



DraperOnline for Shade Dealers

GETTING STARTED GUIDE



Make the most of your time.

Generate quotes anytime.

Receive instant access to a printed quote

Request and generate drawings (dwg and pdf) to be emailed to you within minutes.

Reopen and revise quotes

Convert your quote to an order with a few clicks.

DraperOnline – Logging In

DraperOnline is located in the Draper Pro Portal.

- **No Pro Portal account?** Register for one here: www.draperinc.com/draperpro/register.aspx
- While filling out the registration form, select “Yes” beside “If you do not have a DraperOnline User ID, would you like to request one?”

Draper Pro Portal Registration - X +
https://www.draperinc.com/draperpro/register.aspx

Pro Portal Account Registration

ACCESS YOUR PRODUCT PRICING, ORDER STATUS, AND THE ABILITY TO PAY INVOICES ONLINE.

Contact information

All fields are required.

First Name:
Last Name:
Company:
Country: United States
State/Province: Alabama
ZIP/Postal Code:
Your Role: Select One

Pro Portal settings

Account settings

Draper® Account Number:
Required. Providing your dealer number will allow us to streamline your access to price lists and other important dealer information. It is located on the address label of any letter, invoice, or order acknowledgement. Please contact your Draper® representative if you do not know your dealer number.

User ID for DraperOnline:
Optional. Providing your User ID for DraperOnline will allow us to log you into our online AV and shade ordering system.

If you do not have a DraperOnline User ID, would you like to request one?
You will receive an email with your DraperOnline credentials by the end of the next business day.

Yes No

Display your dealer net prices on projection screen pages? Yes No

Email:
Please re-enter your email:
Create a password:
Please re-enter the password:

Already have a Pro Portal account?

- To log on to DraperOnline for the first time, visit your account maintenance page here: www.draperinc.com/draperpro/accountmaintenance.aspx
- Click the Request a DraperOnline User ID button.
- You’ll receive an email with your DraperOnline User ID.
- Go back to your Pro Portal account maintenance page to enter your DraperOnline User ID in the appropriate field.
- From this point on, you can automatically log into DraperOnline from the Pro Portal: www.draperinc.com/draperpro/portal.aspx

