to switch to Tablet View from their PC.

19. Display Rush Order Options

Displays Rush Options defined in Utilities > System Defaults > Order > RUSH Options on the OSC order header.

20. Manage Customer Ship-To's

Allows the Dealer to add additional Ship To's to their account.

21. Require Customer PO

Select Not Required, Quote Entry, or Submit Order for Customer PO setting.

22. Apply Canadian Rate

Allows the Dealer to use multiple tax rates when preparing OSC quotes.

If selected, any tax rate delivery, tax rate installation, miscellaneous rate before the tax, and price adjustment will be calculated with the total. These rates are only saved in the system if the Canadian Rate option has been selected.

23. Allow RGA Entry

Gives the Dealer the ability to add and view an RA.

24. Allow Service Request

Allows the Dealer to add and view SR's.

25. Invoice Email Attachment

The fabricator has the option to email Invoices as an attachment or the Dealer will be notified to login to their OSC and view the Invoices.

See Utilities > System Defaults > Emails > Invoice Notification > Instructions at the top of the page

26. Bypass Status 3 Hold

OSC orders will bypass status 3 hold and go straight to credit check.

27. Order Source

Default Order Source Code when orders are submitted from the OSC.

28. Hide Copy on e-PIC Order

Hides the copy option on e-PIC entered orders but allows copy on OSC entered orders.

General Navigation and Feature Definitions

The general layout of e-PIC consists of three frames: the Toolbar, at the top of the screen, the Menu Tree on the left side of the screen, and the Workspace on the Right side. In the upper right corner of the e-PIC window you have buttons to control the Refresh of the screen, Options to change your colors and Logout. **Note:** Always use the “Logout” button when exiting the Online Service Center.

Index

"Index" pages (e.g. "Sales Order Search", "Account Search") contain many pieces of information designed to provide a powerful, yet easy-to-use interface. Working from the top of an index page downward:

At the top, you may Enter or Select criteria and click on "Find Match" to restrict which data will appear. Only records matching the selection criteria will be displayed. If you have more than one page of results, click the “Previous / Next” buttons between the Selection area at the top of the screen and the results page on the bottom to navigate through multiple pages.

By clicking on the column headers of the results page, you can change the sort from ascending to descending. Click a column header again to reverse the sort. Left click on a row to view or inquire on a record. Right click on a row (record) to view options for that record.

e-PIC One Enterprise

#1 Wholesale Blinds

Online Service Center

- Manage Clients
- Manage Quote/Order
- FAB Order Status
- Account Statement
- Dealer Admin

e-Store

- Change Password
- Change PIN
- My Bookmarks

Sales Order Search

Order: Client: Date: 03/19/2016 to Entered By: Select All

Customer PO: Sidemark:

Include Quotes ☒ Include Orders ☒ Include Canceled ☐

Find Match

First Prev Page 1 of 1 (10 Records) Next Last Left-Click to View, Right-Click for Options

Order	Entered	Client	Status	Customer PO	Sidemark
3107851	05/02/2016		FULL PACKED		
3107842	04/21/2016		IN PROCESS		
3107828	04/13/2016		FULL PACKED		
3107827	04/13/2016		FULL PACKED		
3107816	04/05/2016		FULL PACKED	TESTSUMMARYPACKINGLI	TESTPACKINGLIST
3107815	04/05/2016		CREDIT OK - HOLD		
3107810	03/30/2016		INVOICED		
3107803	03/28/2016		IN PROCESS		
3107795	03/24/2016		IN PROCESS		
3107788	03/22/2016		PAID		

Add New Quote

Data Entry

"Data Entry" pages are accessible in Add/Change/Inquire "Modes". Describing from the top downward:

At the top of the page is a Page Header. It indicates which section of the Dealer Center you are working in currently.

Below the title is a form with data-entry fields that fall into two categories.

Standard browser controls include:

- Text field, text area, checkbox, pull down menu, hover help, alert, confirm, buttons.

Non-standard controls include:

- Tabs, Date fields, Lookup buttons (e.g. "Client" on the order header), scrolling layers. A lookup button appears as a 3D button as in the "Client" Button.

