

# WIZARD

WEB USER MANUAL

IMPROVING PRODUCTIVITY & ACCURACY



*Blackinton*

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## INTRODUCTION

Much of the Wizard system is self-explanatory, but we recognize there are some things that need explanation. Below are instructions for functionality we are most commonly asked “how do I do X?”

## GET HELP / CONTACT

Should you have questions, problems, or need assistance please call customer service. If you find a bug in the program, or have a suggestion for a new feature please reach out to:

**Sharyn Dunn**

**Email:** sdunn@blackinton.com

**Ph:** 800-699-4436 x113

There is a **HELP** tab within Web Wizard that has numerous short videos explaining various functions, also you can search for help articles.

<<**CLICK HERE**>> to visit Help Site.

## GETTING STARTED LOG ON:

**Web Address:** app.blackinton.com

**TOP BOX** is User Name:

**BOTTOM BOX** is a “Case Sensitive” Password:

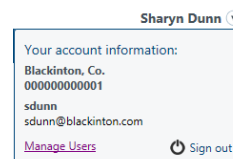
**NOTE:** The minimum supported screen resolution is 1280 for width. If you are not at this resolution you will experience problems scrolling.

If you forget your User Name or Password you can reset / retrieve from the login screen. **Trouble with your account? [Click Here.](#)**

## MANAGE USERS – ADD AND MANAGE USER ACCOUNTS FROM YOUR COMPANY


You can manage and add users from your company. To add and manage users:

1. Upon logging on in the upper right hand corner of the screen you will see your name
2. Click the arrow next to it and a box will open
3. Click the Manage Users link
4. Then Add New Users or click on an existing one to edit



## CUSTOMERS / ADDRESS BOOK

### ADDING CUSTOMERS

1. Click Customers on the menu
2. Click on the plus sign in the upper right of the screen to add a customer 
3. Under Customer type you designate Business or Individuals, type in the customer name (you do not have to save until you are done adding all information) (we suggest you set your customers up as business and put the many contacts and addresses under the business)
4. Click Addresses tab, click **Add New Address (link in upper right)**... add the address if this is a default address click make default, as during check out it will default to this address. **CLICK ADD**
5. Click Contacts / **Add New Contact (link in upper right)**
6. Add each of the contacts you have for this department, after adding each **CLICK ADD**. Be sure to identify who is the default contact by putting a check in the Make Default Contact.
7. **CLICK SAVE CUSTOMER** When you are finished with this customer

You can also add your customers while you are creating an Order / Quote / Template. This is covered in the Orders Section.

## ORDERS

### UNDERSTANDING THE ORDER DASHBOARD

To get to the dashboard click on Orders on the top main menu.

- **ALL** – A master listing of all your orders regardless of the state of the order
- **RECENT** – Lists from top to bottom the most recently opened / worked on order
- **DRAFT** – Lists all orders being configured, that have not been submitted
- **REVIEW** – Lists all orders in “review” state which is draft, EXCEPT review allows for one click submission

- **SUBMITTED** – You have placed the order, you have 1 hour to recall it back to draft if there is an error on it (You would just need to pick **RECALL** on drop down menu and the order goes back to draft status)
- **HOLD** - There are two different reasons an order could be on hold. To see why your order is on hold open the order in view mode. Each line/product has an item status under this you will see [Hold](#)
  - » Under hold if it says **Credit Stop** - this means your account is overdue and you should contact our accounting department to rectify the issue.
  - » Under hold if it says **Production Question** this means our customer service group has a question about that line item. Customer service will be giving you a call, or you can feel free to call them yourself to rectify the issue.
- **CONFIRMED** – Blackinton has reviewed the order and it is being manufactured
- **SHIPPED** – Your order is on its way
  - » A multi-line item order is moved to shipped once the first line item on that order ships – it doesn't necessarily mean the entire order shipped. You will need to look at each line item for status.
- **CANCELED** – Lists all orders that Blackinton has canceled.

## STARTING AN ORDER

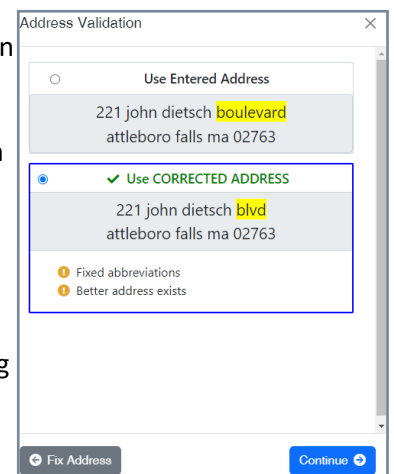
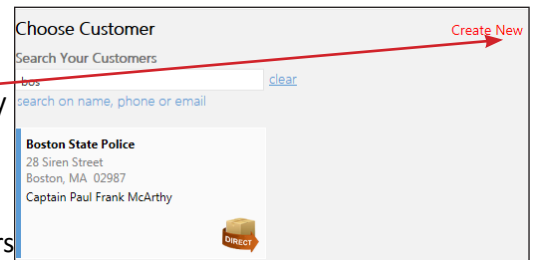
### Start by Clicking Orders / New Order on Menu

1. You will be brought to the New Order screen where you pick which customer this order is for.
2. Enter your PO# (if you don't have one the system will auto-generate a number)
3. You can put in your customer's PO if you'd like or skip it
4. You can name your order: i.e., 2024 recruits
  - You can search all aspects of an order so naming will help find it at a later time
5. If the order is not a customer order; i.e., you are purchasing stock for your store click NO next to is this a customer order and you will bypass having to pick a customer.

## CHOOSE CUSTOMER

6. **Search** for your customer under **Choose Customer** and click on the customer address box to select
7. **If your customer is new** or not in the system yet you can create the customer by clicking **Create New**
8. **New Customer Profile** will come up.
  - » Enter the Contact information for this customer
  - » Enter the shipping address for your customer, you will note Customer Preferences Drop Shipment is checked, this helps during checkout, as the customers address will be chosen.
9. When you are finished click Continue - An Address Validation box may pop up like the one on the right. We have software that checks the address entered against the addresses in USPS and UPS database. We suggest you Use the Corrected Address
10. Once you click continue. You are brought to the product page where you search for the item you would like to order... please make note of the blue bar at the top of the page. You will see upper right, under your name, that an order has been started: An order number was generated and your customer's name is shown. An order is not an order until you add one product to the order.
 

