

FeneTech, Inc.

FeneVision[®] Web Center



User Manual

FeneVision[®] Web Center User Manual

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Overview

The FeneVision® Web Center application is a member of the FeneVision® family of software products that are pioneering the path of visual manufacturing within the fenestration industry. The FeneVision® products are designed with an open architecture and can easily interface to the user's existing business systems.

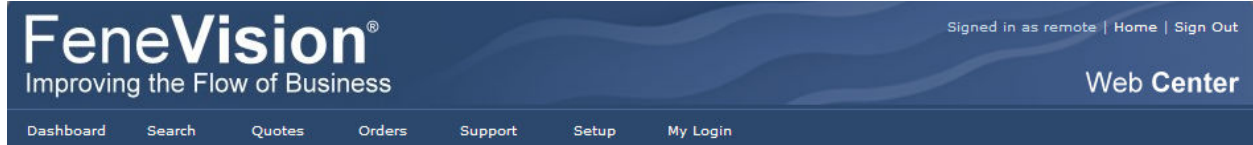
System Requirements

The FeneVision® Web Center application has specific hardware and software requirements, please reference the FeneVision® Hardware & Software Requirements document.

Setup

There are several required and optional features to be setup before using Web Center.

The top portion of the Dashboard contains navigation menus and links described below:



The above navigation menu includes the following items:

Dashboard – Landing page for Web Center.

Search – Displays the Search Screen.

Quotes – Directs the user to a menu of links: Quote Entry and Quote Maintenance.

Orders – Directs the user to a menu of links: Order History and Purchase History.

Support – Display a menu containing a link to Files. *(Set-up required)*

Setup – Directs the user to a menu of links to setup the application.

My Login – The user can enter their name and change their password.

The setup menu contains links to setup a customer base, payment terms, shipping methods, pricing table and company information. This section will explain the setup menu options.

Customer

A customer must be setup in the application prior to an order being entered for the customer. To setup an account complete the following:

1. Click Setup → Customers. The left side of the screen is where customers are added. The right side of the screen lists customer details for the selected customer.

The screenshot shows the FeneVision Web Center interface. At the top left is the FeneVision logo with the tagline "Improving the Flow of Business". At the top right, it says "Signed in as remote | Home | Sign Out" and "Web Center". Below the logo is a navigation menu with items: Dashboard, Search, Quotes, Orders, Support, Setup, and My Login. The main content area is titled "Customer Setup" and contains a button labeled "Add New Customer". Below the button is a list of customer accounts, each with a red 'X' icon in a circle to its right. The list includes: House Account (Default), AAA Glazing, aasd, ABC Windows, ABCD, Frank's Contracting, Mike Myers, QA Discount Test, QA Doors, QA Margin Test, QA Markup Test, and Testing Windows. At the bottom of the page, there is a footer with "© 2009 Fenetech | www.fenetech.com" and "Powered By FeneVision".

- Click the "Add New Customer" button, producing a new template for adding customer information, as shown below.

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Improving the Flow of Business

Signed in as remote | Home | Sign Out

Web Center

Dashboard Search Quotes Orders Support Setup My Login

Customer Setup

Add New Customer

Customer

- House Account (Default) [X]
- AAA Glazing [X]
- aasd [X]
- ABC Windows [X]
- ABCD [X]
- Frank's Contracting [X]
- Mike Myers [X]
- QA Discount Test [X]
- QA Doors [X]
- QA Margin Test [X]
- QA Markup Test [X]
- Testing Windows [X]

General

Name:

Notes:

Inactive:

Default:

Measurement Type:

Financial

Category	Markup %	Table
Designer	<input type="text" value="0.00"/>	<input type="text"/>
FT	<input type="text" value="0.00"/>	<input type="text"/>
IA	<input type="text" value="0.00"/>	<input type="text"/>
Misc	<input type="text" value="0.00"/>	<input type="text"/>
Windows & Doors	<input type="text" value="0.00"/>	<input type="text"/>

Pricing Method:

Terms:

Salesperson:

Tax Percent: % Tax Title:

Tax Percent 1: % Tax Title 1:

Tax Percent 2: % Tax Title 2:

Add Cancel

3. Enter the customer information under the General Section.

General	
Name:	<input type="text"/>
Notes:	<input type="text"/>
Inactive:	<input type="checkbox"/>
Default:	<input type="checkbox"/>
Measurement Type:	<input type="text" value="Imperial"/>

The General Section consists of the following:

Name – Customer's name (*Required*)

Notes –Notes regarding the customer. Notes are for internal use only, and do not show up on any reports. (*Optional*)

Inactive – Enables an inactive status for the customer. Quotes can not be added for inactive customers.

Default – Default customer information used to pre-populate information when adding new customers. Only one default customer can be set up.

Measurement Type – Default measurement type.

4. Enter information into the Financial Section.

Financial			
Category	Markup %	Table	
Designer	0.00		
FT	0.00		
IA	0.00		
Misc	0.00		
Windows & Doors	0.00		
Pricing Method:	Markup From Cost		
Terms:	Net 30		
Salesperson:	Jeon, Janice		
Tax Percent:	5	%	Tax Title:
Tax Percent 1:	0	%	Tax Title 1:
Tax Percent 2:	0	%	Tax Title 2:
Tax Percent 3:	0	%	Tax Title 3:
Tax Percent 4:	0	%	Tax Title 4:

The user can enter information into the following fields:

Categories - Pre-assigned by the manufacturer. Categories contain their own orderable parts and discount tables. *(Optional)*

Markup / Margin / Discount - Each product category can have a markup (percent or multiplier based upon manufacturer settings), margin or discount (percent or multiplier based upon manufacturer settings), depending on the pricing method specified for the customer. The price to the end customer will apply the specified value to the part and each option if a table isn't defined. If a table is defined, this value will be used for the part given no value is defined in the table for the part, and the value will be used for all options that have no value defined in the table.

Table – Each product category can have a Markup / Margin / Discount table, depending on the Pricing Method specified for the customer. *(Optional)*

Pricing Method - Customer pricing calculation method. The user must select one of these three options from the dropdown list: *(Required)*

- Markup from Cost
- Discount from List
- Gross Margin

Terms – Default payment terms selected via the Terms dropdown list. *(Optional)*

Salesperson – Identifies the default salesperson for the customer through the dropdown list. *(Optional)*

Tax Percent – Customer tax rates. *(Optional)*

Tax Title – The title for each tax rate. *(Optional)*


5. Enter address information into the Billing Address and Shipping Address Sections.

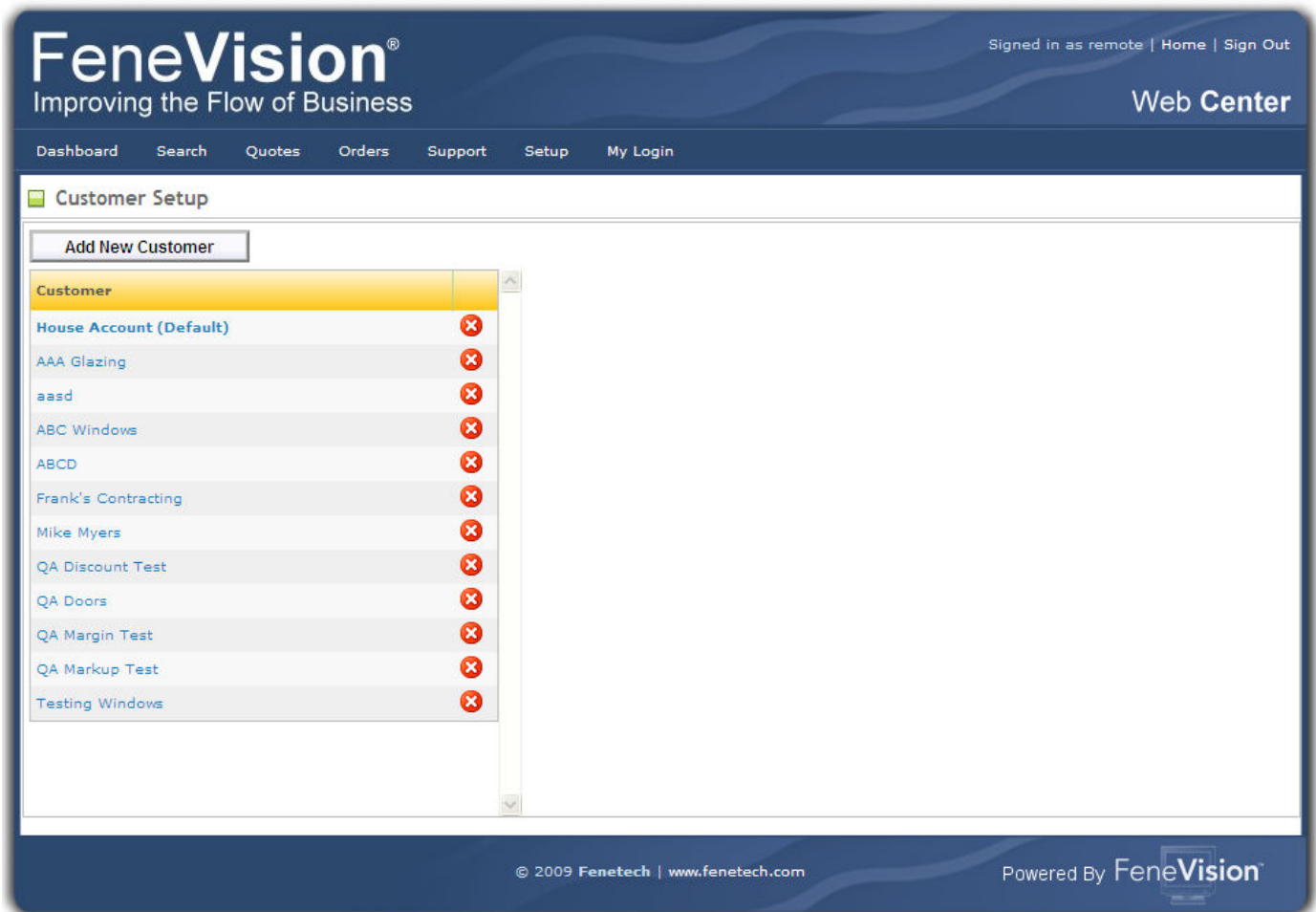
Billing Address	
Address 1:	4551 Country Side Rd.
Address 2:	
City:	Millersburg
State:	OH
Zip Code:	44654
Phone:	330-555-2389
Fax:	330-893-3530
Email:	ron_crowl@fenetech.com
Shipping Address	
	<input checked="" type="checkbox"/> Same as billing address
Ship Via:	<input type="text" value=""/>
Address 1:	4551 Country Side Rd.
Address 2:	
City:	Millersburg
State:	OH
Zip Code:	44654
Phone:	330-555-2389
Fax:	330-893-3530
Email:	ron_crowl@fenetech.com

In the billing address section, the user can enter the billing information for the new customer. If the shipping address is the same as the billing, click the “Same as billing address” checkbox which will become read-only.

