

Contents

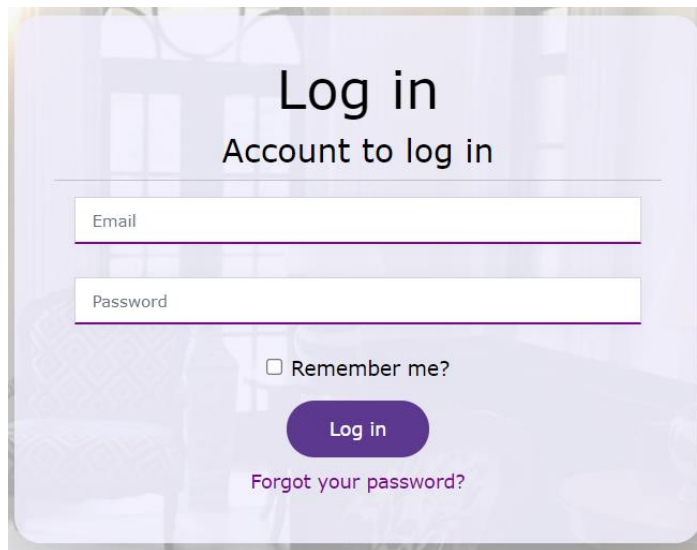
I.	Login to the Workroom Pro Admin side-	2
A.	Login page-	2
a.	Go to login page of the application. (Login credentials will be provided by application owner.) 2	
II.	Order Estimation.....	3
A.	After Admin login.....	3
B.	Quote Request Inbox-	3
C.	Quote statuses-	4
D.	Estimates Sent-	6
E.	Order Inbox-	6
III.	Order Tracking-	8
IV.	Archived-	15
V.	Key Performance Indicator report (KPI report)	16
a.	Year- in the column all years are shown.....	16
VI.	Order Summary-	17
VII.	Order Report-	18
VIII.	Manage Designer-	19
IX.	Search All-	20

ADMIN SIDE WORKING-

I. Login to the Workroom Pro Admin side-

A. Login page-

- a. Go to login page of the application. (Login credentials will be provided by application owner.)
- b. Enter the **Username** and **Password** provided by application owner, click on “Log in” button and login to your Admin side.

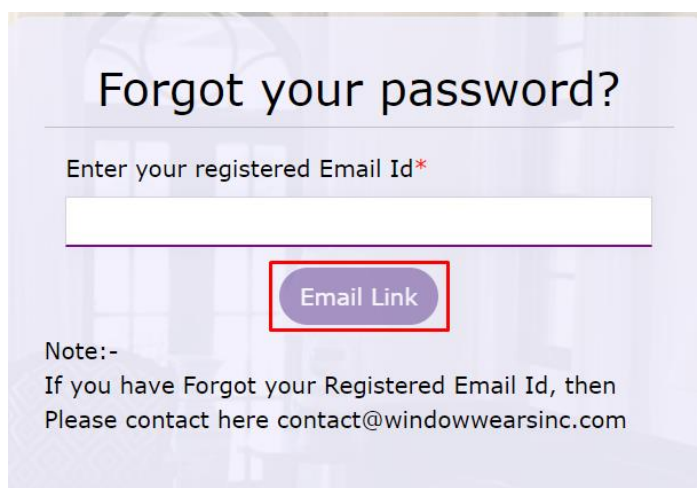


The screenshot shows a login page with the following elements:

- Header: "Log in" and "Account to log in"
- Input fields: "Email" and "Password"
- Checkbox: "Remember me?"
- Button: "Log in"
- Link: "Forgot your password?"

- 2.) To reset password, click on “**Forgot your password?**” link. You will be redirected to “**Forgot your password?**” page.

- a. Enter the Email Id in the text box of “**Enter your registered Email Id**” and click on “**Email Link**” button



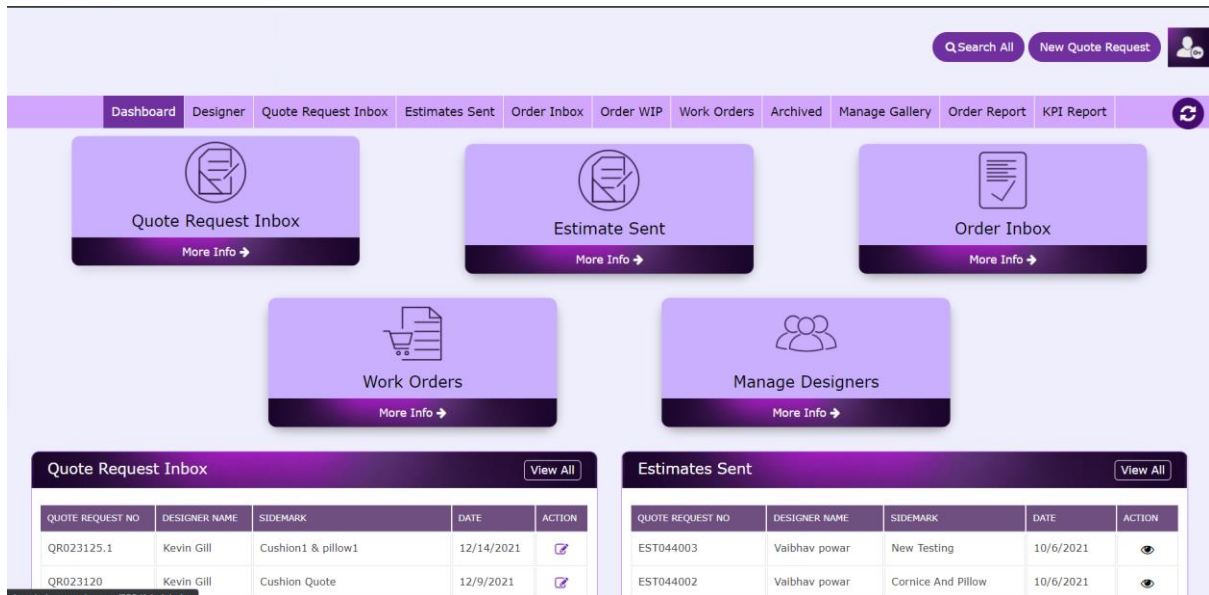
The screenshot shows a "Forgot your password?" page with the following elements:

- Header: "Forgot your password?"
- Text: "Enter your registered Email Id*" above an input field
- Button: "Email Link" (highlighted with a red box)
- Note: "Note:- If you have Forgot your Registered Email Id, then Please contact here contact@windowwearsinc.com"

II. Order Estimation

A. After Admin login

- a. On the Dashboard you will see the options of Designer, Quote Request Inbox, Estimate Sent, Order Inbox, Order WIP, Work Orders, Archived, Manage Gallery, Order Report, KPI Report.



The dashboard interface includes a top navigation bar with a search function and a 'New Quote Request' button. Below this is a horizontal menu with tabs for various sections: Dashboard, Designer, Quote Request Inbox, Estimates Sent, Order Inbox, Order WIP, Work Orders, Archived, Manage Gallery, Order Report, and KPI Report. The main content area features five large action cards: Quote Request Inbox, Estimate Sent, Order Inbox, Work Orders, and Manage Designers, each with a 'More Info' link. At the bottom, there are two data tables.

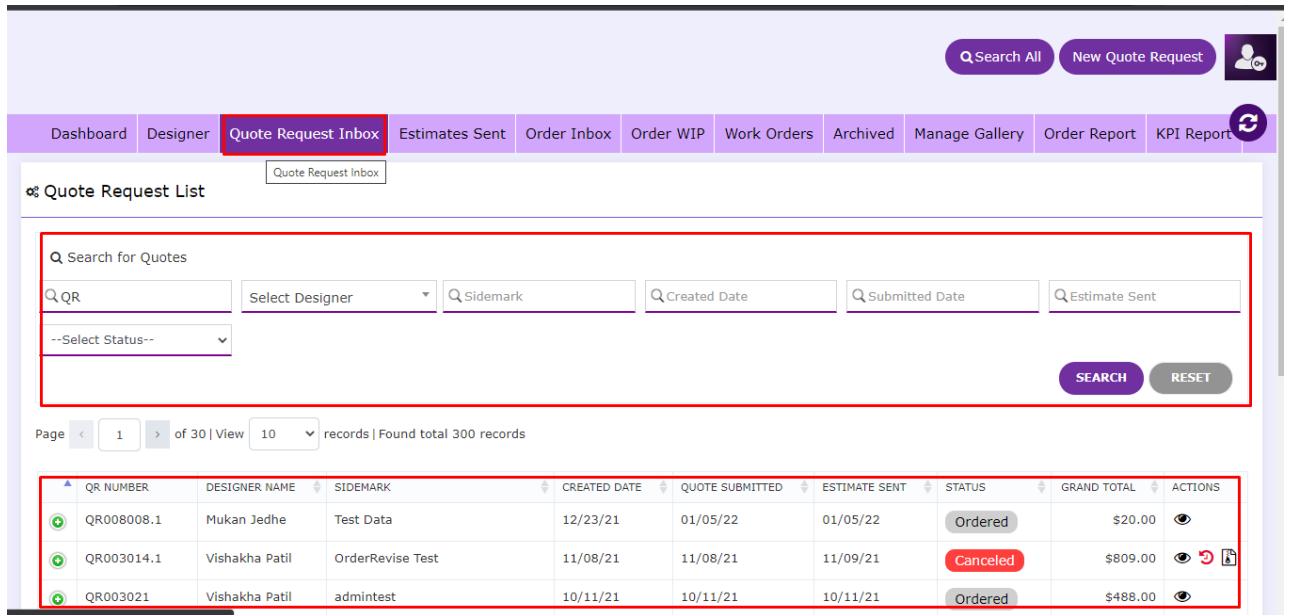
QUOTE REQUEST NO	DESIGNER NAME	SIDEMARK	DATE	ACTION
QR023125.1	Kevin Gill	Cushion1 & pillow1	12/14/2021	
QR023120	Kevin Gill	Cushion Quote	12/9/2021	

QUOTE REQUEST NO	DESIGNER NAME	SIDEMARK	DATE	ACTION
EST044003	Vaibhav powar	New Testing	10/6/2021	
EST044002	Vaibhav powar	Cornice And Pillow	10/6/2021	

B. Quote Request Inbox-

- a. **List view and Searching quotes sent by designers-**
 - i. Under "Quote Request Inbox" you will see all the quote requests sent by the designers in a list view.

- ii. If you want to search any specific quote from the list, you can take help of Search option. You can search by QR, Designer, Sidemark, Created Date, Submitted Date, Estimate sent Date, Status.



Quote Request List

Q Search for Quotes

Q QR Select Designer Q Sidemark Q Created Date Q Submitted Date Q Estimate Sent

--Select Status--

SEARCH RESET

Page < 1 > of 30 | View 10 records | Found total 300 records

QR NUMBER	DESIGNER NAME	SIDEMARK	CREATED DATE	QUOTE SUBMITTED	ESTIMATE SENT	STATUS	GRAND TOTAL	ACTIONS
QR008008.1	Mukan Jedhe	Test Data	12/23/21	01/05/22	01/05/22	Ordered	\$20.00	
QR003014.1	Vishakha Patil	OrderRevise Test	11/08/21	11/08/21	11/09/21	Cancelled	\$809.00	
QR003021	Vishakha Patil	admintest	10/11/21	10/11/21	10/11/21	Ordered	\$488.00	

C. Quote statuses-

iii. Not quoted-

1. You will receive a new quote request from designer with its status as “Not Quoted”. Click on the arrow to send the quotation.

QR NUMBER	DESIGNER NAME	SIDEMARK	CREATED DATE	QUOTE SUBMITTED	ESTIMATE SENT	STATUS	GRAND TOTAL	ACTIONS
QR008011	Mukan Jedhe	10	01/05/22	01/05/22	--	Not Quoted	\$0.00	
QR008008.1	Mukan Jedhe	Test Data	12/23/21	01/05/22	01/05/22	Ordered	\$20.00	
QR003014.1	Vishakha Patil	OrderRevise Test	11/08/21	11/08/21	11/09/21	Cancelled	\$809.00	
QR003021	Vishakha Patil	admintest	10/11/21	10/11/21	10/11/21	Ordered	\$488.00	
QR003025.3	Vishakha Patil	test revised	12/13/21	12/13/21	12/13/21	Cancelled	\$558403.00	
QR024061	Handley Allen	Cornice and Drapery	09/27/21	09/27/21	09/27/21	Quoted	\$12773.00	
QR023147	Kevin Gill	test34	12/23/21	12/23/21	12/23/21	Work Order	\$500.00	

2. After clicking on “Send quotation” arrow a window will open where you can add your Estimate by filling the fields of Unit, Per Unit Charges, Lining Yardage, Per Yard Price, Additional Note, Fabric Details. To save the estimate click on “Save & Continue” button.

Estimate (EST008011)

ADDITIONAL DESCRIPTION

Additional Description

UNIT	PER UNIT	TOTAL
4	\$ 20	\$ 80.00

[Add +](#)

LINING YARDAGE	PER YARD	TOTAL
2	\$ 10	\$ 20.00

GRAND TOTAL

\$ 100.00

ADDITIONAL NOTE

Additional Note

Trim Details

No Trim Available

Fabric Details

FABRIC DESCRIPTION 1

Test

FABRIC YARDAGE 1	FABRIC CUTS 1
4 Yards	3 Cuts

APPROVED AND ACCEPTED BY Admin Window Wear

APPROVED DATE Approved Date

[Save & Continue](#)

3. Click on “Send Estimate” button to send your estimate to the designer.

Dashboard Designer Quote Request Inbox Estimates Sent Order Inbox Order WIP Work Orders Archived Manage Gallery Order Report KPI Report

Added Forms

Cornice

CONFIRMATION

Do you want to send this estimate form?

4. Confirm sending the estimate to designer by clicking on “Yes” option of “Do you want to send this estimate form?”

- iv. **Quoted-** Once you send the estimate to designer the status changes to “Quoted” *(If the designer revises the quote and sends it back to you, the revised quote will be visible in “Quote Request Inbox” with update QR number. Again, you can review the quote and estimate the new quote)*
- v. **Ordered-** After designer accepts the estimate you see the status as “Ordered”
- vi. **Work Order-** After the order is sent for order processing, then the status is updated to “Work Order”

vii. **Cancelled-** If any estimate is cancelled by designer the status is “Cancelled”

D. Estimates Sent-

- Under “Estimate Sent” you will see all the estimates sent to the designers in a list view.
- If you want to search any specific quote from the list, you can take help of Search option. You can search by EST, Designer, Sidemark, Created Date, Submitted Date, Estimate sent Date, Status.

Estimate List

Q Search for Estimates

Q EST | Select Designer | Q Sidemark | Q Created Date | Q Submitted Date | Q Estimate Sent

--Select Status--

SEARCH RESET

Page < 1 > of 23 | View 10 records | Found total 225 records

ESTIMATE NUMBER	DESIGNER NAME	SIDEMARK	CREATED DATE	QUOTE SUBMITTED	ESTIMATE SENT	STATUS	GRAND TOTAL	ACTIONS
EST008011.1	Mukan Jedhe	10	01/05/22	01/05/22	01/05/22	Ordered	\$11.00	👁️ 🔄
EST008008.1	Mukan Jedhe	Test Data	12/23/21	01/05/22	01/05/22	Ordered	\$20.00	👁️
EST003021	Vishakha Patil	admintest	10/11/21	10/11/21	10/11/21	Ordered	\$488.00	👁️
EST024061	Handley Allen	Cornice and Drapery	09/27/21	09/27/21	09/27/21	Quoted	\$12773.00	👁️ 📄 📧
EST023147	Kevin Gill	test34	12/23/21	12/23/21	12/23/21	Work Order	\$500.00	👁️

E. Order Inbox-

- Under “Order Inbox” you will see all the estimates converted to work order sent to the designers in a list view.
- If you want to search any specific quote from the list, you can take help of Search option. You can search by ORD, Designer, Sidemark, Created Date, Ordered Date.

