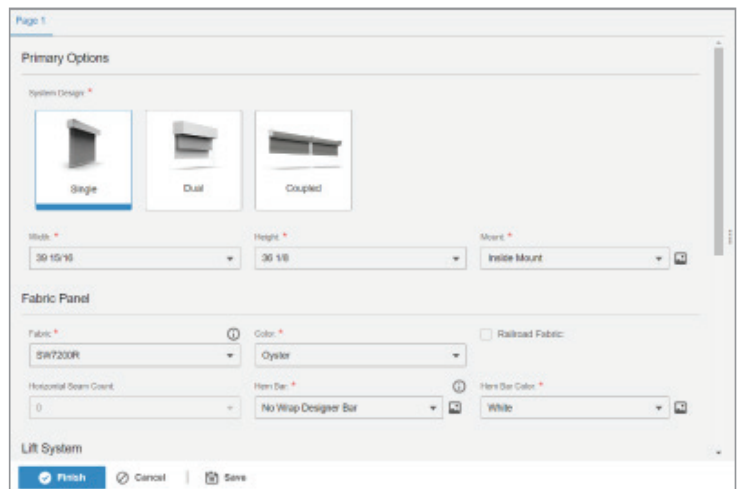


Sun Shade



Sun Shade Designer

Quick Start Guide

Nice

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Overview

The Shade Designer is what is used to design and configure shades. It is accessible via PC/MAC from the Nice Dealer Portal (Supported Browsers: Chrome and Safari). This tool will let you input a shade type, size, other details and options. It will also determine the options available by the size, type and the fabric selected. You'll start by setting up an account, creating quotes then converting to an order.

It is important to note that shipping is not calculated until the order is completed. Shipping will be added afterward then charged at the time of shipment.

Account Creation

To access the Shade Designer, an account must be created for your company. This may be done by passing the training modules. Once passed, an account will be created for your company.

NOTE: It can take up to 72 hours to generate an account.

Once the account is generated, you will receive an email. Once you receive the email, follow the link to complete the account setup.

NOTE: Be sure to check spam folders, because the link is only good for seven days.

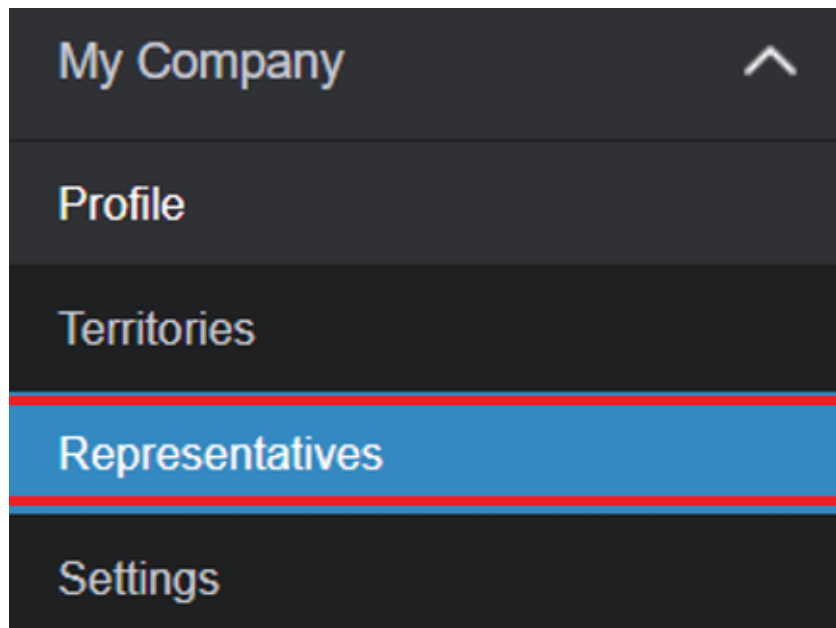
If the link is no longer active, please email sunshades@niceforyou.com with your company name.

Managing Access

Once an account is created, you can add people within your organization to use the account.

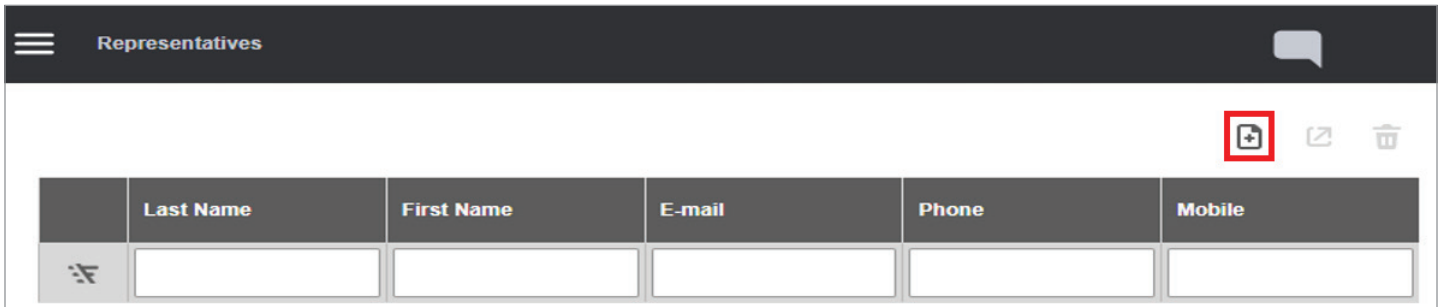
NOTE: You are limited to one account per company.