draperinc.com/draperpro/portal.aspx

DRAPER
FOCUSED ON INNOVATIVE SOLUTIONS

Audiovisual Solutions Shading Solutions Gymnasium Solutions Market Solutions

Resources | Login Search part no. or keyword Search

The Draper® Pro Portal

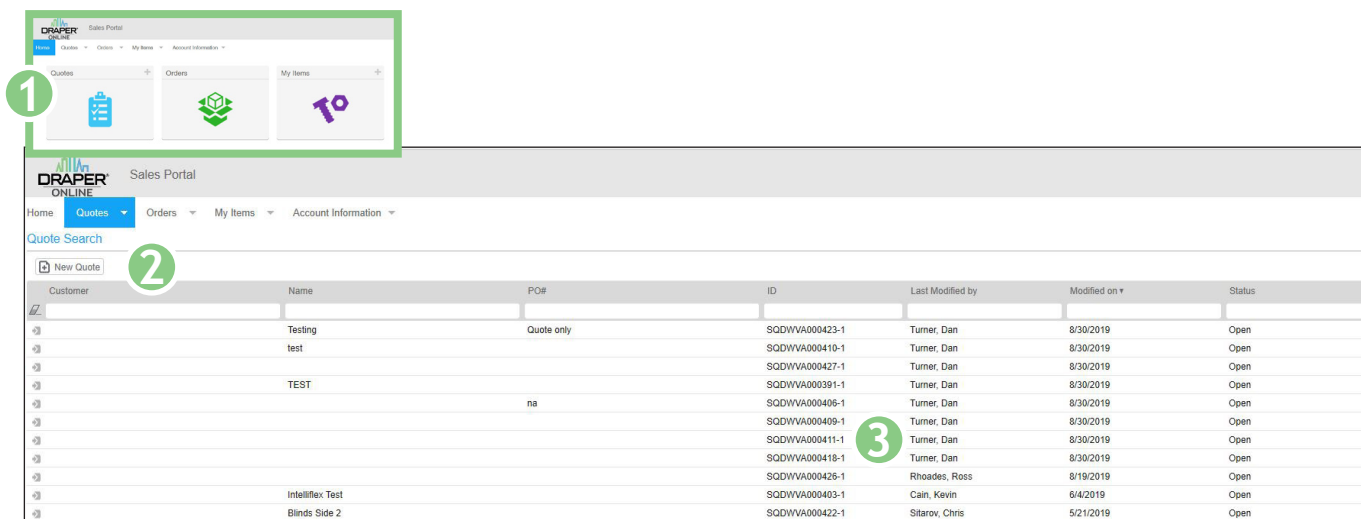
DRAPER DEALER NEWS

Your Draper Account Number is (

Price Lists & Deleted Documents
DraperOnline Login
DraperOnline Video Tutorials and Instructions
Pro Portal Toolbox: Designing, Images, and Documentation

Pro Portal Account Management
Change of address
Order Status & Tracking
Pay Invoices & Sales Orders

Navigating the Dashboard & Starting a Quote

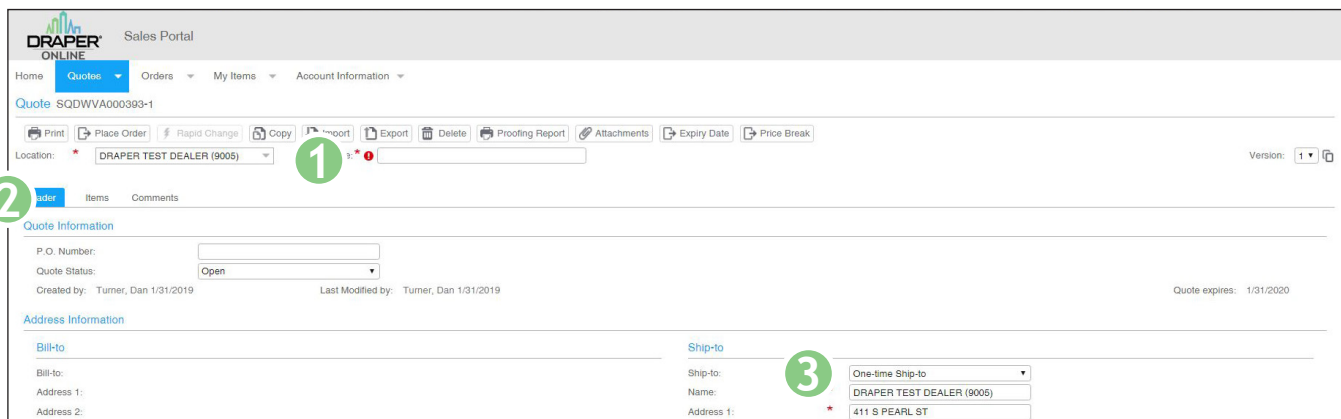


DASHBOARD and QUOTE WINDOW

■ When you first log in, you will see the “Dashboard”.

- 1 There will be no quotes the first time you log on. As you create multiple quotes, you can use the dashboard filters to search for a quote you’ve already created.
- 2 Click on the **NEW QUOTE** button to get started!
- 3 If there are multiple users on your company’s account, all of their quotes will be visible as well.

Header Tab – Quote Information and Address Information



NEW QUOTE WINDOW

■ The address will autofill with the info in our Draper system. Make sure all fields needed are complete on the header tab. Drop-ship requires extra steps for delivery to a different address.

- 1 The **QUOTE NAME** field is required. Please fill in with the name of the project you are quoting.
- 2 The **P.O. NUMBER** field is the second required field. Please fill in with whatever you wish to use for your reference. Or fill in “Quote.”
- 3 If you are drop shipping the order, click on the **SHIP-TO** drop down and select **ONE-TIME-SHIP-TO** and fill in the shipping address, contact name, and phone at the delivery location before placing order. If this field is not changed, the order will ship to your **BILL-TO** address.

