Navigating Premier ePic Ordering System

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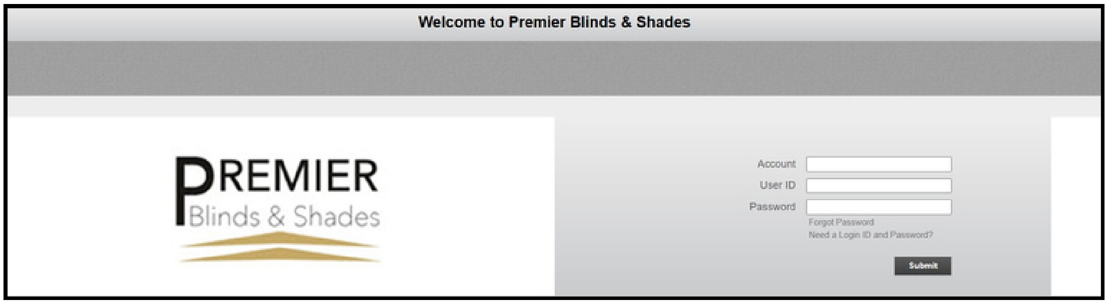
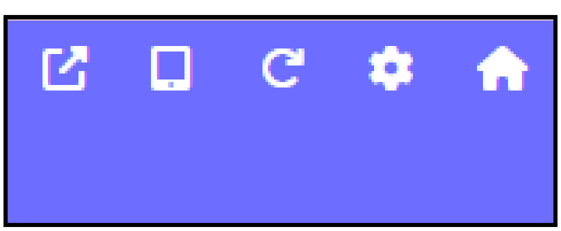
Premier Login



- Navigate to www.premierblindsshades.com > Click “***Dealer Login”***
- Or Bookmark - https://46184.picbusiness.com/
- Upon account activation you will receive an email with your login information. The Login D 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.
- Assigned password can be changed. 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.
- Enter Account Number, Username, and Password.
- Usernames and passwords are ***case sensitive***
- **Pop-ups must be enabled**.