6. Whether the “Same as billing address” checkbox is selected or not, the Ship Via will not be read-only. Click on the appropriate method using the Ship Via dropdown list.
7. Click the “Add” button. The customer will be added to the list on the left side of the Customer Setup Screen. If the user does not want to add the customer, click the “Cancel” button. The customer will not be added to the customer list.

To delete a customer from the existing customer list, complete the following:

1. Find the customer to be deleted in the list on the left side of the customer setup screen.
2. Click the  button next to the customer.



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Signed in as remote | Home | Sign Out

Web Center

Dashboard Search Quotes Orders Support Setup My Login

Customer Setup

Add New Customer

Customer	
House Account (Default)	
AAA Glazing	
aasd	
ABC Windows	
ABCD	
Frank's Contracting	
Mike Myers	
QA Discount Test	
QA Doors	
QA Margin Test	
QA Markup Test	
Testing Windows	

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To edit a customer, complete the following:

1. Click on the customer in the customer list on the left side of the screen and the following screen will display on the right.

General	
Name:	ABC Windows
Notes:	
Inactive:	No
Default:	No
Measurement Type:	Imperial
Financial	
Billing Address	
Shipping Address	

2. Click the "Edit" button.
3. Make all necessary changes.
4. Click the "Apply" button to save the changes or the "Cancel" button to cancel the changes.


Terms & Ship Via

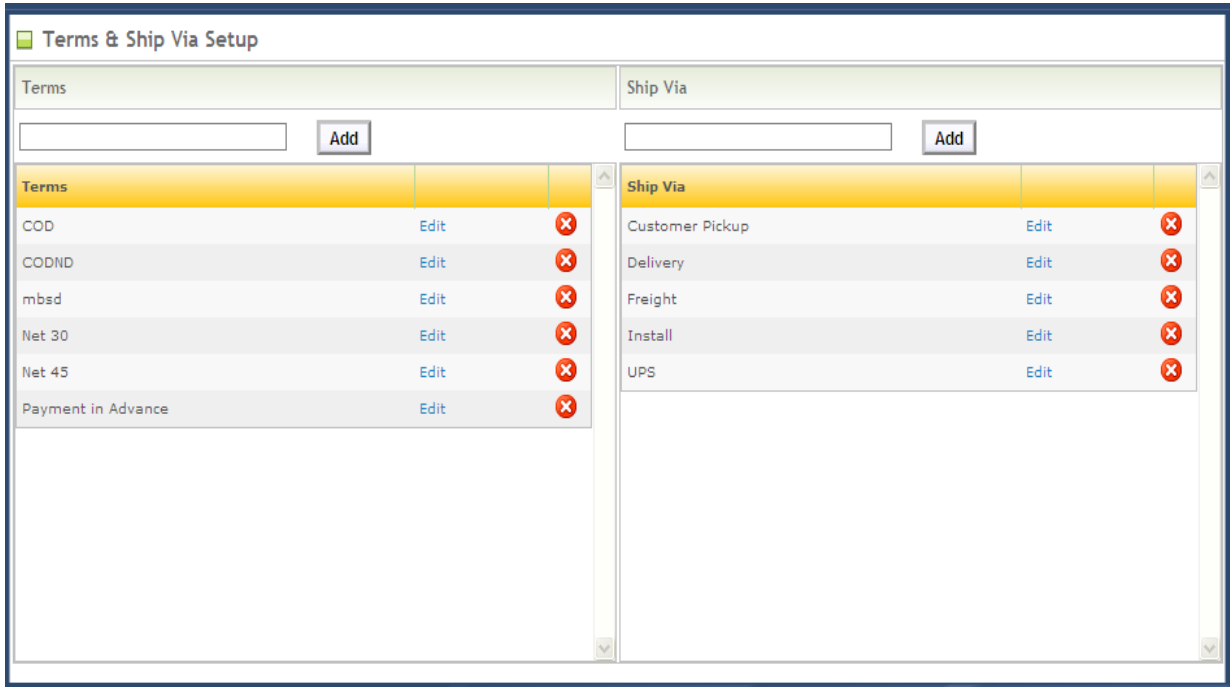
To add payment terms and shipping methods, complete the following:

1. Click on Setup → Terms & Ship Via. On the left side, the user can add, edit, or delete terms. On the right side, the user can add, edit, or delete the ship via records.

Terms		Ship Via	
<input type="text"/>	<input type="button" value="Add"/>	<input type="text"/>	<input type="button" value="Add"/>
Terms		Ship Via	
COD	Edit	Customer Pickup	Edit
CODND	Edit	Delivery	Edit
mbsd	Edit	Freight	Edit
Net 30	Edit	Install	Edit
Net 45	Edit	UPS	Edit
Payment in Advance	Edit		

2. In the field under the Terms section, enter the name.
3. Click the “Add” button. These can now be used in order entry or customer setup.
4. Click on the “Edit” button next to the appropriate Term or Shipping Method to edit them.
5. Rename the value.
6. Click on the “Update” button to save or the “Cancel” button to cancel changes.

7. Click the  button next to the appropriate value to delete a Term or Shipping Method. The user will be prompted to validate the deletion.



The screenshot shows a window titled "Terms & Ship Via Setup" with two main sections: "Terms" and "Ship Via". Each section has an "Add" button and a table of items. The "Terms" table lists: COD, CODND, mbsd, Net 30, Net 45, and Payment in Advance. The "Ship Via" table lists: Customer Pickup, Delivery, Freight, Install, and UPS. Each row in both tables has an "Edit" link and a red "X" delete button.

Pricing

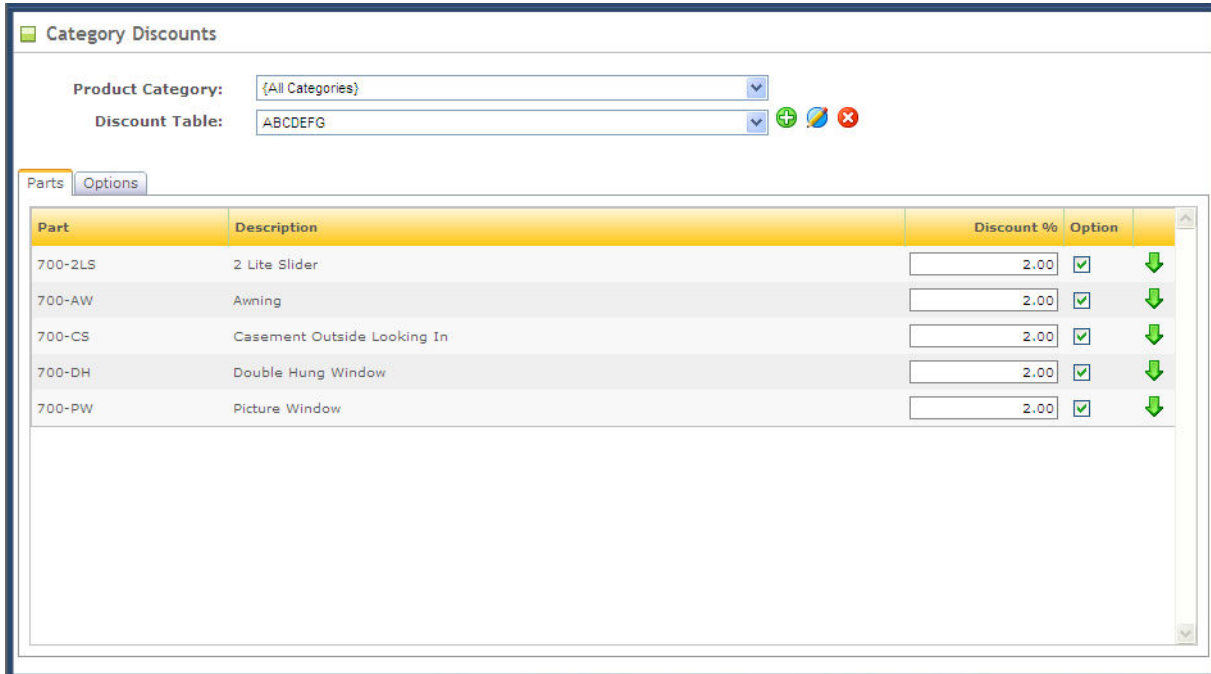
Below are the three types of pricing methods a price table can be setup with:

- **Discount from List** - Reduction from manufacturer's list price. For example, if the manufacturer list price for a window is \$50.00 and the discount is 10%, the price to the end customer will be \$45.00.
- **Markup from Cost** - Increase from cost (manufacturer's price to the Web Center user). For example, if the manufacturer's price to the Web Center user is \$50.00 and the markup is 10%, the price to the end customer will be \$55.00.
- **Gross Margin** - Difference between cost and selling price. For example, if the manufacturer's price to the Web Center user is \$100.00 and the margin is 20%, the price the end customer will be \$125.00

Discount, Markup, and Margin Tables


To set up pricing tables, complete the following:

1. Click Setup → Pricing → {Discounts / Markups / Margins}.
2. In the example below, category discounts is used as the pricing method. (Follow the same procedure to set up markup and margin tables.)



The screenshot shows the 'Category Discounts' window. At the top, there are two dropdown menus: 'Product Category' set to '{All Categories}' and 'Discount Table' set to 'ABCDEFGH'. Below these are two tabs: 'Parts' (selected) and 'Options'. The main area contains a table with the following data:

Part	Description	Discount %	Option
700-2LS	2 Lite Slider	2.00	<input checked="" type="checkbox"/>
700-AW	Awning	2.00	<input checked="" type="checkbox"/>
700-CS	Casement Outside Looking In	2.00	<input checked="" type="checkbox"/>
700-DH	Double Hung Window	2.00	<input checked="" type="checkbox"/>
700-PW	Picture Window	2.00	<input checked="" type="checkbox"/>

3. To add a new discount table, click the  button.



The dialog box contains the following text and controls:

Please create a new table by choosing a name, and then assigning the table to a product category.

