User Manual

PIC BUSINESS SYSTEMS INC

pro design

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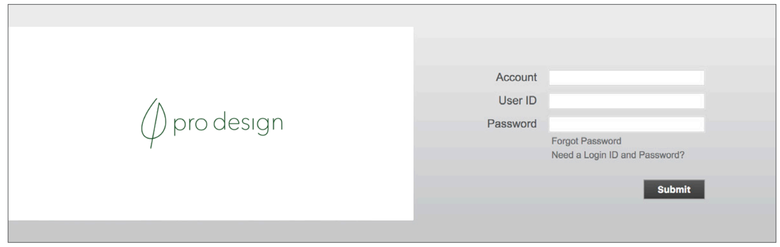
Account Set Up

User Login

To set up your PIC portal, go to **https://330422.picbusiness.com**.

Log in with the account activation information that was sent to you from Pro Design LLC via noreply@picbusiness.com.

Note that the account activation email includes login information for the master account holder. Additional logins can be set up for your portal with custom access settings if desired.

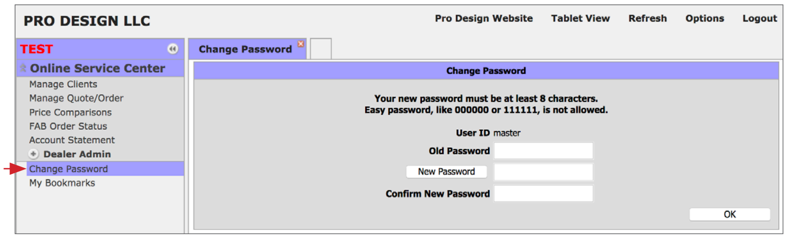


Portal Login Page

Change Password

Once you have logged in using your account activation information, you will receive access to the customer portal.

Finish your account set up by resetting your password. This can be done by clicking CHANGE PASSWORD on the left side menu in the customer portal.



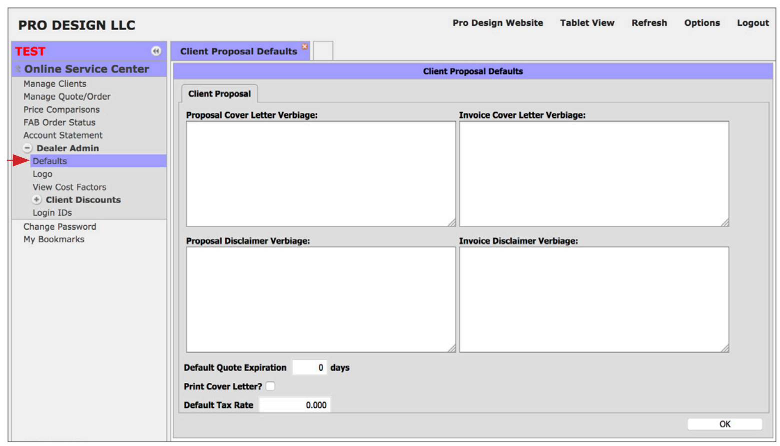
Change Password

Setting Defaults

Client Proposal Default

You can create default proposal and invoice letters by accessing the DEFAULTS tab under Dealer Admin on the left side menu of your portal.

You can also set a default quote expiration date and default tax rate in this section if desired.

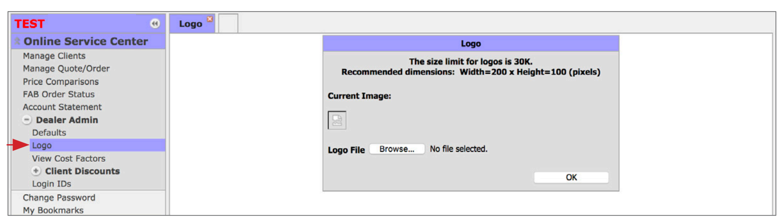


Client Proposal Defaults

Add Logo

You can add a logo to your default settings by accessing the LOGO tab under Dealer Admin on the left side menu of your portal.

Keep in mind that logo image files must be .JPG or .GIF that are approximately 1.5″ x 1.5″.