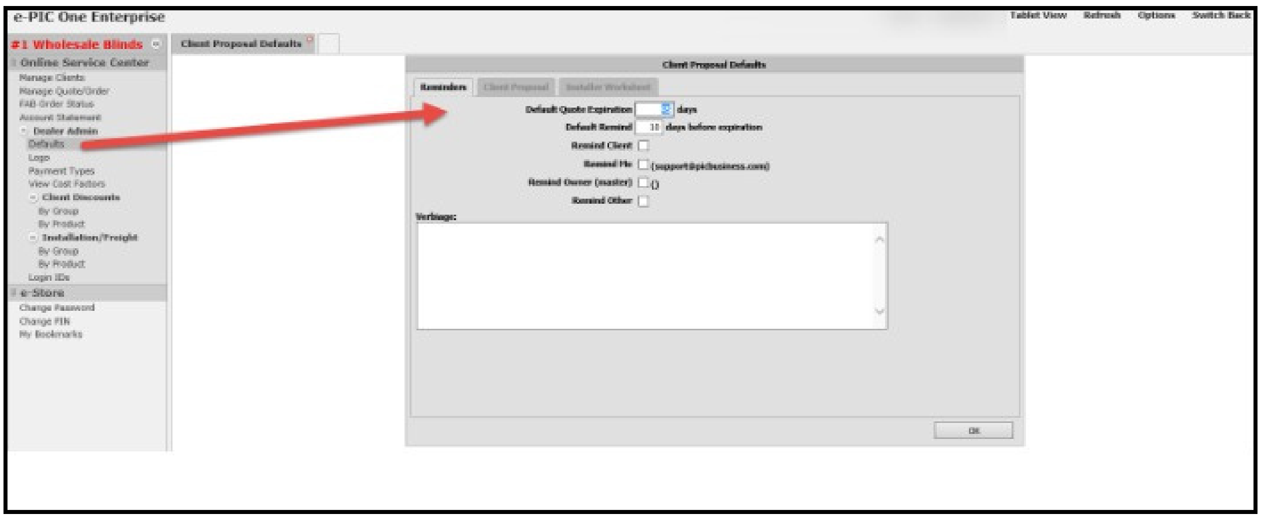
Settings TIPS

- Tired of clicking “I have Read & Agree to Terms of Service” at every login.
    - Click the Settings gear in upper right corner, scroll down to the Terms of Service message and Toggle On. It will no longer appear.
- Using an iPad or phone and can’t right click?
    - Click the Tablet view in the upper right corner...or
    - Click the Settings gear in upper right corner, scroll down to the Substitute “right-click” with “click” and Toggle On.



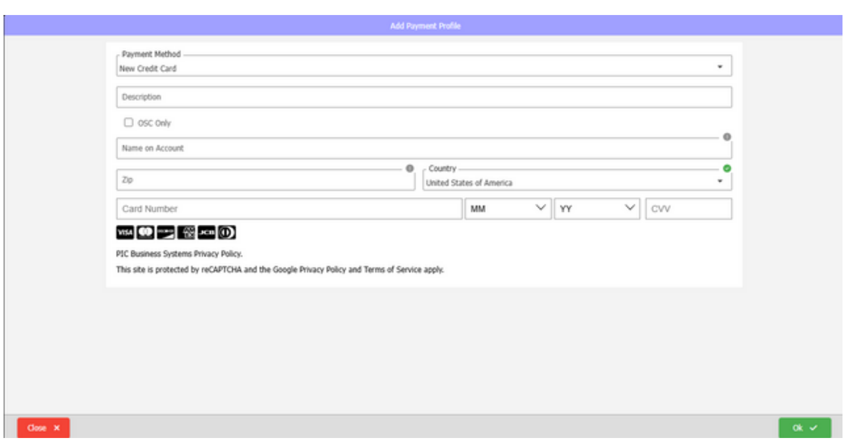
Setting up Defaults

- Navigate to Admin > Defaults
- 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.



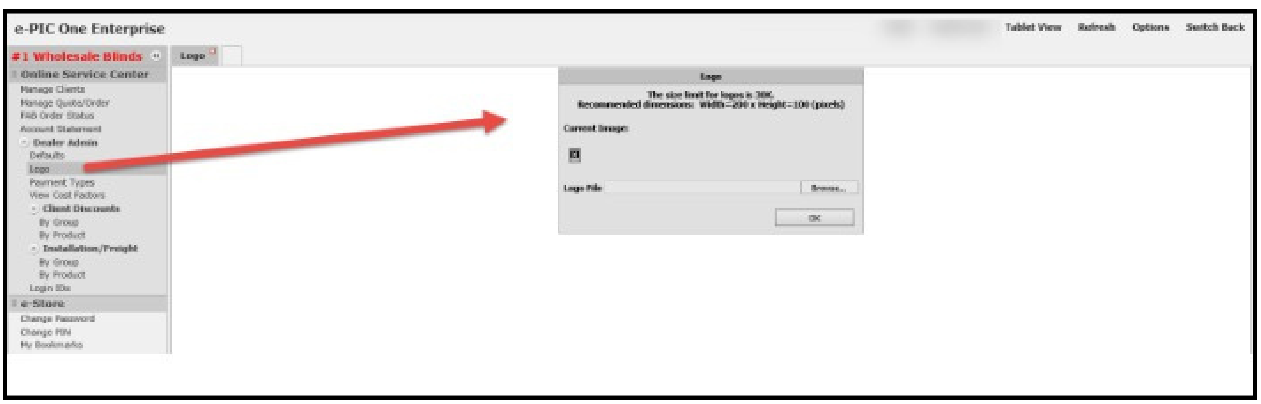
Payment Types

- Navigate to Admin > Payment Types > Add
- Complete Payment Profile information
- Click “**OK**” to save.
- **NOTE**: If you are unable to add a payment, check the permissions for your login in Admin > Login IDs



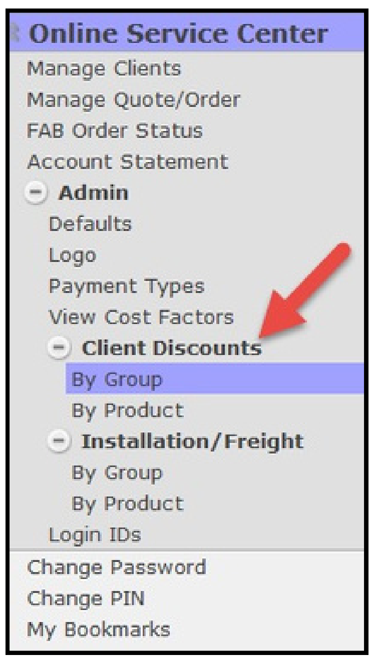
Define a Company Logo to be used on Client Proposals

- Navigate to Admin > Logo
- 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.



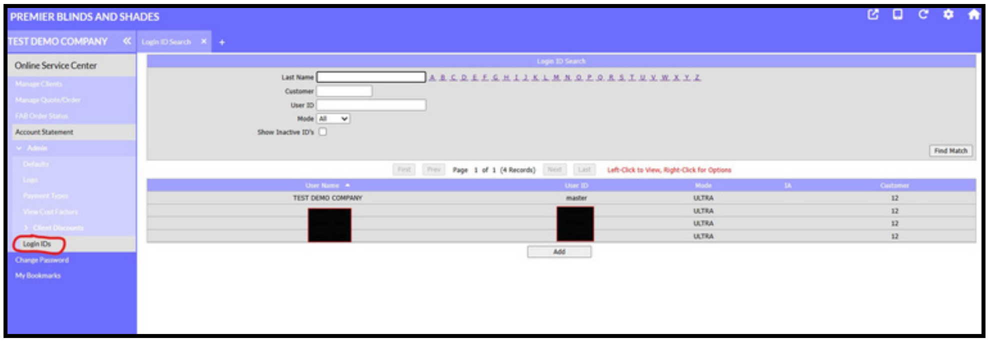
Set up Discounts for Clients

- Navigate Admin > Client Discounts
- 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.