Table Name:

Product Category:


4. Enter the name of the new discount table and choose the product category.
5. Click the “OK” button to add the new table or the “Cancel” button to cancel the changes.
6. When “OK” is selected, the screen will display the parts for the category. The user can fill in the table with the discount(s), per global option and per part-specific option. Now, the table is available to be assigned to customers in Customer Setup.

- To edit the name of a discount table, select the  icon. The user will be prompted with the following box:

Edit the table name




Old Name:

New Name:

- Enter the new name.
- Click the "OK" button to save or "Cancel" button to delete changes.
- To delete a table, click the  icon. This will permanently delete the selected table.
- In the Parts tab, if the option checkbox is checked off for a part then the value entered for the part will be used for the part's options unless an overriding value for the option has been entered.
- Click the Options tab to add pricing to options. For example, if the user wanted to give away Low-E in a special promotion, the following steps would be completed:
 - Click the Options tab, find the Low-E option and enter 100%. This will give free Low-E to any customer assigned to the Free Low-E table.











Category Discounts

Product Category:

Discount Table:   

Parts Options

Part:

Code	Description	Discount %
1COLR	ONE COLOR PAINTING	<input type="text" value="1.00"/> 
4LB	FOUR LITE BAY	<input type="text" value="1.00"/> 
ALU	ALUMINUM SCREEN	<input type="text" value="1.00"/> 
ARG	ARGON GAS	<input type="text" value="1.00"/> 
AUTOLK	AUTO CHOOSE NUMBER OF LOCKS	<input type="text" value="1.00"/> 
BCOLS	BRASS PENCIL COLONIAL GRIDS - SASH	<input type="text" value="1.00"/> 
BCOLW	BRASS PENCIL COLONIAL GRIDS	<input type="text" value="1.00"/> 
BG	BEIGE	<input type="text" value="1.00"/> 
C2COLS	CONTOUR TUTONE COLONIAL GRIDS - SASH	<input type="text" value="1.00"/> 
C2COLW	CONTOUR TUTONE COLONIAL GRIDS	<input type="text" value="1.00"/> 

- b. The green down arrow allows the specified value to be filled down to all parts below the row (if in the parts tab) or all options below the row (if in the options tab).


Company

This section will show how to enter company information and create users.

Information

To enter information about a company, complete the following:

1. Click Setup → Company → Information.
2. Click the name of the Web Center user's site in the list on the left side of the screen.
3. Click the "Edit" button on the right side of the page to add information.

<input type="button" value="Apply"/> <input type="button" value="Cancel"/>	
Company Name	
Name:	<input type="text" value="Fenetech"/>
Address Information	
Address 1:	<input type="text" value="1455 Danner Drive"/>
Address 2:	<input type="text"/>
City:	<input type="text" value="Aurora"/>
State:	<input type="text" value="OH"/>
Zip Code:	<input type="text" value="44202"/>
Phone:	<input type="text" value="330-995-2830"/>
Fax:	<input type="text" value="330-999-9999"/>
Web URL:	<input type="text" value="www.fenetech.com"/>
Settings	
Default Mfg PO Number:	<input type="radio"/> Mfg Default - Order <input type="radio"/> Order <input checked="" type="radio"/> PO <input type="radio"/> Blank (Override)
Default Mfg Customer Ref.:	<input type="radio"/> Mfg Default - Customer <input type="radio"/> Customer <input type="radio"/> Order-Customer <input checked="" type="radio"/> Customer Ref. <input type="radio"/> Blank (Override)
	<input type="text"/> <input type="button" value="Browse..."/> <input type="button" value="Upload Logo"/> <input type="button" value="Clear Logo"/>

4. Edit the Company and address information in the provided fields, as needed. *Note: this information will be displayed on the quote report given to the end user.*
5. The Default Mfg PO Number and Default Mfg Customer Ref settings are used when the quote is uploaded to the manufacturer. The PO Number and Customer Ref between the Web Center user and the end customer are not necessarily the same PO number and Customer Ref between the manufacturer and the Web Center user.
6. To add a logo, click the "Browse..." button. Select the logo to be added.
7. Press 'Upload Logo' to upload the logo to Web Center. Press 'Clear Logo' to remove the logo from Web Center. The logo will be displayed on reports given to the end customer.
8. Click the "Apply" button to save or the "Cancel" button to delete the changes.

Users

To add additional users or change the permissions of a user, complete the following:

1. Click on Setup → Company → Users.
2. Click the “Add New User” button, and then complete the information on the right side of the screen. (*User name, password and permissions are required.*)*Note:* If the Inactive box is checked, the user will not be able to log into Web Center.

The screenshot shows the 'User Setup' window. On the left, there is a table of existing users. On the right, there is a form for adding a new user with sections for General information and Permissions.

User	My Site	
matt	Main Office	✖
remote	Main Office	
ideal (Inactive)	Main Office	
Roncrowl	Main Office	✖
aj	Main Office	
joniglas (Inactive)	Main Office	
mariamain	Main Office	
john	Main Office	✖
mariaallusers	Main Office	✖
thermo	Main Office	
tristate	Main Office	

General

User Name:

Password:

First Name:

Last Name:

Email Address:

Inactive:

Mfg Created: No

Permissions

Administrator

Standard User

Permission
<input type="checkbox"/> Create/Modify Customers & Pricing
<input type="checkbox"/> Create/Modify Quotes
<input type="checkbox"/> Delete Quotes
<input type="checkbox"/> Modify Quote Pricing
<input type="checkbox"/> Upload Quotes
<input type="checkbox"/> Upload Quotes with Exceptions
<input type="checkbox"/> View Cost
<input type="checkbox"/> View Pricing
<input type="checkbox"/> View Quotes of All Users

3. The default permission is set to Administrator, equivalent to a standard user with all boxes checked. If a Standard User is selected, permissions can also be selected. Permissions that can be selected are as follows:
 - Create/Modify Customers & Pricing
 - Create/Modify Quotes
 - Delete Quotes
 - Modify Quote Pricing
 - Upload Quotes
 - Upload Quotes with Exceptions
 - View Cost
 - View Pricing

- View Quotes of All Users

4. Click the “Add” button.

Note: Users can be edited and deleted. Some users don't have a delete icon next to them – these users were created by the manufacturer and therefore cannot be deleted.

My Login

The ‘My Login’ screen allows the currently logged-in user to change their First Name, Last Name, E-Mail Address and Password.

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Signed in as remote | Home | Sign Out

Web Center

Dashboard Search Quotes Orders Support Setup My Login

My Login

User Name: remote

New Password:
*Only fill this in if you wish to change the password

First Name: test

Last Name: user

Email Address:

Save Changes

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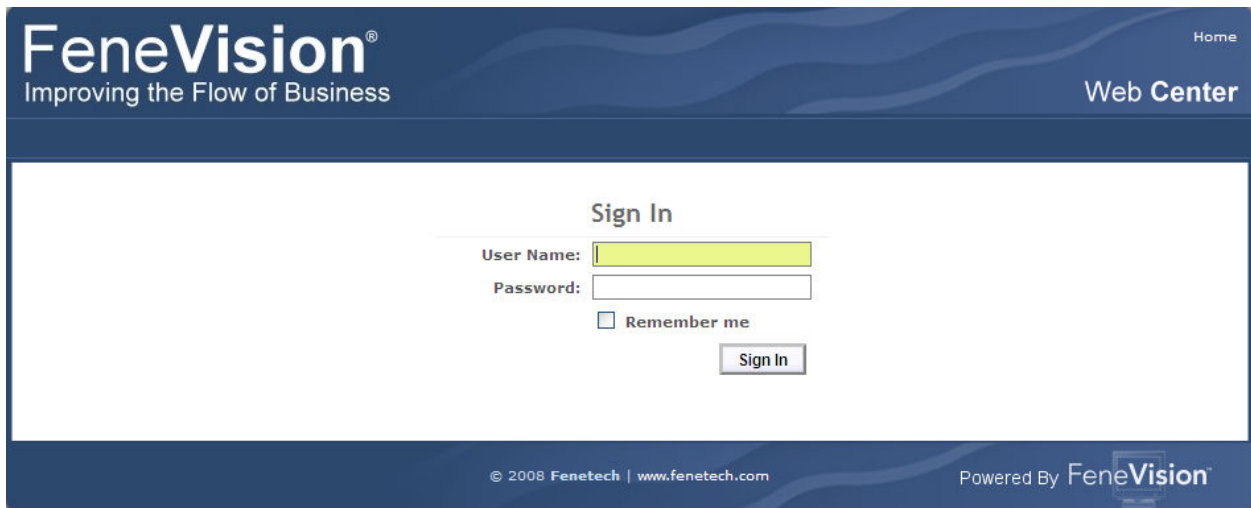
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Using Web Center

Once users have been created, the users will be able to enter quotes, upload quotes to the manufacturer, track the status of open orders, and view their own order and purchase history. This section will explain the steps to complete these functions.

Starting

1. Enter the Web Center URL into the address toolbar of a browser window. A login screen, similar to the one below, will be displayed.



The screenshot shows the FeneVision Web Center login interface. At the top left, the FeneVision logo is displayed with the tagline "Improving the Flow of Business". At the top right, there is a "Home" link and the text "Web Center". The main content area is titled "Sign In" and contains a "User Name:" field with a yellow highlight, a "Password:" field, a "Remember me" checkbox, and a "Sign In" button. At the bottom, there is a footer with the copyright notice "© 2008 Fenetech | www.fenetech.com" and the text "Powered By FeneVision".

2. Enter the assigned user name and password. The user may also check 'Remember Me'. This will place a cookie on the user's machine that remembers their login information, so they won't be forced to log into Web Center again.
3. Click the "Sign In" button.

Note: There are security ramifications of clicking 'Remember Me'. On a public computer or a computer used by more than one user, all subsequent users will be able to access Web Center using the original user's login information. The manufacturer can hide this checkbox through the Web Center Administrator site.

Dashboard

The dashboard screen is the landing page for FeneVision® Web Center. This page provides a quick snapshot to open orders uploaded to the manufacturer, and non-expired quotes that have not been uploaded.

Order	Date	PO Number	Customer Ref.	Total	My Site	Received	In Process	Shipped
109759	8/27/08	2345		\$1,006.53	123 Doors & Windows	✓		
109758	8/26/08	abc	123	\$0.00	123 Doors & Windows	✓		
109757	8/14/08	DSF	JOB	\$713.83	123 Doors & Windows	✓		

Quote	Date	Customer	PO Number	Customer Ref.	Total	My Site	Expires
109791	9/9/08	House Account			\$369.53	123 Doors & Windows	10/9/2008
109790	9/9/08	QA Doors			\$736.70	123 Doors & Windows	10/9/2008
109789	9/2/08	QA Doors			\$7,608.51	123 Doors & Windows	10/2/2008
109788	9/2/08	House Account			\$240.59	123 Doors & Windows	10/2/2008

The top portion of the Dashboard contains navigation menus and links:

In the upper right corner, the login name appears. The “Home” link is used to access the manufacturer’s website. By clicking the “Sign out” link, the user will log out of Web Center.

The navigation menu includes the following items:

Dashboard – Landing page for Web Center.

Search – Displays the Search Screen.

Quotes – Directs the user to a menu of links: Quote Entry and Quote Maintenance.

Orders – Directs the user to a menu of links: Order History and Purchase History.

Support – Display a menu containing a link to Files. (*Set-up required*)

Setup – Directs the user to a menu of links to setup the application.

My Login – The user can enter their name and change their password.

The Open Orders section of the Dashboard shows *all orders* pending at the manufacturer:

Open Orders								
Order	Date	PO Number	Customer Ref.	Total	My Site	Received	In Process	Shipped
109759	8/27/08	2345		\$1,006.53	123 Doors & Windows	<input checked="" type="checkbox"/>		
109758	8/26/08	abc	123	\$0.00	123 Doors & Windows	<input checked="" type="checkbox"/>		
109757	8/14/08	DSF	JOB	\$713.83	123 Doors & Windows	<input checked="" type="checkbox"/>		
109756	8/1/08	4567	895	\$240.50	123 Doors & Windows	<input checked="" type="checkbox"/>		
109755	8/1/08	456892364		\$169.64	123 Doors & Windows	<input checked="" type="checkbox"/>		
109754	8/1/08	45	789	\$169.64	123 Doors & Windows	<input checked="" type="checkbox"/>		
109753	7/15/08	35600	88	\$270.96	123 Doors & Windows	<input checked="" type="checkbox"/>		
109752	7/14/08	45698	87	\$110.45	123 Doors & Windows	<input checked="" type="checkbox"/>		
109751	7/11/08	456789	QA1	\$123.94	123 Doors & Windows	<input checked="" type="checkbox"/>		
109750	7/9/08	303		\$0.00	123 Doors & Windows	<input checked="" type="checkbox"/>		
109749	7/8/08	308		\$165.51	123 Doors & Windows	<input checked="" type="checkbox"/>		
109748	6/20/08			\$168.75	123 Doors & Windows	<input checked="" type="checkbox"/>		
109747	6/18/08	1	123 Windows and Doors	\$0.00	123 Doors & Windows	<input checked="" type="checkbox"/>		
109746	6/7/08	299		\$188.39	123 Doors & Windows	<input checked="" type="checkbox"/>		
109745	6/5/08			\$173.40	123 Doors & Windows	<input checked="" type="checkbox"/>		
109744	6/4/08	294	123 Doors & Windows	\$419.88	123 Doors & Windows	<input checked="" type="checkbox"/>		
109740	2/15/08			\$173.40	123 Doors & Windows	<input checked="" type="checkbox"/>		

The Open Orders section displays open orders in FeneVision® CORE. The orders displayed have been uploaded from Web Center, Remote Order Entry, or originated in FeneVision® CORE.

- **Order** – Order number assigned in FeneVision® CORE. Clicking on the order number (blue) link will display the Order Status page for the order.
- **Date** – Date the order was received by the manufacturer.
- **PO Number** – Purchase Order number for the order.
- **Customer Ref.** – Customer Reference for the order.
- **Total** – Total currency amount for the order.
- **My Site** – Web Center’s customer’s site. The manufacturer can create customer-level logins for Web Center. These logins may have more than one site. When a quote is created, the site must be selected if more than one exists (consider a login for a company that has branches in many cities – they might have three sites – Columbus, Cincinnati and Cleveland).
- **Received** – A checkmark in this column indicates the order was received by the manufacturer.
- **In Process** – A checkmark in this column indicates the order was acknowledged by the manufacturer.
- **Shipped** - A green checkmark in this column indicates the order was fully shipped. A red checkmark in this column indicates the order was partially shipped.

All columns except "Received" can be sorted by clicking on the column header.

The Quotes section lists all non-expired quotes currently pending in FeneVision® Web Center. These quotes have not been uploaded to the manufacturer.

Quotes								Create New Quote
Quote	Date	Customer	PO Number	Customer Ref.	Total	My Site	Expires	
109791	9/9/08	House Account			\$369.53	123 Doors & Windows	10/9/2008	
109790	9/9/08	QA Doors			\$736.70	123 Doors & Windows	10/9/2008	
109789	9/2/08	QA Doors			\$7,608.51	123 Doors & Windows	10/2/2008	
109788	9/2/08	House Account			\$240.59	123 Doors & Windows	10/2/2008	

The Quotes List displays the following information for a pending Quote:

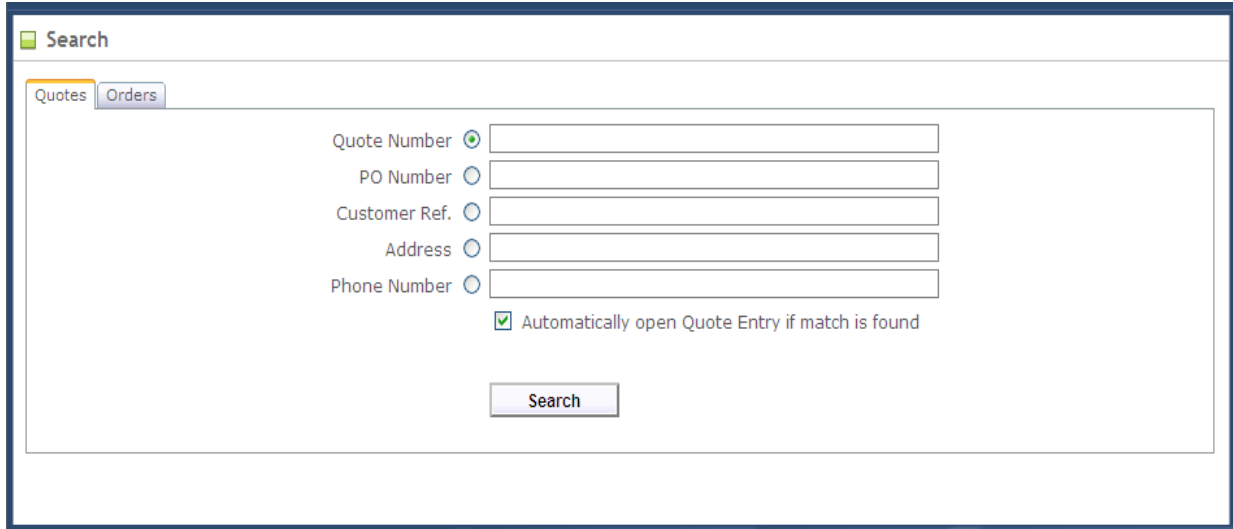
- **Quote** – Quote number. Clicking on the quote number (blue) link will display the Quote Entry page for the quote.
- **Date** - Date the quote was entered.
- **Customer** - End customer for the quote.
- **PO Number** – Purchase Order number for the quote.
- **Customer Ref** – Customer Reference for the quote.
- **My Site** – Web Center's customer's site.
- **Total** - Total currency amount for the quote.
- **Expires** – Date the quote must turn into an order to preserve the pricing given at the time the quote was entered. The manufacturer controls the number of days quotes can exist before they expire through a setting in the Web Center Administration site.

All columns can be sorted by clicking on the column header.

Searching

To search for orders or quotes, complete the following:

1. Click the Search menu item.



The screenshot shows a web application window titled "Search". At the top left, there is a small green square icon followed by the text "Search". Below this, there are two tabs: "Quotes" (which is highlighted with an orange border) and "Orders". The main content area contains five search fields, each with a radio button to its left. The first field is labeled "Quote Number" and has its radio button selected. The other four fields are labeled "PO Number", "Customer Ref.", "Address", and "Phone Number", each with an unselected radio button. Below these fields is a checkbox labeled "Automatically open Quote Entry if match is found", which is checked. At the bottom center of the search area is a button labeled "Search".

The default search screen is to search for a quote; however the user may search for an order as well. The quote search fields include the following:

- **Quote Number** – Quote number assigned to the quote.
 - **PO Number** – Purchase order number on the quote.
 - **Customer Ref** – Customer reference information on the quote.
 - **Address** – Any portion of the street of the quote’s shipping address.
 - **Phone Number** - Any portion of the phone number from the quote’s shipping address.
2. The user may enter information into multiple search fields; however only click one search field to perform the search.

3. Click the “Search” button when ready to find a quote in the system. The following is an example of user looking for an address containing the number 13.

Search

Quotes **Orders**

Quote Number

PO Number

Customer Ref.

Address

Phone Number

Automatically open Quote Entry if match is found

Search

14 Quotes found.

Quote	Date	Customer	PO Number	Customer Ref.
109810	9/24/08	Frank's Contracting		
109809	9/24/08	Frank's Contracting		
109807	9/24/08	Frank's Contracting		
109805	9/24/08	Frank's Contracting		
109802	9/23/08	Frank's Contracting		
109801	9/23/08	Frank's Contracting	123456	123475
109787	8/28/08	Frank's Contracting		
109786	8/27/08	Frank's Contracting	ABCD	EFGH
109785	8/18/08	Frank's Contracting		
109784	8/18/08	Frank's Contracting		
109783	8/18/08	Frank's Contracting	TEST	ABCD

4. All columns can be sorted by the column header.

Choose between the following search options:

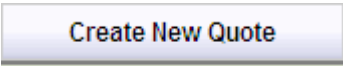
- If a quote link is selected, the quote entry page for the quote will be displayed.
- If the “Automatically open Quote Entry if match is found” checkbox is selected, instead of displaying search results, the quote entry screen will appear when only one match is found.
- Searching for an order is very similar to searching for a quote. The only exception is that the user can search on an order number instead of quote number, and it will display the order status page instead of the quote entry page.

Quotes

The customer can generate quotes through FeneVision® Web Center and upload them to the manufacturer as orders.

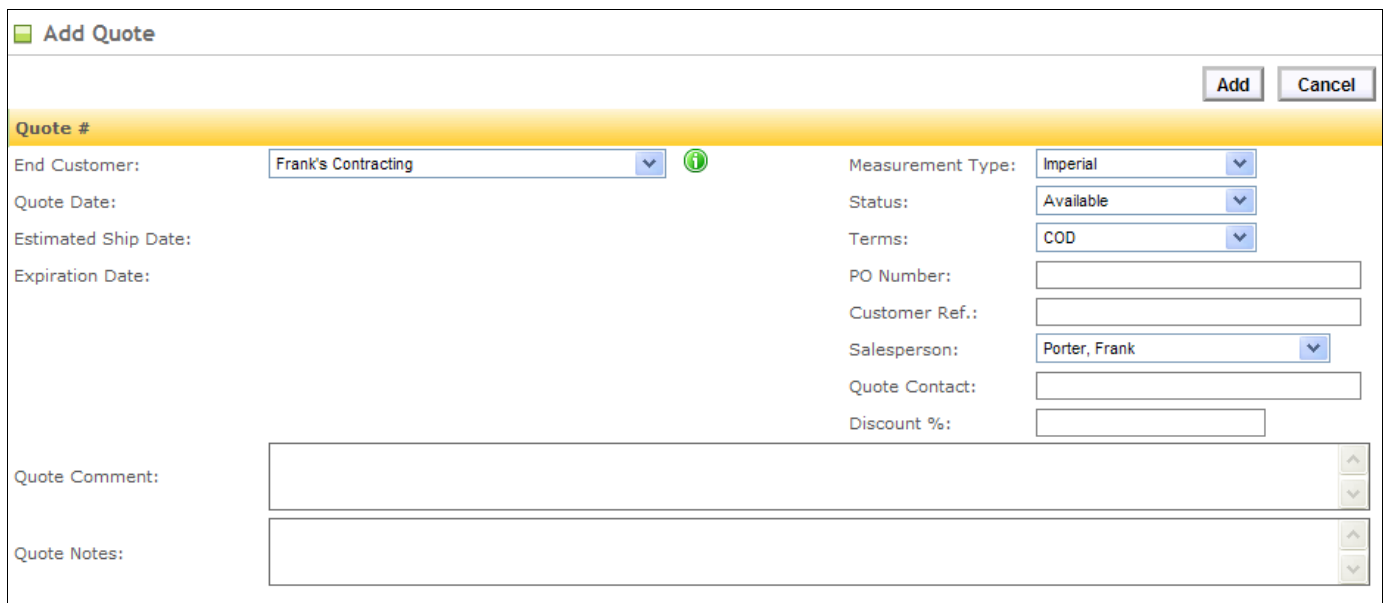
Quote Entry

There are two ways that a user can get to the quoting screen:

- Click the  button on the Dashboard, or
- Click Quotes → Quote Entry.

Add Quote

Upon entering the quoting screen, the Add Quote screen will appear as shown below.



The screenshot shows the 'Add Quote' form. At the top left is a green square icon and the text 'Add Quote'. At the top right are 'Add' and 'Cancel' buttons. Below this is a yellow header bar with 'Quote #' on the left. The form is divided into two columns. The left column contains: 'End Customer:' with a dropdown menu showing 'Frank's Contracting' and a green information icon; 'Quote Date:'; 'Estimated Ship Date:'; 'Expiration Date:'. The right column contains: 'Measurement Type:' with a dropdown menu showing 'Imperial'; 'Status:' with a dropdown menu showing 'Available'; 'Terms:' with a dropdown menu showing 'COD'; 'PO Number:' with a text input field; 'Customer Ref.:' with a text input field; 'Salesperson:' with a dropdown menu showing 'Porter, Frank'; 'Quote Contact:' with a text input field; 'Discount %:' with a text input field. At the bottom, there are two text areas: 'Quote Comment:' and 'Quote Notes:', each with a vertical scrollbar on the right.

This screen allows the user to specify information for the quote. The two sections of the Add Quote screen are Quote Number and Address Information. The Quote Number section provides information about the quote. The Address Information screen includes the Billing Address and Shipping Address information.

The Quote Number Section fields include:

- **My Site** – Identifies the customer site. This dropdown list is only displayed if the user is logged in using a customer-level login that has multiple sites. *(Required when available)*
- **End Customer** – Identifies end customer. When a customer is selected in the list, all the other fields on the screen populate with the default information for the customer. *(Required)*
- **Quote Date** – Date the quote is created. *(Locked from user)*

- **Estimated Ship Date** – Estimated date the order will ship after it has been uploaded. *(Locked from user)*
- **Expiration Date** – Date the quote will expire. *(Locked from user)*
- **Measurement Type** – Measurement for the quote and will impact the line item dimensions. The two choices are imperial and metric.
- **Status** – Status of the quote. The two status values to choose from are Available and On Hold. *Note: On Hold quotes cannot be uploaded to the manufacturer.*
- **Terms** – Payment terms.
- **PO Number** – Purchase order number for the quote from the end customer. Must be unique.
- **Customer Reference** – Text that uniquely identifies the particular quote.
- **Salesperson** - Salesperson name. This would be the salesperson assigned to the quote.
- **Quote Contact** – Contact name for the Quote. *(Required)*
- **Margin, Discount, or Markup** - Discount, markup or margin for the quote. If specified, it overrides any values specified for the customer in the Customer Setup webpage.
- **Quote Comment** - General comments about the quote Comments will remain on the quote when it is uploaded to the manufacturer, and also print on reports. *(Optional)*
- **Quote Notes** - Notes regarding the quote.–Notes do not remain on the quote when it is uploaded to the manufacturer. They are for internal use only and do not print on reports. *(Optional)*

The Address Information section fields include:

- **Billing Address** - Automatically filled in when the customer is selected and is configured in the Customer Setup screen. *(Read-Only)*
- **Shipping Address** - Automatically filled in when the customer is selected, with the address configured in the Customer Setup screen. Clicking on a field and typing the desired information will override the default address.
- **Ship Via** - Ship Via method for the quote.
- **Shipping Comment** - Shipping comments for the quote which will remain on the quote when it is uploaded to the manufacturer.

When all information is entered, click the “Add” button to save or the “cancel” button to cancel changes.

Quote Entry

After selecting the “Add” button, the Quote Entry screen (shown below) will be displayed.

The screenshot shows the 'Quote Entry' interface. At the top, there's a 'Header Information' section with an 'Edit' button and a dropdown menu for 'Acknowledgement'. Below this are tabs for 'General', 'Shipping', and 'Invoicing'. The 'General' tab is active, displaying fields for Quote Number (109850), Quote Date (1/20/2009), Measurement Type (Imperial), Customer (Frank's Contracting), Status (Available), Comment, PO Number, Customer Ref., Salesperson (Porter, Frank), Terms (COD), Discount %, My Site (123 Doors & Windows), Contact, Est. Ship Date (2/2/2009), and Exp. Date (2/19/2009). Below the header information, there are dropdown menus for 'Category' and 'Part', both with the placeholder text 'Please select a category' and 'Please select a part' respectively, and an 'Add' button. At the bottom, there is a table with columns: Item, Quantity, Part, Size, Price, and Total. The table contains summary rows: Subtotal: \$0.00, Tax: \$0.00, and Total: \$0.00.

The Quote Entry screen has two sections: Header Information and Line Item Information. Header Information shows the information entered in the Add Quote screen. Line Item Information is the section where the user will select items to quote.

The Header Information contains the following:

Edit - Edit the header information. It will display the Edit Quote Header page, similar to the Add Quote Page. When all information is entered, click the “Update” button to save the information and return to the Quote Entry screen. Note that the customer can be changed on the quote header only if the quote contains no line items.

Finish - Closes the quote and display the dashboard. Clicking this button will not prevent the quote from being modified in the future. The user can come back and edit the quote at any time, until it expires or has been uploaded to the manufacturer.



- Display Global Options Changes screen. This allows the user to globally modify (add, edit or remove) options for all line items and alternate wizard selections on the quote.

Global Option Changes

Question: {None} Old Option: {None} New Option: {None} Change

These items will be saved

These issues must be resolved before the items will be saved

Save Cancel



- Print the quote report in Adobe Acrobat format (PDF).



- Quote information will be imported into a third party application. The quote export file name will be {quotenumber}.csv.

The file layout will be as follows:

- The first record of the file is the header record for the quote.
- The following records are each line item for the quote.
- Each file in the file is wrapped in double quotes and separated by a comma.
 - Example: "109829", "", "123 Doors & Windows", "1/7/2009"
- Any double quotes in a string field will have a double quote appended to it.
 - Example: original string= 123 Doors & Windows "Double Quoted"
 - output = "123 Doors & Windows ""Double Quoted"""
- Any line feeds will stay the same.
 - Example: original string= 123 Doors & Windows
 - output = "123 Doors & Windows"
- If the user or site doesn't have necessary permissions for a field, then it will fill that field with a blank. If the user does not have permission to view pricing, then it will fill the field with "".

- The header record will contain the following columns:

Field	Permission Checked
OrderNumber	
PONumber	
Manufacturer SiteName	
OrderDate	
CustomerRef	
OrderContact	
MeasurementType	
SalespersonName	
ReqDate	
Discount /Markup/Margin Value	Yes
OrderNotes	
OrderComment	
Shipping CompanyName	
Shipping Address1	
Shipping Address2	
Shipping State	
Shipping ZipCode	
Shipping Phone	
Shipping Fax	
Shipping ShipVia	
Drop Ship	
Shipping Comments	
SubTotal	Yes
TaxTotal	Yes
Misc Total	Yes
Total	Yes

- The detail record will contain the following columns:

Field	Permission Checked
LineItem	
SubLineItem	
Quantity	
Part	
CallSize	
Width	
Height	
Thickness	
Cost	Yes
UnitPrice	Yes
ExtendedUnitPrice	Yes
SqFtPrice	Yes
OptionsDescription	
IsSurchargePart	
Comment	
Exception	

To enter line item information, complete the following:

- Select a category from the left dropdown list. This will filter the part list to only the parts that exist in the selected category.
- Select a part from the right dropdown list.

Category:	Windows & Doors	Part:	700-DH - Double Hung Window	Add	
Item	Quantity	Part	Size	Price	Total
				Subtotal:	\$0.00
				Tax:	\$0.00
				Total:	\$0.00

- Click the **Add** button to view the Add Quote Item page. This screen allows the user to configure the line item quantity, sizing, options, and comments. The following is an example of a 700-DH window.

Add Quote Item
Add **Cancel**

Part

Quantity:

Call Size:

Width:

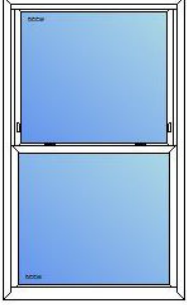
Height:

Question	Option	Input
Sizing?	RO - ROUGH OPENING	▼
Window Color?	WHT - PAINTABLE WHITE LITE FRAME	▼
Oriel?	{None}	▼
Glass Configuration?	IG-STD - IG STANDARD GLASS	▼
Glass Type?	DCCW - DS CLEAR/CLEAR	▼
Gas?	{None}	▼
Grids?	{None}	▼
Temp?	{None}	▼
Screen?	SCRN - SCREEN	▼
Screen Type?	HALF - HALF SCREEN	▼
Screen Material?	FIBER - FIBER GLASS SCREEN	▼
Locks?	AUTOLK - AUTO CHOOSE NUMBER OF LOCKS	▼
Foam Wrap?	FOAM - FOAM WRAP	▼
Test	{None}	▼

Line Item Comment:

Add **Cancel**

700-DH



[View Summary](#)

- Enter the required information in the following fields:

- **Quantity** - Line item quantity
- **Call Size** - Width and height of the ordered part in using the industry standard call size. The value entered in this field will be converted to the specified measurement type on the quote header and the converted value will be displayed in the Width and Height fields. The standard format of this field is FIFI where F = Feet and I = Inches.
- **Width** – Width of the ordered part. Decimal or fraction values may be entered. *Disabled when a call size is selected.*
- **Height** – Height of the ordered part. Decimal or fraction values may be entered. *Disabled when a call size is selected.*
- **Thickness** – Thickness of the ordered part. Decimal or fraction values may be entered.

- Configure Options. If an option is required, the user will not be able to make further selections until the required choice is made. In the example below, the screen is a required choice. Once an option is selected, the user may proceed with further option selections or add the quote item.

NOTE: Shape and Muntin managers are available through the Web Center options wizard. When configured, an extra button will display in the Input column which will take the user to either the Shape Manager or Muntin Manager web page.

Add Quote Item
Cancel

Part

Quantity:

Call Size:

Width:

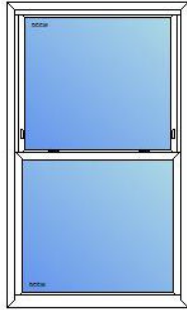
Height:

Question	Option	Input
Sizing?	RO - ROUGH OPENING	<input type="button" value="v"/>
Window Color?	WHT - PAINTABLE WHITE LITE FRAME	<input type="button" value="v"/>
Oriel?	{None}	<input type="button" value="v"/>
Glass Configuration?	IG-STD - IG STANDARD GLASS	<input type="button" value="v"/>
Glass Type?	DCCW - DS CLEAR/CLEAR	<input type="button" value="v"/>
Gas?	{None}	<input type="button" value="v"/>
Grids?	{None}	<input type="button" value="v"/>
Temp?	{None}	<input type="button" value="v"/>
Screen?	{(Required)}	<input type="button" value="v"/>

Line Item Comment:

Cancel

700-DH

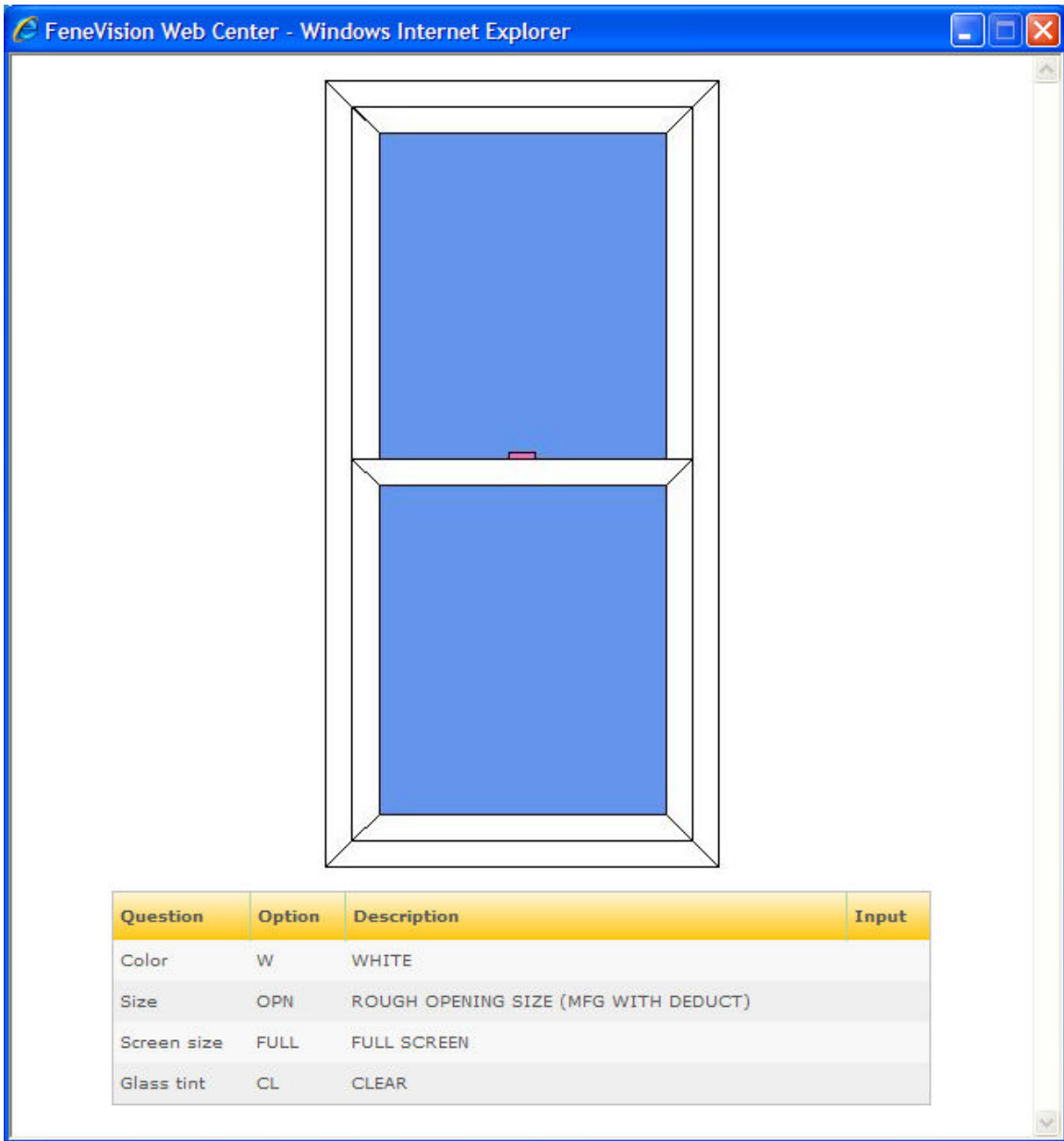


[View Summary](#)

- Line item comments, which are any notes needed to be made regarding the part being entered, can be typed in the Line Item Comment field. *(Optional)*

Line Item Comment:

7. The part being entered includes a link to a larger view. Click the “View Summary” link to see the larger image and a summary of the options selected.



The screenshot shows a web browser window titled "FeneVision Web Center - Windows Internet Explorer". The main content area displays a technical drawing of a double-hung window frame with two panes of blue glass. Below the drawing is a table with the following data:

Question	Option	Description	Input
Color	W	WHITE	
Size	OPN	ROUGH OPENING SIZE (MFG WITH DEDUCT)	
Screen size	FULL	FULL SCREEN	
Glass tint	CL	CLEAR	

- When all fields are completed and required options have been configured, the “Add” button will appear. Click the “Add” button for the line item to be added to the quote.

The screenshot shows the 'Quote Entry' window with the following details:

Header Information: Acknowledgement, Finish

General: Quote Number: 109791, Quote Date: 9/9/2008, Customer: House Account, Status: On Hold, Comment: (empty)

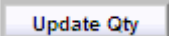
Shipping: PO Number: (empty), Customer Ref.: (empty), Salesperson: (empty), Terms: (empty), Markup %: (empty)

Invoicing: My Site: 123 Doors & Windows, Contact: (empty), Est. Ship Date: 9/12/2008, Exp. Date: 10/9/2008

Category: Windows & Doors, Part: 700-2LS - 2 Lite Slider, Add

Item	Quantity	Part	Size	Price	Total	
1	1	700-DH - Double Hung Window	3050	\$211.87	\$211.87	[Link] [Down Arrow] [Close]
Sizing?{RO}, Window Color?{BG}, Glass Configuration?{Glass Type?{DCCW}, Grids?{CCOLW=[2Vx2HC]}, IG-STD}, Screen?{NS}, Locks?{AUTOLK}, Foam Wrap?{FOAM}						
2	1	700-2LS - 2 Lite Slider	3030	\$150.41	\$150.41	[Link] [Up Arrow] [Close]
Sizing?{RO}, Window Color?{BG}, Glass Configuration?{Glass Type?{DCCW}, Grids?{CCOLW=[1Vx2HC]}, IG-STD}, Screen?{NS}, Locks?{AUTOLK}, Foam Wrap?{FOAM}, REP						
SURCHARGE				\$7.25	\$7.25	
				Subtotal:	\$369.53	
				Tax:	\$0.00	
				Total:	\$369.53	

Update Qty

- To edit a line item, select the link in the part column, to display the edit quote item screen.
- To change the quantity of an item, enter the new amount in the provided field and click the  button.
- To view a line item price breakdown, click the link in the price column. The user can to edit the price of the part and options.

The Order Item Price Breakdown screen provides the following information

- Part Price** – Price of the part.
- Item Price** – Sum of the part and option prices for the item. Will be the same as overall price when the ordered part does not have sub line items. However, when the ordered item has sub line items (that are priced), the overall price will obviously exceed the item price.
- Item Cost** – Cost for the item. Will be the same as overall cost when the ordered part does not have sub line items. However, when the ordered item has sub line items (that have a cost), the overall cost will obviously exceed the item cost.
- Overall Price** – Sum of all part and option prices on the ordered item and all sub line items.
- Overall Cost** – Sum of all item costs on the ordered item and all sub line items.

Line Item Price Breakdown: 109817-1


Quantity: Item: Size:


Part Price:

Option Prices:

Question	Code	Description	Value	Price
Sizing?	FINISH	FINISH SIZE		\$0.00 Edit
Window Color?	WHT	PAINTABLE WHITE LITE FRAME		\$0.00 Edit
Glass Configuration?	IG-STD	IG STANDARD GLASS		\$6.05 Edit
Glass Type?	DCCW	DS CLEAR/CLEAR		\$0.00 Edit
Gas?	ARG	ARGON GAS		\$0.00 Edit
Screen?	SCRN	SCREEN		\$0.00 Edit
Screen Type?	HALF	HALF SCREEN		\$0.00 Edit
Screen Material?	FIBER	FIBER GLASS SCREEN		\$0.00 Edit
Locks?	AUTOLK	AUTO CHOOSE NUMBER OF LOCKS		\$0.00 Edit
Foam Wrap?	FOAM	FOAM WRAP		\$0.00 Edit

Item Price:
 Item Cost:
 Overall Price:
 Overall Cost:

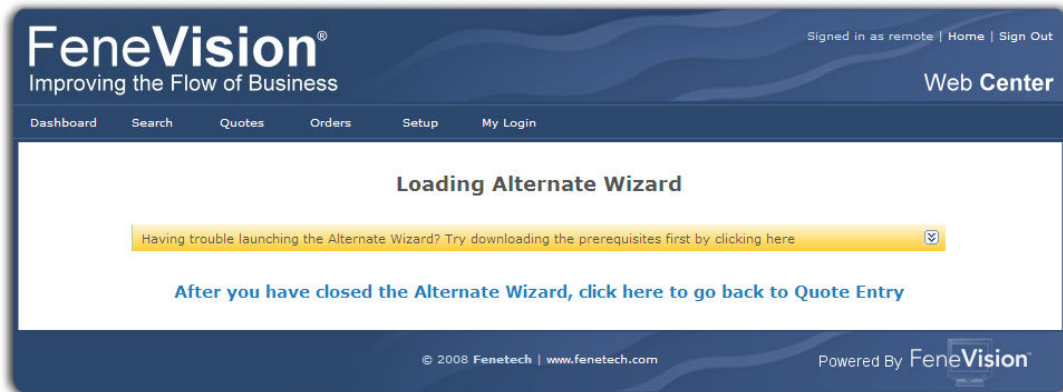
12. The  button will copy the current line item and paste it at the end of the quote.

13. The  button will delete the line item from the quote.

14. The up and down arrow buttons allow line items to be moved.

Alternate Wizard

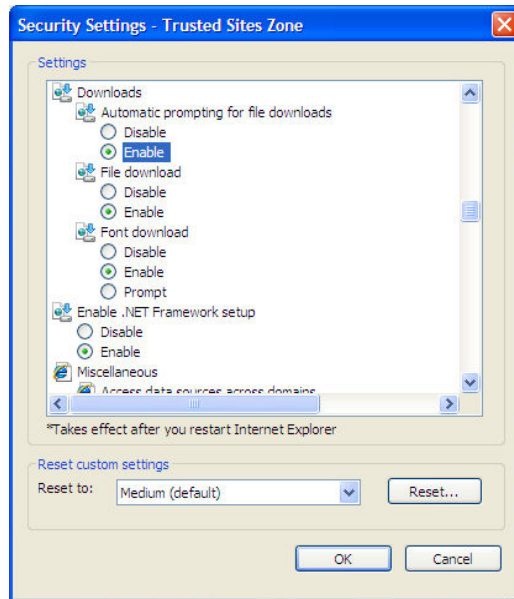
When entering an opening designer part or a bay or bow, the following screen will appear. Note: This screen launches downloads that installs components on the user's computer that makes opening bay and bow configuration simple. This functionality is only available on Internet Explorer 7 and 8, and FireFox 3.



The first time this screen is opened, the user needs to follow the on-screen instructions to download the appropriate components onto their computer. If using Internet Explorer, the user may also wish to use the following instructions which allow the browser to automatically launch Opening Designer or the Bay Bow Designer. If the following steps are not taken, the user will need to manually launch the Opening Designer or Bay Bow Designer each time they access this page.

1. When the Web Center website is open, locate the top tool bar. Click Tools → Internet Options.
2. In the Internet Options screen, click the "Security" tab.
3. Click the "Trusted Sites" icon.
4. Click the "Sites" Button.
5. Add the Web Center website to the list and close the box.
6. Click the "Custom Level" button for trusted sites on the Internet Options box. When the Security Settings screen displays, scroll down to the Downloads section, and change the setting for 'Automatic prompting for file downloads' to "Enable".

7. If the user has changed it from “Disable” to “Enable”, the user must close Internet Explorer and reopen it.



Quote Maintenance

The Quote Maintenance screen provides a centralized location in which quotes can be uploaded, edited, and/or deleted.

To access the quote maintenance screen, click Quotes → Maintenance.

Quote Maintenance

Available

	Quote	Date	Customer	Total	My Site	Mfg PO Number	Mfg Customer Ref.	Expires	
<input type="checkbox"/>	110096	2/15/2010	ABC Homeowner	\$0.00	Main Office	110096	ABC Homeowner	Edit 3/17/2010	
<input type="checkbox"/>	110095	2/15/2010	MD another customer	\$24,166.80	Main Office	110095	MD another customer	Edit 3/17/2010	
<input type="checkbox"/>	110093	2/11/2010	ABC Homeowner	\$377.69	Main Office	110093	ABC Homeowner	Edit 3/13/2010	
<input type="checkbox"/>	110092	2/5/2010	maria's alluser customer	\$0.00	Main Office	110092	maria's alluser customer	Edit 3/7/2010	
<input checked="" type="checkbox"/>	110091	2/4/2010	maria's alluser customer	\$963.71	Main Office	110091	maria's alluser customer	Edit 3/6/2010	
<input type="checkbox"/>	110090	2/4/2010	maria's alluser customer	\$0.00	Main Office	110090	maria's alluser customer	Edit 3/6/2010	
<input type="checkbox"/>	110089	2/4/2010	maria's alluser customer	\$0.00	Main Office	110089	maria's alluser customer	Edit 3/6/2010	
<input type="checkbox"/>	110088	1/28/2010	Window Mart	\$1,200,557.44	Main Office	110088	Window Mart	Edit 2/27/2010	
<input type="checkbox"/>	110086	1/18/2010	Maria's customer	\$1,839.94	Main Office	110086	Maria's customer	Edit 2/17/2010	

Several tabs are provided to help manage the quotes. These tabs are as follows:

Available - All quotes except those with a status of 'On Hold' that have been entered.

On Hold - Quotes placed on hold.

Expired- Expired quotes.

Uploaded – Uploaded quotes.

The links and buttons in the Order Maintenance Screen allow the user to do following:

Quote Link – Quote entry page for the quote will be displayed.

Red Box on Quote Number – Quote has at least one line item with an exception.

Edit Link – Enter a PO Number and Customer Ref. These values will be uploaded to the manufacturer as the PO Number and Customer Ref on the order. The default radio button selections can be specified in the Company Information setup screen.

	Quote	Date	Customer	Total	My Site	Mfg PO Number	Mfg Customer Ref.	Expires	
<input type="checkbox"/>	110096	2/15/2010	ABC Homeowner	\$0.00	Main Office	<input checked="" type="radio"/> Order <input type="radio"/> PO <input type="radio"/> <input type="text"/>	<input checked="" type="radio"/> Customer <input type="radio"/> Order-Customer <input type="radio"/> Customer Ref. <input type="radio"/> <input type="text"/>	Update Cancel 3/17/2010	



- Print the quote/order to a PDF (Adobe Acrobat) file.



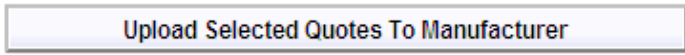
– Copy the quote to a new quote and automatically open up Quote Entry for the new quote.



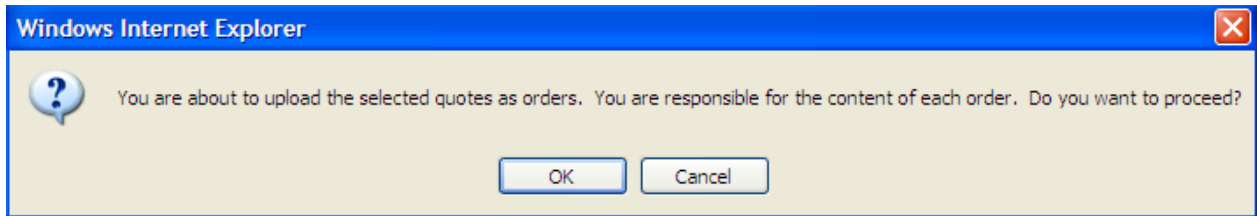
– Delete the quote.

To upload selected quotes to a manufacturer, complete the following:

1. Click the checkbox to the left of each quote to be uploaded.



2. Click the **Upload Selected Quotes To Manufacturer** button located in the Available Tab of Quote Maintenance. The manufacture can configure the message the customer will see at this point. See the screenshot shown below for an example.



3. Click the “OK” button to upload the quote(s).
4. Once the upload is complete, a confirmation screen will appear that lists all quotes successfully uploaded, and those that failed to upload. The number on the left of the screen is the manufacturer’s order number All successfully uploaded orders will now display in the ‘Open Orders’ section of the Dashboard.



Orders

Orders are either uploaded quotes by the Web Center user-or entered directly by the manufacturer. The customer will be able to view both types of orders as they are processed by the manufacturer. This section will explain the tools available to monitor orders.


Order History


The user can view order history, whether or not the order has been placed through Web Center. To do this, complete the following:

1. Click Orders → Order History.
2. Enter the desired date range, and click on the “Submit” button. This will display a list of all orders and quotes placed by the Web Center user’s company.

3. Open and complete orders can be viewed, depending on the tab selected.

Order History

Starting Date: 

Ending Date: 

2 open orders found between 6/9/2008 and 7/9/2008.

Open Orders Complete Orders

Order	Type	Date	My Site	PO Number	Customer Ref.	Total
109749	Normal	7/8/2008	123 Doors & Windows	308		\$165.51
109748	Normal	6/20/2008	123 Doors & Windows			\$168.75

4. Click on the order number on the left to view the order status page, shown below. (Read-only)

Order Status					
Header Information					
General Shipping Invoicing					
Order Number:	109749	Order Date:	7/8/2008	PO Number:	308
Order Type:	Normal	Ack. Date:		Customer Ref.:	
My Site:	123 Doors & Windows	Target Ship Date:	7/11/2008	Salesperson:	McDonald, Gerard
Comment:					
		Ship Date:			
		Invoice Date:			
Item	Quantity	Part	Size	Price	Total
1	1	700-DH - Double Hung Window	30 W X 50 H	\$162.26	\$162.26
Sizing?{RO}, Window Color?{BG}, Glass Configuration?{Glass Type?{DCCW}, Grids?{CCOLW=[1Vx1HC]}, IG-STD}, Screen?{Screen Type?{HALF}, Screen Material?{FIBER}, SCRNI}, Locks?{AUTOLK}, Foam Wrap?{FOAM}					
SURCHARGE -				\$3.25	\$3.25
				Subtotal:	\$165.51
				Tax:	\$0.00
				Non-Taxable Misc:	\$0.00
				Total:	\$165.51

5. Click on the link next to the ship date to view shipping information for the order.

Order Status					
Header Information					
General Shipping Invoicing					
Order Number:	207017	Order Date:	2/28/2005	PO Number:	22805-2
Order Type:	Normal	Ack. Date:	2/17/2006	Customer Ref.:	MILLER
My Site:	123 Doors & Windows	Target Ship Date:	3/7/2005	Salesperson:	McDonald, Gerard
Comment:					
		Ship Date:	3/4/2005		
		Invoice Date:	2/21/2006		
Item	Quantity	Part	Size	Price	Total
1	4	700-DH - Double Hung Window	36 1/2 W X 51 1/2 H	\$121.27	\$485.08
Equal Glass?{EQUAL}, Handle Rail?{LIFT}, Series?{N/C}, Sizing?{FINISH}, Window Color?{WHT}, Glass Configuration?{Glass Type?{D1CW}, Gas?{ARG}, Grids?{FCOLW=[3Vx1HC]}, IG-STD}, Screen?{Screen Type?{HALF}, Screen Material?{FIBER}, SCRNI}, Locks?{AUTOLK}					
2	2	700-DH - Double Hung Window	31 1/2 W X 35 1/2 H	\$127.89	\$255.78
Equal Glass?{EQUAL}, Handle Rail?{LIFT}, Series?{N/C}, Sizing?{FINISH}, Window Color?{WHT}, Glass Configuration?{Glass Type?{DTSCW}, Gas?{ARG}, Grids?{FCOLW=[2Vx1HC]}, IG-STD}, Screen?{Screen Type?{HALF}, Screen Material?{FIBER}, SCRNI}, Locks?{AUTOLK}					
3	1	700-DH - Double Hung Window	31 1/2 W X 43 1/2 H	\$110.45	\$110.45

Below is a sample of shipping information:

Route:		DOORS & WINDOWS			
Target Ship Date:					
Actual Ship Date:		3/4/2005			
Item	Part	Ordered Qty	Shipped Qty	Delivered Qty	Delivered Time
1	700-DH - Double Hung Window	4	4	0	
2	700-DH - Double Hung Window	2	2	0	
3	700-DH - Double Hung Window	1	1	0	
4	700-DH - Double Hung Window	7	7	0	
5	700-DH - Double Hung Window	2	2	0	
6	700-DH - Double Hung Window	2	2	0	
7	700-DH - Double Hung Window	1	1	0	
8	700-DH - Double Hung Window	6	6	0	

Production Status

The manufacturer may elect to allow the Web Center users to see Production Status for orders. If this is the case, a link to Production Status will be displayed between the order header and the line items on the order.

Order Status

Header Information

General Shipping Invoicing

Order Number: 109881	Order Date: 4/15/2009	PO Number: OPENING123
Order Type: Normal	Ack. Date: 4/15/2009	Customer Ref.:
My Site: 123 Doors & Windows	Target Ship Date: 4/27/2009	Salesperson: McDonald, Gerard
Comment:	Ship Date:	
	Invoice Date:	

Production Status

Item	Quantity	Part	Size	Price	Total
1	1	OPENING - OPENING	90 W X 84 H	\$423.92	\$423.92
Subtotal:					\$423.92
Tax:					\$0.00
Non-Taxable Misc:					\$0.00
Total:					\$423.92

When the Production Status link is selected, the following screen (Order Production Status) appears.

Order Production Status
Print

Header Information

General
Shipping
Invoicing

Order Number: 109881	Order Date: 4/15/2009	PO Number: OPENING123
Order Type: Normal	Ack. Date: 4/15/2009	Customer Ref.:
My Site: 123 Doors & Windows	Target Ship Date: 4/27/2009	Salesperson: McDonald, Gerard
Comment:	Ship Date:	
	Invoice Date:	

Schedule	Batch	Unit	Bin	Item/Order	Part	Station	Date/Time	Status	Container
473	1	4	4	1/1	OPENING - OPENING		4/15/2009 10:54:50 AM	Released	
473	1	5	5	1.1/1	700-DH - Double Hung Window		4/15/2009 10:54:50 AM	Released	
473	1	6	6	1.2/1	700-DH - Double Hung Window		4/15/2009 10:54:50 AM	Released	
473	1	7	7	1.3/1	SNAPMULL - SNAP MULL STRIP		4/15/2009 10:54:50 AM	Released	

Purchase History

Clicking the Purchase History menu brings up a screen for the total invoiced sales for a specified time period, total overall sales, item quantity, and percentage of item sales.

The user can display information by Orders, Parts, or Options for designated starting and ending dates.

1. Clicking the button will summarize customer information for all orders during the designated time frame.

The screenshot shows a web application window titled "Purchase History". At the top, there are two date input fields: "Starting Date" with the value "1/17/2001" and "Ending Date" with the value "2/17/2010". Below these are four buttons: "Customers" (which is highlighted), "Orders", "Parts", and "Options". A message below the buttons states "3 customers found between 1/17/2001 and 2/17/2010." Below this is a table with the following data:

Customers	Quantity	Total Sales	Percentage
P O OR Window Mart	2	\$263.65	0.10 %
P O OR ABC Homeowner	12	\$2,269.09	0.84 %
P O OR {Orders Entered by Manufacturer}	1,675	\$267,946.21	99.06 %
Overall Totals	1,689	\$270,478.95	100.00 %

- a. Clicking the “P” from the customer column will display ordered part sales screen detailing the part sales for the selected customer.

Purchase History

Starting Date:

Ending Date:

Customers **Orders** **Parts** **Options**

6 parts found between 1/17/2001 and 2/17/2010 for customer ABC Homeowner.

Part	Quantity	Total Sales	Percentage
DH-700 - 700 Series Double Hung Window	5	\$932.03	41.08 %
2LS-700 - 700 Series 2 Lite Slider	3	\$591.94	26.09 %
DHTWIN-700 - 700 Series Twin Double Hung Window	1	\$445.22	19.62 %
CS-700 - 700 Series Casement	2	\$279.90	12.34 %
SURCHARGE	0	\$20.00	0.88 %
BAY-3 - 3 LITE BAY WINDOW	1	\$0.00	0.00 %
Overall Totals	12	\$2,269.09	100.00 %

- b. Clicking the “O” from the customer column will display ordered option sales screen detailing the option sales for the selected customer.

Purchase History

Starting Date:

Ending Date:

Customers **Orders** **Parts** **Options**

14 options found between 1/17/2001 and 2/17/2010 for customer ABC Homeowner.

Options	Quantity	Total Sales	Percentage
P FULL-FULL SCREEN	5	\$124.55	65.13 %
P WHT-PAINTABLE WHITE LITE FRAME	9	\$45.00	23.53 %
P BG-BEIGE	2	\$21.69	11.34 %
P DCCW-CLEAR/CLEAR	11	\$0.00	0.00 %
P FIBER-FIBER GLASS SCREEN	10	\$0.00	0.00 %
P RO-ROUGH OPENING	10	\$0.00	0.00 %
P FOAM-FOAM WRAP	10	\$0.00	0.00 %
P AUTOLK-AUTO CHOOSE NUMBER OF LOCKS	8	\$0.00	0.00 %
P HALF-HALF SCREEN	3	\$0.00	0.00 %
P XO-XO	3	\$0.00	0.00 %
P HL-HINGE LEFT	2	\$0.00	0.00 %
P D30-30 DEGREES	1	\$0.00	0.00 %
Overall Totals	76	\$191.24	100.00 %

c. Clicking the “OR” from the customer column will display the orders for the selected customer.

Purchase History

Starting Date:

Ending Date:

Customers **Orders** **Parts** **Options**

7 orders found between 1/17/2001 and 2/17/2010 for customer ABC Homeowner.

Order	PO Number	Quantity	Total Sales	Percentage
110035	123	5	\$730.42	32.19 %
109847		2	\$683.85	30.14 %
109848		1	\$221.94	9.78 %
110037	123	1	\$219.61	9.68 %
109849		1	\$139.95	6.17 %
109850		1	\$139.95	6.17 %
110036	110042	1	\$133.37	5.88 %
Overall Totals		12	\$2,269.09	100.00 %

2. Clicking the **Orders** button will show sales information for all orders during the designated time frame.

Purchase History

Starting Date:

Ending Date:

Customers **Orders** **Parts** **Options**


143 orders found between 6/9/2005 and 7/9/2008.


Order	PO Number	Quantity	Total Sales	Percentage
109296	PO	101	\$13,617.93	7.42 %
109334	1ofEach1	43	\$11,790.13	6.43 %
109344	1of each2	43	\$11,790.13	6.43 %
109299	1 of each	43	\$11,676.34	6.37 %
207082	42605-4	48	\$10,383.85	5.66 %
109471	45003	5	\$5,609.46	3.06 %
207066	42205-4	21	\$4,663.80	2.54 %
207017	22805-2	34	\$4,040.26	2.20 %
207053	4405-8	30	\$3,568.55	1.95 %
207080	42605-2	17	\$3,559.57	1.94 %
109599	65234	9	\$3,508.11	1.91 %
207059	4705	23	\$3,488.58	1.90 %
Overall Totals		1,391	\$183,442.98	100.00 %

Note: The total sales dollar values do not include sales tax, or non-taxable miscellaneous charges from Order Status.

3. Clicking the Parts button will display all parts purchased for the chosen dates. This screen displays the total sales for the given time period and also the percentage of total sales for each part.

Purchase History

Starting Date: 

Ending Date: 


Customers Orders Parts Options


72 parts found between 6/9/2005 and 7/9/2008.

Part	Quantity	Total Sales	Percentage
DH-700 - 700 Series Double Hung Window	478	\$76,008.39	41.43 %
2LS-700 - 700 Series 2 Lite Slider	175	\$22,683.60	12.37 %
OPENING - OPENING	16	\$12,447.76	6.79 %
PD-700 - 700 Series PD Patio Door	20	\$7,988.64	4.35 %
STEELDOOR - Steel Entry Door Series	8	\$6,616.40	3.61 %
PW-700 - 700 Series Picture Window	29	\$5,716.45	3.12 %
VistaView - Vista View Opening	3	\$4,015.65	2.19 %
RSH - