



ORDER ENTRY

User Guide

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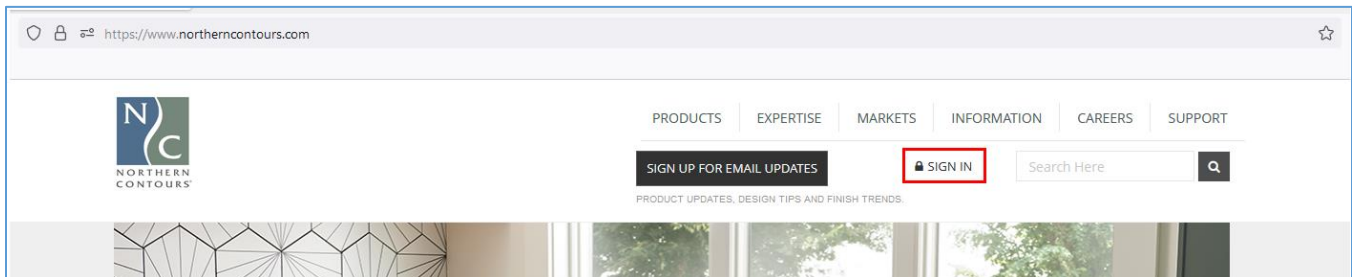
Accessing the Tool

Accessing Order Entry

Northern Contours' order entry is a web-based tool. Without installing any software, you can access it on any PC or Mac with an internet connection and a current web browser.

Navigate to <https://www.northerncontours.com>.

Click **SIGN IN**.



New User Registration and Returning Users





New users click the **REGISTER** button and complete the registration form to obtain access to the order entry tool. Returning users enter their username and password and click **LOGIN**.

A screenshot of the Northern Contours login and registration page. The browser address bar shows 'https://www.northerncontours.com/Account/Login/?returnUrl=https://www.northerncontours.com/'. The page features the Northern Contours logo and a navigation menu with links for PRODUCTS, EXPERTISE, MARKETS, INFORMATION, CAREERS, and SUPPORT. Below the navigation menu, there is a 'SIGN UP FOR EMAIL UPDATES' button and a 'SIGN IN' button. To the right of the 'SIGN IN' button is a search bar with the placeholder text 'Search Here' and a magnifying glass icon. The main content area is titled 'LOGIN' and includes a sub-header 'Login to access'. Below this, there are two sections: 'EXISTING ACCOUNT' and 'NEW ACCOUNT'. The 'EXISTING ACCOUNT' section contains fields for 'E-mail Address' and 'Password', a 'Remember My Email' checkbox, and a 'LOGIN' button. The 'NEW ACCOUNT' section contains a 'REGISTER' button and a note: 'If you do not already have an account on our website, use this option to create one. A website account is used to gain access to Support and Order Entry tools.'

Accessing the Tool

Help Logging In

Expand the **NEED HELP?** section below the login area to view possible problems and resolutions.

NEED HELP?	
 Problem	 Resolution
Email Invalid	This means you are attempting to log in with an email address that does not exist in our system. Before trying to register it again make sure you have it spelled correctly and that it is the address you use with this site.
Registration Pending	This means your New Account Registration request information has not been verified yet. Please allow up to 1-2 business days from the time you register. Once your information is verified you will receive an email notification. If your information is not verified within this time please contact Support.
Locked Out	If you have been locked out due to incorrect password attempts, follow the prompts above the existing account section. Authentication Lock-Out timespan is 5 minutes. When you attempt to log in while this timer is still active there will be a message to inform you how much longer to wait above the login area.
Forgot Password	 RESET YOUR PASSWORD
Other Issues	 CONTACT SUPPORT

Navigating the Tool

Overview

Below is a snapshot of areas on the Northern Contours website available to authenticated users.

The screenshot displays the Northern Contours website's Order Entry interface. The header includes the Northern Contours logo and a navigation menu with links: PRODUCTS, EXPERTISE, MARKETS, INFORMATION, CAREERS, and SUPPORT. Below the navigation menu, there are three buttons: ORDER, ACCOUNT, and SIGN OUT, each with a red box around it. A search bar labeled 'Search Here' is also present. The main content area is titled 'ORDERS' and includes a subtitle 'Order Entry Options, History and Tracking'. Below this, there are three tabs: Orders, Acknowledgements, and Shipment Tracking. The Acknowledgements tab is highlighted with a red box. Under the Orders tab, there is a button labeled '+ CREATE NEW ORDER' with a red box around it. Below the tabs, there are several filters and buttons: SHOWING 20 COLUMNS, COLUMN SORTING, DEFAULT CRITERIA, ENTERED BY ME, and REFRESH RESULTS. At the bottom, there is a table with columns: #, Rev., Actions, PO, Total, Sales Orders, Status, and ProductionStatus. The table is currently empty. Annotations with arrows point to various elements: 'Start New Order' points to the '+ CREATE NEW ORDER' button; 'Order Index' points to the 'ORDER' button in the header; 'Website Account Info' points to the 'ACCOUNT' button in the header; and 'Batch Acknowledgement Tool' points to the 'Acknowledgements' tab.

Start New Order

Order Index

Website Account Info
Customer Care Rep information
User information
Password change tool

Batch Acknowledgement Tool

Order Index

Overview

This tool is an interface that allows you to view and search order history, perform certain actions like view and edit existing orders, copy an existing order to create a new one, download order-specific documents, and initiate an order cancel.

#	Rev.	Actions	PO	Total	Sales Orders	Status	ProductionStatus	Or
832888	3	[Edit] [Delete] [View] [Print] [Warning] [Cancel]	123496 Dhalwal-3	\$56.26	0002366324	Committed		20
833026	1	[Edit] [Delete] [View] [Print] [Warning] [Cancel]	Ambeliotis-PSA-Add	\$208.46		Has SignOff		20
833029		[Edit] [Delete] [View] [Print] [Warning] [Cancel]	Voss	\$1,343.47		Open		20

Search Tool

Click the + button to add criteria.
Change the operator (click AND or OR) to define your search.

Order Actions

Hover your cursor over the buttons to see the action.

Order Index Grid Controls

Customize your view of the grid by selecting/deselecting columns and sorting.
Refresh your search results.

Interacting with the Order Index Grid

By default, the results (orders) are sorted by date, with the most recent order at the top. Column headers can be clicked to change the sorting per column to alphabetical, numerical, or chronological order.

At the bottom of the grid is a summary/paging section that displays the number of results (orders) returned and allows you to change the number of results displayed and page through the results.

<div> <div> « < 1 2 3 4 5 6 7 > » </div> <div>5 ROWS PER PAGE ▼</div> <div>PAGE 1 OF 78 390 TOTAL ROWS</div> </div>									
---	--	--	--	--	--	--	--	--	--

The Anatomy of an Order

Overview

There are four sections within an order: **Header**, **Line Detail**, **Totals**, and **Save/Commit**. Steps are completed in sequence during order creation.

Header

The Header section contains information applicable to the entire order, such as PO number, requested ship date, pricing proposal selection, and specifications for shipping.