Creating Sub-Account Users

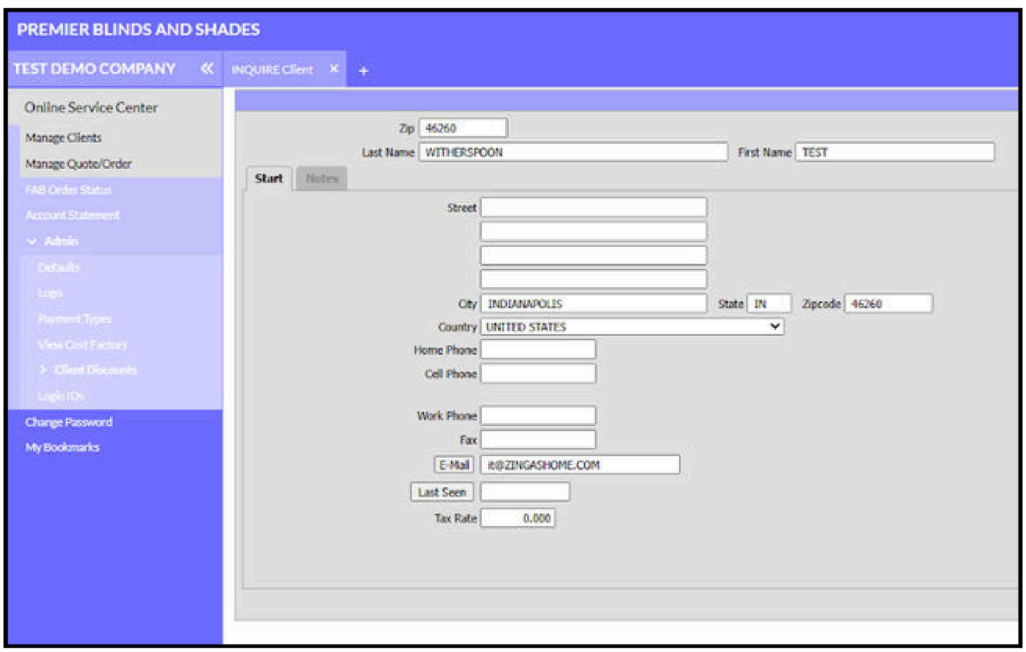
- Navigate to Admin > Login IDs > Add



- Complete login details
  - **User ID** - this will be their username (case sensitive)
  - **Password** - they can change the password
  - **First Name/Last Name/Email**
  - **Access**:
    - **Deactivate Login ID** - only click when you need to deactivate a login
    - **Clients**: check if you want user to have access to your Clients
    - **Show Costs**: Check if you want user to see costs
    - **Dealer Admin**: Only check if you want user to make changes to your account (Payments, Users, etc)
    - **Submit to Fabricator**: Check if the user can send orders to Premier
    - **Account Balance**
    - **Define Payment Types**: Can user add payment types? Yes/No
    - **Access Orders Entered by Others**
    - **FAB Order Status**: Can user see order status/shipping information
- Click "***OK***" to SAVE

Managing Clients/Customers

- 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.

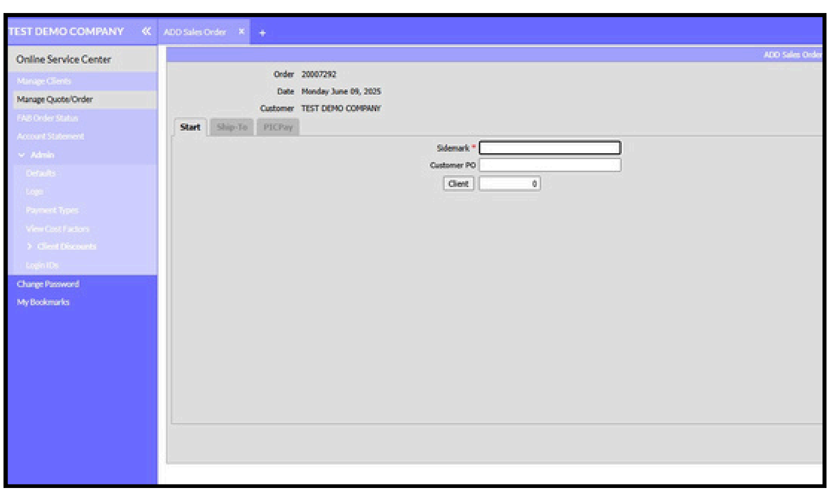


Managing Quotes/Orders

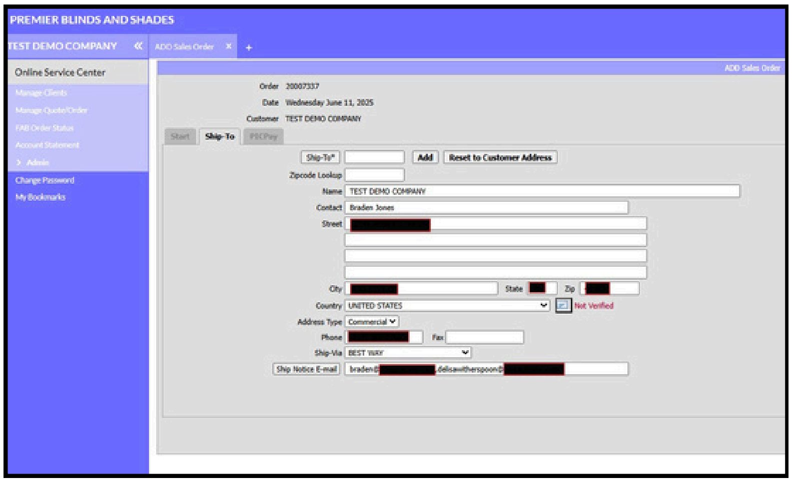
Adding a Quote/Order into the System

- Click on the "***Manage Quote/Order***" on the left menu tree.
- Select **Add New Quote -** The Sales Order number is displayed in the Header of the screen.

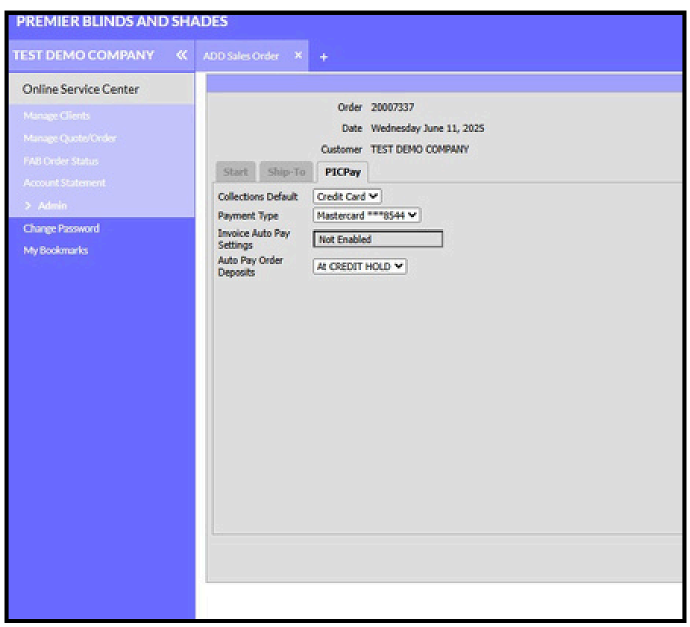
- Complete the information under the "Start" tab
  - **Sidemark**
  - **Customer PO** (Can be your PO# or, Customer Name, or Customer's PO#)
  - **Client**: If you have added Clients, either type in the Client # if known or click on the "***Client***" button to get a list of clients to choose from. Clicking on a client from the client list automatically fills in the client on the Start tab and shipping information on the Ship-To tab.



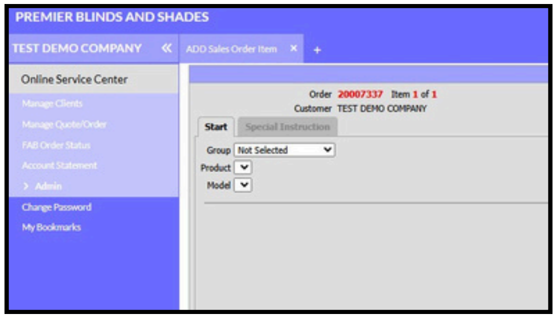
- Select the "***Ship To***" tab and complete Address Information. The default Ship-To information has been set up in your account. You can change / edit this information at the point of entering a Quote or Order. Any default emails on file for your account will appear in Ship Notice E-Mail. You can add additional emails separated by a comma (,) with no spaces.



- Select the "***PICPay***" tab. If you have already saved a CC on file and you want payment to flow without taking any additional steps, Select Credit Card for Collections Default. Select your saved card under Payment Type. Select "***At CREDIT HOLD***" under Auto Pay Order Deposits.

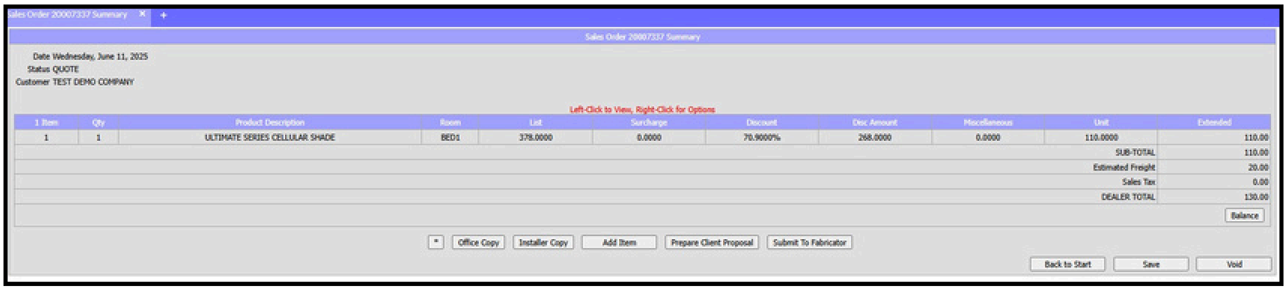


- When complete, click on the "***Next***" button in the lower right of your screen to proceed to Line Item Entry Screen.
- Confirm Yes/No "Did you verify the Ship-To-Information?

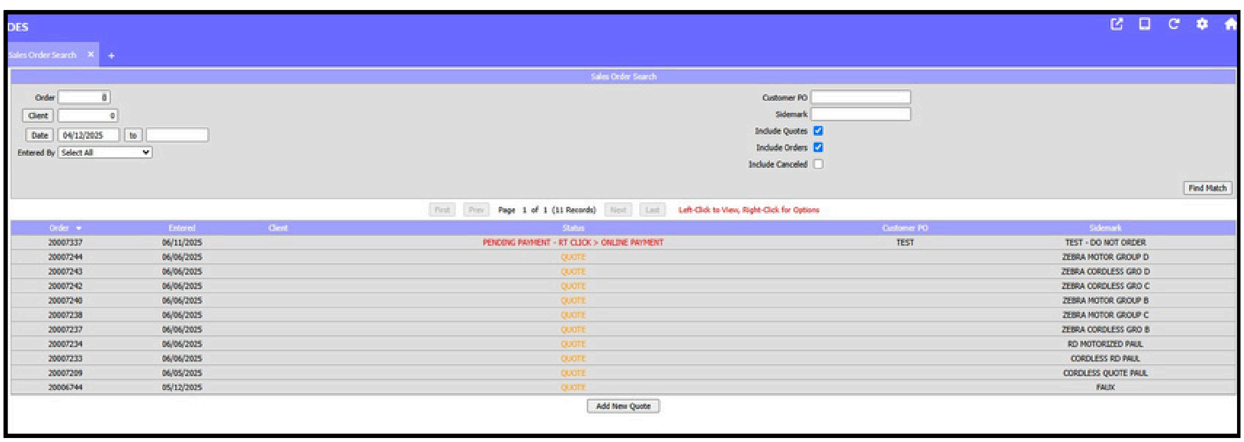


- Now select the Product Group, Product and Model. A list of unique order entry questions are presented based upon your Group, Product and Model selection. Answer the order entry questions and click "***Ok Item***". You may experience a message pop-up at the point of saving the line item (clicking "***OK"***). These messages 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.

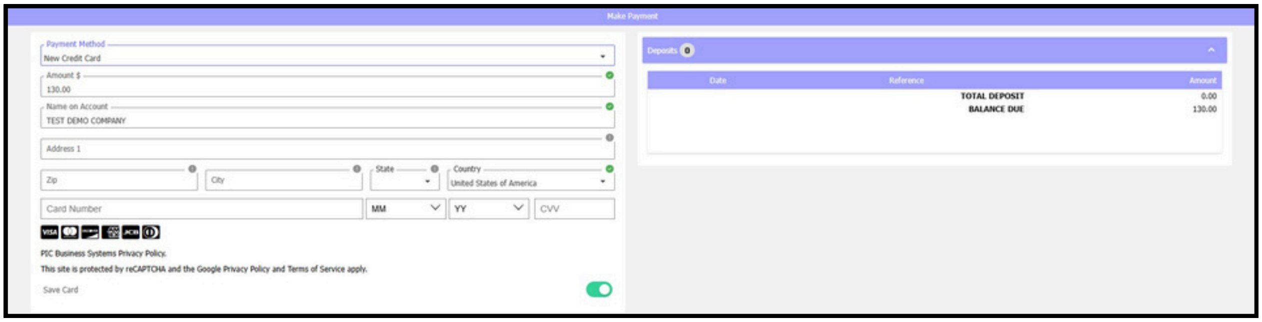
- Enter additional line items in the same manner by choosing a different product or by editing the existing product and clicking “**Add Item**” for each line item.
- When complete, click on the “***Summary***” button next to the “***Add***” button.