**If you close before adding a product to the order there will be no order saved!**
11. The upper right under your name will list an order number and the customer you are placing that order for. The RED circle with the dash (-) will close the order.





## PRODUCT CONFIGURATION

### SEARCH FOR A PRODUCT

You can search for the product you want to order by using the left menu, or putting the style number; i.e., B296 in the Keywords box, or if you are unsure of the style number use key words; i.e., Maltese

- Find the product you would like and then click on the product

### CONFIGURE THE PRODUCT

If the product image is a blank image like this B296 it means the product is “Designable”.

- As you pick the badge options you will see the badge come to life with each choice you make.



**B296 - Our most popular shield with an eagle on top**

Product is not shown actual size.  
The finished product may vary slightly from the graphic rendition shown.

<b>ORDER QTY</b>	<input type="text" value="1"/> each
Quick Ship	<input type="text" value="No"/>
Finish	<input type="text" value="Gold Plate"/>
Enamel Type	<input type="text" value="Regular"/>
Solid Back	<input type="text" value="No"/>
Lettering Font	<input type="text" value="Block"/>
Lettering Color	<input type="text" value="Black"/>
Engraved Line	<input type="text" value="CAPTAIN"/>
Engraved Line	<input type="text" value="ATTLEBORO FALLS"/>
Seal	<div style="border: 1px solid #0070C0; padding: 5px; text-align: center;"> <p>MA1 rim/back Commonwealth of Massachusetts State Seal 15/16" Color: Blue</p> </div>
Engraved Line	<input type="text" value="POLICE DEPARTMENT"/>
Engraved Line	<input type="text" value="9865"/>
Attachment	<input type="text" value="Safety Catch"/>
Badge Case	<input type="text" value=""/>
Special Instructions	<a href="#">add special instructions</a>

**Seals:** You can pick a seal by typing in the style number, or click the magnifying glass to browse, or you can search by key word; i.e., mass. If you choose a rim/one color seal a pop up will ask you what color you would like.

**\*\*NOTE** if you browse seals and the badge you are configuring takes a range of seal sizes you will note some seals say Smaller and Larger. This means the seal is Smaller or Larger than the Standard Default seal size.



With a designable product you will see the difference in the design. See below where I chose the MA2 seal which is 11/16" smaller than the standard MA1 15/16". Compare the below image to the image on the left.



### QUICKSHIP BADGES

We have 21 badges that are called QuickShip, they are guaranteed to ship in 5 business days of order receipt at Blackinton. The B296 above is one.

- Under ORDER QTY you see an option Quick Ship - if you pick YES, this becomes a QuickShip badge.
- The system will automatically take away some finishes, seals, and hard enamel because the program limits what can be ordered as QuickShip.

## SPECIAL INSTRUCTIONS

Special instructions should be used when you want to add information about the product configuration to your order. You do not need to reiterate anything you already chose; i.e., regular enamel. To access special instructions click add special instructions+ at the bottom of the configuration page. [add special instructions +](#)

- When the screen shifts you will see a text box, where you can write in your instructions, and to the right a place where you can attach a file by clicking Choose File (pdf, work, excel, jpg, etc)

**Special Instructions**



This section provides the ability to provide special instructions related to this product. Instructions provided below should contain information related to this product only and **should not contain general order instructions**. For "runs" of information, like badge numbers, please attach a file containing this information. As with the instructions, attached files should be for this item only.

**Optional File Attachments**

Choose File No file chosen

There are currently no files attached to this product. To attach a file, click the 'attach file' button above.

Any files attached should be specific to this product only.

- When you are finished adding special instructions click Save in the upper right corner and you will be brought back to the product configuration page.
- You will note when you return to the page next to special instructions a paper icon if notes were added and a paper clip if an attachment was added. [special instructions](#)  

Below are a few examples when you should use special instructions:


- If you are ordering multiple badges and they are all the same except for one engraving line. The easiest thing to do is configure your badge once, put quantity 10, on the line to be engraved differently for each badge leave it blank and in special instructions list the 10 different Ranks/Numbers/etc you want to appear on each of the badges.
- If a department provides you with a spread sheet listing the different numbers, attach that spread sheet
- There is a picture to attach to the order, you can attach most common image file types
- You want an extra panel added to the badge and the system does not allow it. Use special instructions to tell us what you are looking for; i.e., put retired panel above Captain
- You can't do something you need to while configuring a product explain in special instructions what you are looking for.
- DO NOT** put ship complete here! Use the shipping special instructions to indicate ship complete.

## CLICK ADD TO ORDER WHEN YOU ARE READY TO PROCEED

[+ Add to Order](#) [- Cancel](#)

## PRODUCT CONFIGURATION PAGE PANEL BADGE

**B736 - Badge with Eagle and Applied Panels**



Product is not shown actual size. The finished product may vary slightly from the graphic rendition shown.

Applied Panel (B698)

Applied Panel (B738)

Applied Panel (B699)

Applied Panel (B740)

Attachment

Badge Case

Special Instructions [add special instructions +](#)

**ORDER QTY** 1 each

**Finish** Silver Panels on Gold

**Enamel Type** Hard

**Strike Solid** No

**Lettering Font** Roman

**Lettering Color** Black

**Applied Panel (B699)**

**Applied Panel (B740)**

**Attachment** Safety Catch

**Badge Case**

**Special Instructions** [add special instructions +](#)

Start configuring your badge like you did with the B296, by picking options.

If you click on a Magnifying glass the screen shifts and you can see images of finish/attachments etc.

- Hard & Regular enamel follow the finish type; i.e., if you pick a high-end finish it flips to hard enamel and a pop-up appears. You can still change the enamel type, it just switches to the default.

### Applied Panel

There are many ways to find a panel.

1. Simply type a word; i.e., fire and hit return if we have the panel it will populate
2. If you know a panel style number type it in and hit return and it will populate
3. Click the magnifying glass and see all the panels available. \*\*\*Always pick the recommend panel if it matches the word you want, this is the "Standard" panel the factory uses.

<b>B689-A</b> Roman		<b>B1575-J</b> Roman	
Seal: 11/16"	Recommended Panel	Seal: 13/16"	
Applied Seal, 1 Die Line		Applied Seal, 1 Die Line	

4. In the above example you will see there is no option to pick a seal. This is because the applied panel on line 4 has the seal applied to it, so you must pick a panel then a window will pop up where you can type in the seal you want and hit enter, then save.

**CUSTOMIZE APPLIED PANEL**

**B689-A** The panel you have chosen may require additional customization. Please review the customization options carefully to insure accurate ordering. When done, please click the **SAVE** button to continue.

<b>Panel Configuration</b>	<b>Seal Configuration</b>
<b>NO IMAGE</b>	Panel supports optional applied seal with a diameter of 11/16"
	Enter Style MAA <input type="text"/>
	<a href="#">Browse All Seals</a>
<b>Optional Seal</b> (CHOOSE SEAL TO RIGHT)	
<b>Die Line (below seal)</b> POLICE <input type="text"/>	

**Recommended:** The recommended way to configure a panel badge is to simply type what you want in the applied panel box and hit enter. Let the system do the work for you. The system will pull the recommended panel.


### ORDER REVIEW

After you click Add to Order you are brought to the order review screen (shopping cart) below. You can edit on the fly on this screen by clicking any of the red edits. If you click the edit under badge description you will be brought back to the badge configuration screen where you can make your changes to the badges configuration; i.e., change finish, panels etc.

**Attleboro Falls Police** Order Action drop down menu allows: edit

**Order Information** W70384091

Dealer PO No.	Customer PO No.	Order Name	Last Modified	Created	Status
000002163 <span style="color: red;">edit</span>	none specified <span style="color: red;">edit</span>	Captain Badge <span style="color: red;">edit</span>	Sharyn L .Dunn 6/13/2024 @ 1:46 PM	Sharyn L .Dunn 6/13/2024 @ 1:46 PM	Draft

Product	Description	Options	Qty	Cost	Disc	Net
	B296 Our most popular shield with an eagle on top <span style="color: red;">edit</span>	Quick Ship: No Finish: Gold Plate Enamel Type: Regular Solid Back: No Lettering Font: Block Lettering Color: Black Engraved Line: CAPTAIN Engraved Line: ATTLEBORO FALLS Seal: MA2 rim/back: Blue, 11/16" Commonwealth of Massachusetts State Seal Engraved Line: POLICE DEPARTMENT Engraved Line: 9865 Attachment: Safety Catch Special Instructions: hgfhjf File Attachments: <a href="#">BKlogo_293.png</a>	1 <span style="color: red;">edit</span>	50.85 ea	\$0.00	\$50.85

Name this Configuration: none specified edit

Dealer SKU: none specified edit

Factory Order Numbers: not yet available

Item Status: Draft

Back
Templates
Products
Save
Finalize

**ORDER ACTION**

- Close
- Print
- Duplicate
- Delete

**ITEM ACTION**

- Edit
- Duplicate
- Remove
- Template

To add a template to your order click this button.

To add another product to your order click this button.

If you want to Close and save your order click the Save Button.

If you are to check out Click the Finalize Button and you will be brought to the Shipping Page.

Dealer SKU is one of our newer features. You can now save each configuration to coincide with your SKUs. Then save it as a template for future use.

### SAVE THE CONFIGURATION AS A TEMPLATE

We highly recommend saving product configurations as a template, to help make ordering in the future a breeze.

- To save as a template Click Item Action Dropdown and Click Template
- The window to the right will pop up.
  - » Enter the name you want to save your template as
  - » You will see your customers name auto populates
  - » Then click Create

**NEW CUSTOMIZATION TEMPLATE**

Template Name  
  
name for this customization

Linked Customer  
  
 Not a Customer Specific Template

What should I do here?  
 Choose a name for this product configuration and a template will be created that can be used in the future for faster reordering.

Template names should NOT include the customer name, as this system will automatically link your template to the customer. Avoid the style number in the name as well.

If a template is not customer specific, click the "Not a Customer Specific Template" checkbox.



## SHIPPING PAGE

### Modify Shipping Information Attleboro Falls Police

Order Information [edit](#) W70384091

Dealer PO	Customer PO	Order Name	Status	Source	Last Modified
000002163 <a href="#">edit</a>	none specified <a href="#">edit</a>	Captain Badge <a href="#">edit</a>	Draft	Web Portal	Sharyn L. Dunn 6/13/2024 @ 1:46 PM

Shipment Location [Create New](#) Shipment Attention [Create New](#)

Search Addresses  [clear](#) Search Contacts  [clear](#)

**Dealer Addresses** | **Customer Addresses** | **Customer Contacts**

**Attleboro Falls Police**  
221 John Dietsch Blvd  
Attleboro Falls, MA 02763

[Edit](#) [Default](#)

No contacts where found. Click the 'Create New' link in the upper right to create a new contact or if searching, please modify your search criteria.

Shipping Method: Orders are shipped *best way*, selecting a carrier based on package value. Blackinton ships via USPS® First Class, UPS® and FedEx® unless otherwise noted. Expedited shipment is available at an additional charge, please note requested service in shipping instructions. To use your own carrier account please select "yes" to the question below and enter your account information.

Ship other than "best way"?  Yes  No

Shipping Policy: Blackinton® ships line item quantities in full as they become available. Please indicate in writing within the shipping instruction section below if this order should ship complete.

Special Shipping Instructions

Shipping Notifications: Dealer Shipment Notifications   
semicolon separated email addresses will receive shipment notifications  
Customer Shipment Notifications:  Yes  No

[Back](#) [Continue](#)

If you need to add a ship to address click CREATE NEW - but please make sure you are on the proper tab. Customer Addresses or Dealer Addresses!

If you have special instructions that involve shipping add them here; i.e., Ship Complete. \*\*please note we can only ship complete items on the same Purchase Order.

This is where many folks get confused. If you are shipping to your customer - click the Customer Address tab, if you are shipping to yourself click Dealer Addresses.

**NOTE: if you have QuickShip items on your order and they don't meet the criteria of the program; i.e., you put >50 pieces you will get the below error and will not be able to finalize until you fix the quantity.**



## FINAL STEPS

After clicking continue on shipping screen you are brought to the order confirmation screen where you can review your order, you can also make edits on this page by clicking on any of the **Red Edits**. When you are satisfied with your order and you want to submit it; scroll down and click on the Submit Button.

**Order Confirmation**
Attleboro Falls Police

---


Order Information [edit](#)
W70384091

Dealer PO No.	Customer PO No.	Order Name	Status	Source	Last Modified
000002163 <a href="#">edit</a>	none specified <a href="#">edit</a>	Captain Badge <a href="#">edit</a>	Draft	Web Portal	Sharyn L .Dunn 6/14/2024 @ 9:40 AM

---

Product Information [edit](#)

Qty	Style	Description	Retail	Cost	Total
1	B296	Our most popular shield with an eagle on top	\$101.70 ea	\$50.85 ea	\$50.85



Billing Information [edit](#)

Address  
MARK'S TESTING ACCOUNT  
221 JOHN DIETSCH BLVD.  
PO BOX 1300  
ATTLEBORO FALLS MA 02763

Shipment Information [edit](#)

Address  
Attleboro Falls Police  
221 John Dietsch Blvd  
Attleboro Falls MA 02763

Method  
Best Way

Shipping Policy  
Blackinton® ships line item quantities in full as they become available. Please indicate in writing within the shipping instruction section below if this order should ship complete.

Shipment Notifications [edit](#)

Dealer Shipment Notifications  
No shipment email notifications will sent for this order.

Customer Shipment Notifications  
Your customer will not receive shipment email notifications for this order.


Subtotal	\$50.85
Sales Tax	\$0.00
<b>Estimated Total</b>	<b>\$50.85</b>

[← Back](#)

[Save](#)

[Review](#)

[Submit](#)

 **YES!** Your order has been successfully submitted and is now queued for processing.

**Thank you for your business!**

Your Order Number is **W70384091**.

After your order is confirmed you can access order status, by going to the order dashboard, opening your order, and clicking on each line items Factory order link.

If you need assistance, click HELP on the menu or give Blackinton a call. When contacting customer service, please have your order number available.

Again, thank you for choosing Blackinton®.

[Continue](#)

When you click submit your order is on the way to our order entry group.

Above you see Review. If you put an order into Review - it is like draft mode. Review is used often when company's use permissions; i.e., sales may put an order together, save it in review, so purchasing can review and release the order.

## QUOTES

Our quoting feature is great and allows you to get a detailed quote in your customers hands. You can set the quote expiration and pricing, and once your quote is approved it is easily turned into an order.

### STARTING A QUOTE

1. Go to the menu click on Quotes / New Quote
  - » You will note this screen looks just like the order screen.
  - » Just like with an order you can name your quote
  - » Set the expiration date
  - » Then search for your customer, click on the address box for the customer to choose
  - » Just like an order you are assigned a quote number

2. Search for the product you would like to place on this quote
3. Configure your product and when you are happy with the configuration click on Add to Quote
4. Just like an order from this page you can add products or templates
5. At this time you can not email out of the system, but you can save the quote as a pdf and email it as a pdf. Under quote action pick Print

### TURN A QUOTE INTO AN ORDER

When you are ready to turn your quote into an order go to the Quote Dashboard and find your quote and under the action drop down pick Order, a pop up will come up asking are you ok to convert quote? When you click OK the quote turns into an active order - and it opens in the order screen where you can make edits if you'd like too. NOTE: the quote number is now the order number.

You can also turn it into an order from this drop down.

Be sure to work with our sales group... we can lock down a template for you so it is ALWAYS ordered correctly!!

## TEMPLATES

Each template is “one” product configuration. Using templates will speed up order placement, we highly recommend you use this feature. Remember when naming templates you do not need to include department name, your template is already associated with that department. Use something like Chief hat badge... etc.

### CREATING TEMPLATES

There are two ways you can create templates, from the menu and from an order, both are outlined below.

#### Creating a Template from the Menu

1. Go to menu Templates / New Template
2. Give your template a unique name (do not use department name) i.e., Captain shirt badge
3. You can also assign a Dealer specific SKU if you have one on this page
4. Configure your badge
5. Click add to template

**New Template**

Template Name	Dealer SKU


#### Creating a Template from an Order

1. If you are creating an order and have a badge configuration on your order you want to save as a template
2. From the order review screen find the line item you want to save
3. In the bottom right of the line item click on the ITEM ACTION / Template

Attleboro Falls Police edit

Order Information edit WT0384091

Dealer PO No.	Customer PO No.	Order Name	Last Modified	Created	Status
000002163 <span style="color: red;">edit</span>	none specified <span style="color: red;">edit</span>	Captain Badge <span style="color: red;">edit</span>	Sharyn L. Dunn 6/14/2024 @ 9:55 AM	Sharyn L. Dunn 6/13/2024 @ 1:46 PM	Draft

Product	Description	Options	Qty	Cost	Disc	Net	Extended
	B296 Our most popular shield with an eagle on top <span style="color: red;">edit</span>	Quick Ship: No Finish: Gold Plate Enamel Type: Regular Solid Back: No Lettering Font: Block Lettering Color: Black Engraved Line: CAPTAIN Engraved Line: ATTBORO FALLS Seal: MA2 rim/back: Blue, 1 1/16" Commonwealth of Massachusetts State Seal Engraved Line: POLICE DEPARTMENT Engraved Line: 9865 Attachment: Safety Catch Special Instructions: hgthf File Attachments: <a href="#">88599_299.pdf</a>	1 <span style="color: red;">edit</span>	50.85 ea	\$0.00	\$50.85	\$50.85

Name this Configuration none specified <span style="color: red;">edit</span>	Dealer SKU none specified <span style="color: red;">edit</span>	Factory Order Numbers not yet available	Item Status Draft
---	--	--	----------------------

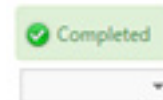
Edit  
Duplicate  
Remove  
Template

**NEW CUSTOMIZATION TEMPLATE**

<p>Template Name</p> <input style="width: 90%;" type="text" value="Captain Shirt Badge"/> <p style="font-size: small; color: #757575;">name for this customization</p>	<p><b>What should I do here?</b></p> <p>Choose a name for this product configuration and a template will be created that can be used in the future for faster reordering.</p> <p>Template names should NOT include the customer name, as this system will automatically link your template to the customer. Avoid the style number in the name as well.</p> <p>If a template is not customer specific, click the "Not a Customer Specific Template" checkbox.</p>
<p>Linked Customer</p> <input style="width: 90%;" type="text" value="Attleboro Falls Police"/> <p><input type="checkbox"/> Not a Customer Specific Template</p>	

Create
Cancel

4. The template window will pop up, name your template
5. Note it is already linked to your customer no need to use customer name in template name
6. Click create
7. The window will close and green box will pop up above ITEM ACTION saying completed
8. Your template is created





## USING TEMPLATES IN ORDERS

This section explains how you can use your templates in orders and/or quotes.