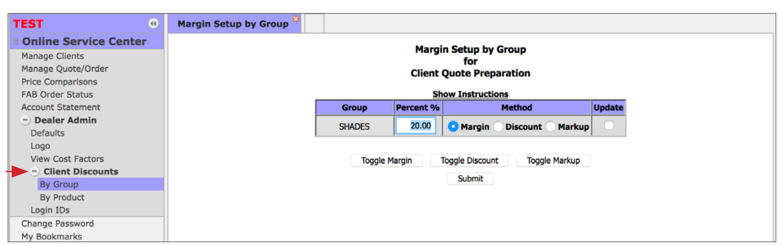
Add Logo

Set Client Discounts

You can predefine client discounts by product GROUP or individual PRODUCT. Key in the percentage you would like to set and indicate if the percentage is a MARGIN, DISCOUNT, or MARKUP.

Please note if you specify a discount for an individual product and also have a discount set up for that product under product group, the individual product discount will take precedence.

Click the "SHOW INSTRUCTIONS" button for additional information on calculating discount, margin, and markup.

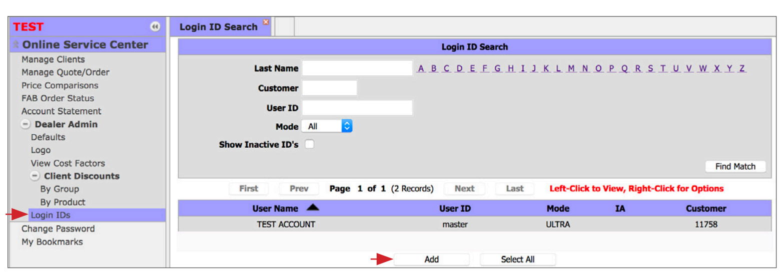


Set Client Discounts

Set Additional Users

You can set up additional user login IDs by accessing the LOGIN IDS tab under Dealer Admin.

To add an additional user, click ADD, enter the user information, and select the user settings you would like to include. There can be up to 5 users logged in at one time, but you can set up more than 5 logins.



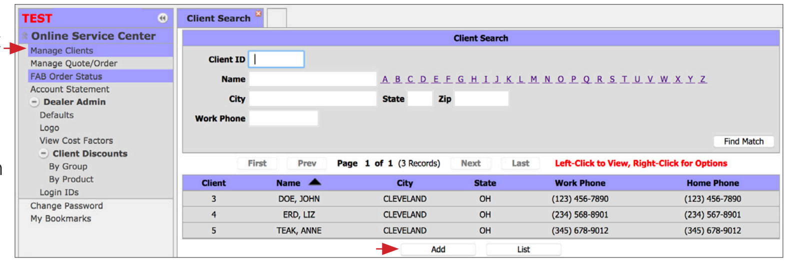
Set Additional Users

Manage Clients

In the Manage Clients tab of the left side menu, you can access all of your stored client information. You can search for clients using the search function at the top of the page.

You can add client information to your list by clicking ADD at the bottom of the screen. Customer information that is requested on the first tab of the add screen will be preloaded when filling in customer proposals, so include as much information as possible. You can also add customer notes under the second tab of the add screen.

To change, copy, delete, or add new quotes for clients after they have been added, right click on the client record.



Manage Clients

Adding a Quote / Order

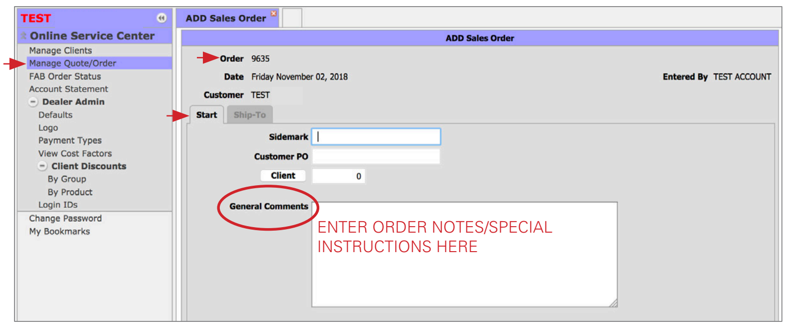
In the Manage Quote/Order tab of the left side menu, click ADD at the bottom of the screen to start a new order.

