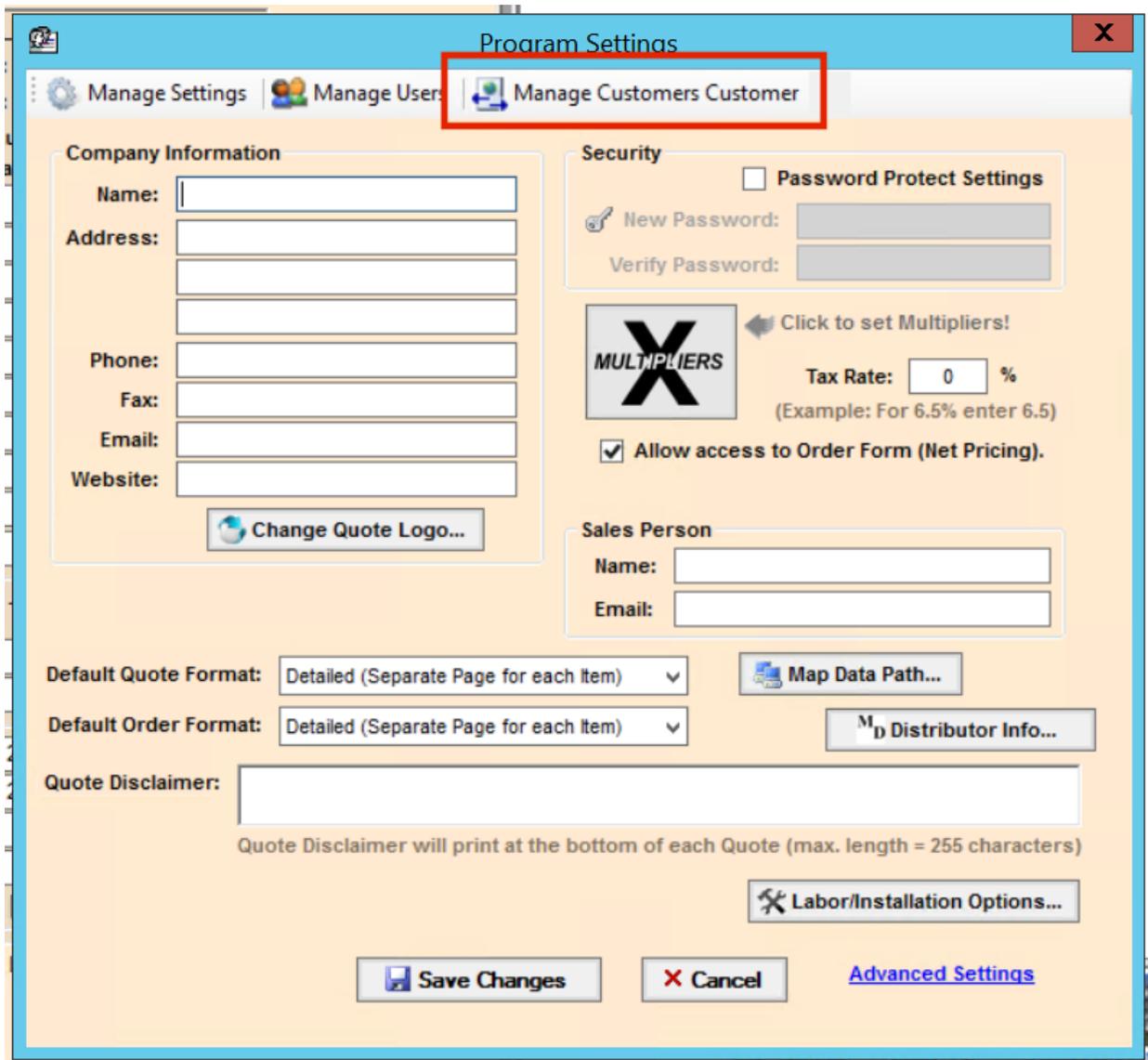


Customer's Customer Setup

An optional feature of the E-Catalog is the ability to create customer relationships. The Customers' Customer Feature allow an E-Catalog Customer to be set up as a customer of another E-Catalog customer. If you have a customer that would like to offer your E-Catalog to one or more of their customers the Customers' Customer Feature is ideal.

After you have signed up for the Customers' Customer Feature you will get an additional command on the Program Settings toolbar (Online Users Only). All options of the Customers' Customer Feature are administered from '**Manage Customers Customer**' link.