Configuration Options

ADDING DETAILS TO THE ITEMS WINDOW

- Fill in all details relating to your selected product.

ITEMS and their descriptions can be found beginning on **PAGE 11** of this manual.

- Fill in the details of the shade you want to add. Once all the details are filled in, click the **ADD** button.

OR

- Click the **LOCK** icon on any features you wish to apply to future line items. This allows rapid entry of multiple line items that may share features such as fabric or hardware choice.

- Clicking the **SELECT OPTIONS** button will allow you to explore more in depth the product you have selected.

If you are satisfied with the details you have provided, clicking the **ADD** button at the bottom of the window will add the line item to your quote.

Any boxes that are already selected are the Draper standard options for that product.

The **tab** key will advance you to the next required field.

On many of the fields, typing in the **first letter** will provide a drop down box.

For example: for measurements, type "1" and three choices will appear.

Fabrics are listed either **numerically or alphabetically**, e.g. Typing "2" will show the fabric list starting with 2000.



Please create separate Shade and Screen quotes if both are on the same project.

Expand All to View Details

Quote Lines

Validate All [Expand All](#)

Line	Room/Location	Item
1		FLEXSHADE MO (Motorized Flexshade) Motorized Flexshade

Change Options
More...

Copy

!New Improved!

Select Options Add Reset selected options Named Configurations

Quote Lines

Validate All [Expand All](#)

Line	Room/Location	Item	Qty	UOM
1		FLEXSHADE MO (Motorized Flexshade) Motorized Flexshade	1	PC

Line Details

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ITEM SELECTION WINDOW, EXPAND FOR DETAILS

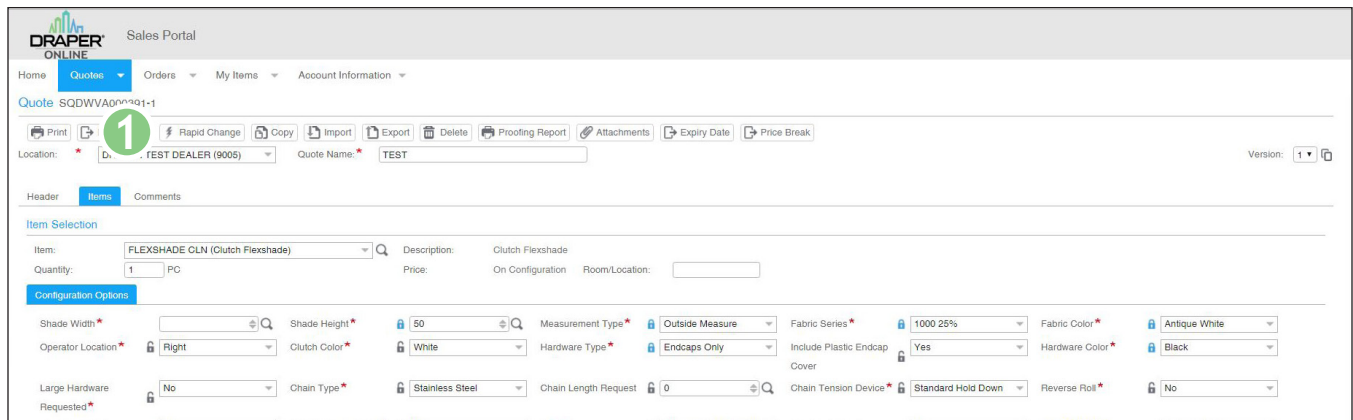
- When the items are added onto your quote, there are no details displayed in standard view.

1 Click the **EXPAND ALL** tab to see the line details for each line item listed so far on the quote.

2 When new items are added, the details for those new items will not be in view. Keep adding new items the same way. Continue to click **EXPAND ALL** to view details if needed.

3 Use the blue **COPY** button to create a duplicate of a specific line. This allows for quick data entry when only one feature needs to be changed from one line to the next.