Order List

Q Search for Order

Q ORD | Select Designer | Q Sidemark | Q Created Date | Q Ordered Date

SEARCH RESET

Page < 1 > of 20 | View 10 records | Found total 196 records (filtered from 224 total entries)

ORDER NUMBER	INVOICE NUMBER	ORDER CREATED BY	SIDEMARK	STATUS	SUBMITTED DATE	ESTIMATE DATE	ORDER DATE	GRAND TOTAL	ACTIONS
ORD008012	--	Mukan Jedhe	Test09	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	👁️ 🔄 📄 📧
ORD008011.1	--	Mukan Jedhe	10	Order processing	01/05/22	01/05/22	01/05/22	\$11.00	👁️ 🔄 📄 📧
ORD008008.1	--	Mukan Jedhe	Test Data	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	👁️ 🔄 📄 📧
ORD024111.1	--	Handley Allen	Roman Shade and Cushion Quote	Order processing	12/28/21	12/28/21	12/28/21	\$9326.00	👁️ 🔄 📄 📧
ORD024110.5	--	Handley Allen	Multi Form Quotation	Ordered	12/28/21	12/28/21	12/28/21	\$5126.00	👁️ 🔄 📄 📧 🚫
ORD023153	--	Kevin Gill	Drapery & Roman Shade	Ordered	12/28/21	12/28/21	12/28/21	\$730.00	👁️ 🔄 📄 📧

- Click on arrow for converting the order to work order.

ORDER NUMBER	INVOICE NUMBER	ORDER CREATED BY	SIDEMARK	STATUS	SUBMITTED DATE	ESTIMATE DATE	ORDER DATE	GRAND TOTAL	ACTIONS
ORD008012	123	Mukan Jedhe	Test09	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	👁️ 🔄 📄 📧
ORD008011.1	--	Mukan Jedhe	10	Order processing	01/05/22	01/05/22	01/05/22	\$11.00	👁️ 🔄 📄 📧

- After clicking on “Click here to Convert Work Order” arrows, a window will open where you need to select option of “Sub Contract” or “Hourly Basis”.

- = **Sub Contract-** Add the details of Units for labor, Per Unit cost for labor, Lining Yardage, Per Yard Price, Additional Note, Fabric Details. To save the work order click on “**Save & Continue**” button.

Work Order (WO008011.1)

Sub Contract **Hourly Basis**

UNIT	PER UNIT	TOTAL
Labor	\$ Labor Per Unit	\$ Labor Total
Add +		
LINING YARDAGE	PER YARD	TOTAL
Lining	\$ Lining Per Unit	\$ Lining Total
GRAND TOTAL		
Grand Total		
DUE DATE		

Fabric Details

FABRIC DESCRIPTION 1

Test

FABRIC YARDAGE 1	FABRIC CUTS 1
2 Yards	1 Cuts

ADDITIONAL NOTE

Additional Note

APPROVED AND ACCEPTED BY	APPROVED DATE
Admin Window Wear	1/5/2022

[Save & Continue](#)

OR

- = **Hourly Basis-** Add Hour Unit, Due Date, Fabric Description 1, Fabric Yardage 1, Fabric Cuts 1, Fabric Details. To save the work order click on “**Save & Continue**” button.

Work Order (WO008011.1)

Sub Contract **Hourly Basis**

HOUR UNIT

4

DUE DATE

01/14/2022

Fabric Details

FABRIC DESCRIPTION 1
Test

FABRIC YARDAGE 1 **FABRIC CUTS 1**
2 Yards 1 Cuts

ADDITIONAL NOTE
Additional Note

APPROVED AND ACCEPTED BY **APPROVED DATE**
Admin Window Wear 1/5/2022

Save & Continue

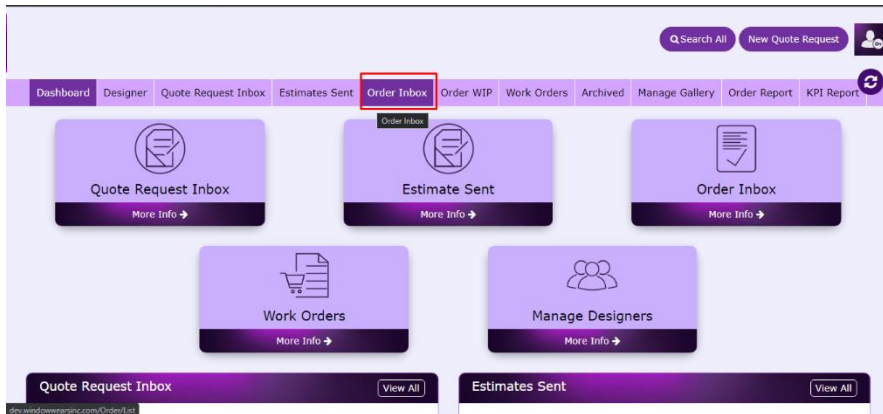
- e. Confirm converting the work order by clicking on “Yes” option of “Are you sure you want to convert this to Work Order?”

CONFIRMATION ×

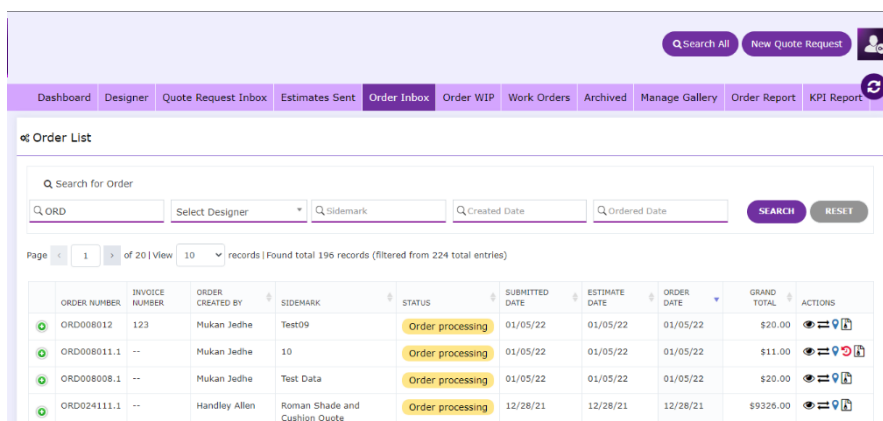
Are you sure you want to convert this to Work Order?

III. Order Tracking-

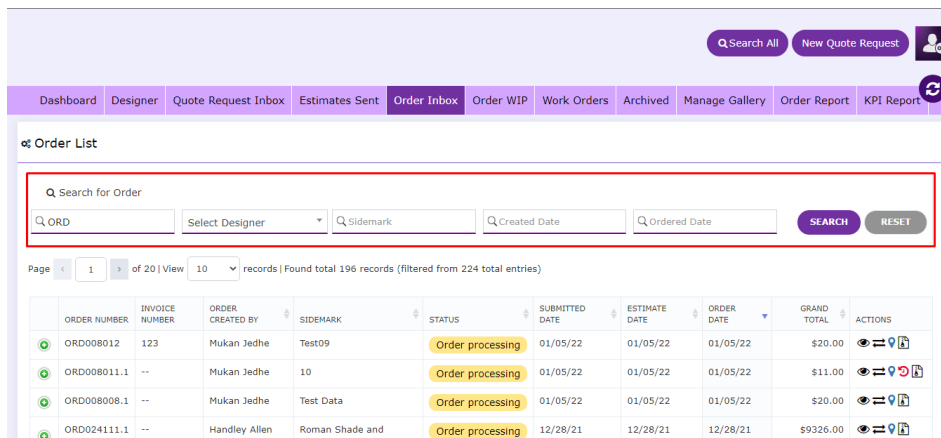
- a. Click on Order Inbox to find the work order list.



b. After clicking on “Order Inbox”, following screen will be displayed



c. You can search a specific order if you know its Order No, Designer, Sidemark, Created Date, Ordered Date.



