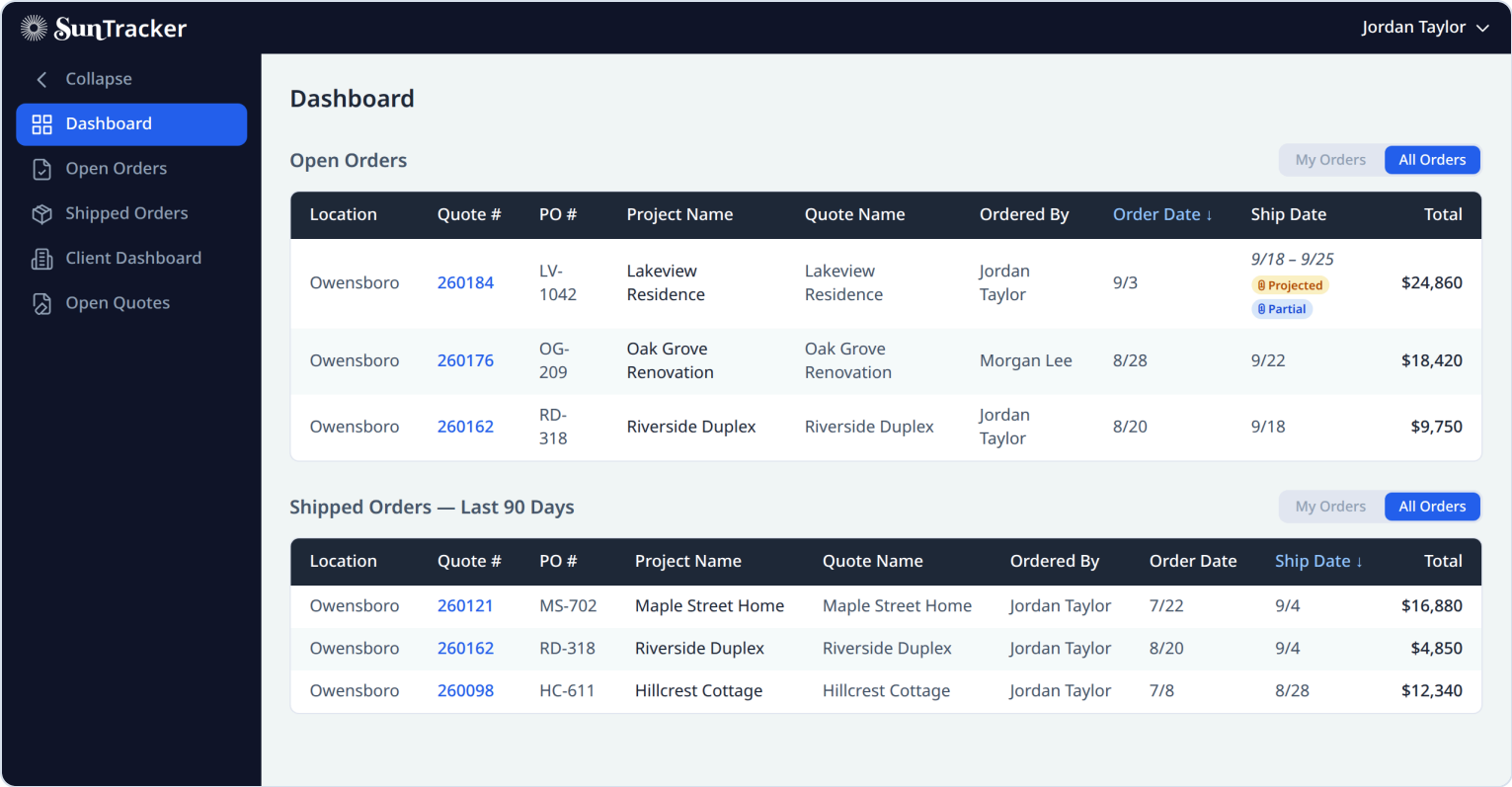


SunTracker · Dealer guide

A visual walkthrough of your quotes, orders, shipments and account information.



Actual SunTracker interface, shown with fictional dealer records.