Using the Rapid Change Option

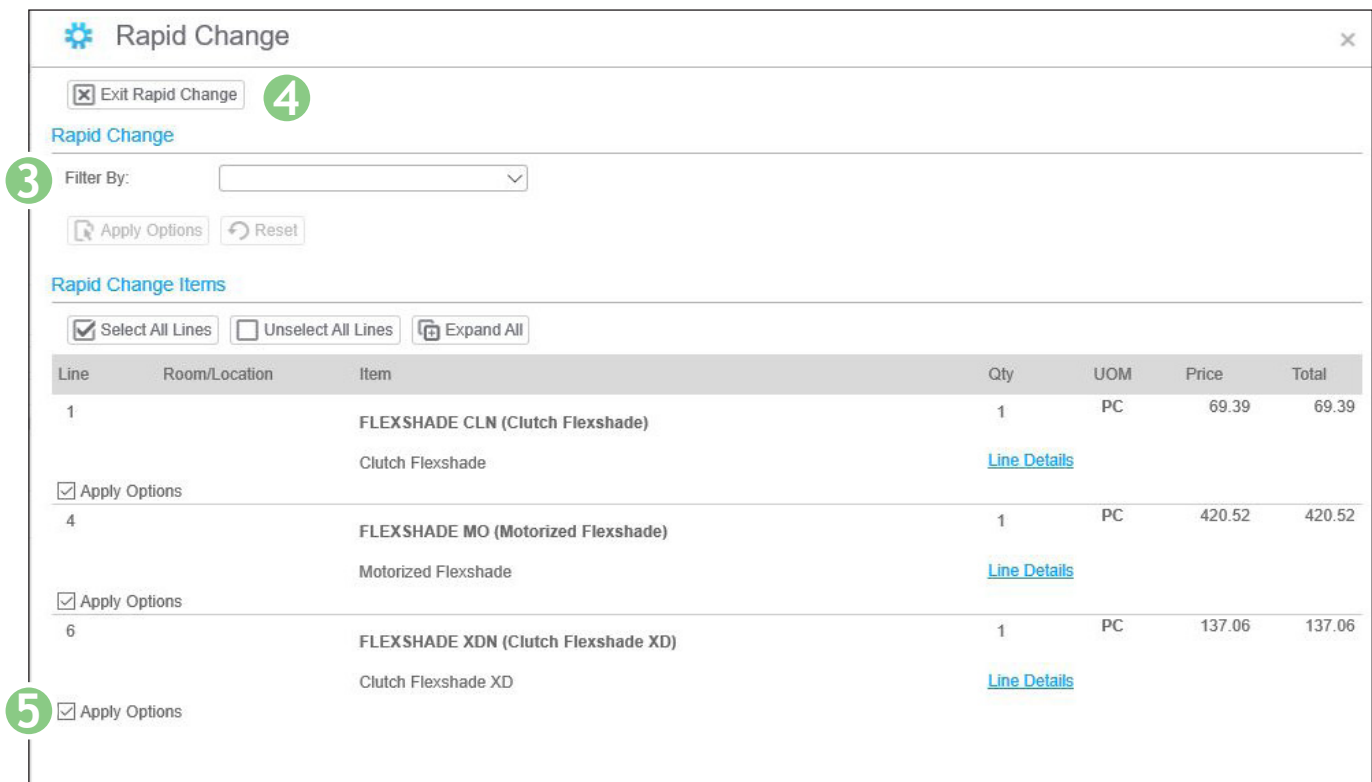


■ Making changes to multiple line items at once is quick and easy.

TO MAKE CHANGES

1 Click on the **RAPID CHANGE** button.

2 This option is only available on certain products at this time. If the **RAPID CHANGE** button is greyed out, then click on the **CHANGE OPTIONS** for that line item. Locate the drop down that needs changes to select that change, then click **CONTINUE** in the upper left corner. (You may need to click this button several times.)



■ Apply changes, then return to your quote.

ITEM SELECTION WINDOW, EXPAND FOR DETAILS

3 Click on the **FILTER BY** drop down menu to select the product you want to change. As you make a change, only options with a checkmark will change.

