

**Once an Order is Placed:**

1. Once an estimate is received by the designer they can revise it, archive it or convert it to an order. They have the option of converting all forms to an order or only some forms, keeping the rest as an estimate in their Estimate Inbox
2. Once they convert the Estimate to an order, you will receive an email notification of such.
3. You can now track fabrics, payments and costs by using the location icon to the right and you can convert the order into a work order with just a few keystrokes.

**4. Tracking the Order:**

- a. Click on the location icon to the right of the order. 
- b. The Order tracking form will pop up:
- c. The main page allows you to enter the invoice # (if you use a separate invoicing program). Fill in all the cells with the requested information. In the Track Status drop down you have several options:

**Order Tracking**

ESTIMATE NUMBER EST019068.6	SIDEMARK Gelsen	SUBMITTED DATE 11/22/2021	GRAND TOTAL \$ 4070.00
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Order Track   Trim Track   Fabric Track   Job Costing

INVOICE NUMBER * 5685	INVOICE DATE *  12/31/2021	INVOICE AMOUNT * \$ 4070.00
DEPOSIT AMOUNT \$ Deposit Amount	DEPOSIT DATE  MM/DD/YYYY	
BALANCE PAID \$ Balance Paid	BALANCE PAID DATE  MM/DD/YYYY	REMAINING BALANCE \$ 4070.00
DUE DATE  MM/DD/YYYY	DAYS TO CLOSE 39	TRACK STATUS Pending Fabric and Deposit 
DESCRIPTION Description	NOTES Notes	

Update Order
Cancel

- i. Balance Due – meaning the job is complete and the client owes a balance
- ii. Change order – this refers to any changes made after the order has been placed.
- iii. Finished – the job is complete, paid for and ready for pick up
- iv. In Process – deposits and all fabrics have been received and the job is on the schedule. A due date should be filled in the Due Date cell at this point.
  - v. On Hold – if for any reason your client needs to pause this order
  - vi. Paid – the job is complete, picked up and paid for
  - vii. Paid in Process – the job is on the schedule and has been paid in full up front.
  - viii. Past Due – The balance is past 30 days old.
  - ix. Pending Deposit – The fabric has arrived, but the client still needs to remit a deposit.
  - x. Pending Fabric – The deposit has been paid but not all the fabric has arrived.
  - xi. Pending Fabric and Deposit – the job is not in process because fabric and the deposit have not arrived.

- d. The Remaining Balance will automatically fill in as you enter payment amounts.
- e. Your client can check their order status at their convenience, so that you don't have to update them continually.

**5. Fabric Track:**

- a. The Workroom Pro helps you and your client see what fabrics are in and what fabrics are missing and holding the order up.
- b. Click on the Fabric or Trim Track Tab
- c. You will see a list of every fabric that is required to complete the order, itemized by room



- d. Click on the icon to the right of each room and it will open up a list of fabrics needed.
- e. As the fabrics arrive, you will fill in the information to the right with the yardage that was received, the day it was received and the day it was inspected or measured.
- f. To the far right of each room you can fill in the name of the seamstress you will assign to that order.
- g. Once you enter a received date the fabric will highlight in yellow.
- h. Your designer can check each fabric as well and see what fabrics have yet to arrive.
- i. Once all fabrics arrive, you will change to the status from "Pending Fabric" to the appropriate status

**6. Job Costing**

**Job Costing**

- a. Click on the Job Costing Tab.
- b. You will see a list for every room on the order and a description of the treatment.



- c. Click on the icon to the right of each room and a form will open that allows you to enter costs for each room.
- d. The amount charged for that room will appear in the Invoice Cell and the units that were used to charge for that treatment.
- e. There is a cell where you can enter any error that affected the costs such as a seamstress error or incorrect yardage etc.
- f. Then you can fill in the \$ amounts the seamstresses were paid any commission you may have paid to get the order (if you have a salesperson or lead generation cost) the cost of materials, linings, headrails, boxes for cornices etc. If you set goals for your hourly seamstresses, you can enter the goal hours in the Goals Cell and the actual hours it took. Once the job is complete you can enter the actual costs in labor to produce the order. If you use subcontract seamstresses, you will fill in their pay under Employee. The rest of the information will automatically fill in giving you a Profit amount and a Gross Profit %.
- g. All of this information will be carried over to the KPI (Key Performance Indicators) on the final tab at the top of the dashboard giving you an overview of your numbers.