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.

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

***When entering ship to information, please note that shipping information has been preset by Pro Design 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.*

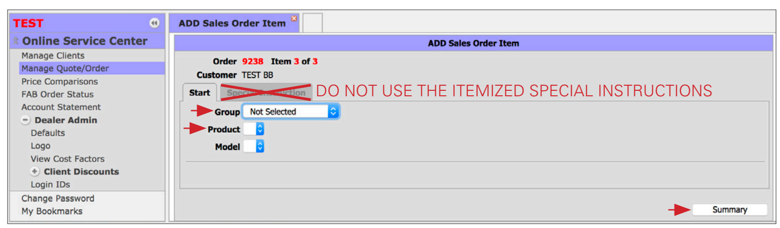
IMPORTANT: When entering special instructions for your order, be sure to enter them under the general comments section on the start screen. DO NOT enter special instructions by line item.



Manage Quote/Order

To populate the order form options, select the group and product you will be ordering. Answer the order entry questions that populate and click OK ITEM.

Depending on the product you are ordering, a WARNING or ERROR message may appear. Please note that WARNING messages are only informational. ERROR messages indicate there is something on your order that must be changed or that a required field is missing.

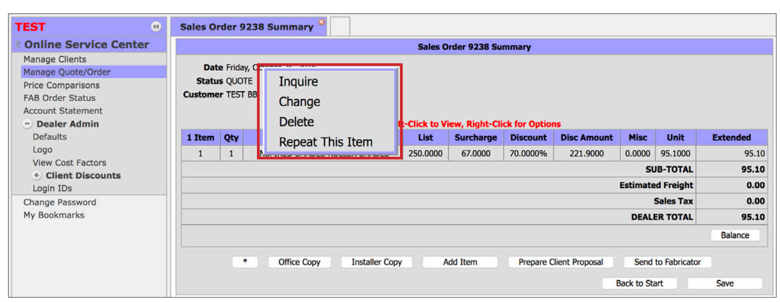


Manage Quote/Order

Once a line item is saved, you will be prompted to enter a new line item by selecting the group and product. If you would like to repeat a previous line item or make changes/delete an item that has already been entered, click SUMMARY at the bottom of the screen. Once in the order summary, 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



Order Summary Screen

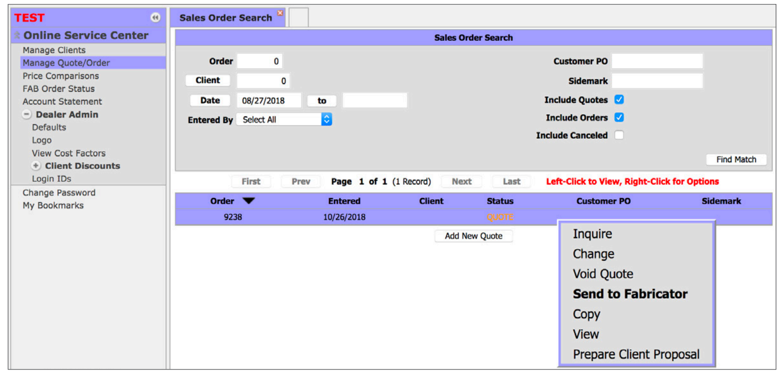
Manage Your Quotes and Orders

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:

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



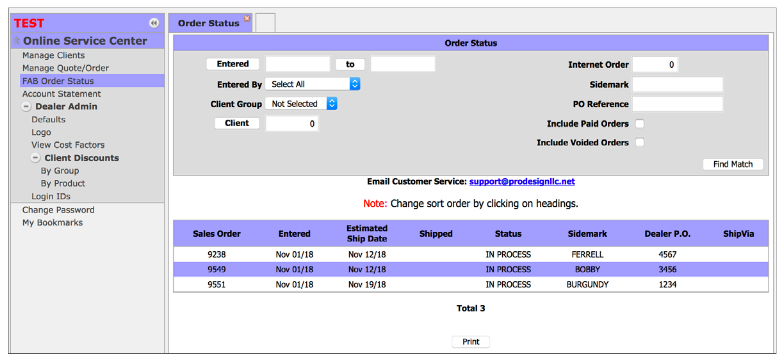
Manage Quote/Order

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.