4 When ready, click the **APPLY OPTIONS** button and all selected products will change.

5 Click on **EXIT RAPID CHANGE** to return to the dashboard.

Saving and Printing Your Quote

The screenshot shows the DRAPER ONLINE interface with a 'Print Options' window open. The window is divided into two panes. The left pane, titled 'Print Options', contains settings for 'Prices' (Selling, Selling (No Totals), Selling (MSRP)), 'Sort By' (Line Number, Label), and 'Order' (Ascending, Descending). The right pane, titled 'QUOTATION', displays quote details including Quote ID (SQDWVA000391-1), Quote Name (TEST), Quoted for (Jeffrey Frownfelter), and Quoted by (Jeffrey Frownfelter). The total price is 166.00.

PRINT OPTIONS WINDOW

■ Steps to keep a record of your quote.

- 1 Once your quote is complete, you can create a PDF version by clicking the **PRINT** button at the top. A second window will appear.
- 2 Click **PRINT** again to create a PDF for saving or printing.
- 3 PDF result for saving or printing.

Returning to Your Dashboard

The screenshot shows the DRAPER Sales Portal interface. At the top, there is a navigation menu with 'HOME', 'Orders', 'My Items', and 'Account Information'. Below the menu are three dashboard widgets: 'Quotes', 'Orders', and 'My Items'. A 'Quote Search' section is visible, containing a 'New Quote' button and a table of quotes. The table has columns for Customer, Name, PO#, ID, Last Modified by, Modified on, and Status. A context menu is open over a quote row, showing options: Open, Open New Page, Print, Copy, Delete, and Export. The status of the quote is 'Open'.

Customer	Name	PO#	ID	Last Modified by	Modified on	Status
	Testing	Quote only	SQDWVA000423-1	Turner, Dan	8/30/2019	Open
	test		SQDWVA000410-1	Turner, Dan	8/30/2019	Open
			SQDWVA000427-1	Turner, Dan	8/30/2019	Open
	TEST		SQDWVA000391-1	Turner, Dan	8/30/2019	Open
		na	SQDWVA000406-1	Turner, Dan	8/30/2019	Open
			SQDWVA000409-1	Turner, Dan	8/30/2019	Open
			SQDWVA000411-1	Turner, Dan	8/30/2019	Open
			SQDWVA000418-1	Turner, Dan	8/30/2019	Open
			SQDWVA000425-1	Rhoades, Ross	8/19/2019	Open
	Intelliflex Test		SQDWVA000403-1	Cain, Kevin	6/4/2019	Open
	Blinds Side 2		SQDWVA000422-1	Sitarov, Chris	5/21/2019	Open
	The Blinds Side 1		SQDWVA000421-1	Sitarov, Chris	5/21/2019	Open
			SQDWVA000414-1	Fessler, Sheri	5/20/2019	Open
			SQDWVA000405-1	User: DRAPER TEST DEALER	2/19/2019	Open
	Test control		SQDWVA000404-1	Cain, Kevin	2/19/2019	Open

QUOTES WINDOW AND NAVIGATION

- *Navigate back to Dashboard and find quotes using Quote Search.*

- 1 Click on the **HOME** button at the top of the menu. To return to your quote Dashboard, click on Quotes.
- 2 Select a quote by double clicking on a quote, OR . . .
- 3 Click on the folder icon at left of the quote for more options. You can open, open in a new page, print, copy, or delete the quote. *Please ignore the Export option.*

***If you delete the quote,
it CANNOT be retrieved.***



**The more detail you provide on your header page,
the easier your search for quotes will be.**

Adding Contact Info Before Ordering

USE ORDER COMMENTS FOR CONTACT INFORMATION

- Before placing order please enter the desired contact information in the Place Order area to ensure proper delivery.