d. Click here to track the order

ORDER NUMBER	INVOICE NUMBER	ORDER CREATED BY	SIDEMARK	STATUS	SUBMITTED DATE	ESTIMATE DATE	ORDER DATE	GRAND TOTAL	ACTIONS
ORD008012	123	Mukan Jedhe	Test09	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	
ORD008011.1	--	Mukan Jedhe	10	Order processing	01/05/22	01/05/22	01/05/22	\$11.00	
ORD008008.1	--	Mukan Jedhe	Test Data	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	
ORD024111.1	--	Handley Allen	Roman Shade and Cushion Quote	Order processing	12/28/21	12/28/21	12/28/21	\$9326.00	
ORD024110.5	--	Handley Allen	Multi Form Quotation	Ordered	12/28/21	12/28/21	12/28/21	\$5126.00	
ORD023153	--	Kevin Gill	Drapery & Roman Shade	Ordered	12/28/21	12/28/21	12/28/21	\$730.00	
ORD023152	--	Kevin Gill	Cornice & draperyyyy	Ordered	12/27/21	12/27/21	12/27/21	\$1400.00	
ORD023151	--	Kevin Gill	Cornice & Draperyyy	Ordered	12/27/21	12/27/21	12/27/21	\$294.00	
ORD023150	--	Kevin Gill	Cornice & Drapery 27-12-2021	Order processing	12/27/21	12/27/21	12/27/21	\$693.00	
ORD023072	--	Kevin Gill	Valance Quote	Order processing	09/28/21	09/28/21	12/23/21	\$9416.00	
								Grand Total	\$27,036.00

e. Once you click here, a pop up will appear as follows

Order Tracking

ESTIMATE NUMBER
EST023153

SIDEMARK
Drapery & Roman Shade

SUBMITTED DATE
12/28/2021

GRAND TOTAL
\$ 730.00

Order Track

Trim Track

Fabric Track

Job Costing

Please enter required fields to enable Fabric Track and Job Costing.

INVOICE NUMBER *

INVOICE DATE *

INVOICE AMOUNT *

DEPOSIT AMOUNT

DEPOSIT DATE

BALANCE PAID

BALANCE PAID DATE

REMAINING BALANCE

DUE DATE

DAYS TO CLOSE

TRACK STATUS

DESCRIPTION

NOTES

f. Here, Estimate Number, Sidemark, Submitted Date and Grand Total are auto filled.

Order Tracking

ESTIMATE NUMBER
EST023153

SIDEMARK
Drapery & Roman Shade

SUBMITTED DATE
12/28/2021

GRAND TOTAL
\$ 730.00

Order Track

Trim Track

Fabric Track

Job Costing

Please enter required fields to enable Fabric Track and Job Costing.

INVOICE NUMBER *

INVOICE DATE *

INVOICE AMOUNT *

DEPOSIT AMOUNT

DEPOSIT DATE

BALANCE PAID

BALANCE PAID DATE

REMAINING BALANCE

DUE DATE

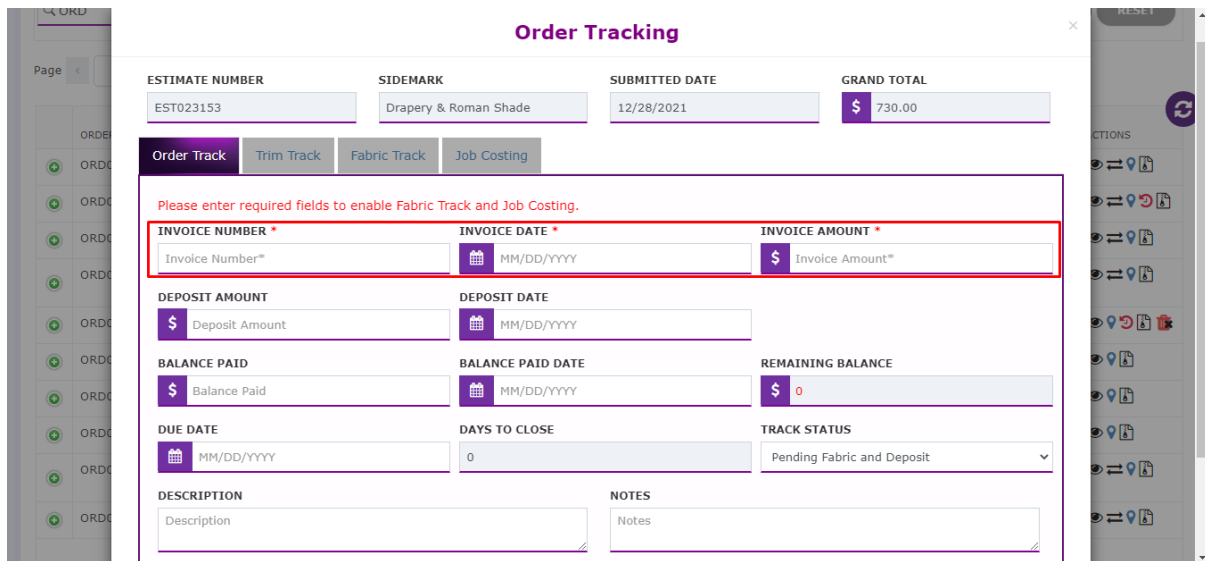
DAYS TO CLOSE

TRACK STATUS

DESCRIPTION

NOTES

g. Now, you need to fill all the mandatory fields in “Order Track” tab.



Order Tracking

ESTIMATE NUMBER	SIDEMARK	SUBMITTED DATE	GRAND TOTAL
EST023153	Drapery & Roman Shade	12/28/2021	\$ 730.00

Order Track | Trim Track | Fabric Track | Job Costing

Please enter required fields to enable Fabric Track and Job Costing.

INVOICE NUMBER *	INVOICE DATE *	INVOICE AMOUNT *
Invoice Number*	MM/DD/YYYY	\$ Invoice Amount*

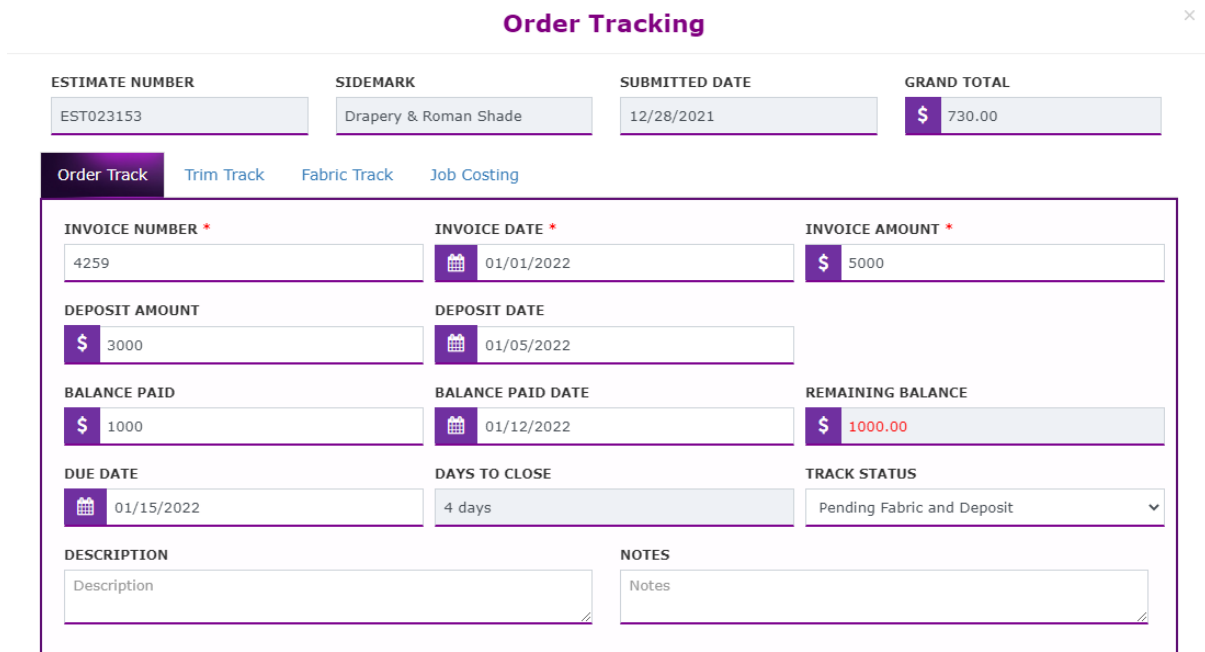
DEPOSIT AMOUNT	DEPOSIT DATE
\$ Deposit Amount	MM/DD/YYYY

BALANCE PAID	BALANCE PAID DATE	REMAINING BALANCE
\$ Balance Paid	MM/DD/YYYY	\$ 0

DUE DATE	DAYS TO CLOSE	TRACK STATUS
MM/DD/YYYY	0	Pending Fabric and Deposit

DESCRIPTION	NOTES
Description	Notes

h. After entering the details, Remaining balance is auto calculated. You cannot select Deposit date and Balance paid date, the date prior to Invoice Date.



Order Tracking

ESTIMATE NUMBER	SIDEMARK	SUBMITTED DATE	GRAND TOTAL
EST023153	Drapery & Roman Shade	12/28/2021	\$ 730.00

Order Track | Trim Track | Fabric Track | Job Costing

INVOICE NUMBER *	INVOICE DATE *	INVOICE AMOUNT *
4259	01/01/2022	\$ 5000

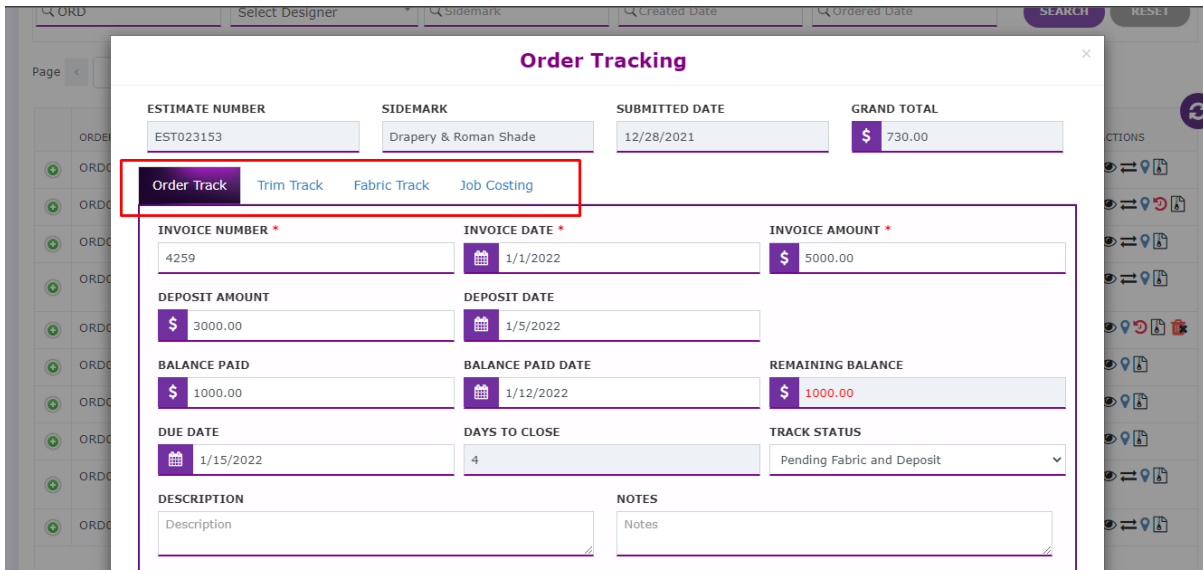
DEPOSIT AMOUNT	DEPOSIT DATE
\$ 3000	01/05/2022

BALANCE PAID	BALANCE PAID DATE	REMAINING BALANCE
\$ 1000	01/12/2022	\$ 1000.00

DUE DATE	DAYS TO CLOSE	TRACK STATUS
01/15/2022	4 days	Pending Fabric and Deposit

DESCRIPTION	NOTES
Description	Notes

- i. After filling all details, “Trim Track”, “Fabric Track” and “Job Costing” tabs will get activated



Order Tracking

ESTIMATE NUMBER: EST023153 SIDEMARK: Drapery & Roman Shade SUBMITTED DATE: 12/28/2021 GRAND TOTAL: \$ 730.00

Order Track | Trim Track | Fabric Track | Job Costing

INVOICE NUMBER: 4259 INVOICE DATE: 1/1/2022 INVOICE AMOUNT: \$ 5000.00

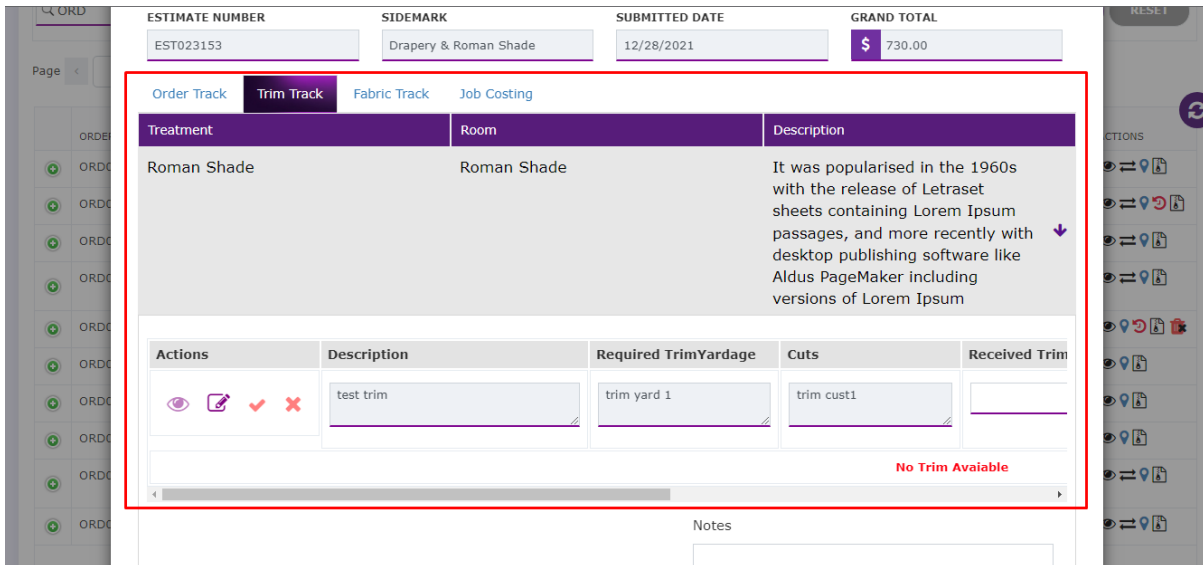
DEPOSIT AMOUNT: \$ 3000.00 DEPOSIT DATE: 1/5/2022

BALANCE PAID: \$ 1000.00 BALANCE PAID DATE: 1/12/2022 REMAINING BALANCE: \$ 1000.00

DUE DATE: 1/15/2022 DAYS TO CLOSE: 4 TRACK STATUS: Pending Fabric and Deposit

DESCRIPTION: Description NOTES: Notes

- j. Trim Track- You can see all the filled data and can also edit a few fields.



ESTIMATE NUMBER: EST023153 SIDEMARK: Drapery & Roman Shade SUBMITTED DATE: 12/28/2021 GRAND TOTAL: \$ 730.00

Order Track | **Trim Track** | Fabric Track | Job Costing

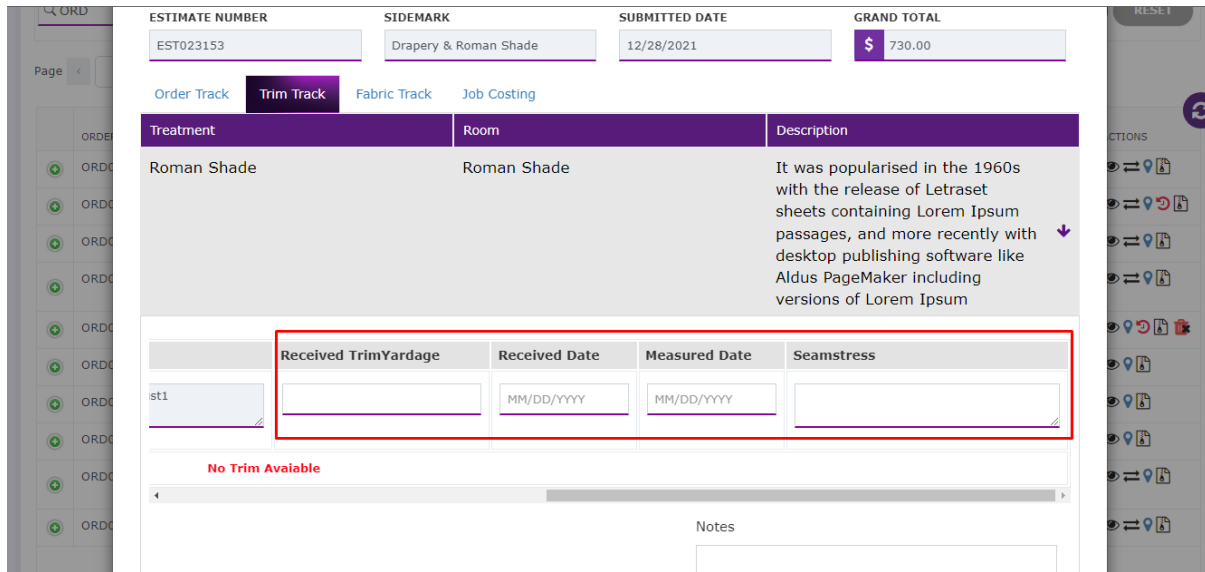
Treatment	Room	Description
Roman Shade	Roman Shade	It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Actions	Description	Required TrimYardage	Cuts	Received Trim
	test trim	trim yard 1	trim cust1	

No Trim Available

Notes

k. You can add these details if you want to add.



ESTIMATE NUMBER: EST023153 | SIDEMARK: Drapery & Roman Shade | SUBMITTED DATE: 12/28/2021 | GRAND TOTAL: \$ 730.00

Order Track | **Trim Track** | Fabric Track | Job Costing

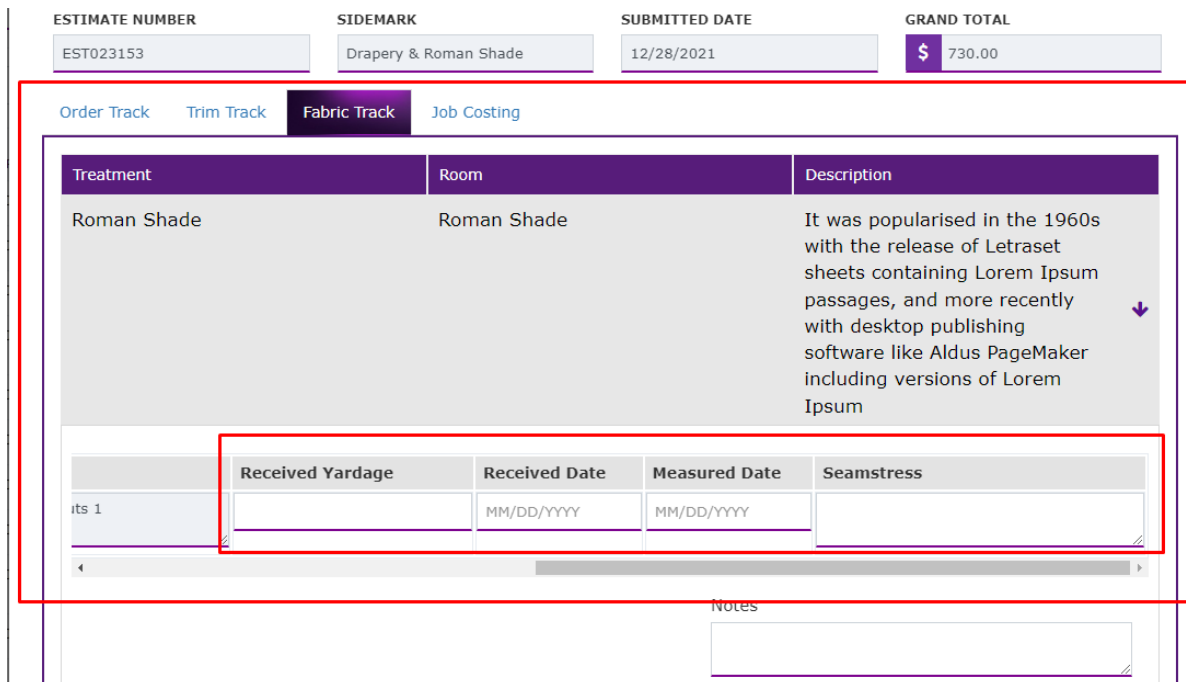
Treatment	Room	Description
Roman Shade	Roman Shade	It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Received TrimYardage	Received Date	Measured Date	Seamstress
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>

No Trim Available

Notes

l. Fabric Track- You can see all the filled data. You can also edit a few fields if you want to.



ESTIMATE NUMBER: EST023153 | SIDEMARK: Drapery & Roman Shade | SUBMITTED DATE: 12/28/2021 | GRAND TOTAL: \$ 730.00

Order Track | Trim Track | **Fabric Track** | Job Costing

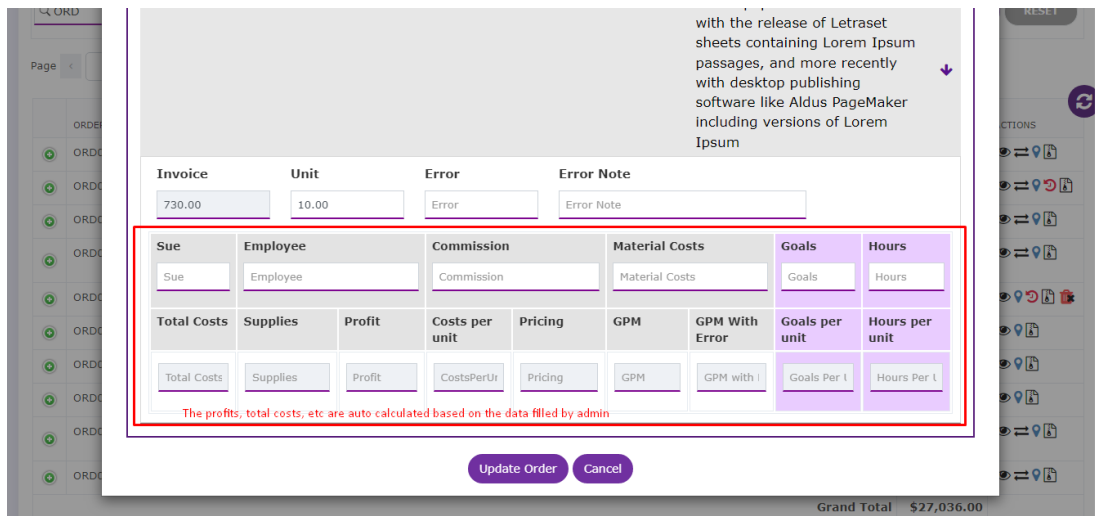
Treatment	Room	Description
Roman Shade	Roman Shade	It was popularised in the 1960s with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Received Yardage	Received Date	Measured Date	Seamstress
<input type="text"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text" value="MM/DD/YYYY"/>	<input type="text"/>

Notes

m. Job Costing-

1. Admin can fill the details and dependent on that the total costs, profits, etc are auto calculated.



with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Invoice	Unit	Error	Error Note
730.00	10.00	Error	Error Note

Sue	Employee	Commission	Material Costs	Goals	Hours
Sue	Employee	Commission	Material Costs	Goals	Hours

Total Costs	Supplies	Profit	Costs per unit	Pricing	GPM	GPM With Error	Goals per unit	Hours per unit
Total Costs	Supplies	Profit	CostsPerUn	Pricing	GPM	GPM with I	Goals Per I	Hours Per I

The profits, total costs, etc are auto calculated based on the data filled by admin

