



DEALER RESOURCE CENTER TUTORIAL

Please review the General System Requirements and Navigation rules below before proceeding.

System Requirements

Internet Access is required; the faster, the better. It is not designed for dial-up. A business connection is recommended such as DSL, Cable or T1.

PC's running Microsoft Windows 2000, 2003, XP or Vista Operating system running Internet Explorer 6.0 or greater.

A shared or stand alone Laser Printer is required for document printing; dot matrix printers are not supported. The Page Set-up in your browser should have the Header and Footer blanked out. This will prevent the Web-Site Address from printing on the bottom of each report. Additionally, the Left, Right, Top and Bottom Margins should be set to (0.25).

The required browser is Microsoft Internet Explorer.

- Internet Explorer Version 6.0 or greater.
- Monitor Resolution set to 1024 x 768
- You **MUST** have cookies turned on.
- You **MUST** have Javascript turned on.
- Popup blockers (including the one built into XP SP2) will cause problems if not setup correctly.

Many popup blockers can be configured to permit pop ups from a particular site. Review your settings for handling pop ups on your Web Browser prior to logging in.

Passwords

Secure your password: don't tell it to anyone, don't write it down on a Post-It note. Insist that your users safeguard theirs.

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 ePIC DRC Window.

Getting Started

STEP 1

Go to www.unitedsupplyco.com 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 online account was activated. 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. A maximum of 5 logins can be set up and all 5 can access the DRC application simultaneously.**

Step 2

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
 - ❖ Add Quote / Order
 - ❖ Manage Quote / Order
 - ❖ Price Comparisons
 - ❖ FAB Order Status
 - ❖ Account Balance
- ✚ **Dealer Admin**
 - Defaults
 - Logo
 - View Cost Factors
- ✚ **Retail Discount & Margin**
 - By Group
 - By Product
 - ❖ Login ID's
 - ❖ Change Password

Step 3

Passwords – FOR YOUR SECURITY

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.

Step 4

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.

Step 5

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.

Step 6

Set up Discounts for Clients

You can pre-define 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.

Step 7

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 per account may be setup.

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.

Step 8

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 the 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.

Step 9

Adding a Quote / Order into the System

Click on the "Add Quote/Order" on the left menu tree. 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 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 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
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

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.

Step 10

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
Send 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, i.e. placed an order, you can no longer make changes. To make a change you must contact customer service at (800)334-1207 or customerserv@unitedsupplyco.com.

Step 11

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 apposing 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.

Step 12

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 ePIC 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. FEDX 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.

Step 13

Review your Account Balance

Click on Account Balance 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.

Step 14

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 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 detail 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.

Step 15

Submitting an Order

Submitting a Quote to United Supply Company as 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 **"Send to Fabricator"**. The second way to submit an Order is to click the **"Send"** button on the Order Summary Screen. The ability to submit orders is a function defined by the users Login ID. These options do not appear unless authorization has been granted.

Once you have clicked on "Send to Fabricator" or the "Send" button 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, simple 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.