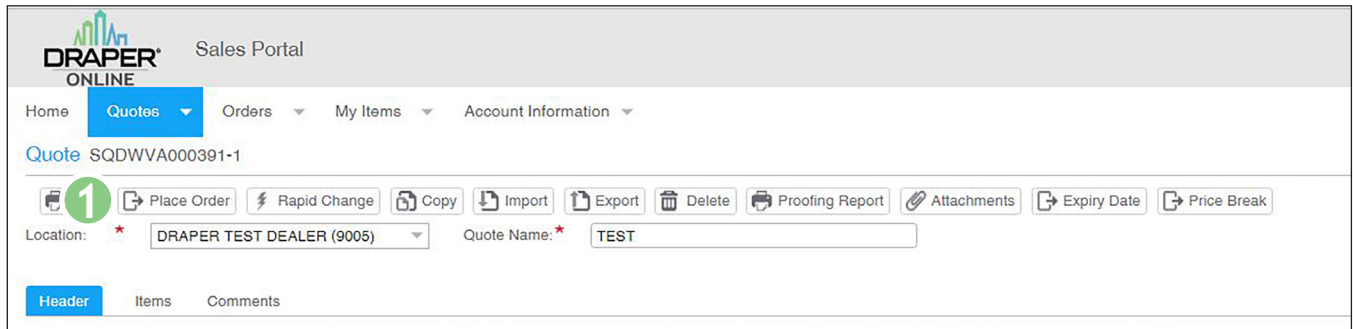
- 1 Select a quote by double clicking on a quote, OR . . . Click on the icons at left of the quote you wish to order and select Open.
- 2 Click on the **PLACE ORDER** button at the top to open the window you will need to enter your contact information.
- 3 Scroll down to the **PAYMENT INFORMATION** and **CONTACT INFORMATION** sections.

Enter the desired contact name and phone number (required).

Your order is ready to be placed.

NOTE Please request permission to order through your Draper representative if Order button is not active.

Turning Quotes Into Orders



TURN QUOTES INTO ORDERS

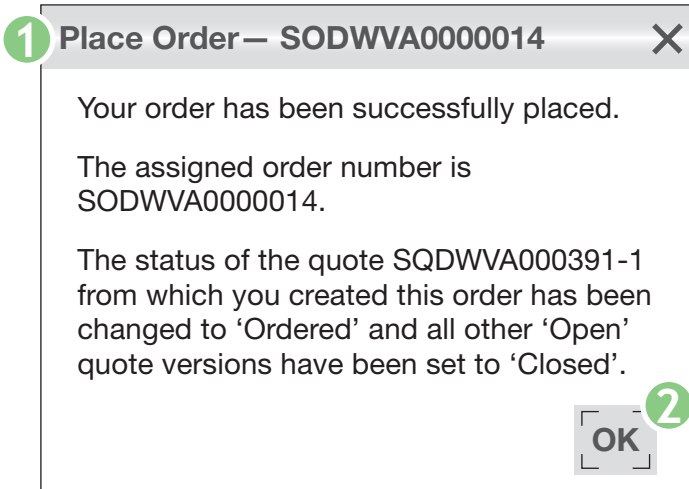
- Now that you have had experience doing your own quotes online, you can convert your quotes directly into orders. This skips the normal order entry time. Quotes must be converted exactly as they are entered.

- 1 Click on the **PLACE ORDER** tab at the top of the Place Order window.

Your order will go directly into the Draper system exactly as you entered the quote. A window with your order confirmation number will show up on your screen.

- Special comments not are allowed on online orders.
- No change orders can be made and no custom details are possible once quote is ordered.
- To change orders, the original order needs to be cancelled and a new order submitted.
- Orders can be cancelled by contacting your Draper Sales Consultant in writing with the P.O. used for the order. **Cancellations must be done within 24 hours.**

Your Order is Now Complete



INDICATES COMPLETION OF ORDER

- Your order, **exactly as you entered the quote**, is complete with a confirmation number. Any changes can only be done by cancelling this order within 24 hours and starting a new order.

- 2 Click on OK to return to your dashboard.