Update Order Cancel

Grand Total \$27,036.00

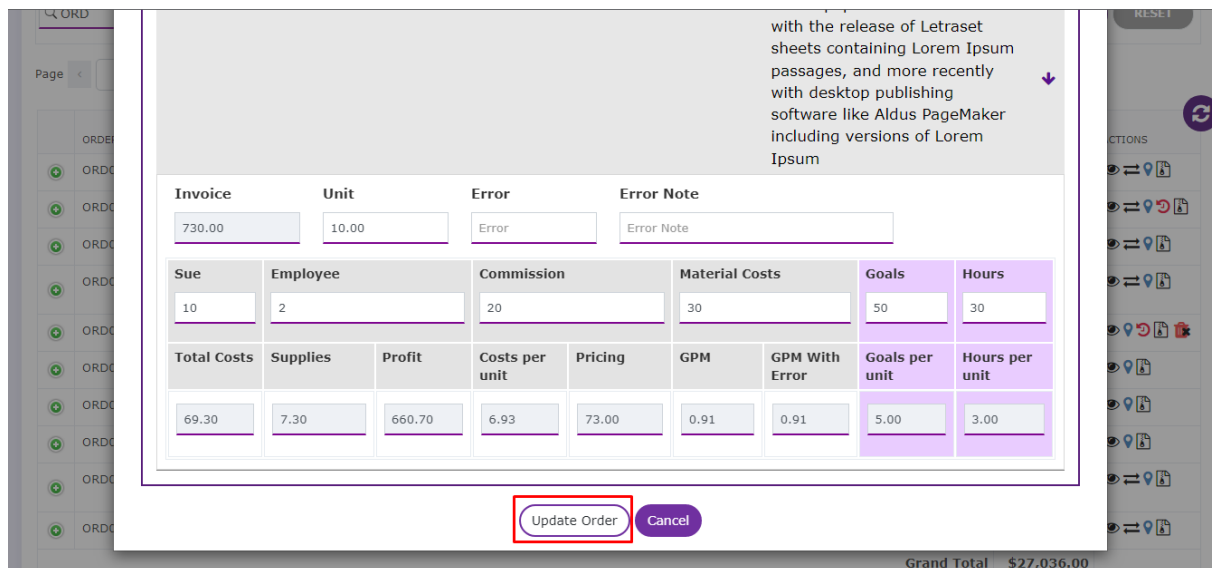
2. Auto calculated data is displayed as follows

Invoice	Unit	Error	Error Note
730.00	10.00	Error	Error Note

Sue	Employee	Commission	Material Costs	Goals	Hours
10	2	20	30	50	30

Total Costs	Supplies	Profit	Costs per unit	Pricing	GPM	GPM With Error	Goals per unit	Hours per unit
69.30	7.30	660.70	6.93	73.00	0.91	0.91	5.00	3.00

n. Now click on Update Order



with the release of Letraset sheets containing Lorem Ipsum passages, and more recently with desktop publishing software like Aldus PageMaker including versions of Lorem Ipsum

Invoice	Unit	Error	Error Note
730.00	10.00	Error	Error Note

Sue	Employee	Commission	Material Costs	Goals	Hours
10	2	20	30	50	30

Total Costs	Supplies	Profit	Costs per unit	Pricing	GPM	GPM With Error	Goals per unit	Hours per unit
69.30	7.30	660.70	6.93	73.00	0.91	0.91	5.00	3.00

Update Order Cancel

Grand Total \$27,036.00

IV. Archived-

You can archive unwanted quote request, estimate, orders

- a. By clicking on “Click here to Archive” option the quote requests will be moved to “Archived” section.

ESTIMATE NUMBER	DESIGNER NAME	SIDEMARK	CREATED DATE	QUOTE SUBMITTED	ESTIMATE SENT	STATUS	GRAND TOTAL	ACTIONS
EST008011.1	Mukan Jedhe	10	01/05/22	01/05/22	01/05/22	Work Order	\$11.00	
EST008012	Mukan Jedhe	Test09	01/05/22	01/05/22	01/05/22	Ordered	\$20.00	
EST008008.1	Mukan Jedhe	Test Data	12/23/21	01/05/22	01/05/22	Ordered	\$20.00	
EST003021	Vishakha Patil	admintest	10/11/21	10/11/21	10/11/21	Ordered	\$488.00	
EST024061	Handley Allen	Cornice and Drapery	09/27/21	09/27/21	09/27/21	Quoted	\$12773.00	
EST023147	Kevin Gill	test34	12/23/21	12/23/21	12/23/21	Work Order	\$500.00	

- b. Archived section-

- i. Under “Archived” you will see all the estimates converted to archive order in a list view.
- ii. If you want to search any archived quote from the list, you can take help of Search option. You can search by Quote Request Number, Designer, Quote Request Date, Select Status.
- iii. To remove any quote request from archived section, click on “Click here to remove from Archive”

Archive Quote Request List

QSearch for Archive

Page 1 of 4 | View 10 records | Found total 38 records

QUOTE REQUEST NUMBER	DESIGNER NAME	SIDEMARK	STATUS	QUOTE REQUEST DATE	ARCHIVE/DELETE DATE	TYPE	ACTIONS
WO019005	Ronny Albert	Multi form RFQ	OrderedWO	07/21/21	12/15/21	Archive	
QR023124	Kevin Gill	Cornice & Drapery	Admin Draft	12/14/21	12/14/21	Deleted	
WO024085.1	Handley Allen	VC test Form	OrderedWO	10/29/21	10/29/21	Archive	
ORDD023083.3	Kevin Gill	4 Form Quotation	Ordered	10/07/21	10/07/21	Deleted	
ORD033001.1	Shubham dahaple	Cornice and Drapery	Ordered	09/17/21	09/28/21	Deleted	
ORD031001.1	Tony mark	Cornice and Drapery	Ordered	09/18/21	09/28/21	Archive	

V. Key Performance Indicator report (KPI report)

KPI report shows the statistical data of yearly sales performance. Below are the details of the terms (column headers) used,

- a. **Year-** in the column all years are shown.
- b. **Lost-** Indicates the orders which are archived/deleted by the designer. It states the order value which is lost by you.
- c. **Pending-** Indicates the possible orders you will be getting if it is still not converted to work order.
- d. **Sales to Date-** Indicates the orders which get converted to work order.
- e. **Total-** Indicates the values of all three Lost, Pending, Sales to Date.
- f. **Est/Inv-** Indicates the value of total invoice amount/ total
- g. **Closing ratio-** Indicates the value of Sales to Date/(Lost + Pending)
- h. **Days to close-** Indicates the days Invoice date – Estimate Date +Avg (Sum of all Days to close)

SR NO	YEAR	LOST	PENDING	SALES TO DATE	TOTAL	\$ EST/INV	CLOSING RATIO	DAYS TO CLOSE
2	2022	\$0	\$0	\$10000	\$10000	\$1	0	0
1	2021	\$5150	\$0	\$68114.32	\$73264.32	\$0.9297	0	20
Grand Total		\$5,150.00	\$0.00	\$78,114.32	\$83,264.32	\$1.93		

VI. Order Summary-

You can see the order summary of a particular order where multiple treatment forms are filled. It is seen in the **Order Inbox** and **Estimate Sent**.

- a. Below shown order is having multiple treatment forms filled. Click on the view icon of the order.

Q Search for Order

Q ORD Select Designer Q Sidemark Q Created Date Q Ordered Date **SEARCH** **RESET**

Page < 1 > of 20 | View 10 records | Found total 196 records (filtered from 224 total entries)

ORDER NUMBER	INVOICE NUMBER	ORDER CREATED BY	SIDEMARK	STATUS	SUBMITTED DATE	ESTIMATE DATE	ORDER DATE	GRAND TOTAL	ACTIONS
ORD008012	123	Mukan Jedhe	Test09	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	
ORD008011.1	--	Mukan Jedhe	10	Ordered	01/05/22	01/05/22	01/05/22	\$11.00	
ORD008008.1	--	Mukan Jedhe	Test Data	Order processing	01/05/22	01/05/22	01/05/22	\$20.00	
ORD024111.1	--	Handley Allen	Roman Shade and Cushion Quote	Order processing	12/28/21	12/28/21	12/28/21	\$9326.00	

Treatment Type	Status	Room	Treatment Description	Total
Roman Shade	Cancelled	Roman Room	Lorem Ipsum is simply dummy text of the printing and typesetting industry. Lorem Ipsum has been the industry's standard dummy text ever since the 1500s, when an unknown printer took a galley of type and scrambled it to make a type specimen book. It has survived not only five centuries, but also the leap into electronic typesetting, remaining essentially unchanged. It was popularised in the 1960s with the release of Letraset typefaces. My desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'lorem ipsum' will uncover many web sites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humour and the like).	882
Cushion	Ordered	Cushion Room	Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'lorem ipsum' will uncover many web sites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humour and the like).	9326

- b. After clicking on view icon, the order form is visible. Click on Order Summary tab to view summary a specific order.