To manage access, navigate to the menu, Expand *My Company* and select *Representatives*. From here you can add, delete or edit permissions for the users of the account.



Add/Edit a User

1) To add a User, select the + icon in the upper right.



If editing, select one of the users listed by clicking the last name.

2) If adding a user, enter the information:

<input type="checkbox"/>	Camp	Lar	l.mp@foryou.com	7616145445
--------------------------	------	-----	-----------------	------------

3) An email will be sent to the address entered to complete the registration. Enter the information required:

Representative Information

First Name *

Last Name *

E-mail *

Phone

Fax

Mobile

NOTE: Required information is represented by *

- 4) Set or change a users Role:
- **Administrator:** Has the ability to change settings for the company and users
 - **No Access:** Disables the user from being able to log in
 - **User:** Has access the system, but cannot add others or change permissions

- 5) Set or change a users Quote/Order Privilege:

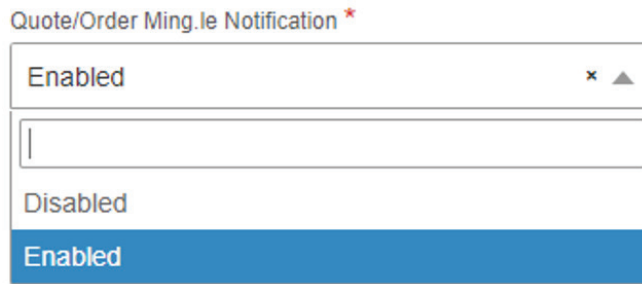
The screenshot shows a user profile form with three main sections: Representative Information, Application Settings, and Configuration Profiles. The Role dropdown menu is open, showing the following options: Administrator, No Access, and User. The Application Settings section also shows the Quote/Order Privilege dropdown menu set to 'Can Order Directly'.

- **None:** May only view quotes and orders
- **Quote Only:** May create a quote only

The screenshot shows a dropdown menu for Quote/Order Privilege. The current selection is 'Can Order Directly'. The menu is open, showing the following options: None, Quote Only, Can Convert Quotes to Orders, and Can Order Directly (highlighted in blue).

- **Can Convert:** May create a quote and convert it to an order.
- **Can Order Directly:** May create and convert quotes, or order accessories from the product catalog independent of a quote/order. A quote does not need to be prepared, but they can order directly with this level of access.

6) Set Notifications:



- If enabled, the user will get an email when activity occurs.

Delete a User

<input checked="" type="checkbox"/>	Camp	Lar	l.mp@foryou.com	7616145445
-------------------------------------	------	-----	-----------------	------------

- 1) Select a user by checking the box next to their name.
- 2) Select the trash can in the upper right.



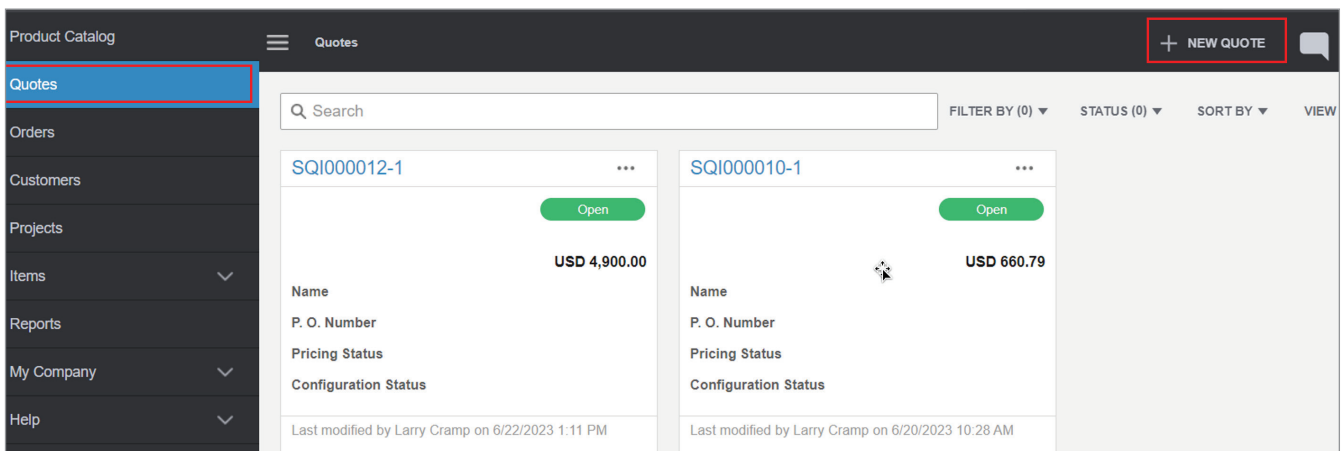
Make sure your account is linked. Be certain your dealer account number is entered into this field.

General
ERPID
<input type="text"/>

Creating Quotes

To order a shade(s), you must first create a quote. Select **Quotes** from the configuration tool. View existing Quotes, or start new Quotes. To begin:

- 1) Select **+ New Quote** in the upper right portion of the window.