At this point, the order can't be changed, except for the ship-to address. **If the details of any part of the order need to be changed, the order must be cancelled and re-submitted. This needs to be done within 24 hours.** A window with your order confirmation number will appear on your screen.

Shade Product Codes for DraperOnline

WINDOW SHADE MOTORIZED PRODUCTS		
PRODUCT CODE:	DESCRIPTION:	SPECIAL NOTES ABOUT QUOTING THIS PRODUCT:
EXT FLEX MON	Exterior Motorized FlexShade	
EXT FLEX XL MON	Exterior Motorized XL FlexShade	
FLEX RECHARGE	Rechargeable, battery-powered motor	
FLEX ZIP 127	FlexShade ZIP 127	
FLEX ZIP 92	FlexShade ZIP 92	
FLEXBOTTOMUP MO	Bottom Up FlexShade Motorized	
FLEXBOTTOMUP DM	Dual Fascia Bottom Up Motorized	Dual roller motorized Bottom Up FlexShade with rollers on bottom
FLEXSHADE C2MO	2-Panel Motor FlexShade	Coupled motorized FlexShade with 2 panels
FLEXSHADE C3MO	3-Panel Motor FlexShade	Coupled motorized FlexShade with 3 panels
FLEXSHADE 2	FlexShade 2 Motorized Shade	FlexShade 2 using surface mounted hardware
FLEXSHADE 2 PKT	FlexShade 2 Pocket	FlexShade 2 using pocket headbox for recessed mounting
FLEXSHADE 24V	24V Low Voltage FlexShade	Using ST30 24V motors
FLEXSHADE BA	Motorized FlexShade standard battery motor.	
FLEXSHADE C4MO	4-Panel Motor FlexShade	Coupled Motorized FlexShade with 4 panels
FLEXSHADE C5MO	5-Panel Motor FlexShade	Coupled Motorized FlexShade with 5 panels
FLEXSHADE COL	FlexShade Colossal	
FLEXSHADE D2MO	2-Panel Motor FlexShade	Large dual coupled 2 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE D3MO	Dual Headbox 3-Panel Motor	Large dual coupled 3 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE D4MO	Dual Headbox 4-Panel Motor	Large dual coupled 4 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE D5MO	Dual Headbox 5-Panel Motor	Large dual coupled 5 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE D6MO	Dual Headbox 6-Panel Motor	Large dual coupled 6 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE D7MO	Dual Headbox 7-Panel Motor	Large dual coupled 7 panel motorized shade with ceiling brackets and large dual headbox
FLEXSHADE DF24	Dual Fascia 24V FlexShade	Dual FlexShade ST30 24V motors. All hardware options available for quoting
FLEXSHADE DFBA	Dual Fascia Battery Shade	Dual FlexShade with standard battery motors and variety of hardware options
FLEXSHADE DFMO	Dual Fascia Motor FlexShade	Standard dual motorized shade with variety of hardware options
FLEXSHADE DHMO	Dual Headbox Motor FlexShade	Large dual motorized shade with ceiling brackets and large dual headbox
FLEXSHADE F2MO	Dual Headbox 2-Panel Motor	Dual coupled 2 panel motorized shade with variety of hardware options
FLEXSHADE F3MO	Dual Fascia 3-Panel Motor	Dual coupled 3 panel motorized shade with variety of hardware options
FLEXSHADE F4MO	Dual Headbox 4-Panel Motor	Dual coupled 4 panel motorized shade with variety of hardware options
FLEXSHADE F5MO	Dual Fascia 5-Panel Motor	Dual coupled 5 panel motorized shade with variety of hardware options
FLEXSHADE F6MO	Dual Fascia 6-Panel Motor	Dual coupled 6 panel motorized shade with variety of hardware options
FLEXSHADE F7MO	Dual Fascia 7-Panel Motor	Dual coupled 7 panel motorized shade with variety of hardware options
FLEXSHADE MO	Motorized FlexShade	Motorized shade using Line Voltage Standard, RTS, 485, IntelliFlex I/O, or Low Voltage DC50 Motors
FLEXSTYLE BA	FlexStyle Battery	
FLEXSTYLE BAZ	FlexStyle Zigbee Battery	
FLEXSTYLE MO	FlexStyle Motorized	
FLEXSTYLE MOZ	FlexStyle Zigbee Motor	
FLEXSTYLE C2MO	FlexStyle 2-Panel Motor	
FLEXSTYLE C2MOZ	FlexStyle 2-Panel Zigbee Motor	
FLEXSTYLE C3MO	FlexStyle 3-Panel Motor	
FLEXSTYLE C3MOZ	FlexStyle 3-Panel Zigbee Motor	
FLEXSTYLE C4MO	FlexStyle 4-Panel Motor	
FLEXSTYLE C4MOZ	FlexStyle 4-Panel Zigbee Motor	
FLEXSTYLE C5MO	FlexStyle 5-Panel Motor	
FLEXSTYLE C5MOZ	FlexStyle 5-Panel Zigbee Motor	
FLEXSTYLE 24V	FlexStyle 24 Volt Low Voltage	
FLEXSTYLE RECHG	FlexStyle Rechargeable	
INTELLIFLEX IO	Parts kit	IntelliFlex I/O System components and controls
LIGHTBLOC MO	Motorized Lightbloc	
LTBLOC ZIP MON	Lightbloc ZIP motorized	
RECHARGE DF	Recharge DF (Dual Flex Recharge)	Dual Roller FlexShade Recharge - Rechargeable battery motors
SKYLIGHT 2	Skylight 2	
SKYLIGHT MO	Motorized Skylight	

