



Quote/Order Guide



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Add Quote/Order

In the Manage Quote/Order tab of the left side menu, click ADD at the bottom of the screen to start a new quote/order.

Order	Entered	Client	Status	Client PO	Sidemark
492569	03/05/2022		INVOICED	TEST 021522	021522
492568	03/05/2022		PRINTED	TEST 030422	030422
490652	02/07/2022		QUOTE	FDSIFDJJSIOPDF	
489325	01/18/2022		QUOTE		TRGDFJK;M;
488914	01/11/2022		QUOTE		TEST2
488878	01/11/2022		QUOTE	TEST1234	

Note that order numbers are automatically generated and can be seen at the top of the Add Sales Order screen. To start an order, enter the information on the START* and SHIP-TO** tabs on the Add Sales Order screen. Then click NEXT.

Order: 492570
Date: Saturday March 05, 2022
Entered By: TEST CUSTOMERS
Customer: TEST CUSTOMERS

Start: Ship-To

Sidemark:
Client PO:
Client:

General Comments:

Next > Void

*When entering your SIDEMARK and CUSTOMER PO please note that shipped orders will be noted by the CUSTOMER PO.

**When entering ship to information, please note that shipping information has been preset by CACO, Inc. and is the shipping address used to set up your account. You can adjust this on an as needed basis on the SHIP-TO tab.

IMPORTANT: When entering special instructions for your order, be sure to enter them under the general comments section on the start screen. **DO NOT** enter special instructions by line item.

CACO, INC. CACO News Refresh Options Logout

TEST CUSTOMERS ADD Sales Order

Online Service Center

Manage Clients

Manage Quote/Order

FAB Order Status

Account Statement

Admin

Defaults

Logo

View FAB Discounts

Client Discounts

By Group

By Product

Login IDs

Change Password

My Bookmarks

Order 488782

Date Sunday January 09, 2022 Entered By TEST CUSTOMERS

Customer TEST CUSTOMERS

Start

Sidemark

Client PO

Client

General Comments

Enter order notes or special instructions here

Next > Void

CACO, INC. CACO News Refresh Options Logout

TEST CUSTOMERS ADD Sales Order Item

Online Service Center

Manage Clients

Manage Quote/Order

FAB Order Status

Account Statement

Admin

Defaults

Logo

View FAB Discounts

Client Discounts

By Group

By Product

Login IDs

Change Password

My Bookmarks

Order 488782 Item 1 of 1

Customer TEST CUSTOMERS

Start

Do not use special instruction tab on line items to send instructions or order notes.

Group Not Selected

Product

Model

Cancel

Select Group, Product, Model and Options for items.

The screenshot shows the 'ADD Sales Order Item' form for Order 492570, Item 1 of 1, for customer TEST CUSTOMERS. The 'Start' tab is active. The 'Group' dropdown is set to 'Not Selected', and its dropdown menu is open, showing options: (OSC) CORDLESS FAST FAUX, (OSC) FAUX WOOD BLINDS, (OSC) WOOD BLINDS, (OSC) CELLULAR SHADES, (OSC) WOVEN WOODS, (OSC) DUAL SHADES (ZEBRA/STRIPED), and (OSC) SHEER SHADES (HORIZONTAL VANE). The 'Product' and 'Model' fields are also set to 'Not Selected'.

The box on the right will detail any errors, warnings or recommendations based on your selections. Any errors must be corrected before continuing to the next item.

The screenshot shows the 'ADD Sales Order Item' form for Order 492572, Item 1 of 1, for customer TEST CUSTOMERS. The 'Start' tab is active. The 'Group' dropdown is set to '(OSC) CORDLESS FAST FAUX', 'Product' to 'CORDLESS FAST FAUX', and 'Model' to '171WE: CORDLESS FAST FAUX EXPRESS WHITE'. The 'Quantity' is 0. The 'Color' dropdown is 'Not Selected' and 'Color Number' is empty. The 'WIDTH' and 'LENGTH' dropdowns are both set to 0. The 'MOUNT' dropdown is 'INSIDE'. The 'HOLD DOWNS', 'BRACKET SPACERS', 'OPTIONAL WAND LENGTH', 'OPTIONAL 2.5" FLAT VALANCE', 'VALANCE RETURNS', and 'COMMON VALANCE' dropdowns are all set to 'NO'. The 'ROOM LOC' field is empty. An 'Errors' box on the right contains the following text: 'Blind size not available in Express Cordless Fast Faux. Available in 48", 54", 60", 66", 72" lengths only. WIDTH must be between 18 and 72. LENGTH must be between 25 and 73'. At the bottom right, there are 'OK Item' and 'Cancel' buttons.

