System Features

Dealers can access Order Status Information

- Click on menu option “Status”.
- You can sort by any column, like date, status, sidemark, by clicking on the column heading.

Dealers can access shipment-tracking information (UPS / FED EX).

- Click on menu option “Status”.
- Click on the Link to go to Fed Ex or UPS Site – under the Shipper Column.
- If the ship reference is available, it will bring up the tracking information.

Dealer can look-up their discount on products

- Click on menu option “Dealer Admin” and then click on “View FAB Discount”.

Dealers can compare their cost on selected products.

- Click on menu option “Price Comparison”.
- Enter the size of the blind.
- Select products to view and click on submit.
- If the product has multiple “Price Groups” you can see the colors for the group by clicking on the group number or letter.

Dealer can verify all valid product options by entering a quote.

- Click on menu option “Add New Quote”.
- Enter Sidemark, PO Number, and any general Order Comments.
- Click on the Next Button to enter the Line Item Information.
- Select the Group, Product, and Model, and then enter the line item specifications, then click on the OK Button.
- If the selected options are not in spec, the system will not accept the line item and it will display an error message.
- If ok, the system will load a new line item. You may want to add another item and only change a size or option.
- Once all items are in, click on the Summary Button.
- You can print the Dealer Copy – for your internal use.
- You can Save it – and edit it later.
- To change or delete a line item from the summary screen, right click on the line item.

Dealers can prepare a professional price quotation that can be presented to their customer (in less time than manually calculating the price and cost).

- Click on menu option “Add New Quote”
- The system will bring you to the order header – follow the above instructions.

- Click on the menu Option – “Prepare Client Proposal”
- Find the 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.
- The system can default your selling discount or cost mark-up. You can use the default, or change it, if you have access.
- The system will let you print a summary quote (description and color – no sizes or options) or it will let you print a detail quote.
- You can prepare your own cover letter to the quote by selecting the menu option “Dealer Admin” – “Client Quote Letter” (a.k.a.”Client Proposal Defaults”). Then enter your letter and click on OK to save.

Dealer can view their Account Balance and review invoices

- Click on menu option “Account Balance”
- To review an Invoice, click on the invoice number – and click on the Print Button to get a hard copy.
- Dealer can pay their account balance by credit card. Select the “**Make Online Payment Now”** Option under Account Balance.

Multiple Logins

- The Master Login can add secondary logins with limited access rights.
- Click on menu option “Dealer Admin” – “Login Ids”, and then click on the Add Button.
- Enter a User ID, Password, User Name, and click on the appropriate Access Rights for the user.

Pre-Define your Selling Discounts

- Click on menu option “Dealer Admin” – “Retail Discount & Margin”.
- Set Up by Group or Individual Products.
- Enter a percentage and select whether you want to use a Margin, Discount, or Mark Up.

You can submit a Quote to your Fabricator – System will send you an email confirmation

Dealers can reduce their time on-hold waiting for customer service.

Dealer information is available 24 hours a day, 7 Days a week