NEW ORDER: HEADER

New Order: Header Details

ORDER LIST

QUICK SAVE

PO	Customer ID	CompanyID	Ship-To ID	Ship Method	Ship Date	S.F.	Qty	Lines	Ship S.F.	\$ (USD)	Status	Prod. Status
					TBD	0	0	0	0	\$0.00	Open	

1

2

3

4

Header

Line Detail

\$ Totals

Save/Commit

The Anatomy of an Order

Line Detail

The Line Detail section is where products are configured and lines are added to the order. The **Line Detail Editor** is used to build line configurations, which are added to the grid below it. Commonly ordered line configurations can be saved as **Line Templates**; these pre-configured lines can be quickly added to future orders. Order lines can also be imported from Northern Contours' standard order form or via a "quick import" on the **Import Files** tab.

1 2 3 4

Header Line Detail Totals Save/Commit

Line Detail Editor Line Templates Import Files

INPUT NAV

- PRODUCT PATH
- PRODUCT SPECS
- PRODUCT OPTIONS
- MATERIAL SPECS
- DIMENSIONS & QTY
- CUSTOMER VALUES
- PRICE ADJUSTMENTS
- FILE UPLOADS

PREVIOUS NEXT

HELP SUMMARY

CLEAR EDITOR / START NEW

1 CREATE 1 LINE

Values can be applied to new Lines

PRODUCT PATH

Product Line: * 3 Possible

CABINET DOORS AND COMPONENTS

Part Number:

Only select a part number if you are ordering Surfaces or have established part numbers;

Rev Level:

NEXT

UOM: STANDARD DESCRIPTION: STANDARD FRACTION

#	Edit	Qty	Width	Height	Description	Unit s.f.	Total s.f.	Line Comment	Drawing #
1		1	15	22	15" x 22" x 3/4" Slab Elegante II Door	2.2917	2.2917		

0 of 1 Selected

PRESET: NO SELECTION COLUMNS

The Anatomy of an Order

Totals

The Totals section is where the order is priced based on selections made in Header and on the order lines configured in Line Detail.

✓

✓

3

4

Header

Line Detail

\$ Totals

Save/Commit

LINES:

RE-CALCULATE

VIEW/PRINT QUOTE

DETAIL MODE

EXPORT

?

Line	Description	Pricing	PricingID (List)	BaseUnits	BaseUnit	Base	Adders	Unit	Qty	Total
1	15" x 22" x 3/4" Slab Elegante II Door	Auto	10FFCORBINR (2022-11-05)	2.2917 SF	\$12.75	\$29.22	\$0.00	\$29.22	1	\$29.22

UPCHARGES:

ADD NEW CHARGE

RE-CALCULATE

Type	Description	Method	Multiplier	Min	Max	Approval	Auto	Remove	Total
------	-------------	--------	------------	-----	-----	----------	------	--------	-------

CURRENCY:

ID	USD
Symbol	\$
Description	U.S. Dollar
Exchange Rate	1

ORDER TOTALS:

Sub-Total	\$29.22
Upcharges	\$0.00
Freight	\$0.00
Sales Tax	\$0.00
Total	\$29.22

The Anatomy of an Order

Save/Commit

Saving your order or approving/submitting it for review is the final step.

Header	Line Detail	Totals	4 Save/Commit
<h3>Request SignOff</h3> <p>Click to send sign-off request to customer.</p> <p>REQUEST SIGNOFF</p>			<h3>Start New</h3> <p>Choose this option to quickly start creating a new Order without exiting and starting over. This option will avoid excessive Line Detail loading times if you are creating multiple Orders. You can choose optional values from the current Order to apply to the new Order.</p> <p>Options to keep:</p> <p>SELECT ALL</p> <ul style="list-style-type: none"> <input type="checkbox"/> Customer, Bill-To, Ship-To and Contact <input type="checkbox"/> Ship Method <input type="checkbox"/> Shipping Specs/Instruction <input type="checkbox"/> Order Notes <input type="checkbox"/> Ship With <input type="checkbox"/> Ship Date (If Overridden) <input type="checkbox"/> Opportunity <input type="checkbox"/> Order Type <input type="checkbox"/> UOM <input type="checkbox"/> Purchase Order <input type="checkbox"/> Tag To <input type="checkbox"/> Packaging Program <input type="checkbox"/> Line Detail Editor Selections <p>START NEW W/O SAVING SAVE & START NEW</p> <p>COMMIT & START NEW</p> <p>REQUEST SIGNOFF & START NEW</p>
<h3>Approve Order</h3> <p>Click to approve order for production. This notifies your Customer Service Rep.</p> <p>APPROVE ORDER</p>			
<h3>Ready to Schedule</h3> <p>Click to show order as Ready to Schedule.</p> <p>READY TO SCHEDULE</p>			
<h3>Commit</h3> <p>Click to commit order for production. Making changes past this point may be subject to upcharges.</p> <p>COMMIT</p>			
<h3>Save</h3> <p>Click to save order. You can come back later and edit or commit.</p> <p>SAVE</p>			

Creating a New Order

Overview

Clicking **CREATE NEW ORDER** brings you into the order interface.

New orders open to the **Header** page. All required fields in each step must be completed in order to move on to the next.

PO	Customer ID	CompanyID	Ship-To ID	Ship Method	Ship Date	S.F.	Qty	Lines	Ship S.F.	\$ (USD)	Status	Prod. Status
10NC-STPAUL	NCI	10NC-STPAUL	NC Standard	TBD	0	0	0	0	0	\$0.00	Open	

Step 1: Completing the Header

Ship-to Address

Required fields are marked with an asterisk (*).

BILL TO and SHIP TO

Addresses are defaulted based on your customer account. **Bill-to address cannot be changed in the order entry tool.**

Contact your customer care representative if this is needed.

SHIP TO address can be changed using the type-ahead search field. Recurring addresses are set up in Northern Contours' system as permanent ship-to addresses and are available for selection in this field.

To add a new address:

Click **NEW ADDRESS** and choose the address type, RECURRING or DROP SHIP. If the new address will be used more than once/on an ongoing basis, choose RECURRING. If the new address is expected to be used only once, click DROP SHIP and then complete the new address form.

Note: the use of drop ship addresses is enabled on customer accounts on an as-needed basis. If drop ship addresses have not been enabled for your account yet, you will see a message indicating such drop down from the top-right corner of the browser window. Upon request, your customer care representative will coordinate with an onboarding specialist to enable this option for your account.

The screenshot displays the 'Basic Info / Line Defaults' tab of the order entry interface. At the top, there are tabs for 'Basic Info / Line Defaults', 'Contacts', and 'Order'. Below the tabs, the 'Customer' section is marked with an asterisk and a question mark icon. A search bar is provided with the placeholder text 'Search by Name, ID, City, State or Postal Code:'. Below the search bar, customer details are listed: ID: 10NC-STPAUL, Name: Northern Contours - St. Paul, CompanyID: NCI, and Need Sign-Off?: false.

