



Navigating Premier ePic Ordering System

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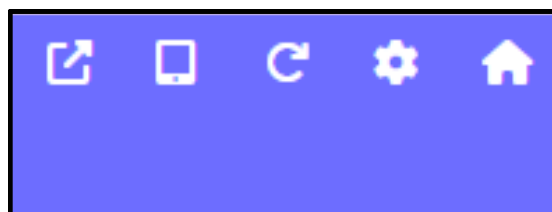
Premier Login

A screenshot of the Premier Blinds & Shades login page. At the top, a grey banner reads "Welcome to Premier Blinds & Shades". Below this, the Premier Blinds & Shades logo is on the left. On the right, there is a login form with three input fields labeled "Account", "User ID", and "Password". Below these fields are links for "Forgot Password" and "Need a Login ID and Password?". A "Submit" button is at the bottom right of the form.

- 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 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.
- 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

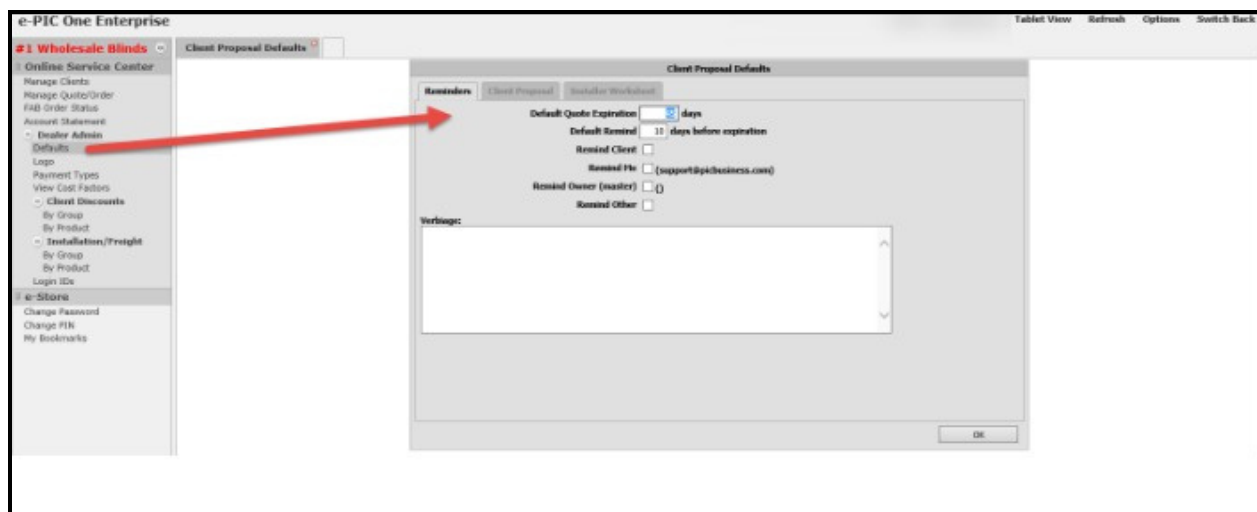
- Tired of clicking "I have Read & Agree to Terms of Service" at every login.
 - Click the Settings gear in upper right corner, scroll down to the Terms of Service message and Toggle On. It will no longer appear.
- Using an iPad or phone and can't right click?
 - Click the Tablet view in the upper right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