FAB Order Status

Review Your Account Balance

To view your account balance, click the Account statement tab on the left side menu.

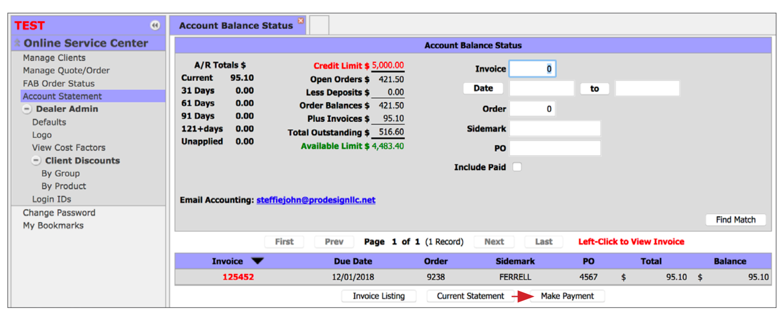
Your accounts receivable totals are shown at the top left.

All open invoices are listed. You can search for a specific invoice by using the search function on the top right corner of the screen. To view an invoice, click on the invoice number.

To make payments on invoices, click MAKE PAYMENT* to indicate the amount you will be paying on the invoice. Payments can be made through your customer portal via credit card or bank information. Pro Design will make adjustments to your balance for payments made by check.

Please note that payments should be submitted after invoices for orders have been created to avoid overpayment. Once an invoice has been created, all applicable discounts will be included in the invoice amount. Invoices are created when your order ships.

**Before making payments, you must set up your payment information. See Setting Your Payment PIN and Adding Payment Information below for instructions.*

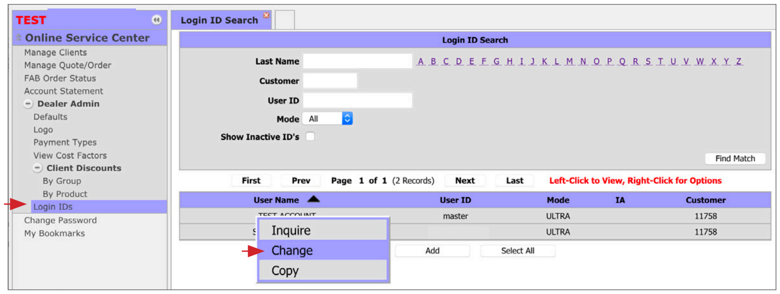


Account Statement

Setting Your Payment PIN

Your account payment PIN can be set up by accessing the LOGIN IDS tab on the left side menu.

Right click on the account ID for which you would like to set up the PIN number and click CHANGE on the menu that appears.

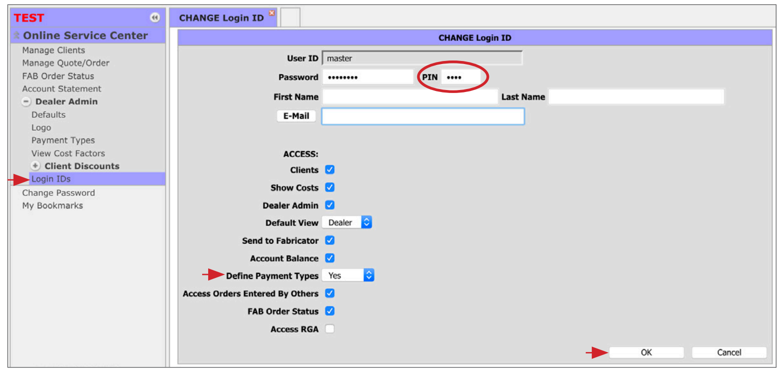


Login IDs

Set your PIN number on the CHANGE LOGIN IDS screen. You will need to enter this PIN number whenever you are ready to make a payment.