The main section is divided into two columns: 'BILL TO:' and 'SHIP TO:'. Each column has a search bar with the placeholder 'Search by any field:'. Below the search bars, a list of addresses is shown for both columns. The address listed is 'Northern Contours - St. Paul' with ID '10NC-STPAUL' and address '1355 Mendota Heights Rd Ste 100, Mendota Heights, MN 55120-1112'. The 'SHIP TO' column also shows the address type as 'Commercial', 'Approved: true', and 'AddrKey: 48169'. Below the address list, there is a button labeled 'NEW ADDRESS' with the text 'If Address is not found in list above:' above it.

Below the address selection, there are three sections for instructions: 'Invoice Instructions (default):' with the text 'Do Not Charge Freight & Packaging'; 'Comm Instructions:' with the text 'Email Acknowledgements to STPadmin@northerncontours.com'; and 'Order Instructions:' with the text 'Small Overages or Short Ships Are Okay'.


At the bottom, there is a section for 'Ship Instructions (default):' with the text 'Do not use sample labels for Mendota Heights stock orders - Small Overages or Short Ships Are Okay - Audit All Orders - Downstack & Bundlewrap in bundles of 5 - Consolidate For Friday shipments - Pallets to Weight No More Than 200 lbs - Dock & Pallet Jack'. Below this, there is a section for 'Ship Specs (default):' with a grid of checkboxes for various shipping options: Box, Downstack, Liftgate, Bundlewrap, Forklift, Storage Unit, Dock, Inside Delivery, and Tube. The 'Bundlewrap' and 'Dock' options are checked.

Step 1: Completing the Header

Packaging and Shipping Specifications

Default instructions and specs for **Shipping and Packaging** are associated with the selected ship-to address and displayed below it on the left side of the Header screen.

Ship instructions, packaging instructions, and specs can be overridden as needed on an order-by-order basis using the corresponding fields on the **right** side of the screen by clicking the **Override Default?** checkbox and populating the fields and/or making selections.

<p>Order Instructions:</p> <p>Small Overages or Short Ships Are Okay – Audit All Orders</p> <p>Ship Instructions (default):</p> <p>Do not use sample labels for Mendota Heights stock orders – Consolidate For Friday shipments</p> <p>Packaging:</p> <p>Downstack & Bundlewrap in bundles of 5 – Pallets to Weight No More Than 200 lbs</p> <p>Shipping and Packaging Specs:</p> <table><tr><td><input checked="" type="checkbox"/> Bundlewrap</td><td><input type="checkbox"/> Corrugate Wrap</td><td><input type="checkbox"/> Divider</td></tr><tr><td><input type="checkbox"/> Inside Delivery</td><td><input type="checkbox"/> Liftgate</td><td><input type="checkbox"/> Storage Unit</td></tr><tr><td><input type="checkbox"/> Contact Customer</td><td><input type="checkbox"/> Customer Specific</td><td></td></tr></table> <p> CONTACT:</p>	<input checked="" type="checkbox"/> Bundlewrap	<input type="checkbox"/> Corrugate Wrap	<input type="checkbox"/> Divider	<input type="checkbox"/> Inside Delivery	<input type="checkbox"/> Liftgate	<input type="checkbox"/> Storage Unit	<input type="checkbox"/> Contact Customer	<input type="checkbox"/> Customer Specific		<p>Shipping Instructions: 500 Max <input checked="" type="checkbox"/> Override Default?</p> <p></p> <p>Packaging: 500 Max <input checked="" type="checkbox"/> Override Default?</p> <p></p> <p>Shipping and Packaging Specs: <input checked="" type="checkbox"/> Override Default?</p> <table><tr><td><input checked="" type="checkbox"/> Bundlewrap</td><td><input type="checkbox"/> Corrugate Wrap</td><td><input type="checkbox"/> Divider</td></tr><tr><td><input type="checkbox"/> Inside Delivery</td><td><input type="checkbox"/> Liftgate</td><td><input type="checkbox"/> Storage Unit</td></tr><tr><td><input type="checkbox"/> Contact Customer</td><td><input type="checkbox"/> Customer Specific</td><td></td></tr></table>	<input checked="" type="checkbox"/> Bundlewrap	<input type="checkbox"/> Corrugate Wrap	<input type="checkbox"/> Divider	<input type="checkbox"/> Inside Delivery	<input type="checkbox"/> Liftgate	<input type="checkbox"/> Storage Unit	<input type="checkbox"/> Contact Customer	<input type="checkbox"/> Customer Specific	
<input checked="" type="checkbox"/> Bundlewrap	<input type="checkbox"/> Corrugate Wrap	<input type="checkbox"/> Divider																	
<input type="checkbox"/> Inside Delivery	<input type="checkbox"/> Liftgate	<input type="checkbox"/> Storage Unit																	
<input type="checkbox"/> Contact Customer	<input type="checkbox"/> Customer Specific																		
<input checked="" type="checkbox"/> Bundlewrap	<input type="checkbox"/> Corrugate Wrap	<input type="checkbox"/> Divider																	
<input type="checkbox"/> Inside Delivery	<input type="checkbox"/> Liftgate	<input type="checkbox"/> Storage Unit																	
<input type="checkbox"/> Contact Customer	<input type="checkbox"/> Customer Specific																		

Step 1: Completing the Header

Order Type, Proposal, PO Number, Ship Date

Required fields are marked with an asterisk (*).

Order Type is set to Standard by default. Sample order type is available for selection.

Proposal field is used to identify the pricing to be applied to the order. If you have special pricing set up for the product you are ordering, choose the appropriate proposal (quote) ID and name from the drop-list. Otherwise, choose your standard discount option from the drop-list.

PO is your Purchase Order number/name.

Ship Method is set by default during your onboarding process. This can be changed per order as needed.

Requested Ship Date should be selected if your order must ship on a certain date. This field is also used to indicate rush orders.

Ship Date will appear as TBD until the order has been reviewed by Schedulers and committed to production.

Order Type: * STANDARD ▼	Quote Only: <input type="checkbox"/>
Proposal: 4 Possible NO SELECTION ▼	
PO: * 50 Max <input type="text"/>	
Tag-To: 100 Max <input type="text"/>	
Ship-With: 100 Max <input type="text"/>	
Pre-Determined Freight Program: Has Freight Program?: false	
Ship Method: * <div> NC STANDARD <div> NC Standard (#380) <input checked="" type="checkbox"/> Is Default <input type="checkbox"/> Only Use <input type="checkbox"/> Is Collect </div> </div>	

Requested ShipDate: <div> Selection of certain ship dates may result in rush charges; See Service Policy Brochure for details; Lead time for an order is determined using business days (Monday through Friday) and work hours of 8:00am - 4:30pm central time; </div> <input type="text"/>
Ship Date: * <input type="text"/> TBD

Step 2: Order Line Configuration

Overview

When Header selections are completed, click the Line Detail tab to move to the next step.

PO	Customer ID	CompanyID	Ship-To ID	Ship Method	Ship Date	S.F.	Qty	Lines	Ship S.F.	\$ (USD)	Status	Prod. Status
Demo	10NC-STPAUL	NCI	10NC-STPAUL	NC Standard	TBD	0	0	0	0	\$0.00	Open	

Progress bar: 1 (Header) → 2 (Line Detail) → 3 (\$ Totals) → 4 (Save/Commit)

The **Line Detail Editor** is your product configurator. Required fields within each section are marked with an asterisk (*). Possible selections in each field are filtered by selections made in previous fields. Your selections are validated as you progress through line configuration. Use the **QUICK SAVE** button to save progress at any time.

INPUT NAV

- 1 PRODUCT PATH
- 1 PRODUCT SPECS
- 2 PRODUCT OPTIONS
- 2 MATERIAL SPECS
- 1 DIMENSIONS & QTY
- 2 CUSTOMER VALUES
- 2 PRICE ADJUSTMENTS
- 2 FILE UPLOADS

← PREVIOUS NEXT →

HELP SUMMARY

↶ CLEAR EDITOR / START NEW

1 ⚙️ **CREATE 1 LINE**

Line Detail Editor sections:

Product Path - Product Line or Part Number selection is made. If using part numbers, Product Line will automatically populate after the part number is selected.

Product Specs - Type, Profile, Style, etc. attributes of the product are selected.

Product Options - Options like Fingerpulls, Hinge Boring, and other product attributes are selected.

Material Specs - Face and back material selections are made. Material selectors are type-ahead search fields; type in the name or ID number of the material. To select from a list of possible materials, click the ? (question mark button) to the right of the search field.

Dimensions & Qty - Assign a quantity, width, height, and depth (depending on product) to the line configuration. For orders where multiple lines will have the same configuration except for the quantity and dimensions, leave these fields blank. (More details on next page.)

Customer Values - Enter any Line Comment, Drawing #, Location, or Serial # associated with the line configuration. For orders where multiple lines will have the same configuration except for these values, leave these fields blank. (More details on next page.)

File Uploads - Attach a file to a specific order line.

Use the **CREATE 1 LINE** button to add a line for the configured product to the order.

Step 2: Order Line Configuration

Multiple Lines at Once

You can create multiple lines from the configuration by changing the number of lines in the field to the left of the **CREATE 1 LINE** button.



Adding multiple lines at once will allow for quick entry of quantity, width, and height in the line detail grid.

<input type="checkbox"/> ALL (4) <input checked="" type="checkbox"/> <input type="button" value="+"/> SORT <input type="button" value="i"/> HELP										UOM: STANDARD ▾		DESCRIPTION: STANDARD FRACTION ▾	
	#	<input type="checkbox"/> Edit	Qty	Width	Height	Description	Unit s.f.	Total s.f.	Line Comment	Drawing #	Depth		
<input type="checkbox"/>	1	<input checked="" type="checkbox"/> ↑				3/4" Slab Elegante II Door	0	0					
<input type="checkbox"/>	2	<input checked="" type="checkbox"/> ↑				3/4" Slab Elegante II Door	0	0					
<input type="checkbox"/>	3	<input checked="" type="checkbox"/> ↑				3/4" Slab Elegante II Door	0	0					
<input type="checkbox"/>	4	<input checked="" type="checkbox"/> ↑				3/4" Slab Elegante II Door	0	0					

After adding your first set of lines, you can return to the Line Detail Editor and change the product type (from Door to Dwr, for example) and create additional sets of lines for each configuration required for the order.

Note: your selections in the Line Detail Editor are retained after lines are created. When you change an input selection to adjust the configuration for your next line or set of lines, some fields may clear and require a new selection and others will retain their value, depending on how you are changing the line configuration.

Inputs Reset

Based on your selections, the following were reset:

- Style was reset in the Editor, based on Type change.
- All fields in Product Options section were reset in the Editor, based on Type change.

Please verify before applying changes to Lines.

OK

Step 2: Order Line Configuration

Line Detail Grid & Line Validation

Qty, Width, Height, Depth (when applicable), and all fields in the “Customer Values” input list (Line Comment, Drawing #, Location, etc.) can be entered directly in the line detail grid. Some of these values can also be imported to the grid from an order form or via quick import (see next page).

Unit of measure (UOM) is assigned to your customer account during the onboarding process and can be changed as needed in the line detail grid. Dimension values are validated based on your UOM selection.

ALL (9)

<

Indicates a valid line configuration.



Indicates an invalid line configuration.

Hover your cursor over the red alert bubble to see the problem field(s). Invalid inputs are highlighted yellow/and or display the invalid value in red text.

Please check input for: Height (Y)										
<input type="checkbox"/>	<input checked="" type="checkbox"/> 8	<input checked="" type="checkbox"/>	2	2.875	97	2 7/8" x 97" x 3/4" Slab Elegante II Overlay None				

Clicking on a dimension field will display the acceptable size range for the configured product.

<input type="checkbox"/>	<input checked="" type="checkbox"/> 9	<input checked="" type="checkbox"/>	1	2.875	72	2 7/8" x 72" x 3/4" Slab Elegante II Overlay None	1.4375	1.4375		
--------------------------	---------------------------------------	-------------------------------------	---	-------	----	---	--------	--------	--	--

0 of 9 Selected

2.875" | 2 7/8" | 73.02mm
Min: 1.125" - Max: 48"

Step 2: Order Line Configuration

Quick Import of Data into the Grid

Line quantity, dimensions, and some other fields can be imported into the line detail grid via the Import Files tab within the Line Detail section of the order entry tool.

Quick Import allows you to import the quantity, width, height, depth, and Customer Values fields into the line detail grid.

Instruction: Each time you Quick Import, you need to **follow all 5 steps**. If you want to Quick Import from Order Forms, you would paste data from the form into the generated Quick Import file from Step 3.

Step 1: Have existing Lines in Line Detail Grid.

Step 2: Select columns to import.

- ☐ PartNumber
- ☒ Qty
- ☒ Width
- ☒ Height
- ☒ Depth
- ☒ Comment
- ☐ Drawing #
- ☐ Design
- ☐ Location
- ☐ Serial #

Step 3: Generate & download import template.

[DOWNLOAD QUICK IMPORT TEMPLATE](#)

Step 4: Edit and save downloaded template on your computer or device.

Step 5: Select file to attach to Order and use Import button to complete.

[Select files...](#)

Step 2: Order Line Configuration

Quick Import Template

Follow the on-screen instructions to design your quick import template (steps 1-2 in the image on the previous page). Clicking **Download Quick Import Template** in step 3 will download an .xls file. Enter your order line data into this template and save to an accessible location on your computer or device.

	A	B	C	D	E
1	Line	Qty	Width	Height	Comment
2	1	3	12.875	36	
3	2	2	12.875	36	
4	3	2	3	72	pantry
5	4	1	20	28	
6	5	5	24	12	
7	6	4	24	8	
8	7	3	10	10	
9	8	2	2.875	96	
10	9	1	2.875	72	
11					

Dimension values can be entered as fraction or decimal and should match the UOM selected in the line detail grid.

Note: it is recommended to copy and paste quantity and dimension values from their source (order form or PO file) when possible to minimize data entry errors.

When the Quick Import template is complete and saved to your device, click **Select files...** in step 5 to upload the file.

Important: the option to import this file will only be available during the session that the file was generated. You will not be able to import it if you leave the order and re-open it later.

After the file uploads, you can optionally rename the file before saving it to the order. Click **Save**.

Upload New Files:

File Name: * 64 Max

NC_Quick_Import_66223e98-4c03-46f6-a7ef-0f1151e76103

File Description (optional): 256 Max

The option to **Import** is now available.

Upload New Files:

NO SELECTION ▼

Files:

NC_Quick_Import_66223e98-4c03-46f6-a7ef-0f1151e76103 (.xls)

Step 2: Order Line Configuration

Quick Import Results

You will be prompted to confirm the import action.

During the import, the line detail grid will be populated with the values from the quick import file and each order line will be revalidated.

Quick Import Data

Are you sure you want to import data from **NC_Quick_Import_66223e98-4c03-46f6-a7ef-0f1151e76103** File?

Note: Make sure the UOM in the Header is set according to the data in the form first. Line values set in existing lines will not be cleared if not found in imported lines.

IMPORT

CANCEL

The system will notify you when processing is complete. Refer to in-line validation to ensure all lines are valid.

Line Detail Editor

Instruction: Files put in this list should apply to

HOW TO IMPORT DATA

Upload New Files:

NO SELECTION

Files:

IMPORT NC_Quick_Import_66223e98-4c03-46f6-a7ef-0f1151e76103 (.xls) Quick Import

Import Completed

The Quick Import process has completed.

Header:

Lines:

9 Lines (Imported values into existing Lines)

OK

<input type="checkbox"/> ALL (9) <input checked="" type="checkbox"/> SORT <input type="checkbox"/> HELP		UOM: STANDARD		DESCRIPTION: STANDARD FRACTION					
#	Edit	Qty	Width	Height	Description	Unit s.f.	Total s.f.	Line Comment	Drawing #
<input type="checkbox"/> 1		3	12.875	36	12 7/8" x 36" x 3/4" Slab Elegante II Door	3.2188	9.6564		
<input type="checkbox"/> 2		2	12.875	36	12 7/8" x 36" x 3/4" Slab Elegante II Door	3.2188	6.4376		
<input type="checkbox"/> 3		2	3	72	3" x 72" x 3/4" Slab Elegante II Door	1.5	3	pantry	
<input type="checkbox"/> 4		1	20	28	20" x 28" x 3/4" Slab Elegante II Door	3.8889	3.8889		
<input type="checkbox"/> 5		5	24	12	24" x 12" x 3/4" Slab Elegante II Dwr	2	10		
<input type="checkbox"/> 6		4	24	8	24" x 8" x 3/4" Slab Elegante II Dwr	1.3333	5.3332		
<input type="checkbox"/> 7		3	10	10	10" x 10" x 3/4" Slab Elegante II Dwr	0.6944	2.0832		
<input type="checkbox"/> 8		2	2.875	96	2 7/8" x 96" x 3/4" Slab Elegante II Overlay None	1.9167	3.8334		
<input type="checkbox"/> 9		1	2.875	72	2 7/8" x 72" x 3/4" Slab Elegante II Overlay None	1.4375	1.4375		

0 of 9 Selected

COLUMNS

Step 2: Order Line Configuration

Upload Other Files for Reference

Additional reference files can be imported to the order. Select your file type from the drop-list and follow the on-screen prompts to save the file to your order.

The screenshot shows the 'Import Files' tab in the 'Line Detail Editor'. At the top, there are three tabs: 'Line Detail Editor', 'Line Templates', and 'Import Files'. Below the tabs is a yellow instruction box: 'Instruction: Files put in this list should apply to ALL lines. Files for individual lines should use the Line Detail Editor below.' Below this is a section titled 'HOW TO IMPORT DATA' with a question mark icon. Underneath is 'Upload New Files:' with a 'NO SELECTION' dropdown menu. A filter input field is visible. A list of file types is shown with checkboxes: 'Drawings/Specs', 'Order Forms', 'Quick Import', and 'Remake Image'. A file named 'NC_Quick_Import_66223e98-4c03-46f6-a7ef-0f1151e76103 (.xls)' is listed with a 'Quick Import' button.

Step 3: Pricing Your Order

Overview

When line configuration is complete, click the **Totals** tab to move to the next step.

PO	Customer ID	CompanyID	Ship-To ID	Ship Method	Ship Date	S.F.	Qty	Lines	Ship S.F.	\$ (USD)	Status	Prod. Status
Demo	10NC-STPAUL	NCI	10NC-STPAUL	NC Standard	TBD	45.6702	23	9	45.6702	\$726.44	Open	

Progress bar: 1 (Header) → 2 (Line Detail) → 3 (Totals) → 4 (Save/Commit)

Optional Batch Processing may be available. Use this feature if you have multiple orders in an Open status that you need to price and commit together. Otherwise, click **NO, ONLY PRICE/COMMIT THIS ORDER** to bypass this feature and proceed to price and commit the current/open order (recommended).

Optional Batch Processing

You have 1 other open Order pending commit.

Are you ready to price and commit them all at once?

YES

NO, ONLY PRICE/COMMIT THIS ORDER

Single Order Processing

Recommended method. Click **NO, ONLY PRICE/COMMIT THIS ORDER** when encountering Optional Batch Processing to proceed with pricing and commit an individual order.

Batch Processing

Use this feature if you have multiple orders in an Open status that you need to price and commit together to meet a price break or for freight purposes. Click **YES** to proceed with batch pricing and commit.

On the next screen, a list of possible orders to batch is presented. Select all orders to batch price and commit, then click **PROCEED BATCH PRICING**.

BATCH ORDERS FOR PRICING/COMMIT: (2 OF 4)

☐ ALL (4)
 ☒ ALL (2)
 REFRESH ORDERS LIST
 BATCH VIEW/PRINT QUOTES
 PROCEED BATCH PRICING

Include?	Valid	#	PO	Opp	Company	Status	\$	Created	Ship	Ship-to	Created By	Qty (PC)	SF
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	933990	Demo-Batch-2	23191	NCI	Open	\$0.00	05/25/2023		Mendota Heights, MN	Test User	1	2.2917
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	933989	Demo-Batch-1	23191	NCI	Open	\$0.00	05/25/2023		Mendota Heights, MN	Test User	1	2.2917
<input type="checkbox"/>	<input checked="" type="checkbox"/>	933981	Accessorials-overridden	23191	NCI	Open	\$29.22	05/18/2023	06/02/2023	Fergus Falls, MN	Danielle Olsgard	1	2.2917
<input type="checkbox"/>	<input checked="" type="checkbox"/>	933942	norlamcts	23191	NCI	Open	\$32.50	05/03/2023	05/12/2023	Mendota Heights, MN	Amy Nelson	10	1.6667

Step 3: Pricing Your Order

Review Your Pricing and Download Quote

Be sure to review pricing for accuracy and note any upcharges that may apply.

LINES:

RE-CALCULATE
VIEW/PRINT QUOTE
DETAIL MODE
EXPORT
?