2) Add items to your Quote by selecting the +Add Items button.

Customer is not selected SELECT CUSTOMER

Last modified by Lar Camp on 6/28/2023 4:49 PM + ADD ITEMS

APPLY AGREEMENT DISCOUNT SELECT ALL DESELECT ALL VALIDATE RESET ...

Line	Item	Status	Price	Quantity	Total	Actions
------	------	--------	-------	----------	-------	---------

Quote Summary

Header [Edit Header Details](#)

Quote Status Open

Contact

Ship To

P. O. Number

Pricing [Edit Pricing Details](#)

Subtotal (List) 0.00

CONVERT TO ORDER

PARTIAL ORDER

3) Typically this is a shade, so select the desired shade type (indoor or outdoor). You can also add an accessory, such as a remote.

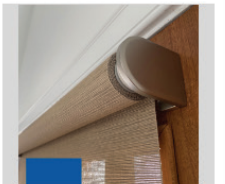
In the example below, we will add an Interior shade. Typically, the quantity will always be "1", because each shade has different measurements (even if the window size is the same). The only time the quantity for a shade should be changed is while creating a *Quick Quote*.

NOTE: A *Quick Quote* can not be turned to an order. Its purpose is to give a ballpark price for a project.

Categories

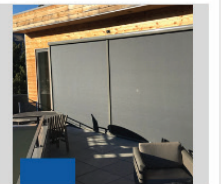
- My Items
- Named Configurations

Products




Interior Nice Roller Shades
Configurable
On Configuration

SELECT



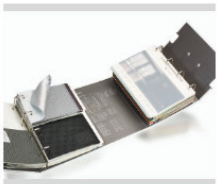
Exterior Roller Shades
Configurable
On Configuration

SELECT



Nice Motorized Accessories
Configurable
On Configuration

CONFIGURE



Sales Tools
Configurable
On Configuration

CONFIGURE

Page 1 of 1

Viewing 1 - 4 of 4

Quick Quote - Interior

Now that an interior shade has been added, a *Quick Quote* may be completed.

Interior Nice Roller Shades

Description:

Product Details:

Item Price: On Configuration

Quantity:

Label:

Configuration Options Global Options

System: *

Width: *

Height: *

Mount: *

Fabric: *

Fabric Color: *

Railroad: *

Hem Bar: *

Lift System: *

Top Treatment: *

Fabric Roll Dir: *

Comments:

Need More Options?

RESET OPTIONS ADD ITEM CONFIGURE

Quantity: Enter the quantity for the shades.

NOTE: On a detailed quote, each shade will be entered separately, so the Quantity will be set to 1.

Label: Enter the room and/or label used to identify the shade (not needed for a Quick Quote).

System: A Quick Quote is only for single shade types.

Width: Enter the estimated *Width* of the shade or shades.

Height: Enter the estimated *Height* of the shade or shades.

Mount: Select the *Mount* for these shades. If an icon is next to an option, it will display a visual.

Fabric: Select the *Fabric*. Use a Fabric Binder, Website or the product section to reference a fabric name.

Fabric Color: Select the Fabric color for the type selected. Refer to the website or binder for examples.

Railroad: If the shade is too wide for the fabric selected, some can be railroaded (turned horizontal).

Hem Bar: If an optional Hem bar is desired, select from an option the list.

Lift System: Select the list system desired.

Top Treatment: Select the shade mount desired. Selecting **None** would indicate Open Roll.

Fabric Roll Dir: Select **Reverse Roll** if desired.

Comment: Leave comments about this particular shade.

Detailed Quote - Interior

A *Detailed Quote* can be converted to an order, but it requires more information for each individual shade. To start a new quote, select add item and the shade type. Enter a Label (usually room name and other description). It is printed on the shade label to identify. Remember, the quantity is always "1". Select *Configure* (the other options are used for quick quoting).

Interior Nice Roller Shades

Description:

Product Details:

Item Price: On Configuration

Quantity: 1

Label: Master Bedroom

Configuration Options Global Options

System: * Single

Width: * []

Height: * []

Mount: * []

Fabric: * []

Fabric Color: * []

Railroad: *

Hem Bar: * Standard Sealed Hem ...

Lift System: * []

Top Treatment: * []

Fabric Roll Dir: * Regular Roll

Comments: []

Need More Options?

RESET OPTIONS ADD ITEM **CONFIGURE**

1) Choose shade design:

Depending on the system chosen, the options that follow will be different.

Primary Options

System Design: *

Single Dual Coupled

For a total blackout configuration, select the checkbox. This will pre-load the rails and hem bar necessary, as well as filter the Fabrics and mounts.