At the bottom of the page you will find two buttons, "OK" and "Cancel or Void". When you want to move to the next screen in Edit Mode click the "OK" button. This saves the changes to the current page and loads the next page for viewing. Clicking the "Cancel or Void" button at any time, on any screen, cancels the edit of the current record and all changes are lost.

The screenshot shows the 'e-PIC One Enterprise' application. The left sidebar contains a menu for '#1 Wholesale Blinds' with options like 'Manage Clients', 'Manage Quote/Order', 'FAB Order Status', 'Account Statement', 'Dealer Admin', and 'e-Store'. The main window is titled 'ADD Sales Order' and shows order details: Order 3930042, Date Wednesday May 18, 2016, and Customer #1 WHOLESALE BLINDS. A red arrow points to a 'Client' button, which is a 3D-style lookup button. Other fields visible include 'Sidemark', 'Customer PO', and 'Entered By #1 Wholesale Blinds LLC'. At the bottom right, there are 'Next >' and 'Void' buttons.

Quick Notes

Menu Tree: Refers to Menu Options on the Left Side of Screen.

The screenshot shows the 'Menu Tree' in the e-PIC One Enterprise application. The menu is titled '#1 WHOLESALE' and 'Online Service Center'. It lists various options: 'Manage Clients', 'Manage Quote/Order', 'FAB Order Status', 'Account Statement', 'Admin', 'Defaults', 'Logo', 'Payment Types', 'View Cost Factors', 'Client Discounts', 'Installation/Freight', 'Login IDs', 'Change Password', 'Change PIN', and 'My Bookmarks'. The 'Admin' section is expanded, showing sub-options like 'Defaults', 'Logo', 'Payment Types', 'View Cost Factors', 'Client Discounts', and 'Installation/Freight'.

Status Line At the top of screen – Shows you the mode (add/change/inquire) you are in for each transaction or master file record.

Left Click Used for selecting Menu options, Opening Folders and executing action buttons like “Customer”, “Add”, Pull Down Lists. Also used for quick navigation between fields and sorting columns of data.

Right Click Where applicable, Right Clicking will present an action choice list.

Example: Click on “Customers” and put your cursor over a customer.

Right Click to see a choice list of actions that can be performed.

Order	Entered	Client	Status	Customer PO	Tag / Sidemark
3005580	04/17/2012		QUOTE		AERGAE
3005559	04/16/2012			PARTS PULL LIST 2	
3005557	04/16/2012			PARTS PULL LIST 1	
3005433	03/29/2012			CZXCXZ	XCZX
3005421	03/28/2012			DEEEE	SHELLQ
3004623	03/24/2012			TESTCOD	
3004277	03/22/2012			12345	12345

Search Look Ups

This allows the user to limit the number of records (customers, vendors) or transactions (orders, purchase orders) are displayed on the screen. Use the fields in the Search Frame at the top of the workspace to identify your search criteria. Only records matching your defined criteria will be listed in the results area.

The image shows a 'Sales Order Search' form. It includes input fields for 'Order' (0), 'Client' (0), 'Date' (02/17/2012), and 'Entered By' (Select All). There are also fields for 'Customer PO' and 'SideMark'. Checkboxes for 'Include Quotes' (checked), 'Include Orders' (checked), and 'Include Canceled' (unchecked) are present. A large red 'FILTER' text is overlaid on the form. A red arrow points to the 'Find Match' button at the bottom right. Below the form is a table with columns: Order, Entered, Client, Status, Customer PO, and Tag / Sidemark. The table shows 'Page 1 of 2 (14 Records)' and navigation buttons like 'First', 'Prev', 'Next', 'Last', and 'Go To'.

Tabs

Top Row of an Open record in the workspace. Each tab contains specific information. The first tab is usually the Start Tab. Additional tabs, when present, allow you to record additional information, such as Ship to and Special Instructions.

The image shows an 'INQUIRE Sales Order' form. It displays 'Order 3005580', 'Date Tuesday April 17, 2012', 'Customer #1 WHOLESALE BLINDS', and 'Status QUOTE'. The 'Entered By' field shows '#1 WHOLESALE BLINDS'. There are tabs for 'Start', 'Ship-To', 'Install Location', and 'Email Notification'. A red arrow points to the 'Email Notification' tab. Below the tabs, there are fields for 'RUSH ORDER?' (Not Selected), 'Install' (checkbox), 'Tag / Sidemark' (AERGAE), 'Customer PO', and 'Client' (0).

