



Distributor User Guide

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Distributor User Guide

You can bookmark <http://nacsystems.ca/QuotesAndOrders/Distributeurs/Login.aspx> to directly access the login page.

Tips & Tricks

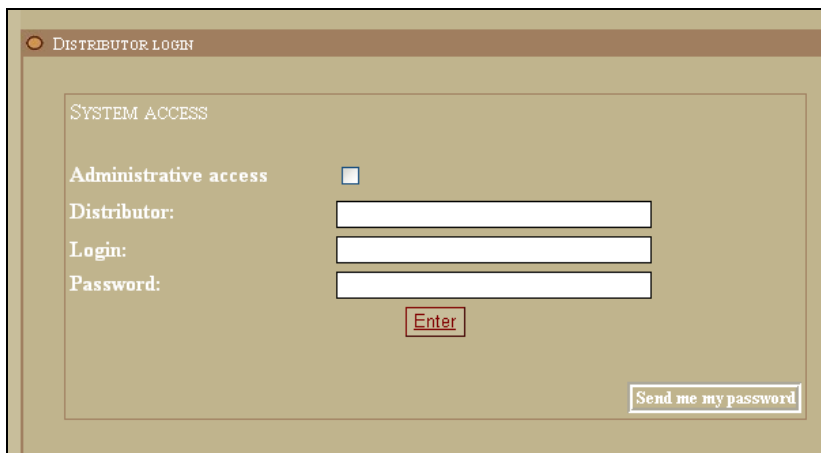
- ✚ Don't use back button or refresh button to avoid unexpected results. Only use bread crumbs and hyperlinks.

What are bread crumbs? In the top of each page, you will find a zone with hyperlinks like this one:



In the picture above, Distributors is a hyperlink to Distributor's menu and Employee Management is the current page.

Login

A screenshot of a web browser window titled 'DISTRIBUTOR LOGIN'. The page has a light brown background. At the top left, there is a small circle followed by the text 'DISTRIBUTOR LOGIN'. Below this, the text 'SYSTEM ACCESS' is displayed. There are three input fields: 'Administrative access' with a checkbox, 'Distributor:' with a text box, 'Login:' with a text box, and 'Password:' with a text box. Below the password field is a red 'Enter' button. At the bottom right of the form area is a button labeled 'Send me my password'.

To be allowed to consult or create quotes & orders, you must first log into the system.

Administrative Access

Check this box to be able to manage employees. You will have to enter your Distributor login and password only (the login box will be hidden). Your Distributor password MUST be kept secret.

Using this access mode, you will be able to consult all orders/quotes created by your employees.

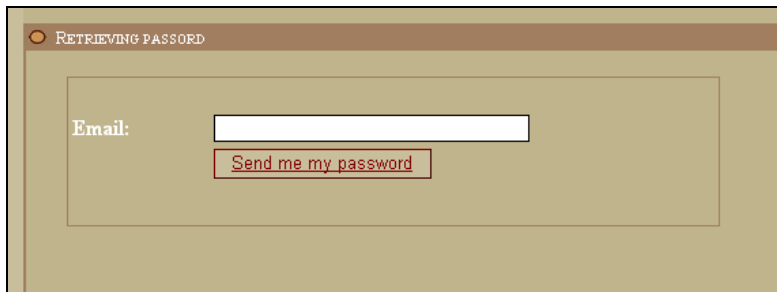
We suggest that you create a regular account for each employee. New quotes & orders may be entered with Administrative login but as a best practice, you should use only Regular Access to create quotes.

Regular Access

To log on with Regular Access, you must enter your Distributor login name, your employee login and your password. Using this access mode, you will be able to consult only your own quotes & orders.

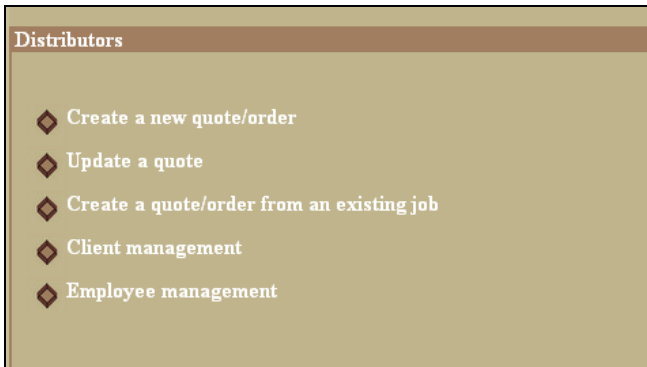
Send me my password

If you have forgotten your password, you can click this link. A new page will open. You will have to enter the email associated with your account. Your password will be sent at this email.



The image shows a screenshot of a web browser window. The title bar at the top reads "RETRIEVING PASSWORD". The main content area is a light brown color and contains a form. The form has a label "Email:" followed by a white text input field. Below the input field is a red button with the text "Send me my password" in white.

Distributor's menu



If you log in using Administrative Access, this menu will be displayed.

Using Standard Access, Employee management will be hidden.