Shade Product Codes for DraperOnline Continued

WINDOW SHADE MANUAL PRODUCTS		
PRODUCT CODE:	DESCRIPTION:	SPECIAL NOTES ABOUT QUOTING THIS PRODUCT:
CRANK WITH ZIP	Lightbloc Zipper Crank	Crank operated Lightbloc shade with ZIP channels
EXT FLEX CRN	Exterior Crank FlexShade	
EXTERIORFLEX CL	Clutch Exterior FlexShade	
FIXED PANEL REC	Fixed Panel Rectangle	
FIXED PANEL SQ	Fixed Panel Square	
FLEXBOTMUP NEXD	Bottom Up FlexShade NEXD	
FLEXSHADE CLN	Clutch FlexShade	
FLEXSHADE DFCL	Dual Fascia Clutch Shade	Manual dual shade using standard clutch and variety of hardware options
FLEX DF NEXD	Dual Fascia NEXD Clutch	Manual dual shade using NEXD clutch and variety of hardware options
FLEXSHADE NEXD	Clutch FlexShade NEXD	Endcaps with or without chain
LIGHTBLOC CL	Clutch Lightbloc	
SHADE SP	Spring Roller Shade	
SHADE SPLINE PN	Shade Panel Mounting Channel	
SKYLIGHT CR	Crank Skylight	
TECHMATIC CL	Techmatic Shade	
WINDOW SHADE HARDWARE & FABRIC REPLACEMENT ONLY		
PRODUCT CODE:	DESCRIPTION:	SPECIAL NOTES ABOUT QUOTING THIS PRODUCT:
COUPLED FABRIC	Coupled Shade Fabric Replacement	
CRANK HANDLE	Crank Handle	
FASCIA	Fascia Only	
H CHANNEL	H Channel	Side and sill channels
HEADBOX	Headbox Only	Single roller pocket or surface headbox, all models (headbox only)
L ANGLE	L Angle	Side and sill angle
POCKET D	Pocket D Headbox	Single roller pocket D headbox, all models (headbox only)
SHADE FABRICS	Shade Fabric Replacement	
U CHANNEL	U Channel	Side and sill channels
W C CLOSURE	Long or Short Closure Panel	Closure for wall clip (wall clip quoted separately)
WALL CLIP	Wall Clip	Closure quoted separately
NEXD CLUTCH	NEXD Clutch Only	Endcaps with or without chain



**If you need assistance please call
765.987.7999 or 800.238.7999 to
ask for a Shades Sales Consultant.**