- After reviewing the line items, you can click “***Save***” to save as a Quote, Prepare Client Proposal to send to your customer or “***Submit To Fabricator***” to place the order.
  - Submit to Fabricator: If you did not complete payment information on the PicPay tab or you haven’t saved a credit card on file yet, your order will be on “Credit Hold”. ***The order will not be processed until payment is received.***
  - Back at the Manage Quote/Order page, you will see your order is “**PENDING PAYMENT - RT CLICK >ONLINE PAYMENT**”



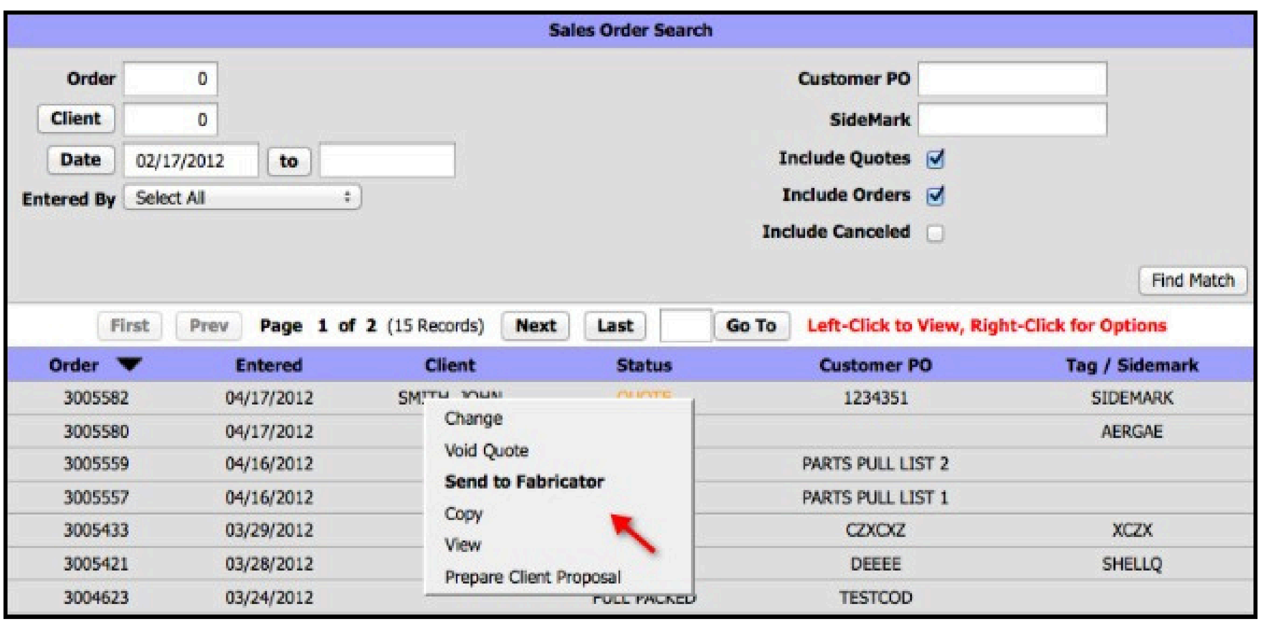
- Right click on the Order. Select “***Make Payment***”
- Complete Payment Information. Toggle On “Save Card” to save the card for future orders.