Action Buttons

Buttons on the bottom of a screen like "Next", "OK", "Void", "Print", etc., represent Action Related functions. These functions are controlled by left clicking on the button.

Find Buttons

If you see a button, followed by a blank data entry field, then you can look up or search the File / Table by clicking on the button. Common examples include Customer, Vendor, and Stock Item.

Inquiry Buttons

If you see a Find button and the data entry field to the right is already filled in, then when you click on the button, you get an inquiry screen for that particular record. Example; Key in a client number in the customer field. Now click on the "Client" button. The client information pops up in another window.

ADD Sales Order

Order 3005581

Date Tuesday April 17, 2012 **Entered By** #1 WHOLESALE BLINDS

Customer #1 WHOLESALE BLINDS

Start **Ship-To** **Install Location** **Email Notification**

RUSH ORDER? ☒ Not Selected ☐ 3 Day Express ☐ Next Day

Install ☐

Tag / Sidemark

Customer PO

Client 96 SMITH, JOHN

Printing

e-PIC opens a new window and prints to the screen. To send the output to a printer, use the "Hard Copy" button at the bottom of the screen. e-PIC prints to Printers defined in your PC's Print Manager. Special Note: Dot Matrix printers are not supported and will not print your document correctly if chosen.

Balance 150.92

****BOXES MUST BE KEPT FOR FREIGHT CLAIMS** **FREIGHT CLAIMS MUST BE FILED WITHIN 10 DAYS OF RECEIPT****

Hard Copy **Close**

Copy & Paste

If you wish to copy and paste information in the system, you can do so using the "Ctrl C" for copy and the "Ctrl V" to paste. Use your cursor to highlight the information you wish to copy then place your cursor the field or area you wish to copy to and hit "Ctrl V". Since this is a Window Function, it is possible to copy and paste between other Window Applications.

Do not exit out of the system by using the "X" in the upper right corner to close your Browser Window. Use the "LOGOUT" button located in the upper Right hand corner of the e-PIC DRC Window.

Tablet View Refresh Options Logout

#1 WHOLESALE BLINDS **Sales Order Search**

Sample User Manual – Dealer Notes

Login Access

Go to your Fabricators Web page and click on the Dealer Access Login Button. Fill in your account number, Login ID and Password. This information was provided to you in an Email when your Fabricator activated your account. The Login ID and Password Emailed to you is the Master Login. **The Master Login ID has access to all areas and is used to set up additional logins with specific access rights. The number of logins allowed can be set up by the Fabricator's system administrator at Utilities>System Defaults>Company>Settings Tab>"Limit # of Dealer Logins To ____.**

Menu Tree Navigation

Open all the folders by clicking on them so the menu tree on the left side of your page looks like the following:

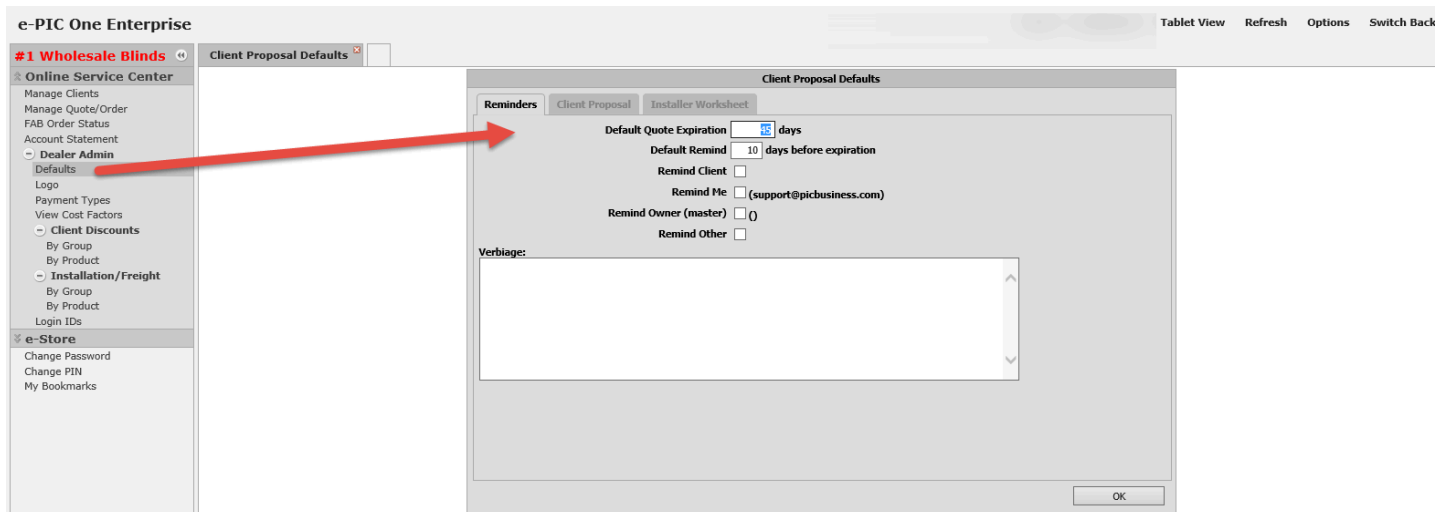
- **Users Name**
 - ❖ Manage Clients
 - ❖ Manage Quote / Order
 - ❖ Price Comparisons
 - ❖ FAB Order Status
 - ❖ Account Statement
- **Dealer Admin**
 - Defaults
 - Logo
 - View Fab Discounts
- **Client Discounts**
 - By Group
 - By Product
- ❖ Login ID's
- ❖ Change Password

Passwords Management

When you first log into the Dealer Center, the first thing you should do is change your password. Go to the option on the left menu tree and click on "**Change Password**". Complete the fields and click OK. Don't forget to record your new password in a safe place.

Setting up Your Defaults

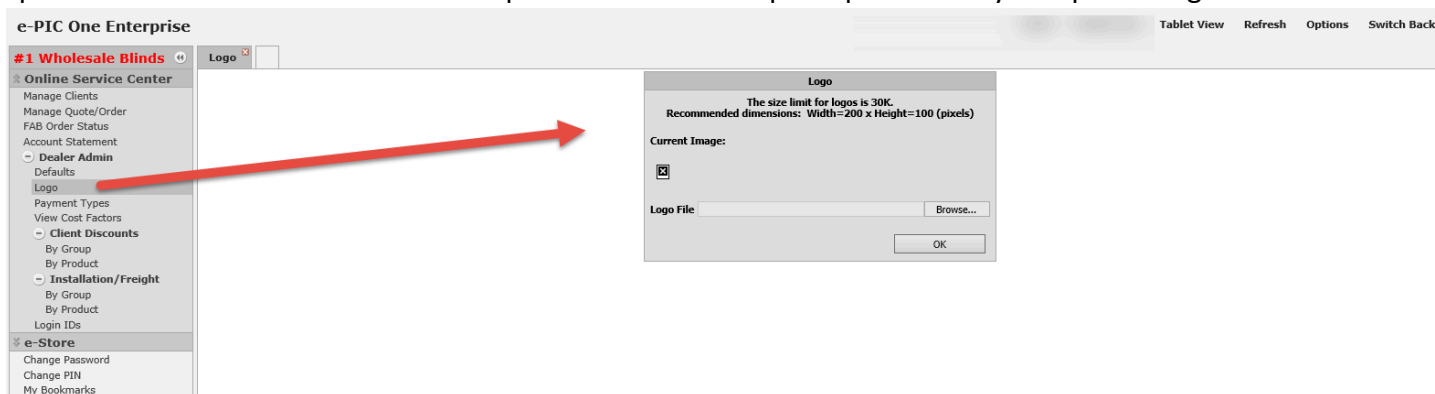
Click on the Defaults Tab under Dealer Admin. Next, under the Client Proposal Tab prepare your letter that will be printed on client proposals and select the Default Quote Expiration. You can also select whether or not to use the letter on Client Proposals. Set a default tax rate if desired.