Line	Description	Pricing	PricingID (List)	BaseUnits	BaseUnit	Base	Adders	Unit	Qty	Total
1	12 7/8" x 36" x 3/4" Slab Elegante II Door	Auto	10NCSTPAUL (2022-11-05)	3.2188 SF	\$15.25	\$49.09	\$0.00	\$49.09	3	\$147.26
2	12 7/8" x 36" x 3/4" Slab Elegante II Door	Auto	10NCSTPAUL (2022-11-05)	3.2188 SF	\$15.25	\$49.09	\$0.00	\$49.09	2	\$98.17
3	3" x 72" x 3/4" Slab Elegante II Door	Auto	10NCSTPAUL (2022-11-05)	1.5000 SF	\$15.25	\$22.88	\$0.00	\$22.88	2	\$45.75
4	20" x 28" x 3/4" Slab Elegante II Door	Auto	10NCSTPAUL (2022-11-05)	3.8889 SF	\$15.25	\$59.31	\$0.00	\$59.31	1	\$59.31
5	24" x 12" x 3/4" Slab Elegante II Dwr	Auto	10NCSTPAUL (2022-11-05)	2.0000 SF	\$15.25	\$30.50	\$0.00	\$30.50	5	\$152.50
6	24" x 8" x 3/4" Slab Elegante II Dwr	Auto	10NCSTPAUL (2022-11-05)	1.3333 SF	\$15.25	\$20.33	\$0.00	\$20.33	4	\$81.33
7	10" x 10" x 3/4" Slab Elegante II Dwr	Auto	10NCSTPAUL (2022-11-05)	1.0000 SF	\$15.25	\$15.25	\$0.00	\$15.25	3	\$45.75
8	2 7/8" x 96" x 3/4" Slab Elegante II Overlay None	Auto	10NCSTPAUL (2022-11-05)	1.9167 SF	\$15.25	\$29.23	\$0.00	\$29.23	2	\$58.46
9	2 7/8" x 72" x 3/4" Slab Elegante II Overlay None	Auto	10NCSTPAUL (2022-11-05)	1.4375 SF	\$15.25	\$21.92	\$0.00	\$21.92	1	\$21.92

UPCHARGES:

Type	Description	Method	Multiplier	Min	Max	Approval	Auto	Total
BUNDLE WRAP	Lines:1, 2, 3...7, 8, 9	SF	0.35	0	999	<input type="checkbox"/>	<input checked="" type="checkbox"/>	\$15.99

CURRENCY:

ID	USD
Symbol	\$
Description	U.S. Dollar
Exchange Rate	1

ORDER TOTALS:

Sub-Total	\$710.45
Upcharges	\$15.99
Freight	\$0.00
Sales Tax	\$0.00
Total	\$726.44

Unless assigned to an established freight program, freight will be listed as \$0.00 and actual freight charges will be billed when your order ships.

Click the **VIEW/PRINT QUOTE** button to download a PDF version of the price quote.

If you batch processed orders, expand the **BATCH ORDERS FOR PRICING/COMMIT** section and click **BATCH VIEW/PRINT QUOTES** to download a PDF file containing price quotes for all orders in the batch.

BATCH ORDERS FOR PRICING/COMMIT: (2 OF 4)

ALL (4)
ALL (2)
REFRESH ORDERS LIST
BATCH VIEW/PRINT QUOTES
PROCEED BATCH PRICING

Pricing the order(s) automatically saves a new version of your order(s) with pricing applied.

If you are ready to submit your order for production, move on to the next step.

Step 4: Submitting Order for Production

Order Sign-Off and Submitting Your Order for Production

When you are ready to submit your order, click the **Save/Commit** tab to move to the final step.

The screenshot shows the 'ORDER LIST' interface with a 'QUICK SAVE' button. Below the header, a table displays order details for a 'Demo' order. A progress bar at the bottom indicates four steps, with the fourth step, 'Save/Commit', highlighted in a red box.

PO	Customer ID	CompanyID	Ship-To ID	Ship Method	Ship Date	S.F.	Qty	Lines	Ship S.F.	\$ (USD)	Status	Prod. Status
Demo	10NC-STPAUL	NCI	10NC-STPAUL	NC Standard	TBD	45.6702	23	9	45.6702	\$726.44	Open	

Progress bar steps: 1. Header (checkmark), 2. Line Detail (checkmark), 3. Totals (checkmark), 4. Save/Commit (highlighted in red box).

Requesting Sign-Off

If your customer account requires a sign-off on orders prior to submitting for production, the **REQUEST SIGNOFF** button will be enabled on this page. Click the button to initiate the sign-off process. This action triggers an automated email to the order sign-off recipients identified for the customer account and the order status changes from **Open** to **Needs SignOff**.

The screenshot shows a grey box with the text 'Request SignOff' and 'Click to send sign-off request to customer.' Below this is a blue button labeled 'REQUEST SIGNOFF'.

The automated email contains high-level order information and the price quote is attached to the message for customer review. When ready to approve, online order entry users can click the link in the email which brings them to the Northern Contours website where, after logging in, they will be directed to the Save/Commit page to approve the order. Alternatively, users who are already logged in or choose not to click the link in the email can navigate to the order list, open the order, click Save/Commit, and they will be presented with the same option to approve the order.

Step 4: Submitting Order for Production

If Changes to the Order Are Needed Before Sign-Off

If changes need to be made to the order prior to approval, the Customer Care Representative (CCR) for the account should be contacted directly. CCRs have the ability to edit orders that are in a Needs SignOff status. External (customer) users of online order entry are no longer able to edit an order after sign-off has been requested.

Approving the Order

To approve the order for production, the online order entry user clicks APPROVE ORDER on the Save/Commit page. This action triggers an automated email to the CCR assigned to the customer account and the order status changes from **Needs SignOff** to **Has SignOff**.

Approve Order

Click to approve order for production. This notifies your Customer Service Rep.

APPROVE ORDER

Step 4: Submitting Order for Production

When Order Sign-Off is Not Required

On the Save/Commit page, sign-off steps are disabled (buttons are greyed out) and the Commit button is enabled. When external (customer) users of online order entry click Commit, the order status will change from **Open** to **Submitted**, and the CCR assigned to the customer account will be notified via an automated email.

Commit

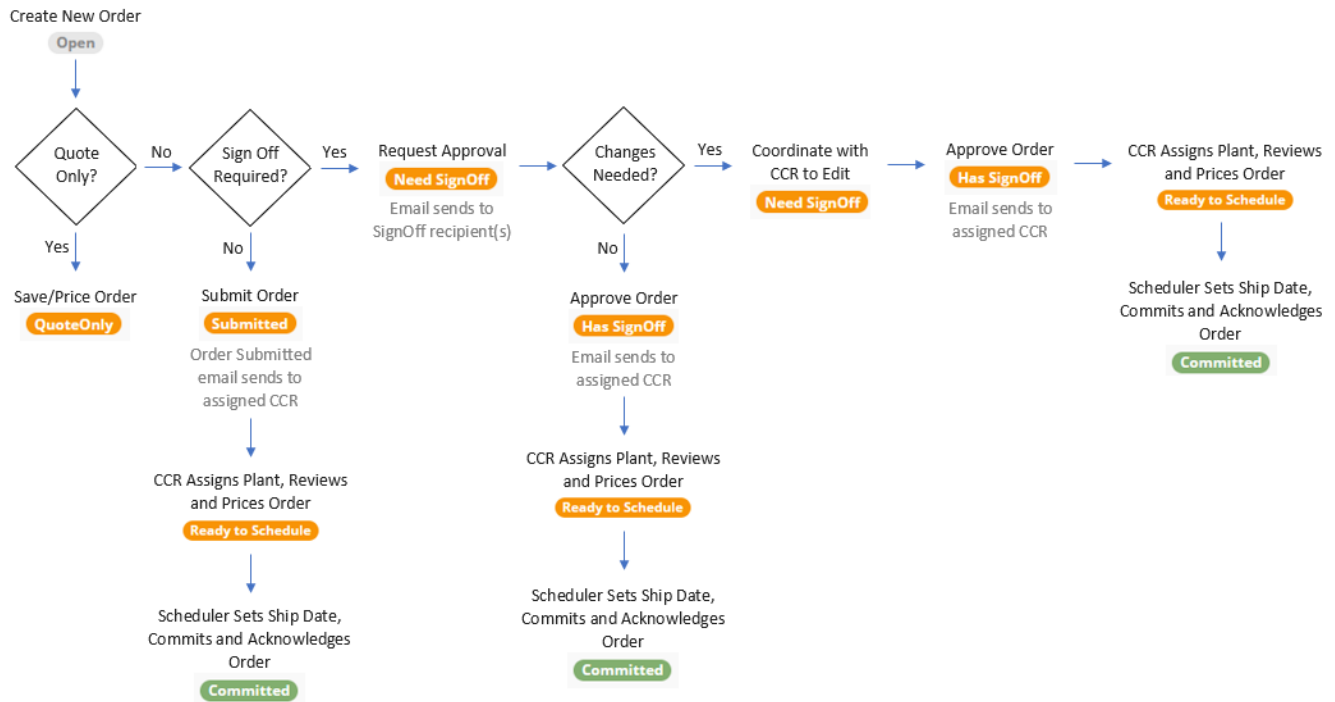
Click to commit order for production. Making changes past this point may be subject to upcharges.

COMMIT

Order Status Flow

Order Status Sequence in Online Order Entry

The following diagram outlines the order status flow in online order entry.



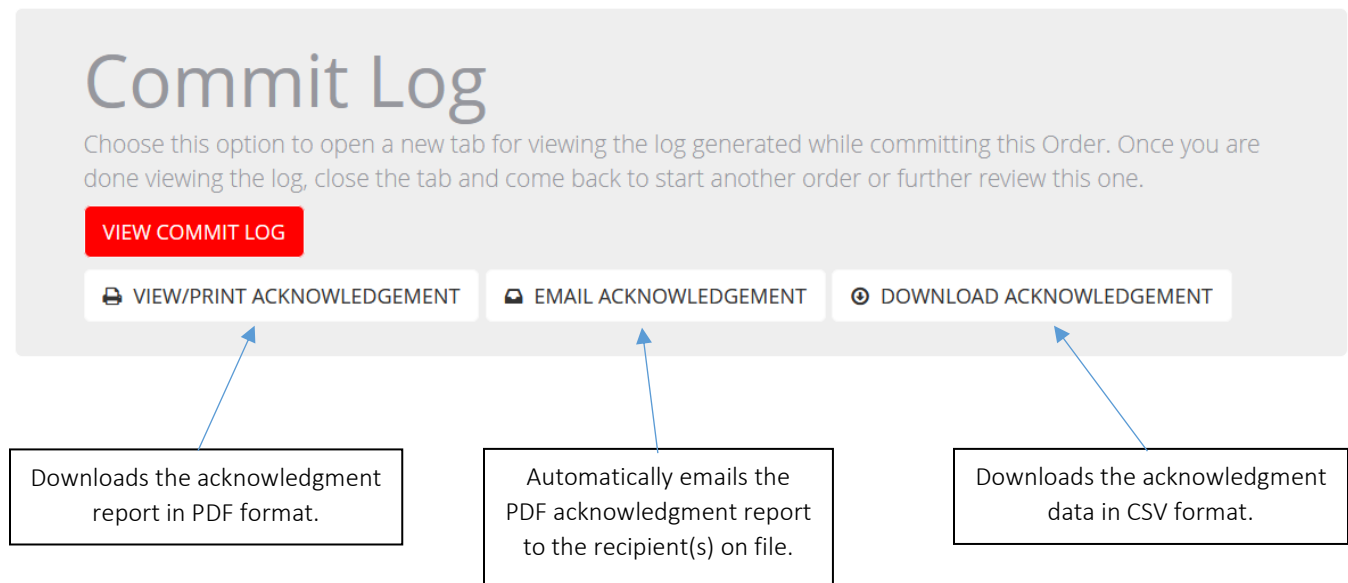
Order Acknowledgement

Accessing the Order Acknowledgement

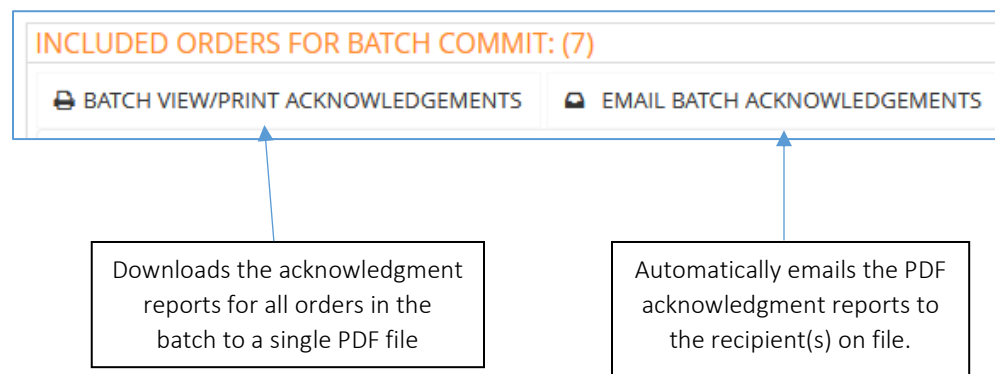
Once an order is committed for production, an order acknowledgement becomes available for download from Northern Contours' online order entry tool. The acknowledgement report is available from two or three different areas within the tool depending on user privileges.

Save/Commit Page

Employees of Northern Contours are exposed to the acknowledgment in the Commit Log section on the Save/Commit page immediately after an order is committed for production.