Once your PIN information has been entered, check that DEFINE PAYMENT TYPES option is set to YES. This will allow you to add payment information to your account.

Click OK to save information.

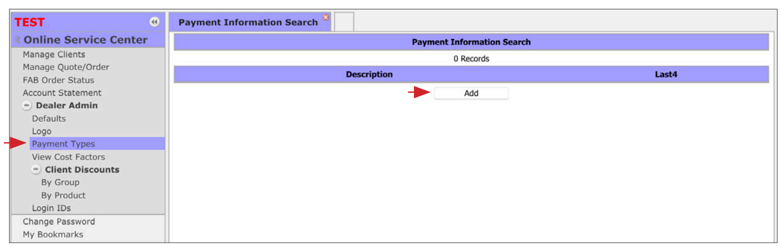


Login IDs

Adding Payment Information

In order to add payment information, make sure that you have selected YES on the DEFINE PAYMENT TYPES option under LOGIN IDS. See instructions above in Setting Your Payment PIN.

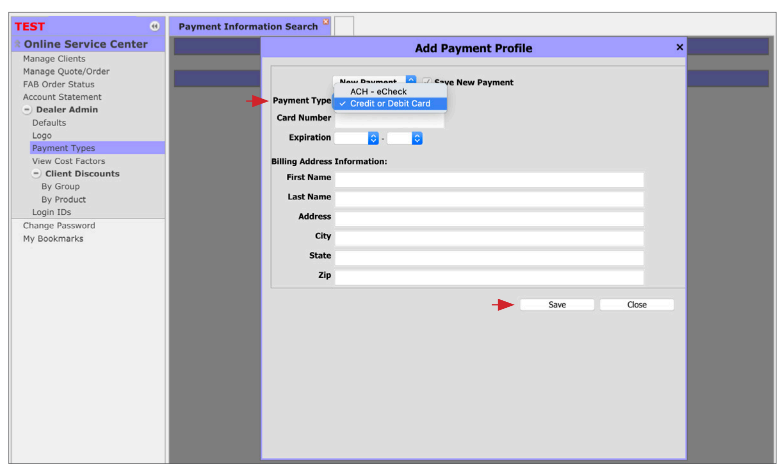
To add payment options to your account, click PAYMENT TYPES on the left side menu and select add.



Payment Information

Online payment information can be added by credit card or by ACH. You are able to add multiple forms of payment to your account if desired.

Select the payment type you would like to set up on the drop down menu. Complete the payment setup by entering the required information and clicking SAVE.



Adding Payment Information

Making Payments

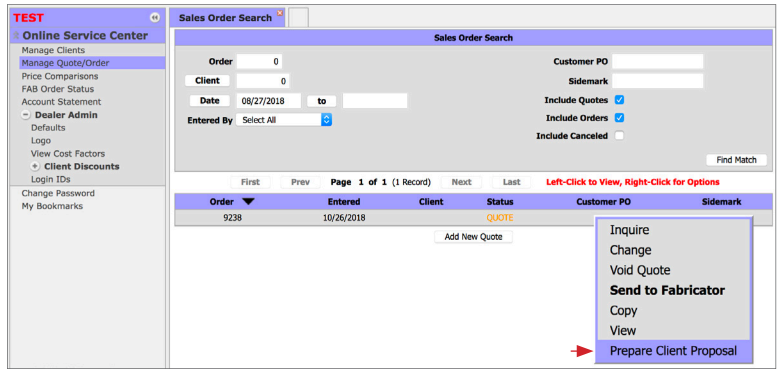
It is important to note that all payments should be made **AFTER** the invoice for the order has been created. This allows all applicable discounts and promotions to be applied to your order. Payments made in advance will not have discounts and promotions applied.

Invoices are created once an order has been shipped. Payments are able to be accepted at this time.

All payments made within 10 days of receiving an invoice will have an additional 2% Portal Pay discount applied.

Prepare a Price Quote

To prepare a professional price quote, click the Manage Quote/Order tab on the left side menu, right click on the order you would like to quote, and select Prepare Client Proposal on the list of items shown.