Define a Company Logo to be used on Client Proposals

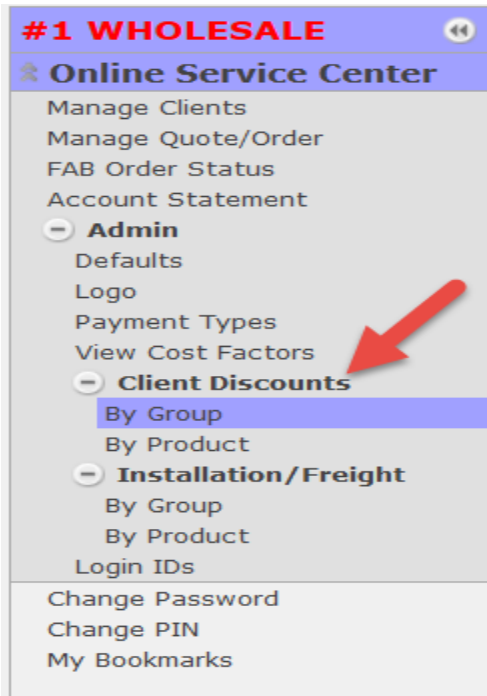
Create your Logo Image approximately 1.5" x 1.5" in size on your PC. The image can be a (.jpg) or (.gif) image. When you click on Logo, browse to where the Image file is located on your PC and select the Image. The file path of the image will be transferred to the field next to the Browse button. Click OK. If the file is too large you will get an error indicating this. To correct the error, reduce the size of the image and try again.

Defining a Company Logo is not required; however if you choose to use a logo you should review the printing options at the bottom of the Client Proposal to see which option pertains to your specific logo.



Set up Discounts for Clients

You can predefine discounts by either the Product Group or by Individual Products. Click on either "By Group" or "By Product" to get a listing in the workspace. You key in a percentage and then indicate whether this percentage is a Margin, Discount or Markup. **Important Note:** If you specify a discount for an individual product (By Product) and also have a discount set up for that product under a Product Group, then the discount By Product will take precedence. Instructions on how to set up discounts is provided by clicking on the **"Show Instructions"** button under the Header on either the By Group or By Product setup screens. These are additional instructions on how to calculate Discount, Margin and Markup.



Set up additional Login ID's for Users

Click on Login ID's on the left menu tree. You will see the master login defined and it will be the only login ID in the list. Click Add. Create additional login ID's by entering in the information for the user and selecting which areas they will be able to access by clicking on the box beside the feature. Do this for all users and record the ID's and Passwords for future reference. Only 5 users can be logged in at any one time but you can set up more than 5 actual logins.

Note; Set up additional users with a default view of "Client". Selecting "Dealer" for this setting will display Dealers Cost Vs. Client Selling Price. You can toggle between Client view and Dealer view by clicking on the (*) on the Order Summary Page.

The screenshot shows the 'e-PIC One Enterprise' interface. On the left, the 'Login IDs' option is highlighted with a red arrow. The main window displays the 'ADD Login ID' form. The form includes fields for User ID, Password, PIN, First Name, Last Name, and E-Mail. Below these fields is the 'ACCESS:' section with checkboxes for Clients, Show Costs, Dealer Admin, and Default View (set to Dealer). There are also checkboxes for Send to Fabricator, Account Balance, Define Payment Types (set to No), Dealer Bookings Report, Order Listing by Employee, Margin Report, Access Orders Entered By Others, FAB Order Status, Client Groups (set to No), and Room Locations (set to No). The form has OK and Cancel buttons at the bottom right.

****NOTE** the use of a pin number is no longer required for OSC users.**

Manage your Clients

Click on Manage Clients on the Left Menu Tree. You will be presented with a Client Search window at the top of the screen and a list of clients on the bottom portion of the screen. When you first log in you will not have any client records so this area will be blank. As you add clients the system will retain this client information and you will see a list of all clients entered.

To add a client, click on the “Add” button in the workspace. When the Add Client window is displayed, fill in all the information regarding the client starting at the top of the screen. Also notice you are working in the “Start” tab. The information recorded here is automatically filled in when preparing a client proposal so it is best to fill in as much information as possible. The second tab in this area is a “Notes” tab. Record any notes regarding this client in this area. Once a client has been entered you will be able to; Change, Copy, Delete or Add New Quote for Client by Right Clicking on the client record.