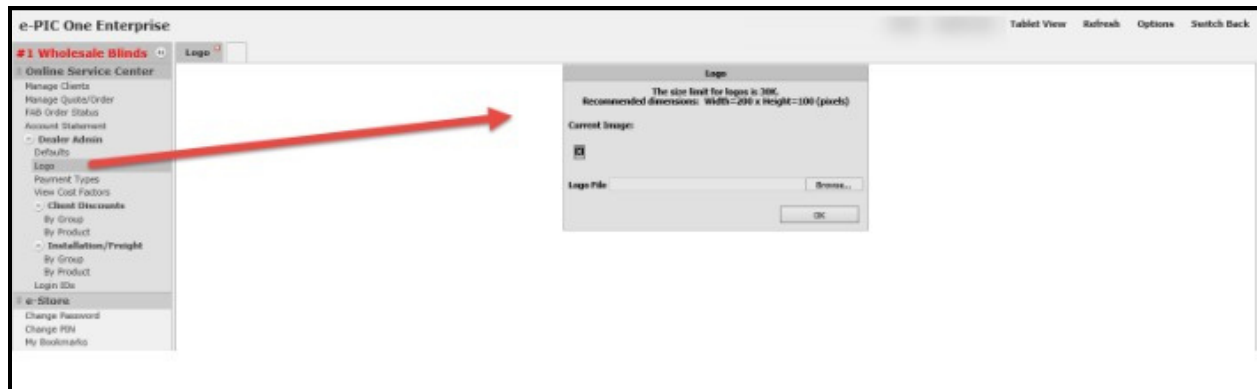
Payment Types

- 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

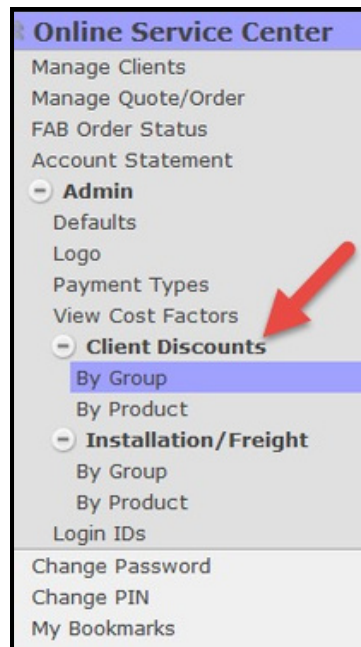
- Navigate to Admin > Logo
- Create your Logo Image approximately 1.5" x 1.5" in size on your PC. The image can be a (.jpg) or (.gif) image. When you click on Logo, browse to where the Image file is located on your PC and select the Image. The file path of the image will be transferred to the field next 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

User Name	Role	Access	Balance
TEST DEMO COMPANY	Master	ULTRA	12
		ULTRA	12
		ULTRA	12
		ULTRA	12

- 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

User ID:
 Password:
 First Name: Last Name:
 E-Mail:

ACCESS:
 Deactivate Login ID: ☐
 Clients: ☐
 Show Costs: ☐
 Dealer Admin: ☐
 Default View:
 Submit To Fabricator: ☐
 Account Balance: ☐
 Define Payment Types:
 Access Orders Entered By Others: ☐
 FAB Order Status: ☐



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.

The screenshot shows the "PREMIER BLINDS AND SHADES" web application. On the left is a blue sidebar menu with options like "Online Service Center", "Manage Clients", "Manage Quote/Order", "FAB Order Status", "Account Statement", "Admin", "Defaults", "Logo", "Payment Types", "View Cost Factors", "Client Discounts", "Login IDs", "Change Password", and "My Bookmarks". The main area has a header with "TEST DEMO COMPANY" and "INQUIRE Client". Below this is a "Start" tab (selected) and a "Notes" tab. The "Start" tab contains a form for adding a new client. The form fields include: Zip (46260), Last Name (WITHERSPOON), First Name (TEST), Street (three empty lines), City (INDIANAPOLIS), State (IN), Zipcode (46260), Country (UNITED STATES), Home Phone, Cell Phone, Work Phone, Fax, E-Mail (it@ZINGASHOME.COM), Last Seen, and Tax Rate (0.000).



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.

PREMIER BLINDS AND SHADES

TEST DEMO COMPANY

Online Service Center

Manage Clients

Manage Quote/Order

FAI Order Status

Account Statement

Admin

Change Password

My Bookmarks

Sales Order Search

Order:

Client:

Date: 04/25/2024 to

Entered By: Select All

Customer PO:

Sidemark:

Include Quotes: ☒

Include Orders: ☒

Include Canceled: ☐

Find Match

Page 1 of 1 (3 Records)

Order	Entered	Client	Status	Customer PO	Sidemark
20001149	06/06/2024		PENDING PAYMENT - RT CLICK > ONLINE PAYMENT	TEST2	TEST - DON'T ORDER
20001148	06/05/2024		QUOTE	TEST1	TEST - DON'T ORDER
20001147	06/05/2024		PENDING PAYMENT - RT CLICK > ONLINE PAYMENT	TEST	TEST - DON'T ORDER

Add New Quote

- 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.