Once all options for the line is completed select the OK Item button to continue to the next item. Once a line item is saved, you will be prompted to enter a new line item by selecting the group and product.

Once a line item is saved, you will be prompted to enter a new line item. Most of the previous selections will be copied on the new line item. Anytime you change the product or group, options will reset.

After all line items are entered, click the SUMMARY button to continue.

Please note any an order has an item that is over 104"will have an estimated shipping cost of \$100,000+. Please contact customer service to have a quoted amount for shipping and handling amount added to your order.

If you would like to repeat a previous line item or make changes/delete an item that has already been entered, right click on the line item you would like to repeat, change, or delete, and select that option from the list that appears.

The buttons on the bottom of the order summary have the following functions:

(*)	Switches the display from Client Price to Dealer Cost
Office Copy	Print an internal copy of the Quote/Order
Installer Copy	Print a copy of the Quote/Order with no price
Add Item	Takes you back to the Product screen to add additional Products
Send 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

Manage Your Quotes and Orders

Existing quotes and orders can be accessed in the Manage Quote/Order tab of the left side menu.

You can look up an existing order using the search function at the top of the screen. You can also scroll through pages of orders or organize orders by column headers.

Left clicking on an order row will allow you to view the order's details. Right clicking on an order will give you a list of actions to be done with the order:

CACO, INC. CACO News Refresh Options Logout

TEST CUSTOMERS Sales Order Search

Online Service Center
 Manage Clients
 Manage Quote/Order
 FAB Order Status
 Account Statement
 Admin
 Change Password
 My Bookmarks

Sales Order Search

Order: 0 Client PO:
 Client: 0 Sidemark:
 Date: 11/12/2021 to:
 Entered By: Select All
 Include Quotes:
 Include Orders:
 Include Canceled:
 Find Match

First Prev Page 1 of 1 (3 Records) Next Last Left-Click to View, Right-Click for Options

Order	Entered	Client	Status	Client PO	Sidemark
488914	01/11/2022		QI		TEST2
488878	01/11/2022		QI	4	MAIN
488782	01/11/2022		INTERN		

Add New Quote

- Inquire
- Change
- Void Quote
- Send to Fabricator**
- Copy
- View
- Prepare Client Proposal

Inquire	View the order/quote
Change	Make changes to the quote
Void Quote	Cancel the quote
Send to Fabricator	Starts the Order Send function to your fabricator
View	View the order/quote
Prepare Client Proposal	Go to the proposal preparation area to prepare a client proposal

Order Status:

Quote - Status of any quote or order not submitted to CACO

Internet Hold - Order submitted to CACO but no released into credit

Production Hold - Status used by CACO only for orders that have questions or have been requested by the customer to be put on hold

Credit Hold - Order released from Internet or Production hold but has not been released from credit yet. Please note any customers that are Pay in Advance must submit payment before orders can be released into production

Printed - Order is in production and no changes can be made.

Shipped - Order is Shipped

Invoiced - Order is complete and is invoiced.

Please note the current cut off time for orders is 3 PM EST. Any orders submitted after this time will not be reviewed until the following day. By the cut off time orders will be released from Internet hold and reviewed for credit. At that time customers with orders requiring payment will be notified. If you are aware payment is required you can submit an order deposit anytime after your order is submitted.

Submitting Orders

To submit an order to the fabricator, click the manage Quote/Order tab on the left side menu

For a quote that has already been created, right click on the quote on the Sales Order Search screen and select SEND TO FABRICATOR on the list of options that appears.

The screenshot shows the 'Sales Order Search' interface. On the left is a sidebar with 'TEST CUSTOMERS' and 'Online Service Center' options. The main area contains search filters for Order, Client, Date, and Entered By. A table lists 8 records. The second record (Order 492570) is highlighted, and a right-click context menu is open over it, with 'Send to Fabricator' selected. Other menu options include Inquire, Change, Void Quote, Copy, View, and Prepare Client Proposal.

Order	Entered	Client	Status	Client PO	Sidemark
492571	03/05/2022		CREDIT HOLD	TREGDNJK	
492570	03/05/2022		QUOTE	TREGDNJK	030422-2
492569	03/05/2022		INVOICED		021522
492568	03/05/2022		PRINTED		030422
490652	02/07/2022		QUOTE		
489325	01/18/2022		QUOTE		TRGDFJK;M;
488914	01/11/2022		QUOTE		TEST2
488878	01/11/2022		QUOTE		

Click SEND to proceed to final submit page.

The screenshot shows the 'Sales Order 492570 Summary' page. It displays the date (Saturday, March 5, 2022), status (QUOTE), and customer (TEST CUSTOMERS). A table lists the items, and a summary table shows the total costs. At the bottom, there are buttons for 'Office Copy', 'Installer Copy', 'Add Item', 'Prepare Client Proposal', 'Back to Search', 'SEND', and 'Cancel'. A red arrow points to the 'SEND' button.

1 Item	Qty	Product Description	List	Surcharge	Discount	Disc Amount	Miscellaneous	Unit	Extended
1	1	CORDLESS FAST FAUX	157.0000	0.0000		0.0000	0.0000	157.0000	157.00
SUB-TOTAL									157.00
Estimated Ship/Handling									15.00
State Tax									0.00
DEALER TOTAL									172.00

TEST CUSTOMERS Submit Information for Order 492570

Submit Information for Order 492570

Your Information:
 Entered By: TEST CUSTOMERS
 Dealer Email: alexiael_2@yahoo.com
 Client PO*: TEST 030422-2
 Sidemark: 030422-2

Ship-To Information: Ship-To Client
 Ship-To:
 Zipcode Lookup: 37604
 Name: TEST CUSTOMERS
 Contact:
 Street:

 City: JOHNSON CITY State: TN Zip: 37604
 Address Type: Commercial
 Phone:
 Fax:
 Ship-Via: UPS GROUND

3rd Party Account: Zip: Country: UNITED STATES

Thank you placing an order. Your order will be placed on internet hold and reviewed before entering credit hold. Please note if your account is pay in advance, over the credit limit or your account is past due, payment will be required before your order is released from credit and printed for production.

OK Cancel

On the following screen please verify Sidemark, PO and Shipping information before clicking OK. Please verify all information carefully, once your order is submitted, changes cannot be made.

You can also submit a quote by clicking SEND TO FABRICATOR on the order summary page of the order. This will change the screen to the one above to finish the submittal process .

TEST CUSTOMERS Sales Order 492570 Summary

Sales Order 492570 Summary

Date: Saturday, March 5, 2022
 Status: QUOTE
 Customer: TEST CUSTOMERS

Left-Click to View, Right-Click for Options

1 Item	Qty	Product Description	List	Surcharge	Discount	Disc Amount	Miscellaneous	Unit	Extended
1	1	CORDLESS FAST FAUX	157.0000	0.0000		0.0000	0.0000	157.0000	157.00
SUB-TOTAL									157.00
Estimated Ship/Handling									15.00
State Tax									0.00
DEALER TOTAL									172.00

Balance

* Office Copy Installer Copy Add Item Prepare Client Proposal Send to Fabricator Back to Start Save

Checking Status of an Order

Check the status of existing orders by clicking FAB Order Status on the left side menu.

By default, orders are listed by the date they are submitted. To search for a specific order, use the search function at the top of the screen. You can also re-sort the list by column headers.

If a shipping company is listed in the ShipVia column, clicking on the link will show you the shipping status of the order on the shipping company website. If you are not automatically redirected to the shipping company website when clicking the tracking link, copy and paste the tracking number manually to check the status.

TEST CUSTOMERS

Order Status

Order Status

Entered [] to []

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: customerservice@cacoinc.com

Note: Change sort order by clicking on headings.

Sales Order	Entered	Estimated Ship Date	Shipped	Status	Sidemark	Dealer P.O.	ShipVia
492568	Mar 05/22	Mar 10/22		PRINTED	030422	TEST 030422	
492569	Mar 05/22	Mar 10/22	Mar 05/22	SHIPPED	021522	TEST 021522	PICK UP

Total 2

Print

Order Status:

Printed - Order is in production and no changes can be made.

Shipped - Order is Shipped

Invoiced - Order is complete and is invoiced.