

How to Request a New Quote:

This information will become the work order for your treatment, it is critical that you provide as much detail as possible. Admin cannot edit, delete, or add any information to your side of the quote request.

1. Click on the New Quote request button in the upper middle of the page.
2. A screen will open up with forms on the left-hand side and cells across the top for you to fill in.
3. Your name and the date will fill in automatically, but you will fill in the cell with the sidemark (your clients name)
4. Choose a form from the left side of the screen that matches the treatment you're requesting a quote for. You can fill out multiple forms under one sidemark. Please select New Form when you are changing fabrics, treatments style or rooms.
5. Once you've selected the correct form, fill in the information requested. Most cells are mandatory, and you will not be able to submit the form until all the mandatory cells are completed. If you're not sure of the meaning of any form, hover your cursor over the title of the cell and an explanation will pop up.
6. The trim cell is to be filled in ONLY if there is trim. The automatic selection is no so you don't need to fill in no, or not applicable if you're not using trim. If you add other information there it will see it as a trim selection which it is not. There is an additional information cell at the bottom of the form. or you can add additional details in the treatment description cell.
7. There are cells for 4 windows in each room, but you can add additional windows by clicking on Add Window.

Add Window

8. After you've added all the windows, fill in the fabric description. You should also upload a picture of the fabric. There is room for 3 fabrics, but you can add more if needed. To upload a picture of your fabric, first save a picture of the fabric. Then select Choose File and select that picture.
9. Then next step will be to select a picture of the treatment style you are requesting. We have a gallery of pictures that are specific to each form, or you can upload your own picture.
10. Finally, note whether any deductions were taken, what color and type of lining you want, whether there are any other treatments in this same fabric. You can also put additional information in the bottom right cell.
11. If this is the only form you are submitting, click Submit. If you have more treatments under the same sidemark, click Next Form. Next Form will take you back to the starting page where you can select additional forms as needed. If you need to come back to this form to add more information later, click Save.

Save

Next Form

Submit

12. Once you click submit you will receive a verification asking if you've double checked that all the details are correct and that you're sure you want to submit this Quote Request. Then you can click on send quote request. If you skip this step, the quote request will remain in your quote inbox as a draft. We will not have received it.
13. You will receive an error message if you miss any mandatory cells. That field will be underlined in red. Please go back and fill in any cells that have been missed.

Field is required x