Order Summary

QUOTE NO QR024111.1	DESIGNER Handley Allen	SIDEMARK Roman Shade and Cushion Quote	CREATED DATE 12/28/21
QUOTE SENT 12/28/2021	ESTIMATE RECEIVED 12/28/2021	ORDER DATE 12/28/2021	

CUSHION

Room Location :- Cushion Room Treatment Description :- Many desktop publishing packages and web page editors now use Lorem Ipsum as their default model text, and a search for 'lorem ipsum' will uncover many web sites still in their infancy. Various versions have evolved over the years, sometimes by accident, sometimes on purpose (injected humour and the like).

FABRIC DETAILS		
Description	Yardage	Cuts
Fabric test	fabri	test

Cushion Final Total :- \$9326.00

Grand Total :- \$9326.00

VII. Order Report-

- Order Report shows the list and the details of all orders which are converted to work order
- If you want to search any specific order from the list, you can take help of Search option. You can search by ORD, Designer name, Sidemark, Order Status, Track Status, Invoice Number, Due Date, Days to Close, Paid Orders.

Q Search for Order

Page < 1 > of 12 | View 20 records | Found total 227 records (filtered from 228 total entries)

SR NO	ORDER NUMBER	SIDEMARK	ORDER STATUS	TRACK STATUS	CREATED BY	INVOICE NUMBER	INVOICE DATE	INVOICE AMOUNT	DEPOSIT AMOUNT	DEPOSIT DATE
302	ORD008012	Test09	Order processing	Pending Fabric and Deposit	Mukan Jedhe	123	12/30/2021	\$5000.00	\$2000.00	1/13/20
301	ORD008011.1	10	Ordered	Pending Fabric and Deposit	Mukan Jedhe	--	--	\$0.00	\$0.00	--
300	ORD008008.1	Test Data	Order processing	Pending Fabric and Deposit	Mukan Jedhe	--	--	\$0.00	\$0.00	--
299	ORD023155	Cornice & Drapery 29	Ordered	Pending Fabric and Deposit	Kevin Gill	--	--	\$0.00	\$0.00	--
298	ORD024111.1	Roman Shade and Cushion Quote	Order processing	Pending Fabric and Deposit	Handley Allen	--	--	\$0.00	\$0.00	--

- After you click on the **Order Number** a pop-up opens where you can see the details of a specific order.

Order Tracking

ESTIMATE NUMBER: EST008012 SIDEMARK: Test09 SUBMITTED DATE: 1/5/2022 GRAND TOTAL: \$ 20.00

[Order Track](#) [Trim Track](#) [Fabric Track](#) [Job Costing](#)

INVOICE NUMBER *
INVOICE DATE *
INVOICE AMOUNT *

DEPOSIT AMOUNT
DEPOSIT DATE

BALANCE PAID
BALANCE PAID DATE
REMAINING BALANCE

DUE DATE
DAYS TO CLOSE
TRACK STATUS



DESCRIPTION
NOTES

VIII. Manage Designer-

You being an Admin will have the ability to create, edit, lock, unlock a designer.

a. List view and Searching quotes sent by designers-

- i. To lock any specific designer's profile, click on unlock icon. After locking the profile, the designer can login to his/her profile but cannot perform any other action.
- ii. In the similar way by clicking on the lock icon you can unlock a designer and revoke his/her abilities.
















Designers List Sales Tax List  Create New Designer 

DESIGNER NUMBER FIRST NAME COMPANY NAME

EMAIL CONFIRMED NOT CONFIRMED USER ACTIVE INACTIVE


SEARCH RESET

Page < 1 > of 5 | View 10 records | Found total 48 records

ID	NAME	COMPANY NAME	PHONE	MOBILE	EMAIL	ACTIONS
46	John Smith	CTC	(201)-254-7896	(203)-214-5875	shubham.shinde@vskysolutions.com	  
45	Shubham Shinde	Demotest	(856)-987-4598	(588)-658-8116	shubham.shinde32@vskysolutions.com	  
44	John Hayes	test	(203)-010-5060	(502)-301-2565	shubham.shinde5@vskysolutions.com	  
43	Shubham Shinde	Demo	(201)-030-5040	(605)-080-9070	shubham.shinde4@vskysolutions.com	  
42	Josh Farmer	CTCLC	(858)-585-8585	(568)-595-6585	shubham.shinde2@vskysolutions.com	  

b. Create New Designer-

- i. Fill in Company Information and Designer Information, click on "Create" button to save the Designer.

Back To List 

Company Information

COMPANY NAME * COMPANY URL COMPANY PHONE * COMPANY MOBILE *

COMPANY DETAILS * ADDRESS 1 * ADDRESS 2

CITY * STATE * ZIP CODE * COUNTRY *

Designer Information

FIRST NAME * LAST NAME * EMAIL *

DESIGNER PHONE * DESIGNER MOBILE *




























PASSWORD * CONFIRM PASSWORD *

Create

- c. **Sales Tax List-** After you create a designer and give access to the designer, the designer will go to his/her profile and update his/her sales tax details. Then you can view sales tax on the designer page under Sales Tax List.
 - i. **View-** You can view the details of Sales Tax.
 - ii. **Download-** You can download the License.
 - iii. **Pdf-** You can view the pdf of License and download it after viewing.

☰ Sales Tax Accounts Back To Dashboard

Page 1 of 1 View 10 records | Found total 9 records

ID	COMPANY NAME	OWNER	EMAIL	SALES TAX LICENSE	EXPECTED ANNUAL VOLUME	YEARS IN BUSINESS	ACTION
9	test	John Hayes	shubham.shinde5@vskysolutions.com	123456	20	20	  
8	Demo	Shubham Shinde	shubham.shinde4@vskysolutions.com	1234567	10	20	  
7	CTCLC	Josh Farmer	shubham.shinde2@vskysolutions.com	123456555	15	20	  
6	Vsky111	Joe Bush	shubham.shinde1@vskysolutions.com	test	10	21	  
5	Windows wear ltd	Kevin Gill	mn675867@gmail.com	10	20	21	  
4	Vsky	Shubham dahaple	tonyruell607@gmail.com	85555	8555	84	  
3	Vsky	Tony mark	tonyruell66079@gmail.com	9960867783	1210	23	  
2	Yash Creations	Vishakha Patil	vishakha.patil@vskysolutions.com	6567	565,656	45	  
1	Jacksonville Designers	Mohit Tambe	mohit.tambe@vskysolutions.com	SV1532656565	3,250,000	10	  

Page 1 of 1 View 10 records | Found total 9 records

IX. Search All-

There is an option of Search All where you can search quote request, work order, etc. in one place.

🔍 Search for Quote

QR NUMBER	DESIGNER NAME	SIDEMARK	STATUS	CANCELLATION STATUS	LOST	DELETED
<input type="text" value="Quote Number"/>	<input type="text" value="Select Designer"/>	<input type="text" value="Sidemark"/>	<input type="text" value="--Select Status--"/>	<input type="text" value="--Select Status--"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="Clone From"/>	<input type="text" value="Created Date"/>	<input type="text" value="Updated Date"/>	
<input type="button" value="SEARCH"/> <input type="button" value="RESET"/>						

Page 1 of 62 View 10 records | Found total 617 records

QR NUMBER	DESIGNER NAME	SIDEMARK	STATUS	CANCELLATION STATUS	ARCHIVED	ADMIN ARCHIVED	LOST	CLONED	CLONED FROM	CREATED ON	UPDATED ON	DELETED
QR008014	Mukan Jedhe	test	Draft	--	--	--	--	✓	QR008010.1	01/06/22	01/06/22	--
QR008013	Mukan Jedhe	Test Data	Draft	--	--	--	--	✓	QR008008.2	01/06/22	01/06/22	--
WO008011.1	Mukan Jedhe	10	OrderedWO	--	--	--	--	--	--	01/05/22	01/05/22	--
ORD008012	Mukan Jedhe	Test09	Ordered	--	--	--	--	--	--	01/05/22	01/05/22	--
QR008011	Mukan Jedhe	10	Canceled	--	✓	--	--	--	--	01/05/22	01/05/22	--
QR008010	Mukan Jedhe	test	Canceled	--	✓	--	--	--	--	01/05/22	01/05/22	--