- When complete > click "***Process Deposit***".
- Your order will now be "IN PROCESS" Status

Managing your Quotes and Orders

- Click on "***Manage Quote/Orders"*** in the Menu.
- Select a quote or order from the list. You can narrow your search 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 click on the order to view or right click to perform additional functions.
- Additional functions are:
    - **Inquire** - review the order with no edit capabilities
    - **Change** - select this option to make changes to the quote
    - **Void Quote** - cancels the quote
    - **Submit to Fabricator** - Starts the order send function to Premier
    - **Copy** - copies the quote View - review the order with no edit capabilities.
    - **Make Payment** - if order is in Pending Payment status, click to pay and move your order along for processing
    - **Prepare Client Proposal** - go to 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**: One you have submitted a quote to Premier, i.e. placed an order, you can no longer make changes. To make changes you must contact Premier.



Sales Order Search

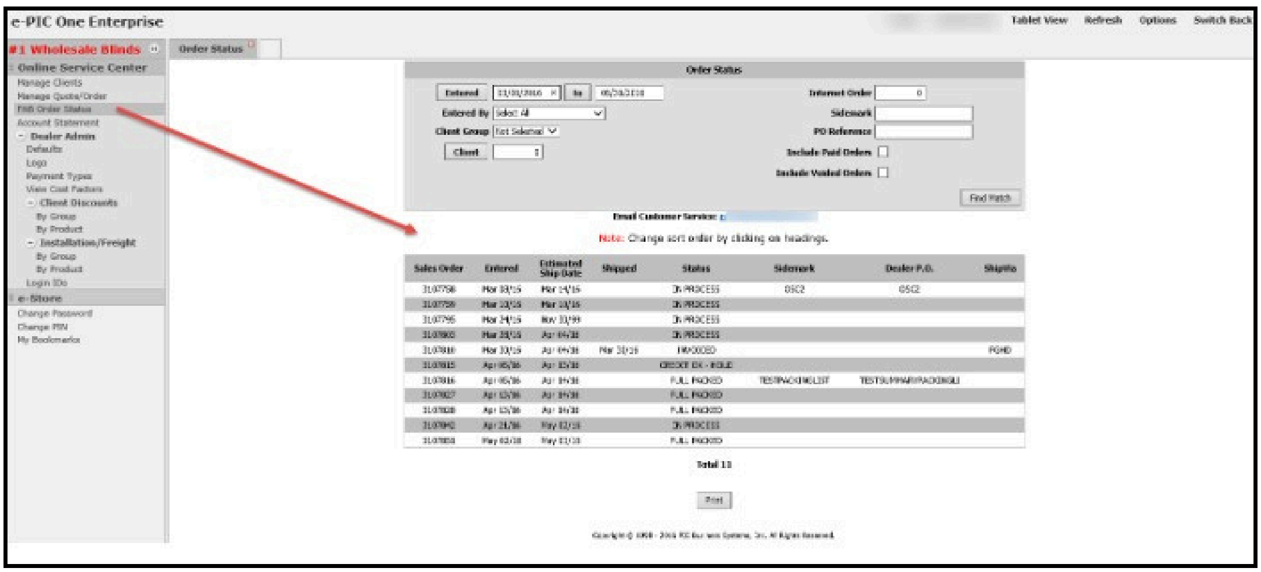
Sales Orders & Quotes can be searched by one or multiple criteria. After entering your criteria, click “***Find Match***”.

Search Criteria:

- **Order Number**
- **Client**: Either enter the Client # or click Client to open a list to choose from
- **Date**: There will be a preset date. To expand your search, clear the date or add custom dates.
- **Entered By**: Default is Select All or Select Sub-Account Users drop down list.
- **Customer PO**
- **Sidemark**
- Checkboxes: **Include Quotes, Include Orders** & **Include Canceled**

Order Tracking/FAB Order Status

- Navigate to 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.
- 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.



Submitting Payment to Premier

- In the ManageQuote/Ordermenu, right click on the Order you wish to pay to proceed.
- Select "***Make Payment***"
- Complete Payment Information
- If you wish to Save Card information, Toggle *Save Card* on.
- Select *"**Process Deposit"***
- Order Status will change to **IN PROCESS**