Total Blackout:

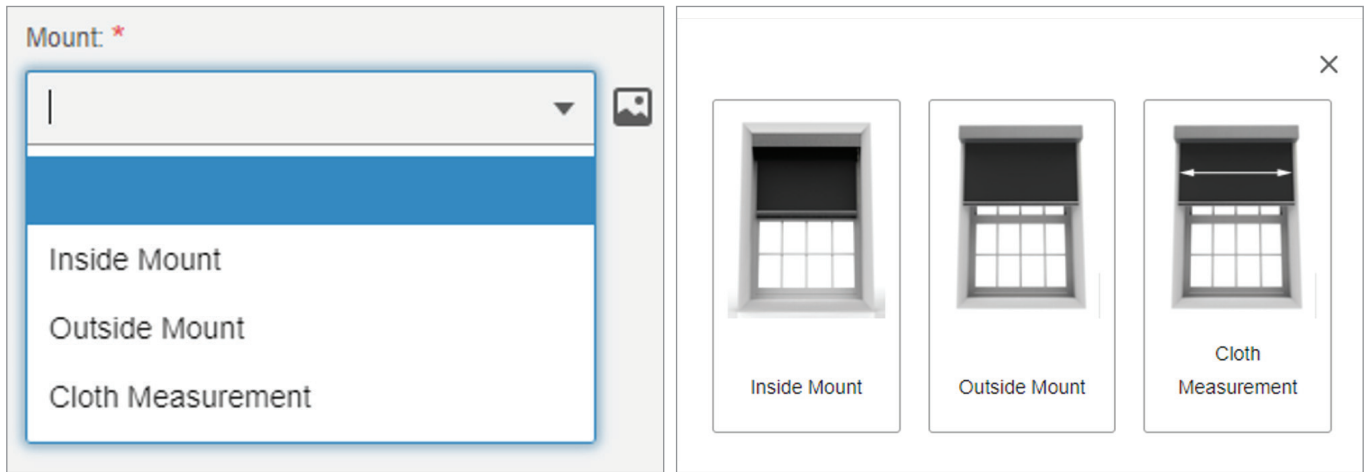
2) Enter Measurements:

Entering incorrect measurements is the most common error made when deploying custom shades. Please take your time, and use the measurement worksheet to measure as accurately as possible (within 1/16"). Be certain to measure all windows. If checked, the **Total Blackout** option will apply the side channels and hem bar. It will also filter the fabric types and mount options appropriately.

Width: * []

Height: * []

3) Choose a Mount:



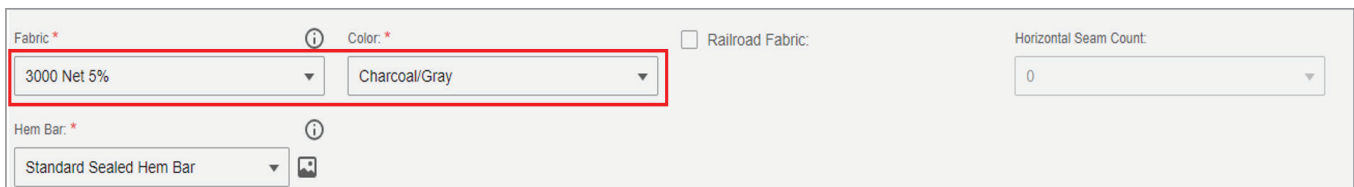
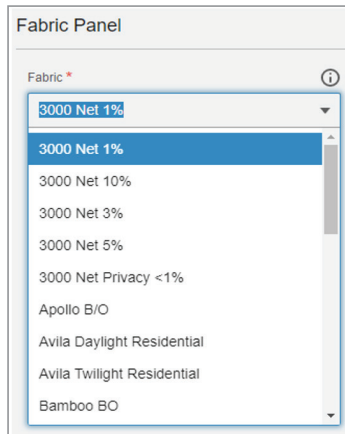
Inside Mount: Mounts located inside the window frame. Note the “light gap” when choosing this option.

Outside Mount: Mounts located outside of the window frame, usually as wide as the trim.

Cloth Width: For outside mounts. When chosen, the measurements given are for the Fabric size. The shade assembly will be the cloth size plus mounting.

4) Select the Fabric Options.

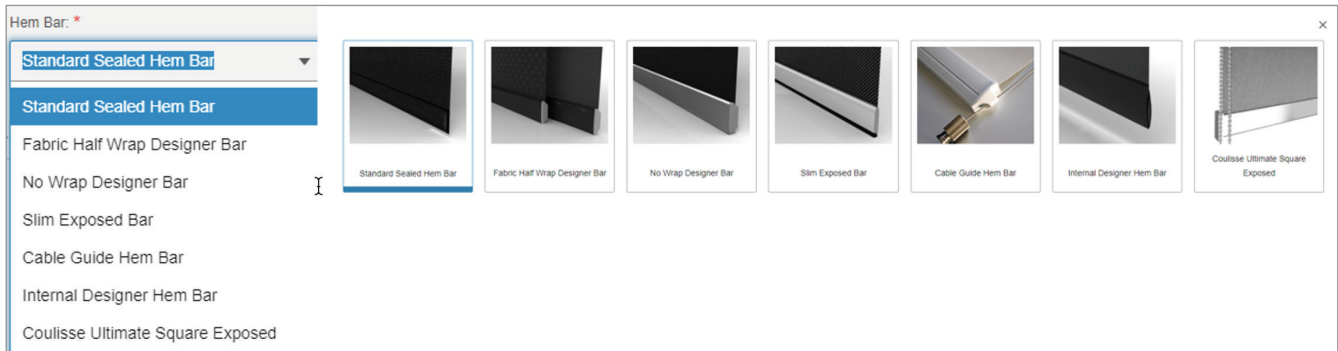
Use the Fabric Binder, Website or the listings under Product Catalog for samples and fabric names. Select from the list, then select the color for the fabric chosen (listed inside/out).



Railroad: If the shade is too wide for the fabric selected, it will be railroaded (turned horizontal) if supported by the fabric. This will automatically be checked (✓) if needed, but you can manually add the check for a smaller shade in the same room where a larger, railroaded, shade is located so they will match.

Horizontal Seam Count: The number of horizontal shade seams.

Hem Bar: Select the *Hem Bar* desired. Default is the *Sealed Hem Bar*.



5) Select *Lift System*.

Motorized: Motorized lift.

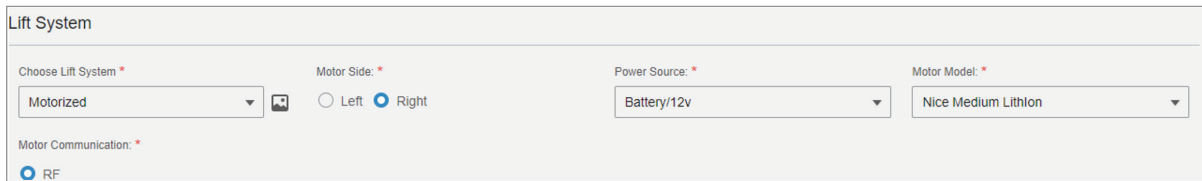
Zero-Gravity: Manual cordless lift

Bead-Chain: Manual corded lift

None: Panel Only. A option for switching fabrics on existing shades



Motorized Options:



Motor Side: Choose *Left* or *Right*. The motor side has a larger bracket gap.

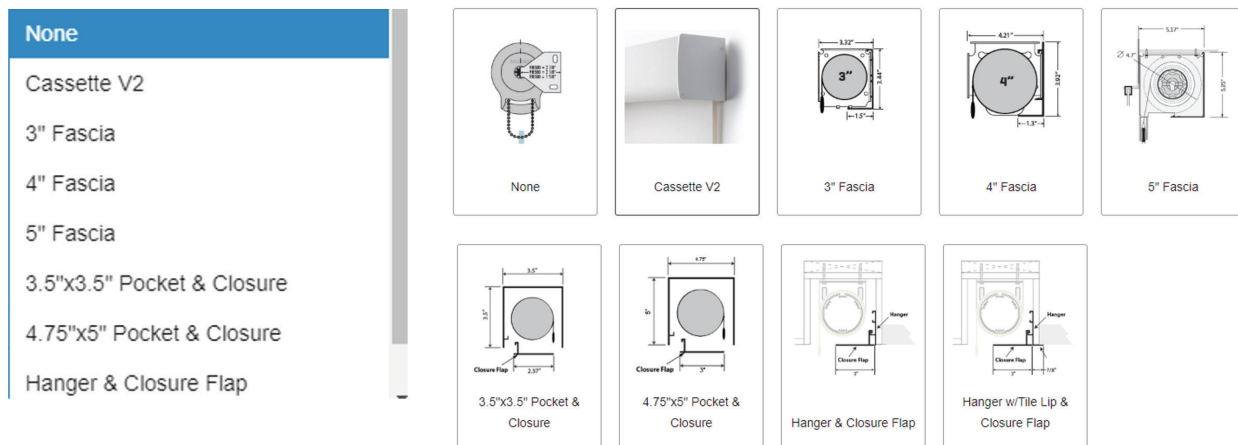
Power Source: Battery, 24vDC (required wiring), 120vAC

Motor Model: This option will auto-select, based on the shade size and fabric weight.

Motor Communication: RF or Digital (requires Nice Wire)

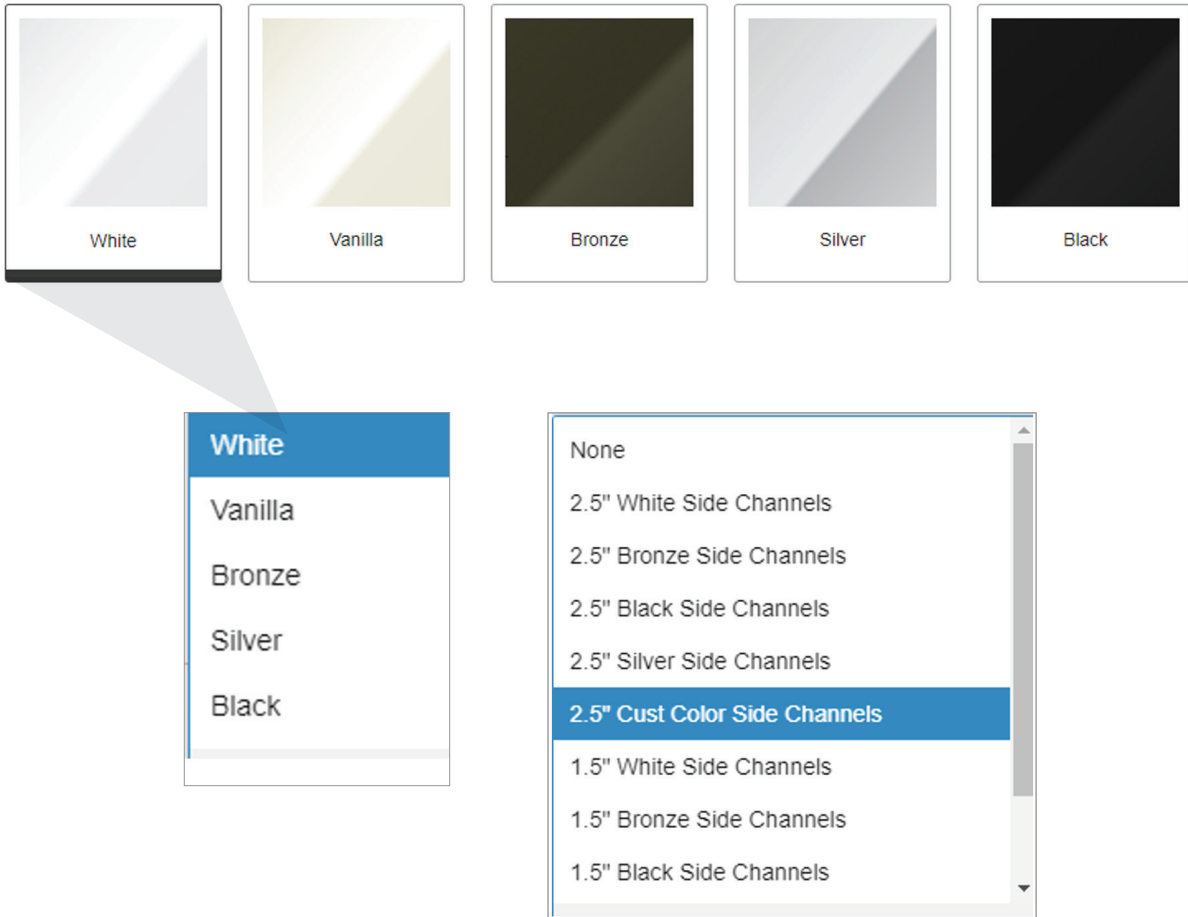
6) Select Lineal Options:

Depending on the shade size and design selected, available options for this shade will be displayed.



In some cases, you may want to oversize an option to match another shade in the same room. If a room has two shades and one is larger and in need of a 5" Fascia, the smaller one can be forced to be 5" to match.

Select Any Color Options:



If Side Channels are desired, select the size and color.

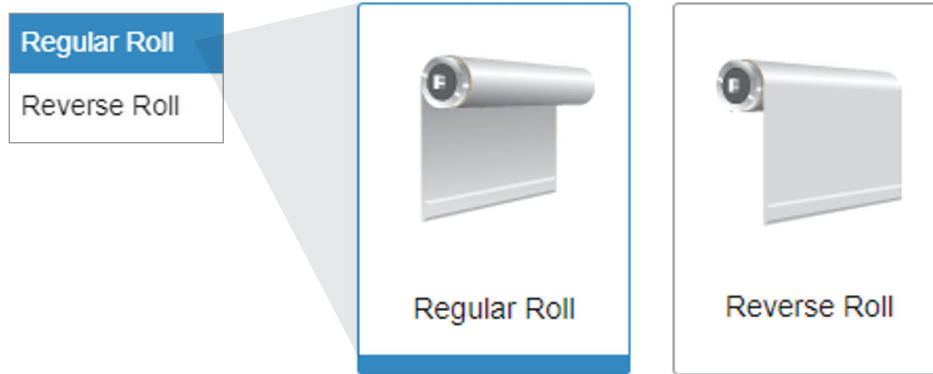
NOTE: If total blackout was selected, the side channel will already be selected.

Select this option if **Bracket End Caps** are desired.

Bracket End Caps:

7) Primary Options:

Select *Regular* or *Reverse Roll*.



Use the Special Comments option to enter any special notes for this shade, and the fabricators will read them.

Special Comments:


8) Select **Finish** or **Save**. If **Save** selected, you may complete this shade order at a later time.



9) Add more shades by selecting **Add New Item**. Continue adding and configuring shades until your quote is complete.

10) **Validate the Quote:** Once completed, you should always **Validate** the quote. Errors will be exposed. Each line should say "Success" if no errors were discovered. If an error is found, the shade will be identified so you can modify and correct the error.

Review and print Quote

Once completed, Pricing (MS ) will be displayed on the right of each listed shade. Shades not completed will be listed as *Partially Saved*. This indicates that there is additional information required to complete the shade order and can't be ordered until the missing information is entered. To edit a shade, select the *Item*.

Customer is not selectedSELECT CUSTOMER

Last modified by Larry Cramp on 7/1/2023 12:12 AM + ADD ITEMS

APPLY AGREEMENT DISCOUNT SELECT ALL DESELECT ALL VALIDATE RESET ...

Line	Item	Status	Price	Quantity	Total	Actions
<input checked="" type="checkbox"/> 1	+ Interior Nice Roll	Partially Saved	544.29/ea	1	544.29	...
<input type="checkbox"/> 2	+ Interior Nice Roll	Success	547.14/ea	1	547.14	...