Create New quote/Order

Distributors Show product List

NEW QUOTE

Série: [dropdown] Glaze: [dropdown] Standard Stain D.front: [dropdown]
 Solid Stain
 Specie: [dropdown] Cab. Edges: [dropdown] Brushing D.Box: [dropdown]
 Antiquing D.Slides: [dropdown]
 Fly Specs
 High Class Save INFOS

Door: [dropdown] Cab Int: [dropdown]
 Color: [dropdown] Cab Cons: [dropdown]
 Client: [dropdown] PO: [input] Quote #: [input] Note: [input]

Item#	Part No	Description	Hinge	FEL	FER	Qty	Note
[input]	[input]	[input]	[dropdown]	[dropdown]	[dropdown]	[input]	[input]
<input type="checkbox"/> Fin.int. W: [input] W2: [input] H: [input] D: [input] Add Clear Save							
No Item							

To create a New Quote, you must first fill every field in the upper section. You must then Click the Save Infos button to be allowed to enter items in quote.

When every field is correctly filled, a quote Number will be displayed and buttons will give you the option to view the quote or pass an order, just below item Note.

You HAVE to enter a client before creating the quote for a client (see distributor menu).

You can enter notes in the upper section and in any quote item.

To enter Items, you have to enter the Item Number first. If you want to add an item attached to another, just enter the same Item Number. Items will be numbered correctly by the system.

You can then enter part Number. You can consult Product list using the Show product List link (at the top of the upper section).

If required, enter Hinge and finished Ends. Follow with quantity.

Check the Fin. Int box to specify an item with finished interior. You may also specify size modification. Upcharges will be added by the system for finished interior, finished ends and size modification.

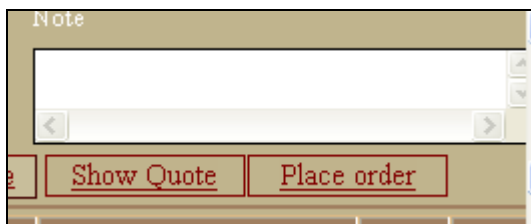
To add the item, click on the Add button.

You can delete an item from the list using the delete button:



NOTE: IF YOU PRESS BACKSPACE BUTTON, YOU WILL BE REDIRECT TO THE MENU. YOUR QUOTE IS NOT DELETED. IT IS SAVED AT EACH ADDED ITEM. YOU CAN THEN CHOOSE UPDATE IN THE MENU AND CHOOSE YOUR QUOTE IN THE LIST TO RESUME YOUR WORK

Show Quote & Place Order



These two buttons will display printable Quotes/Orders with every price, including added upcharges.

With Show Quote, you will be able to send the quote to NAC. They will then receive email with your quote information. Use this button only if you want NAC to verify the quote. Don't forget to enter note in the upper section of the quote!

With Place Order, you will be able to save the Quote as Order. Email will be sent to NAC. Note: A quote can be updated; an Order can be modified just by NAC. After sending the Order, please print, sign and fax the Order to NAC.

NAC will be able to modify quotes and Orders. **The official order will be the signed one.**

Update a quote & Consult Orders

This section permits you to update a saved quote and to consult sent orders.

The screenshot shows a web application interface with a title bar 'Distributors' and a sub-header 'UPDATE QUOTES & CONSULT ORDERS'. It contains two tables: 'QUOTES' and 'ORDERS'. The 'QUOTES' table has columns for Quote #, PO, Employee, and a 'Consult/Update' link with a small icon. The 'ORDERS' table has columns for Order #, Date, PO, Employee, and a 'Consult' link.

QUOTES				
Quote #	PO	Employee		
2221		77@77.com	Consult/Update	

ORDERS				
Order #	Date	PO	Employee	
2217	2007/11/19		ppp@ppp.com	Consult

Remember that a saved order can only be modified by NAC. Clicking Consult/Update link will load the quote in the “New Quote” panel for modification. Consult order will display the printable order.

Manage Clients

The screenshot shows a web application interface with a title bar 'Distributors' and a sub-header 'CLIENT MANAGEMENT'. It contains two sections: 'EXISTING CLIENTS' and 'ADD CLIENT'. The 'EXISTING CLIENTS' section has a table with columns for Name, Address, Phone, FAX, Notes, and Edit/Delete links. The 'ADD CLIENT' section has input fields for Name, Address, Phone, Fax, and Notes, along with a 'Save' button.

EXISTING CLIENTS					
Name	Address	Phone	FAX	Notes	
client 1	add1	phone1	fax1	notes 1	Edit Delete

ADD CLIENT

Name:

Address:

Phone:

Fax:

Notes:

Using this page, you will be able to add, edit and delete clients. Remember you have to create client before adding a quote for this client.

Manage Employees

Login	Password	Email	
ppp	ppp	ppp@ppp.com	Edit Delete
66	test	66@66.com	Edit Delete
ooo	ooo	ooo@iii.com	Edit Delete

ADD EMPLOYEE	
Login:	<input type="text"/>
Email:	<input type="text"/>
Password:	<input type="text"/>
	<input type="button" value="Save"/>

This page will allow you to manage your employees access to the system. Remember your Administrative login must be kept secret. **If an employee leaves your company, just change the password.** You will then be allowed to keep trace of old quotes made by this employee. **The delete link should only be used if you've made a mistake entering employee.**

You have to enter a **valid** email. This email will be used by NAC to send notification on quote/order updates.

Create Quote from an existing Quote/Order

If you have to enter a new quote similar to an old one, you can open a new quote based on the old one. Just click the copy link. A new quote will be opened with a new quote number in the usual quote creating page.

Quote Number	Date	PO	
2217	2007-11-19 00:00:00		Copy
2218			Copy
2220			Copy
2221			Copy
2224			Copy
2225			Copy