Start · Sign in 02 · Dashboard 03

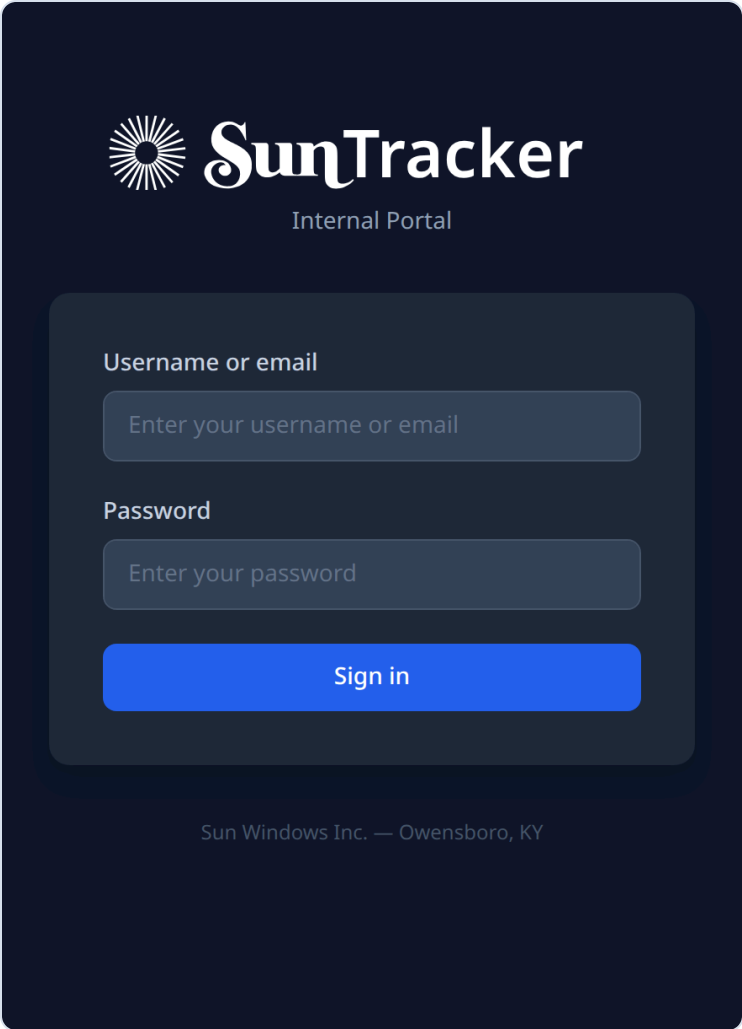
Track work · Quotes 04–05 · Orders 06–09 · Shipments 10

Your account · Client Dashboard 11–13 · Settings 14 · Mobile & help 15 · Exports 16

Screenshots use a local demonstration of SunTracker v2.0.0. Names, prices, dates and drawings are examples. Blue numbered circles are guide annotations. Prepared September 11, 2026.

Sign in and find your way

Use the website address and dealer credentials provided by Sun Windows.



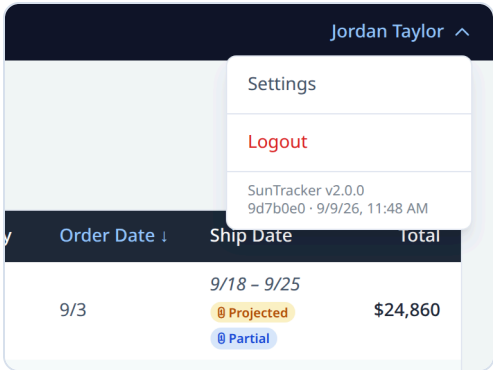
The sign-in page says “Internal Portal”; dealers use this same screen.

1. Sign in

Enter your **Username or email** and **Password**, then select **Sign in**. If your session expires, sign in again.

2. Choose a page

Use the five dealer links in the left sidebar. Select the SunTracker logo to return to Dashboard. **Collapse** makes the sidebar narrower; the arrow expands it.



Open your name in the top-right corner.

3. Open your account menu

Choose **Settings** to adjust the display or **Logout** when finished. The version at the bottom can help Sun Windows troubleshoot an issue.

Dashboard: your daily starting point

See open work and recent shipments for the clients assigned to your login.

SunTracker Jordan Taylor ▾

< Collapse

Dashboard

Open Orders

1 My Orders All Orders

Location	Quote #	PO #	Project Name	Quote Name	Ordered By	Order Date ↓	Ship Date	Total
Owensboro	260184	LV-1042	Lakeview Residence	Lakeview Residence	Jordan Taylor	9/3	9/18 – 9/25 @ Projected @ Partial	\$24,860
Owensboro	260176	OG-209	Oak Grove Renovation	Oak Grove Renovation	Morgan Lee	8/28	9/22	\$18,420
Owensboro	260162	RD-318	Riverside Duplex	Riverside Duplex	Jordan Taylor	8/20	9/18	\$9,750

2

Shipped Orders — Last 90 Days

3 My Orders All Orders

Location	Quote #	PO #	Project Name	Quote Name	Ordered By	Order Date	Ship Date ↓	Total
Owensboro	260121	MS-702	Maple Street Home	Maple Street Home	Jordan Taylor	7/22	9/4	\$16,880
Owensboro	260162	RD-318	Riverside Duplex	Riverside Duplex	Jordan Taylor	8/20	9/4	\$4,850
Owensboro	260098	HC-611	Hillcrest Cottage	Hillcrest Cottage	Jordan Taylor	7/8	8/28	\$12,340

The two tables have independent My Orders / All Orders controls.

1. Choose whose orders to see

My Orders shows orders you placed. **All Orders** includes other users at your assigned clients.

2. Open an order

Select its blue **Quote #**. Click column headings to sort the table.

3. Review recent shipments

The lower table covers the last 90 days by shipment date. Use Shipped Orders for more search and export options.

Open Quotes: find a quote

Review quotes that have not yet become orders.

Open Quotes

1

MODIFIED WITHIN LAST

90 days

MIN AMOUNT

No minimum

Apply

2

Search client, quote #, name, rep...

3

Lakeside Building Supply

3 quotes

\$39,950

Quote #	Quote Name	Rep	Created	Last Modified	Lines	Units	Total
260215	Cedar Ridge Addition	Alex Morgan	9/1/26	9/9/26	3	12	\$12,600
260208	Meadow Lane Remodel	Alex Morgan	9/1/26	9/9/26	3	8	\$8,450
260201	Pinecrest Custom Home	Alex Morgan	9/1/26	9/9/26	3	18	\$18,900

Sidebar → Open Quotes. The default time range is 90 days.

1. Set the scope

Choose **Modified Within Last** (30, 60, 90, 180 days or 1 year). Optionally enter **Min Amount**, then click **Apply**.

2. Search the results

Search by client, quote number, quote name or sales rep. Clear the text to restore the loaded results.

3. Review the quote

Click a blue quote number. When more than ten quotes match, use **Show all ... quotes** and **Show less**.

Example: to find Cedar Ridge Addition, type “Cedar” in the search box, then open quote 260215. This page is for reviewing quotes; creating, editing and submitting orders are not controls in this dealer view.

Quote details: inspect a product

Open a quote, then select a blue line number or an available product image.

← Back

Quote #260215

Open — not yet ordered

CLIENT

Lakeside Building Supply

SALES REP

Alex Morgan

QUOTE NAME

Cedar Ridge Addition

CREATED

9/1/2026

LAST MODIFIED

9/9/2026

QUOTE TOTAL

\$12,600

Line Items (3)

#	Description	Qty	Lead	Unit Price	Subtotal
1	Double Hung Window +1 more Room: Living Room	6 EA	28d	\$850	\$5,100
2	Casement Window +1 more Room: Kitchen	4 EA	28d	\$1,050	\$4,200
3	Picture Window +1 more Room: Great Room	2 EA	28d	\$1,650	\$3,300
Total					\$12,600

Quote overview: customer, dates, total and line items.

1. Review the quote

Check the **Open — not yet ordered** label, total, quantities, unit prices and lead times. Expand long descriptions with **+... more / less**.

2. Open the Line Item panel

Select a line number. Review room, configuration, dealer/customer pricing and notes when available. Configuration headings expand or collapse.

LINE ITEM

1

×

QUANTITY

6 EA

ROOM

Living Room

LEAD TIME

28 days

CONFIGURATION

PRODUCT

Style

Double Hung

Width

36 inches

Height

54 inches

FINISH & GLASS

Exterior

White

Interior

White

Glass

Low-E insulated glass

Screen

Half screen

PRICING

Type	List	Unit	Extended
Dealer	\$1,360	\$850	\$5,100
Customer	\$1,360	\$1,020	\$6,120

Line Item panel for the example double hung window.

3. Return to the quote

Close the panel with its X or the shaded background. Use ← **Back** to return from quote detail.

Open Orders: search and follow progress

Find an order by its quote number, PO, project, quote name or the person who ordered it.

Open Orders

1

2

3

Order Detail

Export to Excel

Search orders...

▼ Lakeside Building Supply 3 orders

\$53,030

Quote #	PO #	Project Name	Quote Name	Ordered By	Order Date ↓	Ship Date	Total
260184	LV-1042	Lakeview Residence	Lakeview Reside...	Jordan Taylor	9/3/2026	9/18/2026 – 9/25/2026 @ Projected @ Partial	\$24,860
260176	OG-209	Oak Grove Renovati...	Oak Grove Reno...	Morgan Lee	8/28/2026	9/22/2026	\$18,420
260162 Partial	RD-318	Riverside Duplex	Riverside Duplex	Jordan Taylor	8/20/2026	9/18/2026	\$9,750 \$4,850 shipped

Sidebar → Open Orders. A single client group expands automatically.

1. Search and sort

Enter a term in **Search orders....** Select column headings to change the sort order.

2. Expand your client

Click the dark group header or chevron. A blue client name opens that Client Dashboard. Multiple client groups start collapsed.

3. Open the order

Click its blue **Quote #**. **Partial** beneath that number means some items shipped; the Total shows remaining open value.

Export to Excel downloads all loaded open orders, including rows hidden by the text search. See page 16 for the export comparison.

Order details: read the order summary

Open any blue order/quote number from an order list to see its details.

Open Orders > Order 260184

Order #260184

PO# LV-1042

ORDER TOTAL

\$24,860

Open: \$24,860
24 units

CLIENT

Lakeside Building Supply

SALES REP

Alex Morgan

PLACED BY

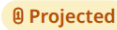
Jordan Taylor

ORDER DATE

9/3/2026

SHIP DATE

9/18/2026 – 9/25/2026 *

 Projected  Partial

SHIPPING

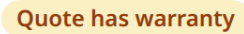
Ship As Ready

PROJECT NAME

Lakeview Residence

QUOTE NAME

Lakeview Residence

 Quote has warranty Case 2041 · Glass / Service review · Open

Order #260184: summary, shipping preference and a sample warranty relationship.

1. Confirm the job

Check the PO, client, placed-by user, project, quote name and order date. The order total can include open, shipped and invoiced portions.

2. Read the shipping preference

Ship As Ready: line items may ship as they finish.
Ship Complete: the whole order waits until ready.

3. Read warranty context

Quote has warranty means a case is associated with this order. **Quote for Warranty** identifies a replacement order.

Dealers can read the displayed case summary but cannot open full warranty case details. A missing badge does not rule out an older claim. Use the breadcrumb above the order to return to your list.

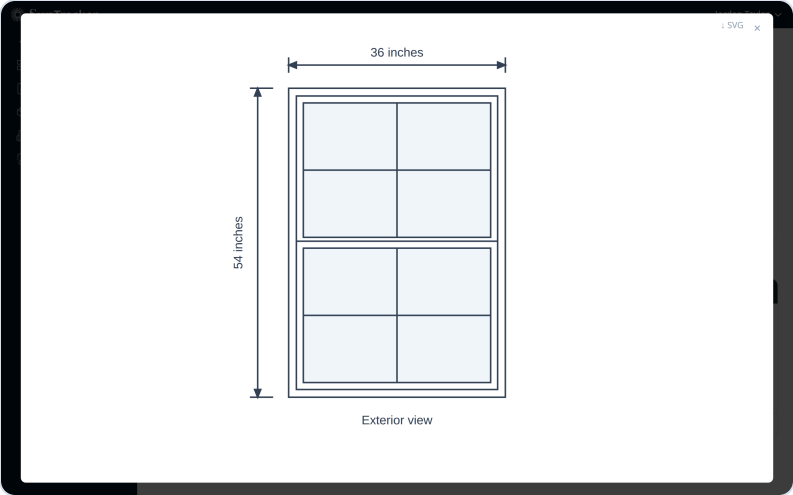
Line items and product drawings

Scroll below the order summary to review each product and its manufacturing status.

Line Items (3)

#	Description	Qty	Unit Price	Subtotal	Status	Original Ship Date	Ship Date
1-1	<div>Double Hung Window ▲ White exterior / white interior Low-E insulated glass; half screen</div>	12	\$850	\$10,200	In Production	9/16/2026	9/18/2026 *
2-1	<div>Casement Window ▼</div>	8	\$980	\$7,840	Scheduled	9/16/2026	9/25/2026 @ Projected
3-1	<div>Picture Window ▼</div>	4	\$1,705	\$6,820	Scheduled	9/16/2026	— @
Total				\$24,860			

Click the description or arrow to reveal additional product details.



An available thumbnail opens the drawing viewer.

1. Read each line

Check quantity, unit price, subtotal and the status badge. Statuses can include **Scheduled**, **In Production**, **Manufactured**, **Shipped** and **Invoiced**.

2. Enlarge or download

Select a drawing thumbnail, then ↓ **SVG** to save the drawing. Close with X, the shaded background or Escape.

3. Compare dates

Compare **Original Ship Date** with the current **Ship Date**. Dealer order-line numbers are informational; they do not open production work-order details.

Ship dates: understand the signals

Dates may be assigned, estimated or unavailable. Read the label beside the date.

Line Items (3)

#	Description	Qty	Unit Price	Subtotal	Status	Original Ship Date	Ship Date
1-1	 Double Hung Window ▲ White exterior / white interior Low-E insulated glass; half screen	12	\$850	\$10,200	In Production	9/16/2026	9/18/2026 *
2-1	 Casement Window ▼	8	\$980	\$7,840	Scheduled	9/16/2026	9/25/2026 🕒 Projected
3-1	 Picture Window ▼	4	\$1,705	\$6,820	Scheduled	9/16/2026	— ⓘ
				Total	\$24,860		

Example: line 1-1 has an assigned date, line 2-1 a projection, and line 3-1 no available date.

What you see	What it means
Plain date or date range	Assigned/confirmed dates for the relevant lines. Original Ship Date is the original baseline.
Projected · amber badge	At least one date is estimated. Projections are still in testing and may differ from actual shipping dates.
Partial · blue badge beside a date	Some open lines have no date. The displayed range covers only lines with an assigned date or projection.
Calculating... / — ⓘ	Calculating means date information is loading. A dash with an information icon means no assigned date or projection is available.
Colored * beside a date	Changed since your last login. Hover over the asterisk for the previous/current dates and explanation.

Green * Earlier; on/before original.

Orange * Later; still on/before original.

Red * Current date is after original.

The blue date badge **Partial** means incomplete date coverage. **Partial beneath a quote number** means a partial shipment. Confirmed-date change warnings appear by default; Settings can include projected changes.

Shipped Orders: locate shipment history

Choose a period, find the order, and review shipped value and any remaining open balance.

Shipped Orders

Last 30 Days

Last 60 Days

Last 90 Days

Last 180 Days

YTD

Last Year

Custom

06/13/2026

to

09/11/2026

Apply

6/13/26 – 9/11/26

Order Detail

Export to Excel

Search...

3

▼ Lakeside Building Supply 3 orders

\$34,070

Quote #	PO #	Project Name	Quote Name	Ordered By	Order Date	Ship Date ↓	Total
260121	MS-702	Maple Street Home	Maple Street Ho...	Jordan Taylor	7/22/26	9/4/26	\$16,880
260162 Partial	RD-318	Riverside Duplex	Riverside Duplex	Jordan Taylor	8/20/26	9/4/26	\$4,850 \$9,750 open
260098	HC-611	Hillcrest Cottage	Hillcrest Cottage	Jordan Taylor	7/8/26	8/28/26	\$12,340

Sidebar → Shipped Orders. Custom reveals the start/end dates and Apply button.

1. Choose the order-date period

Use Last 30/60/90/180 Days, YTD or Last Year. For **Custom**, enter both dates and click **Apply**.

2. Find and inspect

Search the loaded rows, expand the client group and sort by a heading. Click the blue quote number to open the order.

3. Read shipped amounts

Total is the shipped value. **Partial** and an “... open” amount identify work that remains open. Export with **Export to Excel**.

Date detail: this page filters the original **order date**, not shipment date. An older order shipped recently may require a wider range. The Dashboard’s “Last 90 Days” table uses shipment date. Newly shipped work may appear after invoicing is recorded.

Client Dashboard: overview and filters

See your account totals, then narrow the order activity you want to investigate.

Financial Summary

Not affected by the order activity filters

YTD SALES

\$342,780

PRIOR YTD

\$298,400

PRIOR YEAR TOTAL

\$472,900

OPEN ORDERS

\$53,030

Financial Summary is separate from the activity filters.

Order activity filters

Orders match when they contain at least one qualifying work order or line item. Warranty relationships are evaluated at the quote level.

Applied order date: 6/13/26 – 9/11/26

ORDER DATE

30d

60d

90d

180d

YTD

Last Yr

Custom

Production line

Manufacturing status

Warranty

Product code

Remake

All lines

All statuses

Any warranty case r...

All product codes

Any remake status

Clear

Apply

Sidebar → Client Dashboard → Order activity filters.

1. Select your client

One assigned client opens automatically. If you have several, use **Search clients...** and select a result.

2. Read the summary

YTD Sales, Prior YTD and Prior Year Total show invoice-based sales. Open Orders shows open value. These cards do not change with activity filters.

3. Set filters and apply

Choose an **Order date** period and optional production line, status, warranty, product code or remake filters. Select **Apply**; **Clear** restores defaults.

Filter menus allow multiple selections; Product code has search. Warranty choices may be unavailable when warranty data cannot be loaded.

Client activity: connect charts to orders

The applied order activity filters control the charts and the Open Orders / Shipped Orders tables below them.



An order counts once when any item qualifies; sales and units include qualifying items only.

Open Orders (3)

Export to Excel

Search orders...

Quote #	PO #	Project Name	Quote Name	Ordered By	Order Date ↓	Ship Date	Total
260184	LV-1042	Lakeview Residence	Lakeview Reside...	Jordan Taylor	9/3/26	9/18/26 – 9/25/26 @ Projected @ Partial	\$24,860
260176	OG-209	Oak Grove Renovati...	Oak Grove Reno...	Morgan Lee	8/28/26	9/22/26	\$18,420
260162 Partial	RD-318	Riverside Duplex	Riverside Duplex	Jordan Taylor	8/20/26	9/18/26	\$9,750 \$4,850 shipped

Scroll to the account's Open Orders table; Shipped Orders follows it.

1. Read the results

Compare **Ordered sales**, **Orders** and **Units**. These activity totals can differ from invoice-based Financial Summary.

2. Inspect a table

Search within the table, sort its headings and click an order number. Use **Show all** when more than ten rows match.

3. Export your selection

Each table has **Export to Excel**. Here, exports follow applied filters, table search and sort, including rows behind Show all.

Client quotes and assigned users

Open quote dates are controlled separately from order activity.

Open Quotes (3)

Quotes that have not become orders

Open quote date filter

Independent of the order activity filters above.

Quote date field

Last modified date

Date range

30d60d90d180dYTDCustom

Applied: Last modified date, 6/13/26 – 9/11/26

Clear

Apply

Export to Excel

Search open quotes...

Quote #	Quote name	Sales rep	Created	Last modified ↓	Line items	Units	Dealer price
260215	Cedar Ridge Addition	Alex Morgan	9/1/26	9/9/26	3	12	\$12,600
260208	Meadow Lane Remodel	Alex Morgan	9/1/26	9/9/26	3	8	\$8,450
260201	Pinecrest Custom Home	Alex Morgan	9/1/26	9/9/26	3	18	\$18,900

Client Dashboard → Open Quotes. This filter is independent of the order activity filters.

1. Choose the quote date field

Select **Last modified date** or **Created date**, choose a preset or custom period, then **Apply**. **Clear** returns to last modified date, last 90 days.

2. Review or export

Search, sort, use Show all if offered, or export. Quote numbers here are plain text; use sidebar **Open Quotes** to open quote details. If a truncation notice appears, narrow the date range.

Assigned Users		
Full Name	Username	Email
Jordan Taylor	jtaylor	jordan.taylor@example.com
Morgan Lee	mlee	morgan.lee@example.com

Assigned Users lists the people attached to the selected client.

3. Check the account contacts

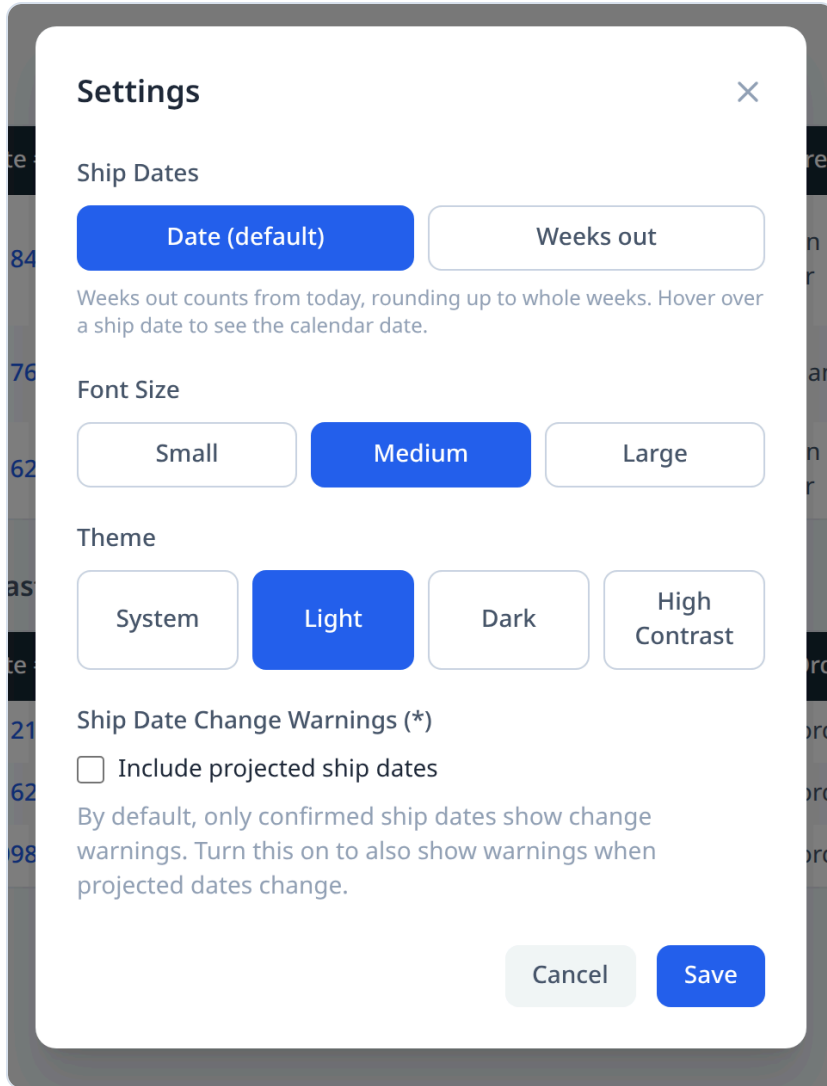
The names, usernames and emails are read-only. Contact Sun Windows if an account assignment needs correction.

SunTracker · Dealer user guide · Example data

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Settings: make the site easier to read

Open your name in the top-right corner, then choose Settings.



The screenshot shows a 'Settings' dialog box with a close button (X) in the top right corner. It contains four sections: 'Ship Dates' with 'Date (default)' and 'Weeks out' buttons; 'Font Size' with 'Small', 'Medium' (selected), and 'Large' buttons; 'Theme' with 'System', 'Light' (selected), 'Dark', and 'High Contrast' buttons; and 'Ship Date Change Warnings (*)' with an unchecked checkbox for 'Include projected ship dates'. At the bottom are 'Cancel' and 'Save' buttons.

Settings X

Ship Dates

Date (default) **Weeks out**

Weeks out counts from today, rounding up to whole weeks. Hover over a ship date to see the calendar date.

Font Size

Small **Medium** **Large**

Theme

System **Light** **Dark** **High Contrast**

Ship Date Change Warnings (*)

☐ Include projected ship dates

By default, only confirmed ship dates show change warnings. Turn this on to also show warnings when projected dates change.

Cancel **Save**

Changes take effect after you select Save.

Ship Dates

Choose **Date (default)** or **Weeks out**. Weeks are rounded to whole weeks from today. Hover over a displayed date to see the calendar date.

Font Size and Theme

Choose Small, Medium or Large text. Themes are System, Light, Dark and High Contrast. System follows your device's preference.

Ship Date Change Warnings (*)

Enable **Include projected ship dates** if you also want warnings when estimates change. Confirmed-date warnings appear by default.

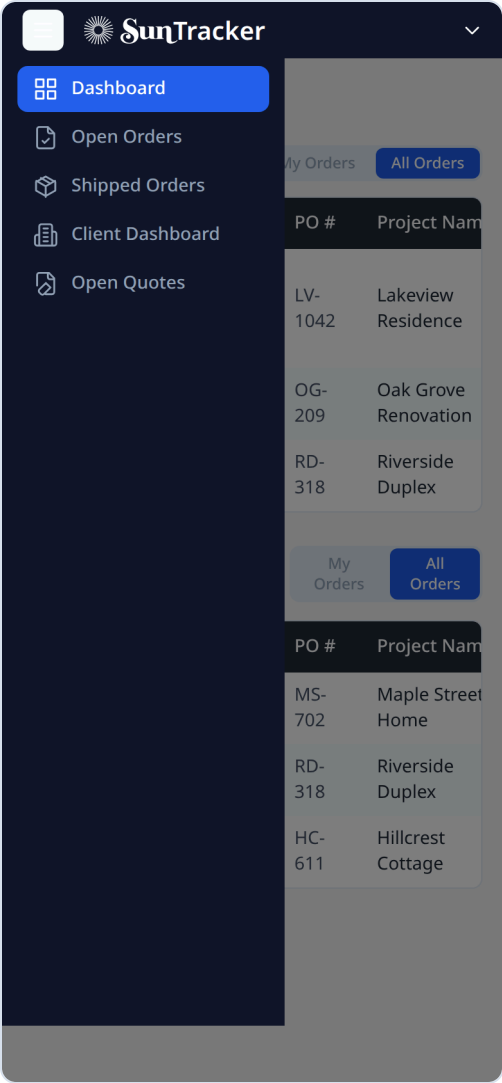
Save or cancel

Select **Save** to apply your choices. Cancel, X or the shaded background closes the dialog without saving.

Preferences are saved for your user in this browser. Set them again when using a different browser or device.

On a phone, and when you need help

The same dealer pages are available through the compact navigation menu.



Tap the top-left menu icon to open navigation.

Use the smaller-screen layout

Choose a page from the menu; it closes after selection. Swipe horizontally in wide tables to see additional columns. The account chevron stays in the top-right corner.

Install or update the app

Where your browser offers an install or Add to Home Screen option, you can open SunTracker like an app. When SunTracker shows “A new version ... is available,” select **Reload** to update or **Dismiss** to postpone. Data still needs a connection.

If this happens...	Try this
No matching orders or quotes	Clear the search, expand the client group, check My/All Orders and widen the date range.
A shipment is missing	Check original order date on Shipped Orders. Newly shipped work may need an invoice record before appearing.
A date is unavailable	Wait for Calculating to finish. Review the order's line dates and contact Sun Windows if you need a confirmed date.
Cannot sign in or see an account	Check credentials and connection. Contact your Sun Windows representative for login or client-access help.

When reporting a problem, include the page name, quote/order number, what happened and the app version from your account menu.

Excel exports and a quick reference

Choose the export location that matches the report you need.

Where you export	What the Excel file includes
Open Orders	All loaded open-order rows. The text search does not narrow this export. File: open-orders.xlsx.
Shipped Orders	All loaded rows for the selected original-order-date range. The text search does not narrow this export. File: shipped-orders.xlsx.
Client Dashboard → Open / Shipped Orders	Rows matching the applied activity filters, table search and sort. Includes rows hidden behind Show all.
Client Dashboard → Open Quotes	Rows matching its separate quote-date filter, table search and sort. Narrow the date range if the site reports truncated results.
Standalone Open Quotes	No Excel export button here. Use the client’s Open Quotes table when you need a spreadsheet.

For this task, start here

Task	Route
Check a customer’s order	Open Orders → Search → Quote # → Order detail
Read a quote’s configuration	Open Quotes → Quote # → Blue line number
Save a product drawing	Order detail → Drawing thumbnail → ↓ SVG
Review your account’s activity	Client Dashboard → Order activity filters → Apply
See why a ship date changed	Order detail → Hover the colored * → Compare dates

This guide covers the standard dealer features in the reviewed version. Additional tools depend on separate account permissions. Example screenshots are illustrative and are not live order or delivery information.