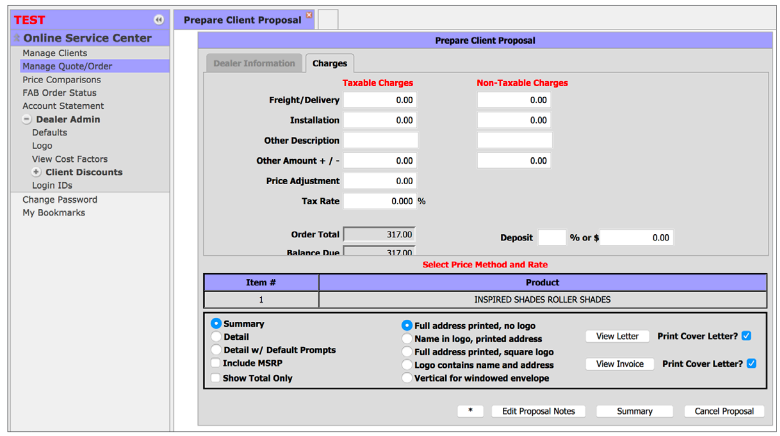


Manage Quote/Order

On the next screen, fill in any applicable taxes, installation fees, freight costs, or other charges. You can also fill in negative amounts for instances like applying a discount to a specific order or recording a price adjustment.

The system will default to your selling price if you have default client discounts set. To view or change the pricing on a particular quote, click the (*) button on the bottom of the screen.

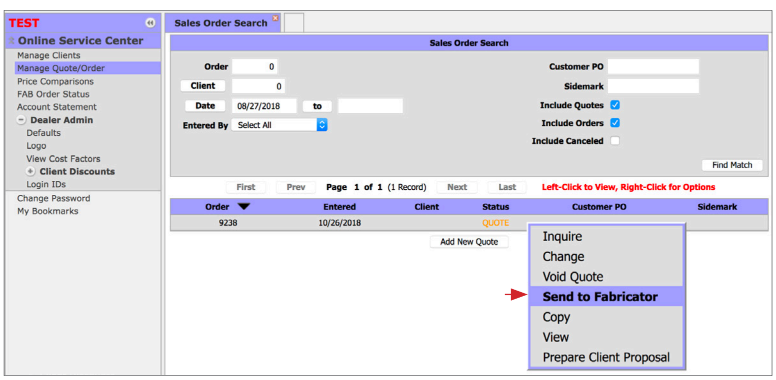
Quotes can be presented as a summary or including order details. Select the type of quote you would like to view and click VIEW LETTER. Quotes can then be printed or emailed.



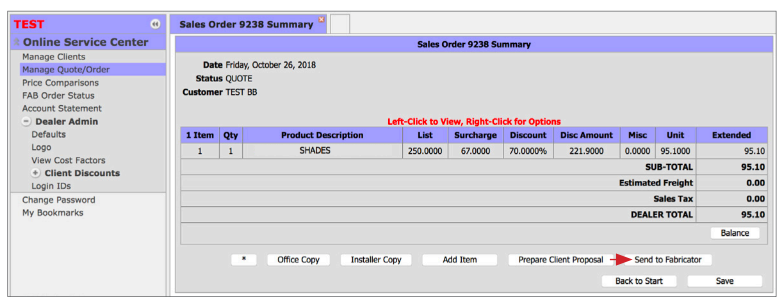
Prepare Client Proposals

Submitting an Order

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.



You can also submit a quote by clicking SEND TO FABRICATOR on the order summary page of the order.

After clicking SEND TO FABRICATOR you will be taken to the Order Submittal Screen.

Enter your account name/number, contact email, customer PO, and side mark in the top left corner of the screen.

Shipping information is entered on the right side of the screen. Select ship to client to auto-fill your client's shipping information. You can also click the ship to button to select from a list of the shipping addresses that Pro Design has on file for your account. If you are shipping to none of these addresses, you can also enter a shipping address manually.

Once complete, review the information on the Submit Screen and click OK. You can then track your order's status in the FAB Order Status tab.