### Start an Order from a Template

If you have a template you want to start an order with – do the following:

1. Go to the menu and click Templates
2. Search for your customer. If you have a lot of templates we suggest using the Advanced search because you can search by a variety of criteria.
3. When you find the template from the Action drop down menu pick New Order

Advanced Search

Template Name  Contains ▾

Product Style  Contains ▾

Dealer SKU  Contains ▾

Customer  Contains ▾

Created On  📅

[clear filters](#)

Back Search

Templates Dashboard

Search Templates

attleboro search | advanced | clear

quick search templates

Customer Name	Template Name	Dealer Sku	Product Configuration	Created	Updated	Last Usage	Action
Attleboro Fire Department 236 Hydrant Way Attleboro, MA 02763	Breast Badge Firefighter		B484-A Fire Department Maltese Cross Badge	3/15/2023 sdunn	3/15/2023 sdunn	never used	▾
Attleboro Falls Police 221 John Dietsch Blvd Attleboro Falls, MA 02763	CAPTAIN SHIRT BADGE		B296 Our most popular shield with an eagle on top	6/14/2024 you	never	never used	▾ New Quote New Order View Edit Print Delete

4. The screen will bring you right to the product configuration where you can edit the configuration if you need too
5. When happy click Add to Order
6. You will be brought to the customer screen, the customer whose template this is will be highlighted - if that is the customer your ordering for click continue at the bottom of screen. If it is not choose a new customer then click continue.

### Import a Template into an Order

If you have an order with line items on it already and you want to add one of your templates - do the following:

1. On the shopping cart screen click on (+) Templates at the bottom of the page
2. The template window will open
3. Either search by template name or badge style or dealer sku to find the your template
4. When your line item appears click on it
5. Your Item will be added to your order.
6. You can now edit by clicking the red edits.

Abington Police Department

Order Information edit W70384281

Dealer PO No.	Customer PO No.	Order Name	Last Modified	Created	Status
none specified edit	none specified edit	Breast Cancer Badges edit	Sharyn L. Dunn 6/14/2024 @ 10:04 AM	Sharyn L. Dunn 6/14/2024 @ 11:16 AM	Draft

Product	Description	Options	Qty	Cost	Disc	Net	Extended
	B38-PI Breast Cancer Awareness B38	Finish: Pink Enamel Type: Regular Strike Solid: No Lettering Font: Block Lettering Color: Black Engraved Line: OFFICER Engraved Line: BREAST CANCER AWARENESS Seal: A12100 full 15/16" Arms: Breast Cancer: Unlock The Cure with handcut. Engraved Line: ABINGTON PD. Engraved Line: 2024 Text Separator: Dot Attachment: Safety Catch	25	45.45 ea	\$4.55	\$40.90	\$1,022.50

Name this Configuration none specified edit

Dealer SKU none specified edit

Factory Order Numbers not yet available

Item Status Draft

Back Templates Products Save Finalize

IMPORT PRODUCT CONFIGURATIONS

Search Template Name or Style  Dealer SKU

template name or product style  custom dealer sku

abington police department all templates

Product	Description	Options	Template Details
	B296 Our most popular shield with an eagle on top	Quick Ship: No Finish: Nickel Enamel Type: Regular Strike Solid: No Lettering Font: Block Lettering Color: Black Engraved Line: OFFICER Engraved Line: ABINGTON Seal: MA7 full 15/16" Commonwealth of Massachusetts State Seal Engraved Line: POLICE DEPT. Engraved Line: MASS. Attachment: Safety Catch	Customer: Abington Police Department Template: OFFICER BADGE Usage: Last Used 1 time 4/5/2023
	B296 Our most popular shield with an eagle on top	Quick Ship: No Finish: Rhodium Enamel Type: Hard Strike Solid: No Lettering Font: Block Lettering Color: Black Engraved Line: CAPTAIN Engraved Line: ABINGTON Seal: MA7 full 15/16"	Customer: Abington Police Department Template: Chief - shirt badge Usage: Last Used 8 times 3/14/2024

Back

## LOCKED / VERIFIED TEMPLATES

Are you tired of getting your orders wrong because you change the finish or rank to the wrong thing etc. We have a terrific new Template feature where our sales team can work with you to lock down options on your templates, so you can't pick the incorrect options. We call this a locked template. Even better is a verified template sales can lock down fields and tie it to one of our specs, this verified template will fly through order entry, because it is verified CORRECT.


When a template has locked options it will show up on your dashboard with a gray lock over it, and when a template is verified it will show up with a green star.

Templates Dashboard


Search Templates  
 search | advanced | clear  
quick search templates

Customer Name	Template Name	Dealer SKU	Product Configuration	Created	Updated	Last Usage	Action
Attleboro Falls Police 221 John Dietsch Blvd Attleboro Falls, MA 02763	Awareness badges <small>Verified Configuration</small>		B736 Badge with Eagle and Applied Panels	6/14/2024 <small>sdunn</small>	6/14/2024 <small>sdunn</small>	never used	
Attleboro Fire Department 236 Hydrant Way Attleboro, MA 02763	Breast Badge Firefighter		B484-A Fire Department Maltese Cross Badge	3/15/2023 <small>sdunn</small>	3/15/2023 <small>sdunn</small>	never used	
Attleboro Falls Police 221 John Dietsch Blvd Attleboro Falls, MA 02763	CAPTAIN SHIRT BADGE <small>Locked Configuration</small>		B296 Our most popular shield with an eagle on top	6/14/2024 <small>you</small>	6/14/2024 <small>sdunn</small>	06/14/2024 <small>1 time</small>	

Below is an example of a template with options locked. You will note that any option with a lock next to it is grayed out. This means you can not change that option, thus no more errors. If you are interested in using this feature please contact your sales representative and map out a plan.



Product is not shown actual size.  
The finished product may vary slightly from the graphic rendition shown.



Dealer SKU

ORDER QTY  each

Finish

Enamel Type

Strike Solid

Lettering Font

Lettering Color

Applied Panel (B688)  **B688-PP**  
die line OFFICER

Applied Panel (B738)  **B738**  
engraved BREAST CANCER AWARENESS

Applied Panel (B689)  **B689**  
engraved POLICE DEPT.  
↓ Panel Seal ↓  
**A12101**  
full Arrest Breast Cancer  
Unlock The Cure with  
Handcuff  
11/16"

Applied Panel (B740)  **B740**  
engraved 25987



## INVOICES AND SHIPMENTS

If you go to shipments on the menu you will be brought to a page which lists all shipments. You can sort by clicking the column headers, or you can do a search for a specific order or PO#.

Shipments

Search:

Order Number	Ship Date	PO Number	Carrier	Tracking	Weight	Charges
45238960	6/12/2024	40478BCCR	USPS	<a href="#">9400109105459567004090</a>	\$0.11	\$4.04
00419200	6/12/2024	43403MPD	USPS	<a href="#">9400109105459062768152</a>	\$0.29	\$4.46
45196681	6/12/2024	42326FPD	FedEx	<a href="#">275830859601</a>	\$0.67	\$12.39
45170680	6/11/2024	41300STN	USPS	<a href="#">9400109105459062141177</a>	\$0.19	\$4.04
45171051	6/11/2024	41369KM	USPS	<a href="#">9400109105459062140439</a>	\$0.19	\$4.04
45192510	6/11/2024	42219CLN	USPS	<a href="#">9400109105459062140279</a>	\$0.28	\$4.46
45160700	6/11/2024	41053TBTS	USPS	<a href="#">9400109105459062140095</a>	\$0.19	\$4.04
45138440	6/7/2024	40366NPD	USPS	<a href="#">9400109105459061212304</a>	\$0.29	\$4.46
45171050	6/7/2024	41369KM	USPS	<a href="#">9400109105459565166417</a>	\$0.19	\$4.04
45179540	6/6/2024	41764MCKN	USPS	<a href="#">9400109105459060757660</a>	\$0.19	\$4.04
45196724	6/6/2024	42326FPD	USPS	<a href="#">9400109105459060688131</a>	\$0.17	\$4.04
00301100	6/5/2024	39851SPD	USPS	<a href="#">9400109105459060125520</a>	\$0.94	\$5.77

If you click on the invoices on the menu bar you will be brought to all your invoices. You will note that you can open the pdf to view your invoice just by clicking on it. Like the shipments page the invoices can be sorted by clicking a column header and you can also do a search for an invoice.

Invoices

Search:


Invoice Number	Date	Transaction	PO Number	Amount	PDF	Message	Gross Amount
419200	6/12/2024	Invoice	43403MPD	\$108.66			\$108.66
45196681	6/12/2024	Invoice	42326FPD	\$234.39			\$234.39
45238960	6/12/2024	Invoice	40478BCCR	\$12.04			\$12.04
45160700	6/11/2024	Invoice	41053TBTS	\$59.79			\$59.79
45170680	6/11/2024	Invoice	41300STN	\$59.79			\$59.79
45171051	6/11/2024	Invoice	41369KM	\$59.79			\$59.79
45192510	6/11/2024	Invoice	42219CLN	\$115.96			\$115.96
45138440	6/7/2024	Invoice	40366NPD	\$144.96			\$144.96
45171050	6/7/2024	Invoice	41369KM	\$59.79			\$59.79
45179540	6/6/2024	Invoice	41764MCKN	\$59.79			\$59.79
45196724	6/6/2024	Invoice	42326FPD	\$55.54			\$55.54
<b>Open Balance</b>							<b>\$2,649.92</b>



## CONFIGURING COMMENDATION BARS

We currently have over 650 commendation bars that are designable, like the screen shot below. You will note as you change each sections color the image of the commendation bar follows suit. The sections are counted from left to right, and in the instance there is a shape or other distinguishing mark we indicate that next to the color; i.e., Diamond.

**A10074 - Six Section Commendation bar with enameled diamond**



Product is not shown actual size.  
The finished product may vary slightly from the graphic rendition shown.

<b>ORDER QTY</b>	1 each
Finish	GOL-TONE®
Enamel Type	X Enamel
Section Color 1	VHB-68 <a href="#">Q</a>
Section Color 2	DR6-73 <a href="#">Q</a>
Section Color 3	DR9-3 <a href="#">Q</a>
Diamond	Red <a href="#">Q</a>
Section Color 5	DR6-73 <a href="#">Q</a>
Section Color 6	VHB-68 <a href="#">Q</a>
Attachment	1 3/8" x 5/16" Single Slide
Special Instructions	<a href="#">add special instructions</a> +

Our Engraveable (-LS) bars have been set up to only take the amount of characters and/or the symbol that will fit in the allotted section. To view all the symbols available click the browse hyperlink next to the symbol. Commendation bar sections are counted from left to right. We have not made the engraveable bars designable yet, so you will not see these bars dynamically design.

**A10802-LS - Three Section Engraveable Commendation Bar**



Product is not shown actual size.  
The finished product may vary slightly from the graphic rendition shown.

<b>ORDER QTY</b>	1 each
Finish	GOL-TONE®
Enamel Type	X Enamel
Engraved Color	None <a href="#">Q</a>
Section Color 1	Red <a href="#">Q</a>
Left Symbol	SYM-11 <a href="#">Q</a> 
Section Color 2	White <a href="#">Q</a> <a href="#">+ engraving</a> <a href="#">+ symbol</a>
Engraved Text	24 <a href="#">Q</a>
Position	Center
Section Color 3	Blue <a href="#">Q</a> <a href="#">+ engraving</a> <a href="#">+ symbol</a>
Attachment	1 3/8" x 3/8" Single Slide
Special Instructions	<a href="#">add special instructions</a> +

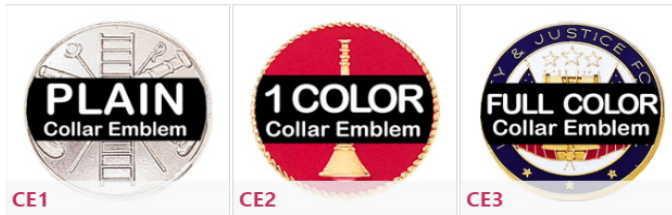
Engraved color refers to the color that would go inside the symbol or characters. This is defaulted to No Color. If you want the metal to show through the symbol/character leave this on No Color.

To view the available symbols click on the browse hyperlink. If you see a limited list of symbols it's because the section you are filling is too small for some of our larger symbols.

To add a symbol or engraving click on the + sign. You will only be able to add what the section can fit.

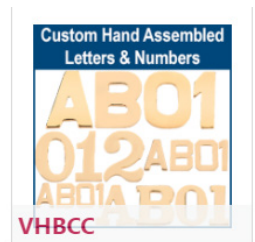
## ORDERING CE1, CE2, CE3 (SEALS) AS COLLAR EMBLEM

If you are looking to purchase a seal as collar insignia you need to choose style CE1 for a plain seal, CE2 for a one color seal, and CE3 for a full color seal. On the configuration page you will be prompted to choose the seal you would like as collar insignia. You will note that the only seals you see are based on the Emblem you pick. If you pick a CE1 you will not be able to choose a one color or full color seal. If you can not find a seal double check and be sure you started with the correct emblem.



## ORDERING HAND ASSEMBLED CUSTOM LETTER/NUMBER COMBOS

Custom combos are unique and very dynamic in this system. Instead of putting each part number combination in the system; i.e., VHB6-2, VHB5-2, VHB4-2 etc... We created a custom combo product VHBCC. You can find this product by searching for VHBCC or any custom combo part number; i.e., VHB6-2. You can also find this product by going to the left menu and under letter/number combos choose Hand Assembled. When you configure this product it will dynamically draw and create the style number and price based on your choices.



Below are step by step instructions:

1. Click on the VHBCC
2. On the next page (configuration page) you will note there is no price (TBD) and the style number is VHBCC. The system is going to auto-generate your style number based on the options you choose.
3. After choosing quantity (note they are sold in pairs) you pick the "Style" letter or number you would like. You will note there is a drop down menu (shown here) which shows you an example of the letter/number, its height, and whether the style is numbers only, letters only, or both.
4. Next choose how many lines you want (one or two stacked)
5. Type what you would like the combo to be; i.e., POLICE. Once you advance out of this field you will note that the system created the combo and generated a style number (upper left) and generated a price (upper right)

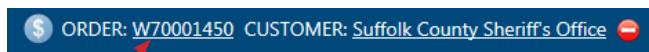
- » If you pick a style that is numbers only and type POLICE the system will not allow you to put the product on an order you will get an error message

Combination Text  ! invalid characters for selected style

- » The style number is derived by the number of characters you are looking for and the "style" of the letter / number you are ordering. For instance if you were ordering a custom combo POLICE in style 2 letters your VHB style number would translate to: VHB6-2. VHB is always the prefix. The 6 signifies the amount of characters and the 2 the style.

## TIPS AND TRICKS

- If you are building a badge with applied panels and you CAN NOT find a particular panel in our panel selector try changing the Lettering Font, it is possible that the panel you are looking for is only available in Roman yet you have Block chosen; i.e., you know Chief should be available – it is possible that it is only available in one font.
- If you can't do something you need to just write in special instructions what you are trying to do.
- Understanding the header that runs across all the pages, below is what you see in the top right. Refer to this bar to understand what is open and being worked on

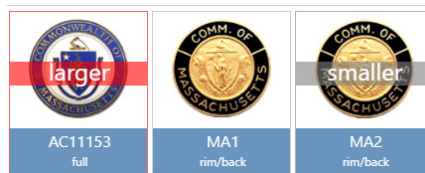


You can close this order by clicking the circle (-). The order will be automatically saved to the dashboard.

This is your order number, it is a hyperlink that will bring you back to your order review page

This is the customer's order you are working on. If you click this it brings you back to the page where you can pick a new customer, change po etc..

- If you are uncertain which seal to choose when browsing seals and seeing multiple versions of the same design always pick the default seal size for that badge. If a seal shown in the seal selector has a gray box with smaller in it or an orange box with larger in it the system is telling you that the seals you see are smaller / larger than the default.



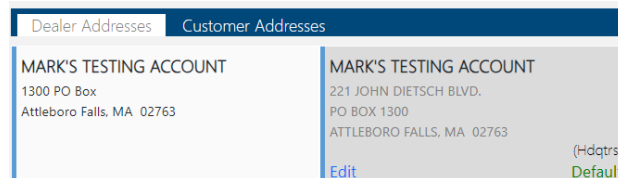
- If you want to see what size a seal is hover over the seal with your mouse and a blue box will slide up and in the bottom left in this box you will see the seal size. Also, bottom right if there is an add on charge for the seal based on the finish chosen you will see the charge.



- If the badge you are configuring takes an applied disc and you are uncertain which to choose ALWAYS choose the default disc this is the one the factory would use. The same holds true for panels. When in doubt pick the default!



- **Ship to addresses:** If you have a drop ship address and it has your company name as the company receiving that is occurring because you added your customers address to the Dealer Address... make sure you pay attention to which tab you are adding an address too.



## INTRODUCTION TO PERMISSIONS

Permissions provide you with the power to manage the work flow throughout the ordering cycle. Permissions also provide a high level of checks and balances when it comes to managing functionality available to users within the Web Wizard Ordering System. For example you may want sales to draft an order, but not have the ability to submit an order. Your organization’s Admin can seamlessly turn functionality on/off for each individual user.

## UNDERSTANDING PERMISSIONS:

Each company will have at least one Admin who is responsible for assigning permissions. There are four main areas / functions that permissions control.

1. **APPLICATION ACCESS**
2. **ORDER** Management
3. **QUOTE** Management
4. **TEMPLATE** Management
5. **CUSTOMER** Management

At the main category level you either ALLOW or DENY a users ability to CREATE an Order/Quote/Template/Customer.

Under each main category you manage a user’s functionality level further by allowing or denying the the ability to modify, delete, submit. There are three controls next to each permission. Using Order Modification as an example, each control is explained below.



1. **ALL** - If checked means a user CAN modify an order created by anybody within your organization.
2. **CREATED BY** - If checked means a user can ONLY modify an order they created. So, if you want your employees to only have the ability to “touch / edit” their items you would check created by.
3. **DENY** - If checked means a user CANNOT modify any orders. Deny means this permission is not allowed for the user.

## GETTING STARTED:

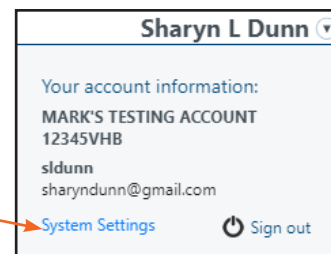
The first thing you should consider is use case scenarios. Perhaps bundle your users into groups and determine what each group’s roles and responsibilities should be along the ordering cycle. Things to consider:

- Do you want a work flow where some groups can create, others review, and others submit?
- Do you want specific users only able to create a template or quote?
- Do you want your employees able to edit/touch items in the system that they did not create?
- Think about each of the main categories and determine what level of access you would like each user/group to have.

## ACCESSING PERMISSIONS:

The Admin is the only person who can assign permissions for each individual user.

1. Log into the Web Wizard
2. In the top right of the screen click your name once and a box will appear
3. Click System Settings





You will be brought to the Settings Page.

- **APPLICATION SECURITY** Turns permissions on and off. This must be turned on to use permissions.
- **WORK FLOWS** Enable this if you would like your process flow to include a review mode. A three tier approach to order approval.
  1. Order creation and save to Review Mode
  2. Order Review and Approval, move the order from review to draft mode
  3. Order Submission to Blackinton, move from draft to submitted
- **CLICK TO MANAGE USERS** To access the area where you manage each user's permissions. Here you will see a table with all your users. To access a user's permissions click once on the user's name and the window to the right of their name will populate.

Under edit user there are two tabs General and Roles. Click on **ROLES** to access permissions for that individual user.

## SETTING PERMISSIONS:

- **APPLICATION USE** – This must be checked ALLOW. This gives the user the ability to login to the Web Wizard.
- **ADMINISTRATION** – Be very careful. An administrator can add / delete users, assign permissions, turn permissions on / off.
- **ORDER MANAGEMENT** – To turn on any level of permissions you must first check the box next to the main category. The screen will change from gray (off) to yellow (on), and by default the sub-level permissions will turn to allow ALL (meaning this user can edit/delete anyones items). The blue text under each permission describes what that permission allows.
  - » **ORDER APPROVAL** - Only shows up if you allowed work flows. Approval means the user can turn an order that is in Draft status to Review Status. Approval does not mean Submit. The user must also

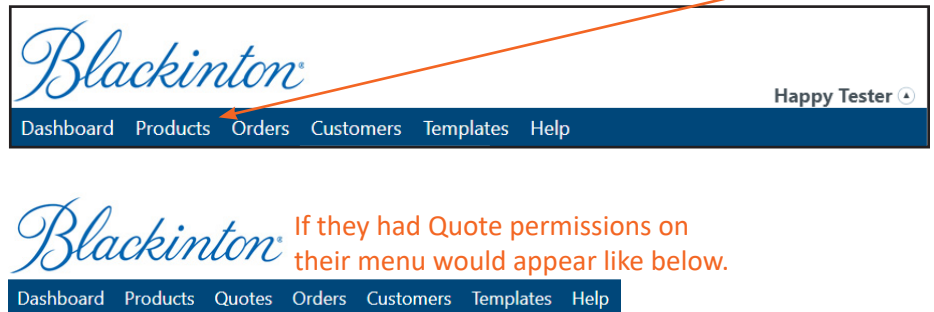
» have order submission (All) checked to submit an approved order.

**DEMONSTRATION OF PERMISSIONS:  
QUOTE, TEMPLATE, & CUSTOMER MANAGEMENT**

Under each of these top level categories you can fine-tune a users permissions

- **CREATION** [ ]Allow [ ]Deny
- **MODIFICATION** [ ]Allow [ ]Created By [ ]Deny
- **DELETION** [ ]Allow [ ]Created By [ ]Deny

In the below example the user Happy Tester does not have any Quote permissions turned on, so they cannot use the quote modal. Because they are prohibited from creating, modifying or deleting a quote - Quotes are not available on the main menu.



- **TEMPLATE MANAGEMENT** - The user 'Happy Tester' is able to create templates, but NOT modify or delete a template.
  - » So, the template drop down will show both All Templates and New Templates since they can create a template.
  - » When they go to a line item on the template dashboard, and click the action drop down menu they only get the choices: New Order, View, and Print.
  - » New Quote dropped off because in the scenario above the user has Quote permissions turned off.

» Edit dropped off because under Template Management Template Modification and Deletion are both set to DENY.

## CUSTOMER MANAGEMENT

- In the previous scenario this user can Create a customer, but only Modify / Delete a customer CREATED BY them. Below is how the dashboard will look.
  - » The top customer Attleboro Fire was created by this user, so under action they see Edit Entry.
  - » The second customer Attleboro pd you can see was created by a different user train.mnormand, so this user can only View the Entry.

Customer Name	Billing Address	Billing Contact	Shipping Address	Shipping Contact	Created	Action
Attleboro Fire Department	221 JOHN DIETSCH BLVD. PO BOX 1300 ATTLEBORO FALLS, MA 02763	no default billing contact	Attleboro Fire Department 236 Hydrant Way Attleboro, MA 02763	no default shipping contact	1/31/2023 you	<a href="#">edit entry</a>
attleboro pd	221 JOHN DIETSCH BLVD. PO BOX 1300 ATTLEBORO FALLS, MA 02763	no default billing contact	attleboro pd 221 John Dietsch Blvd Attleboro Falls, MA 02703	Quartermaster John Q. Public era@comcast.net 508-888-8888	4/6/2018 train.mnormand	<a href="#">view entry</a>