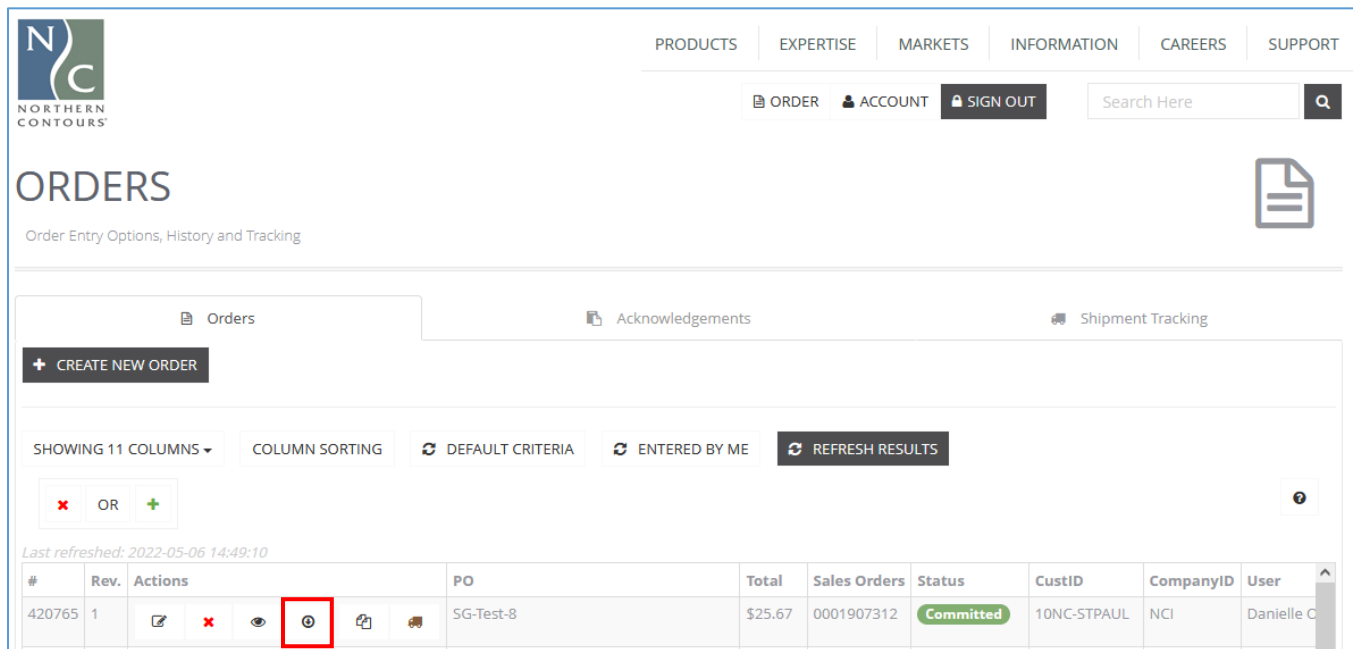
For orders committed in a batch, two additional actions are available in the "Included Orders for Batch Commit" summary on the Save/Commit page.



Order Acknowledgement

Order Index

After an order has been committed for production in Northern Contours' online order entry tool, users can download the acknowledgement report in PDF format from the order list.



The screenshot shows the Northern Contours web application. At the top, there's a navigation bar with links for PRODUCTS, EXPERTISE, MARKETS, INFORMATION, CAREERS, and SUPPORT. Below this, there are buttons for ORDER, ACCOUNT, and SIGN OUT, along with a search bar. The main heading is 'ORDERS' with a subtitle 'Order Entry Options, History and Tracking'. There are tabs for Orders, Acknowledgements, and Shipment Tracking. A '+ CREATE NEW ORDER' button is visible. Below the tabs, there are filters for 'SHOWING 11 COLUMNS', 'COLUMN SORTING', 'DEFAULT CRITERIA', 'ENTERED BY ME', and a 'REFRESH RESULTS' button. A table lists orders with columns: #, Rev., Actions, PO, Total, Sales Orders, Status, CustID, CompanyID, and User. The first row shows order #420765, revision 1, with a status of 'Committed'. A red box highlights the PDF download icon in the 'Actions' column for this order.


#	Rev.	Actions	PO	Total	Sales Orders	Status	CustID	CompanyID	User
420765	1	[Edit] [Delete] [View] [PDF] [Print] [More]	SG-Test-8	\$25.67	0001907312	Committed	10NC-STPAUL	NCI	Danielle C

Downloads the acknowledgment report in PDF format.

Order Acknowledgement

Acknowledgements Tool

Employees and customers of Northern Contours have access to the Acknowledgements tool in online order entry. This feature allows the user to search for a customer, select any recently committed orders that acknowledgements are needed for, and automatically email the acknowledgement reports in a single PDF file to the recipient(s) on file.



[PRODUCTS](#)
[EXPERTISE](#)
[MARKETS](#)
[INFORMATION](#)
[CAREERS](#)
[SUPPORT](#)

[ORDER](#)
[ACCOUNT](#)
[SIGN OUT](#)

ORDERS

Order Entry Options, History and Tracking

[Orders](#)
[Acknowledgements](#)
[Shipment Tracking](#)

[+ CREATE NEW ORDER](#)

SHOWING 11 COLUMNS ▾
 COLUMN SORTING
 DEFAULT CRITERIA
 ENTERED BY ME
 [REFRESH RESULTS](#)

✖ OR +

?

Last refreshed: 2022-05-06 14:25:35

#	Rev.	Actions	PO	Total	Sales Orders	Status	CustID	CompanyID	User
<div> Orders Acknowledgements Shipment Tracking </div> <div> Customer: Search by Name, ID, City, State or Postal Code: <input type="text"/> <div> ID: 101TIME-MISC Name: One Time - Miscellaneous Sales - Taxable CompanyID: NCI </div> Need Sign-Off?: <div> GET ORDERS </div> </div>									

SELECTED ORDERS FOR BATCH ACKNOWLEDGE: (0 OF 1)

☐ ALL (1)

Include?	Valid	#	PO	Status	Opp	\$	Created	Ship Date	Created By	Qty (PC)	SF	CustID	Company
<input type="checkbox"/>	<input checked="" type="checkbox"/>	420736	SignOff-Demo-1	Committed	23191	\$75.67	04/22/2022	05/06/2022	Danielle Olsgard	1	2.2917	101TIME-MISC	NCI

Post-Commit

Ship Date TBD for Orders on Credit Hold

If an order goes on hold after it is committed, the ship date will be displayed as TBD in the user interface of the online order entry tool, in the acknowledgement email, and on the acknowledgement report.






Once an order is released from credit hold the ship date is available for viewing and the order acknowledgement can be re-issued as needed.

Order Changes






Once an order is committed for production it cannot be edited in the online order entry tool. If changes to an order are needed, the Customer Care Representative (CCR) for the account should be contacted.

Canceling an Order

If an order needs to be cancelled after submission, navigate to the order list and click the Cancel Order action button on the order record.

#	Rev.	Actions	PO	Total	Sales Orders	Status
933962	6	    	Demo	\$726.43		Submitted

The order status will change to Cancel Pending and an automated email will be sent to the CCR, who will review and, depending on the production status of the order, complete the cancellation or provide other alternatives.

#	Rev.	Actions	PO	Total	Sales Orders	Status
933962	7	    	Demo	\$726.43		Cancel Pending

Document Revision History

Date	Version	Updated by	Comments
05/06/2023	2.0	Danielle Olsgard	Recreated document from previous version of user guide. Added images, content for new features, and expanded descriptions of existing features.