Adding a Quote / Order into the System

Click on the “Manage Quote/Order” on the left menu tree and then click “Add New Quote” at the bottom of the workspace on the right hand side. The Sales Order number is displayed in the Header of the screen. Complete the information under the Start and Ship-To Tabs. On the Start tab you can either type in the Client # if known or click on the Client button to get a list of clients to choose from. Clicking on a client from the client list automatically fills in the client on the start tab and shipping information on the Ship-To tab. The default Ship To information has been set up by your Fabricator and is typically your business address, i.e. where the Fabricator will ship your Order. You can change / edit this information at the point of entering a Quote or Order. The client information is filled in based upon your client setup information. When complete, click on the “Next” button in the lower right of your screen to proceed to Line Item Entry Screen.

On the Line Item screen notice the Order Information at the top Left and Right of the screen. Now select the Product Group, Product and Model. A list of unique order entry questions is presented based upon your Group, Product and Model selection. Answer the order entry questions and click Ok Item. You may experience a message pop up at the point of saving the line item (clicking OK). These messages are set up by your Fabricator and can be Informational, A warning or an Error. When presented with an Information or Warning message you will be able to save the line item. If the message is an “Error” you will have to correct it before the line item can be saved. What you need to do to correct the line is displayed in RED at the top of the screen when you click OK to the message. Once the line item is saved you are presented with the same product/model selection as the previous line. The same product is displayed so that if you only need to make minor changes, such as width and length for multiple line items, you don’t have to answer all the questions again and again. Enter additional line items in the same manner by choosing a different product or by editing the existing product and clicking “Add Item” for each line item. When complete, click on the “Summary” button next to the “Add” button.

The summary button displays all the line items you have entered with buttons at the bottom of the listing. The buttons have the following functions:

(*)	Switches the Display between Client Price and Dealer Cost
Office Copy	Used for printing an Internal Copy of the Quote / Order
Add Item	Takes you back to the Product screen to add additional Products
Submit to Fabricator	Starts the Order Send function to your Fabricator
Back to Start	Takes you back to the Order Header
Save	Save the Quote / Order

To change a line item, right click on the line and select Change or Delete. Selecting change brings up the line item with order entry questions as they were selected. After changing, click OK at the bottom and you are returned to the Summary screen. You can also inquire on a line item and check all the line item responses. To do this Left Click (**Inquire**) on the first line item. At the bottom of the screen you will see a “**NEXT**” button. Click this button to page through each line item on the order. When you reach the last line item, the button will change to “**PREVIOUS**” and go backwards through the line items.

Manage your Quotes and Orders

Click on Manage Quote/Orders on the left menu Tree. Select a quote or order from the list. You can narrow your results by filling in information in the Sales Order Search frame at the top. You can also click on the column headers to re-sort the columns.

When you find the quote/order you are looking for, you can either Left click on the order to view it or Right click to perform additional functions. These additional functions are:

Change	Select this option to make changes to this quote
Void Quote	Cancels the Quote
Submit to Fabricator	Starts the Order Send function to your Fabricator
View	Review the order with no edit capabilities
Prepare Client Proposal	Go the proposal preparation area to prepare a Client Proposal

You can also choose to “Add a New Quote” from this screen. This button, at the bottom of the Quote / Order list, takes you directly to the Add Quote / Order screen.

Note: Once you have submitted a quote to your Fabricator, i.e. placed an order, you can no longer make changes. To make a change you must contact your Fabricator.

Sales Order Search

Order0

Client0

Date02/17/2012to

Entered BySelect All

Customer PO

SideMark

Include Quotes

Include Orders

Include Canceled

Find Match

FirstPrevPage 1 of 2 (15 Records)NextLastGo ToLeft-Click to View, Right-Click for Options

Order	Entered	Client	Status	Customer PO	Tag / Sidemark
3005582	04/17/2012	SMTU JOUN	QUOTE	1234351	SIDEMARK
3005580	04/17/2012				AERGAE
3005559	04/16/2012			PARTS PULL LIST 2	
3005557	04/16/2012			PARTS PULL LIST 1	
3005433	03/29/2012			CZXCXZ	XCZX
3005421	03/28/2012			DEEEE	SHELLQ
3004623	03/24/2012			TESTCOD	

Price Comparison of Products

Click on Price Comparisons on the left menu tree. Key in a width and length and then select one or more products by clicking on the box opposing the product. When you have selected all the products you would like to compare, click on Submit. You can view additional information by clicking on the (*) button above the list of products or to see a list of colors in a price group by clicking on the price group next to the product.

Checking the Status of an Order

Click on Fab Order Status on the left menu tree. By keying in information at the top of the screen in the Search area you can reduce the number of records that are displayed. Orders listed are orders that may have been called in, faxed in or submitted via the Dealer System. Orders submitted via the dealer system will have both a Factory Order number and an Internet Order number if your Fabricator is still using our Text Based System. If the Fabricator is using our new e-PIC One system you will only see the Order Number. Clicking the column headings will re-sort the list results based upon that column. If you see a shipper ID, i.e. FEDEX or UPS in Blue under the Shipper Column, you can click on this link and you are taken directly to the respective shippers site and the tracking information is pre-filled in for you.

e-PIC One Enterprise

Tablet View Refresh Options Switch Back

#1 Wholesale Blinds **Order Status**

Online Service Center

- Manage Clients
- Manage Quote/Order
- FAB Order Status
- Account Statement
- Dealer Admin**
 - Defaults
 - Logo
 - Payment Types
 - View Cost Factors
 - Client Discounts**
 - By Group
 - By Product
 - Installation/Freight**
 - By Group
 - By Product
 - Login IDs
- e-Store**
 - Change Password
 - Change PIN
 - My Bookmarks

Order Status

Entered: 03/06/2016 to 05/31/2016

Entered By: Select All

Client Group: Not Selected

Client: 0

Internet Order: 0

Sidemark:

PO Reference:

Include Paid Orders: ☐

Include Voided Orders: ☐

Find Match

Email Customer Service: [e](#)

Note: Change sort order by clicking on headings.

Sales Order	Entered	Estimated Ship Date	Shipped	Status	Sidemark	Dealer P.O.	ShipVia
3107758	Mar 08/16	Mar 14/16		IN PROCESS	OSC2	OSC2	
3107759	Mar 10/16	Mar 10/16		IN PROCESS			
3107795	Mar 24/16	Nov 30/99		IN PROCESS			
3107803	Mar 28/16	Apr 04/16		IN PROCESS			
3107810	Mar 30/16	Apr 04/16	Mar 30/16	INVOICED			FGHD
3107815	Apr 05/16	Apr 13/16		CREDIT OK - HOLD			
3107816	Apr 05/16	Apr 14/16		FULL PACKED	TESTPACKINGLIST	TESTSUMMARYPACKINGLI	
3107827	Apr 13/16	Apr 14/16		FULL PACKED			
3107828	Apr 13/16	Apr 14/16		FULL PACKED			
3107842	Apr 21/16	May 02/16		IN PROCESS			
3107851	May 02/16	May 03/16		FULL PACKED			

Total 11

Print

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Review your Account Balance

Click on Account Statement on the left menu tree. You're A/R Totals are presented at the top left and all open invoices are listed. You can narrow the number of invoices displayed in the list by entering in specific criteria on the right side, thus shortening the list of displayed invoices. To view an Invoice, click on the Invoice number. To make payments on Invoice(s), click on Make Payment. Clicking on Make Payment allows you to select an Invoice for Payment and also indicate the amount you will be paying on that invoice. Credit card information is entered at the bottom of the Invoice list. The Make Payment option is controlled by the Fabricator. If this option is not shown it means the Fabricator does not accept credit card payments at this time. This option is also controlled by permissions defined at the Login Level. You must have permission to view Account Balance information.

e-PIC One Enterprise Tablet View Refresh Options Switch Back

#1 Wholesale Blinds Account Balance Status

Online Service Center

- Manage Clients
- Manage Quote/Order
- FAB Order Status
- Account Statement
- Dealer Admin**
 - Defaults
 - Logo
 - Payment Types
 - View Cost Factors
 - Client Discounts
 - By Group
 - By Product
 - Installation/Freight
 - By Group
 - By Product
- Login IDs

e-Store

- Change Password
- Change PIN
- My Bookmarks

Account Balance Status

A/R Totals \$	Open Orders \$ 0.00	Invoice 0
Current 52.50	Less Deposits \$ 0.00	Date to
31 Days 100.00	Order Balances \$ 0.00	Order 0
61 Days 0.00	Plus Invoices \$ 2,725.60	Sidemark
91 Days 0.00	Total Outstanding \$ 2,725.60	PO
121+days 2,573.10		Include Paid ☐

Email Accounting:

Invoice	Due Date	Order	Sidemark	PO	Total	Balance
2365146	04/11/2016	3107810			\$ 100.00	\$ 100.00
2365134	04/28/2016	3107714			\$ 52.50	\$ 52.50
2365116	01/06/2016	3107655		FG OSS TEST	\$ 1,866.85	\$ 1,866.85
2365114	01/06/2016	3107645		US OSS TEST 1	\$ 471.75	\$ 471.75
2365084	08/21/2014	3107406	TESAT12	4423	\$ 123.44	\$ 234.50

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Left-Click to View Invoice

Prepare a Professional Price Quotation

- Click on the menu Option – “Mange Quote/Order”
- Choose a quote and move your mouse over the quote and right click. Select the option “Prepare Quote for Client”.
- Fill in your customer information and any applicable taxes, installation, freight, or other charges. You can fill in a negative charge as well. Example: If you sent out a promotional discount coupon to a group of consumers and the value of the coupon was \$15, you would enter in the Coupon # on the “**Other Description**” and key in a negative amount of \$15 in the format: -15. You can also record a price adjustment. Remember that these two fields are separate, i.e. each one is listed separately and is calculated on the quote.
- The system can default to your selling price provided if you have set up “**Client Discounts**”. You can use the default, or change it if you have access. The default view for a Client Proposal only displays the Item and Product. To View / Change how the product is priced, click on the (*) next to the Summary Button. This will display the percentage markup, discount off list or margin. At this point you can change how the product is priced by changing the percentage and changing the indicator for Discount, Markup or Margin.
- The system will let you print a summary quote (**description and color – no sizes or options**) or it will let you print a detailed quote (**Line item and responses to OE Questions**).
- To prepare a quote in Summary format make sure that you have selected Summary on the lower left side under Item and click “**View Letter**” on the right hand side. To prepare a Detail quote, change the designator from Summary to Detail under Item and click “View Letter”
- When the letter is presented on your screen you have Output Options listed at the bottom left. You can print a copy to a printer, Email to addresses checked off or close without doing any of the above.

Submitting an Order

Submitting a Quote to your Fabricator to place an order can be accomplished two ways. First, you can choose a Quote from the Quote / Order Search Screen and Right Click to present a list of options, one of which is **“Submit to Fabricator”**. The second way to submit an Order is to click the **“Submit to Fabricator”** button on the Order Summary Screen. The ability to submit orders is a function defined by the user's Login ID. These options do not appear unless authorization has been granted.

Once you have clicked on **“Submit to Fabricator”** you are presented with the Order Submittal screen. The information at the top left of the screen is your information; Login ID, Login ID Email Address, Client PO and Sidemark. The Client PO is defaulted to the Order number and is carried over from the Order Header. To insert your specific PO number, blank the field and type your business PO in the field.

The information on the right hand section of the screen is the shipping information. If you wish to ship to your client, Check the **“Ship to Client”** and your clients address will be automatically filled in. The **“Ship To”** button provides a list of Ship To locations your Fabricator has set up for your Organization. The default Ship To is the ship to location your Fabricator has on file as your default ship to. If you have additional Ship To locations set up with your Fabricator, clicking on the Ship To button will present a list of these alternate addresses. When the pop up list of alternate ship to locations is presented, simply click on the ship to location desired and this address will replace the default. You can also manually fill in a separate Ship To address if neither of the above two options apply.

The last step is to confirm how you want the order to be shipped. This is done by selecting a Ship Via from the pull down list provided.

When complete, review the information on the Submit Screen and then Click **“OK”**. Your order will now be visible under the Order Status area enabling you to track its progress.