TEST DEMO COMPANY

ADD Sales Order

Online Service Center

Manage Clients

Manage Quote/Order

FAI Order Status

Account Statement

Admin

Change Password

My Bookmarks

Order: 20007292

Date: Monday June 09, 2025

Customer: TEST DEMO COMPANY

Start

Ship-To

PIC Pay

Sidemark:

Customer PO:

Client:



- 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.

The screenshot shows the 'Ship To' tab selected in the 'ADD Sales Order' window. The form contains the following fields and values:

- Order: 20007337
- Date: Wednesday June 11, 2025
- Customer: TEST DEMO COMPANY
- Buttons: Start, Ship-To (selected), PICPay
- Ship-To*: [Empty field] Add | Reset to Customer Address
- Zipcode Lookup: [Empty field]
- Name: TEST DEMO COMPANY
- Contact: Braden Jones
- Street: [Empty field]
- City: [Empty field] State: [Empty field] Zip: [Empty field]
- Country: UNITED STATES (dropdown menu)
- Address Type: Commercial (dropdown menu)
- Phone: [Empty field] Fax: [Empty field]
- Ship Via: BEST BUY (dropdown menu)
- Ship Notice E-mail: braden@ [Empty field] | adrian@ [Empty field]

- 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.

The screenshot shows the 'PICPay' tab selected in the 'ADD Sales Order' window. The form contains the following fields and values:

- Order: 20007337
- Date: Wednesday June 11, 2025
- Customer: TEST DEMO COMPANY
- Buttons: Start, Ship-To, PICPay (selected)
- Collections Default: Credit Card (dropdown menu)
- Payment Type: Mastercard ***8544 (dropdown menu)
- Invoice Auto Pay Settings: Not Enabled (dropdown menu)
- Auto Pay Order Deposits: At CREDIT HOLD (dropdown menu)



- 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.

DES Order 20007237 Summary

Date Wednesday, June 11, 2025
Status QUOTE
Customer TEST DEMO COMPANY

Left-Click to View, Right-Click for Options

Item	Qty	Product Description	Room	Est	Unit Price	Discount	Disc Amount	Price/Revenue	Unit	Extended
1	1	ULTIMATE SERIES CELLULAR SHADE	RED1	378.0000	0.0000	75.9000%	286.0000	0.0000	110.0000	110.00
										110.00
										110.00
										20.00
										0.00
										130.00
										Balance

Buttons: Office Copy, Installer Copy, Add Item, Prepare Client Proposal, Submit To Fabricator, Back to Start, Save, Void

- 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**”

DES Sales Order Search

Order: [0] Client: [0] Date: 06/12/2025 to [] Entered By: Select All

Customer PO: [] Sidemark: [] Include Quotes: [x] Include Orders: [x] Include Canceled: [] Find Match

Page 1 of 1 (11 Records)

Order	Extended	Client	Status	Customer PO	Sidemark
20007337	06/11/2025		PENDING PAYMENT - RT CLICK > ONLINE PAYMENT	TEST	TEST - DO NOT ORDER
20007244	06/06/2025		QUOTE		ZERRA MOTOR GROUP D
20007243	06/06/2025		QUOTE		ZERRA CORDLESS GRO D
20007242	06/06/2025		QUOTE		ZERRA CORDLESS GRO C
20007240	06/06/2025		QUOTE		ZERRA MOTOR GROUP B
20007238	06/06/2025		QUOTE		ZERRA MOTOR GROUP C
20007237	06/06/2025		QUOTE		ZERRA CORDLESS GRO B
20007234	06/06/2025		QUOTE		RD MOTORIZED PAUL
20007233	06/06/2025		QUOTE		CORDLESS RD PAUL
20007099	06/06/2025		QUOTE		CORDLESS QUOTE PAUL
20006744	05/12/2025		QUOTE		PAUL

Add New Quote

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



Make Payment

Payment Method: **New Credit Card**

Amount: \$ 130.00

Name on Account: TEST DEMO COMPANY

Address 1:

Zip: City: State: Country: United States of America

Card Number: MM YY CVV

Payment icons: Visa, MasterCard, American Express, Discover, PayPal

PSC Business Systems Privacy Policy.
This site is protected by reCAPTCHA and the Google Privacy Policy and Terms of Service apply.

Save Card: ☒

Deposits:

Date	Reference	Amount
	TOTAL DEPOSIT	0.00
	BALANCE DUE	130.00

- 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:** Once 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.

Order

Client

Date to

Entered By

Customer PO

SideMark

Include Quotes ☒

Include Orders ☒

Include Canceled ☐

Find Match

First

Prev

Page 1 of 2 (15 Records)

Next

Last

Go To

Left-Click to View, Right-Click for Options

Order	Entered	Client	Status	Customer PO	Tag / Sidemark
3005582	04/17/2012	SMITH	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	

Change

Void Quote

Send to Fabricator

Copy

View

Prepare Client Proposal



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**

The screenshot shows a web-based search interface titled "Sales Order Search". It contains several input fields: "Order" (0), "Client" (0), "Date" (02/17/2012) with a "to" field, "Entered By" (Select All), "Customer PO", and "SideMark". There are three checkboxes: "Include Quotes" (checked), "Include Orders" (checked), and "Include Canceled" (unchecked). A large red "FILTER" button is in the center. A "Find Match" button is at the bottom right. Red arrows point to the "to" field, the "FILTER" button, and the "Find Match" button. Below the search area is a pagination bar with "First", "Prev", "Page 1 of 2 (14 Records)", "Next", "Last", and "Go To" buttons. A red text instruction says "Left-Click to View, Right-Click for Options". At the bottom is a table header with columns: "Order", "Entered", "Client", "Status", "Customer PO", and "Tag / Sidemark".



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.

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
- Default
- Login
- Payment Types
- View Cost Factors
- Client Discounts
- By Group
- By Product
- Installation/Freight
- By Group
- By Product
- Login ID

e-Store

- Change Password
- Change PIN
- My Bookmarks

Order Status

Entered: 11/01/2016 To: 05/20/2018

Entered By: Select All

Client Group: (Not Selected)

Client: 1

Internet Order: 0

Sidework:

PO Reference:

Include Paid Orders: ☐

Exclude Voided Orders: ☐

Find Hits

Final Customer Service:

Note: Change sort order by clicking on headings.

Sales Order	Entered	Estimated Ship Date	Shipped	Status	Sidework	Dealer P.O.	Ship Via
110758	Mar 14/15	Mar 14/15		In Process	0102	0502	
110758	Mar 14/15	Mar 14/15		In Process			
110756	Mar 24/15	Mar 24/15		In Process			
110860	Mar 24/15	Apr 04/16		In Process			
110310	Mar 13/15	Apr 04/16	Mar 10/15	Completed			PO#0
110315	Apr 05/16	Apr 05/16		ORDER OK - INQUE			
110316	Apr 05/16	Apr 05/16		FULL PACKED	TESTPACKINGLIST	TESTSHIPMENTPACKINGLI	
110307	Apr 05/16	Apr 05/16		FULL PACKED			
110308	Apr 05/16	Apr 05/16		FULL PACKED			
110390	Apr 21/16	May 02/16		In Process			
110304	May 02/16	May 02/16		FULL PACKED			

Total 13

Print

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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**

The screenshot shows the "Sales Order Search" window. At the top, there are search filters for Order, Client, Date, and Entered By. On the right, there are fields for Customer PO and Sidemark, and checkboxes for "Include Quotes", "Include Orders", and "Include Canceled". A "Find Match" button is at the bottom right. Below the filters is a table with columns: Order, Entered, Client, Status, Customer PO, and Sidemark. The table contains three rows of data. A right-click context menu is open over the first row, showing options: "Inquire", "Copy", "View", "Online Payment", and "Prepare Client Proposal".

Order	Entered	Client	Status	Customer PO	Sidemark
20001284	06/24/2024		PENDING PAYMENT - RT CLICK > ONLINE PAYMENT	TEST2	TEST - DONT ORDER
20001149	06/06/2024		PENDING PAYMENT - RT CLICK > ONLINE PAYMENT	TEST1	TEST - DONT ORDER
20001148	06/05/2024		QUOTE	TEST	TEST - DONT ORDER

The screenshot shows the "Make Payment" form. It has a "Payment Method" dropdown menu set to "New Credit Card". Below it is the "Amount \$" field with the value "327.08". There are two fields for card numbers, each containing "1234 1234 1234 1234". Below these are fields for "MM / YY" and "CVC". At the bottom, there is a "Save Card" checkbox which is currently checked.