Quote Summary

Header [Edit Header Details](#)

Quote Status Open

Contact

Ship To

P. O. Number

Pricing [Edit Pricing Details](#)

Subtotal (List) 1,091.43


Total (USD) 1,091.43

CONVERT TO ORDER

PARTIAL ORDER

Actions

Resume Configuration: Resumes configuring this shade

Adjust Price: Not available. 

Comment: Add a comment for this shade

Attachments: Add an attachment. Helpful for specialty shades

Copy: Copy this shade and configuration.

Export: Will export this shade configuration to your computer

Remove: Remove this shade

Resume Configuration

Name Configuration

Adjust Price

Comment

Attachments (0)

Copy

Export

Remove

Detailed quote, Exterior

Building an exterior shade has a few different options and requirements than interior

1) Enter your size. Using the measuring guide, exterior section, and measure for your application.

Type Width: *	Type Height: *
<input type="text"/>	<input type="text"/>

2) Select the System.



- **100 Evo Square:** Surface pocket Max width 157.5" x 106.25; height 118" x 138"
- **150 Evo Semi-Retract Square:** Surface pocket 236.25" x 133.75 126" x 236"
- **100 Evo Slim Recess:** Max Size Shade = 177" x 136"
- **150 Evo IM7 Recess:** Max Widest Shade = 236.25" x 133.75"; Max Tallest Height Shade = 126" x 236"
- **Open Roller:** used for pocket & recesses environments Max Widest Shade = 240" x 130" Max Tallest Height Shade = 126" x 240"
- **Replacement Fabric Panel:** Panel only. Option to replace the material on an existing shade.

100 Evo Square
150 Evo Semi-Retract Square
100 Evo Slim Recess
150 Evo IM7 Recess
Open Roller
Replacement Fabric Panel

4) Choose the lift system.

Lift System

Drive: * Motorized Operator

System: * 110v AC | RF Radio Controls / Obstac....

Control Side: * Left

Cable Exit Location: * Customer To Drill

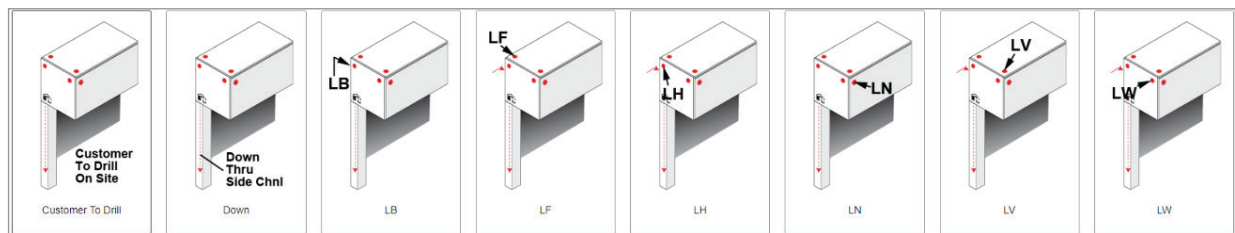
- 110v AC : Exterior rated motor, RF and button operation

5) Select Fabric.

- Select the Fabric desired.
- Use a Fabric book or website to reference the options and nomenclature.
- If crystal window is selected:
 - » Select orientation
 - » Select quantity of windows (can add up to 4)

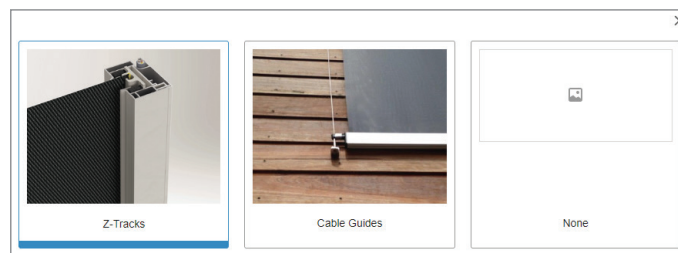
6) Select cable exit.

Select this option carefully! Decide where the power /pushbutton cables will be routed. The cable exit will be drilled in the location chosen. Once selected, this choice cannot be changed.



7) Select side tracks.

Often times exterior shades require a way to secure the sides of the fabric from getting blown around. This can be done by a Z-Track or cable guided. A none option is also available.



- **Z-Track:** The fabric rides in connected side channels
- **Cable Guided:** The hem bar has a ring that follows a cable mounted on each side that keep the fabric in a set boundary
- **None**

8) Metal colors

Most exterior shades have metal enclosures that need to be painted. In this section you will define the color(s) desired. You can also choose a custom color for an additional price by supplying the RAL number.

Head Box Color: * White - RAL 9016

Side Channel Color: * White - RAL 9016

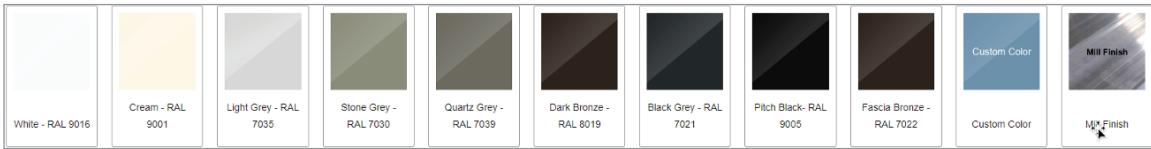
Hem Bar Color: * White - RAL 9016

Sea Side Quality Powder Coat:

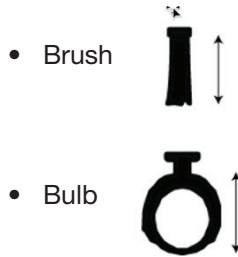
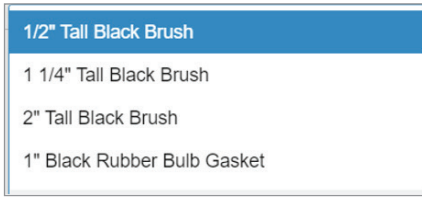
Hem Bar Bottom Gasket: * 1/2" Tall Black Brush

Special Comments:

9) Select the color for the Head box, Hem Bar and Side channel (if equipped).



10) Select the hem bar bottom gasket.



11) Validate the Quote



- Choose SELECT ALL and select VALIDATE.

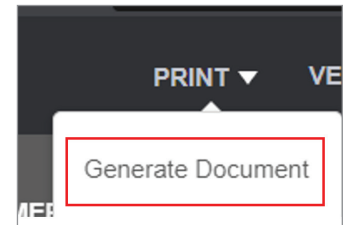
Changing a Quote

To change a quote, select the shade and make any alterations. When finished modifying the quote, be certain that each shade is selected then select **Validate**. When finished, any errors will be displayed.



Printing

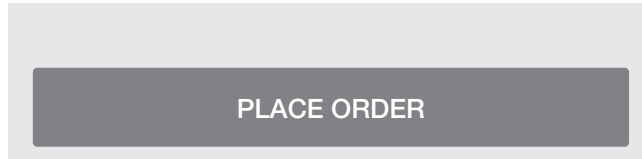
To print your shade quote, select PRINT from the upper right, then select the **Generate Document** option to view the options below:



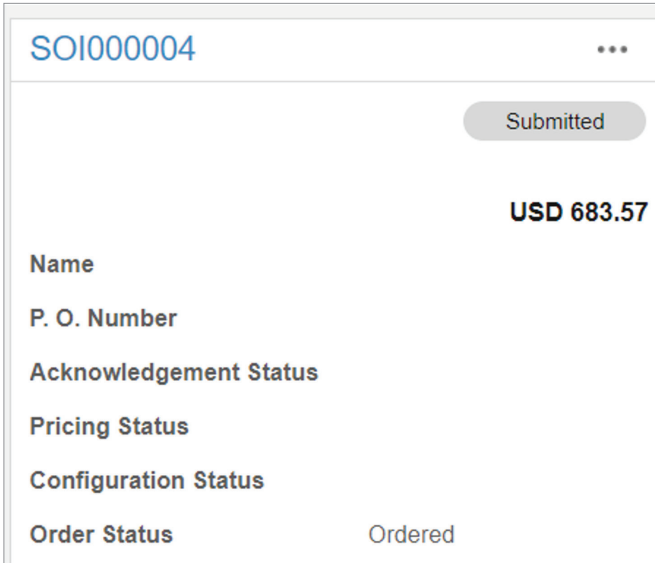
<p>General</p> <p>Pricing * Selling x ▼</p> <p>Line Details * Show x ▼</p> <p>Additional Configuration Details * Show All x ▼</p> <p>Display Culture * English Q≡</p>	<p>Currency Conversion (USD/USD)</p> <p>Report Currency * USD Q≡</p> <p>Exchange Rate * 1.000000</p>
---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------

Converting a Quote to an Order

- 1) To place an order, first create a **Detailed Quote**.
- 2) You may then **Convert to Order** or **Partially Convert**. A **Partial Order** is handy when completing a project in phases. For example, you can order the bedroom shades first, and then order the Kitchen & Living room shades later.
- 3) Under **Orders**, find the **Converted Quote** and select **Place Order**. You have 24 hours to cancel the order.



- 4) The order is now submitted. Note the *Order Number*. The order status is displayed under *Acknowledgment Status*.



SOI000004

Submitted

USD 683.57

Name

P. O. Number

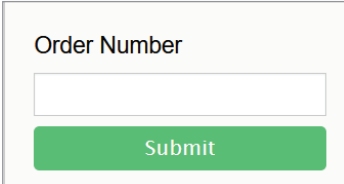
Acknowledgement Status

Pricing Status

Configuration Status

Order Status Ordered

- 5) In the Portal, under *Sun Shades*, enter the order number in the window.



Order Number

Submit

- 6) Add to the cart, and check out. You will not be charged at this time. This will queue your order to be processed. When complete, you will be updated with the shipping price and the order will be charged. We will then supply the tracking information.

NOTE: Shipping will be calculated when the order is complete and added to the total.

Shades should be checked upon arrival. Missing or damaged goods should be reported within 10 days of receiving.

Technical Support:
800-421-1587

Technical Support Hours:
M – F, 6am – 4pm PST

Nice North America
c/o Customer Service
5919 Sea Otter Place, Ste. 100
Carlsbad, CA 92010

The logo consists of a solid black square with the word "Nice" written in white, bold, sans-serif font in the bottom-left corner.

Niceforyou.com

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