The screenshot shows the 'Program Settings' dialog box with a toolbar at the top containing three items: 'Manage Settings', 'Manage Users', and 'Manage Customers Customer'. The 'Manage Customers Customer' item is highlighted with a red rectangle. The main area of the dialog is divided into several sections:

- Company Information:** Includes input fields for Name, Address (three lines), Phone, Fax, Email, and Website. A 'Change Quote Logo...' button is located below these fields.
- Security:** Features a 'Password Protect Settings' checkbox, 'New Password:' and 'Verify Password:' input fields, a 'MULTIPLIERS' icon with a large 'X', a 'Click to set Multipliers!' button, a 'Tax Rate: 0 %' field with an example '(Example: For 6.5% enter 6.5)', and a checked checkbox for 'Allow access to Order Form (Net Pricing)'.
- Sales Person:** Includes 'Name:' and 'Email:' input fields.
- Default Quote Format:** A dropdown menu set to 'Detailed (Separate Page for each Item)'. A 'Map Data Path...' button is to its right.
- Default Order Format:** A dropdown menu set to 'Detailed (Separate Page for each Item)'. A 'M_D Distributor Info...' button is to its right.
- Quote Disclaimer:** A large text area for entering a disclaimer. Below it, a note states 'Quote Disclaimer will print at the bottom of each Quote (max. length = 255 characters)'. A 'Labor/Installation Options...' button is located below the text area.

At the bottom of the dialog, there are three buttons: 'Save Changes', 'Cancel', and 'Advanced Settings'.

When you first navigate to the 'Update Distributor Info' form the 'Customer/Customer Pairing' drop down will contain a message indicating that you do not have any relationships set up. Click the 'Add New Customer/Customer Pairing' to add your first relationship.

Update Distributor Info

Add New Customer/Customer Pairing About Exit

The app will update the 'Distributor Information' as displayed for your Customers' Customers. Select the Customer/Customer pairing you wish to change, update the information and select 'Update Information for all Customer Customer Users' to apply the changes.

Note: Format is Their Customer / Your Customer

Customer/Customer Pairing You currently do not have any relationships. Please select 'Add New Customer/Customer Pairing' to add a relationship. Update Pairing Order Info
Delete Current Pairing Info

Name
Address 1
Address 2
Address 3
Phone
Fax
Email
Website

Order Disclaimer

No
Image
Saved

Select Logo
(Note: Logo is not updated unless the 'Update Distributor Information' link is selected.

Update Distributor Information for all Customer Customer Users

The screenshot shows a dialog box titled "Add Customer Relationship". It features two dropdown menus at the top: "Your Customer" (selected: "Cust Two") and "Their Customer" (selected: "Customer One"). Below these are several input fields and checkboxes:

- Menu Item Text: Submit E-Catalog Order...
- Deliver To Email Address: [Empty]
- Send Acknowledgement
- Acknowledgement Subject: [Empty]
- Acknowledgement Text: [Empty]
- Show Requested Date
- Send Project File
- Hide Email Order Menu Item

At the bottom, there are two buttons: "Add" and "Cancel".

Select **your** customer from the first drop down and **their** customer from the second drop down. The **'Deliver to Email Address'** is the email address to which their customer's orders will be sent. An acknowledgment is optional. If your customer wishes to have an acknowledgment sent automatically upon the receipt of an order, check the **'Send Acknowledgment'** check box and enter an acknowledgment subject and text (Note: if the **'Send Acknowledgment'** check box is checked an acknowledgment subject and text is required). The **Show Requested Date**, **Send Project File** and **Hide Email Order Menu Item** are optional feature which are explained below:

Show Requested Date – If the **Show Requested Date** check box is checked the **'Requested Date'** field is shown on the order information form and the requested date is sent in the body of the order email.

Submit E-Catalog Order

E-Catalog Order Information

Customer Name/Account #: (required)

Customer City: (required)

Ordered By:

Customer Email:

Comment:

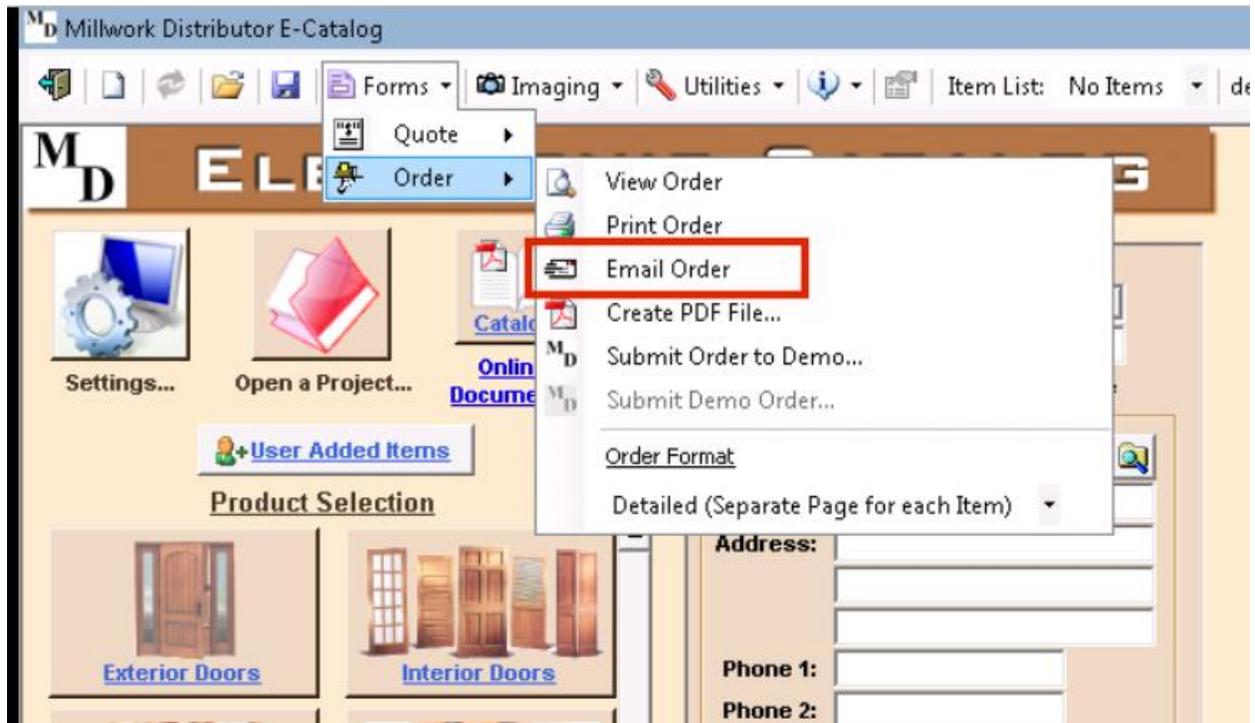
PO #:

Job Name:

Requested Date: 

Send Project File determines if an E-Catalog project file of the order is included in the email. The project file could then be opened by your customer to replicate the order being sent.

Hide Email Order Item determines if the **Email Order** menu items is shown in the E-Catalog. If checked the Email Order menu item is not shown.



Select the '**Add**' button to create the Customer Relationship will create the customer relationship set up on the form and return you to the Management Form. From the Management form you can update the Order Form Information for the selected customer relationship, return and update the order information for the selected relationship, delete the selected customer relationship or add a new customer relationship.

The fields on Update **Distributor Information** form are used to configure how an order is viewed by your customer's customer. By default, the order form is not changed when a new customer relationship is created. You can update this information to display your customer's customers information on the order form. The order form logo is replaced by the selected logo and the Vendor Information is replaced by the other fields on the **Distributor Information** form.

MILLWORK DISTRIBUTOR

Order

Page 1 of 1

Order Number: _____

Date: 2/28/2018

Required Date: 2/28/2018

Vendor Information

Name: Millwork Distributor

Address: 8027 9th St. North
Oakdale, MN 55128

Phone #: (612) 747-6763

Fax #: _____

Email: sales@millworkdistributor.com

Specifications

U.D. = 37 5/8" x 82"; R.O. = 38 1/2" x 82 1/2"

O.M. Of Exterior Trim = 40 1/8" x 83 1/4"

Lead Time: Stock (Call to verify)

(1) 3' 0" x 6' 8" CCA2111D Classic-Craft American Style Fiberglass Door



Image is viewed from Exterior!

Item Description	Qty	Price	Extended
3' 0" x 6' 8" CCA2111D Classic-Craft American Style Fiberglass Door w/Homeward Black Nickel Glass - Left Hand Inswing	1	1,848.00	\$1,848.00
2 3/8" Backset - Single Bore w/Mortised Edge Latch Prep w/1" x 2-1/4" Full Lip Strike Prep	1	0.00	\$0.00
Set of Roll Bearings - 11S2BV2 Zinc Dichromate Hinges	1	0.00	\$0.00

Update Distributor Info

Add New Customer/Customer Pairing Exit

The app will update the 'Distributor Information' as displayed for your Customers' Customers. Select the Customer/Customer pairing you wish to change, update the information and select 'Update Information for all Customer Customer Users' to apply the changes.

Note: Format is Their Customer / Your Customer

Customer/Customer Pairing: You currently do not have any relationships. Please select 'Add New Customer/Customer Pairing' to add a relationship.

Name: _____

Address 1: _____

Address 2: _____

Address 3: _____

Phone: _____

Fax: _____

Email: _____

Website: _____

Order Disclaimer: _____

Select Logo

(Note: Logo is not updated unless the 'Update Distributor Information' link is selected.)

No Image Saved

Contact Millwork Development Customer Service at 612-999-4072 if you have any questions regarding the set up or use of the Customer Relationship Feature.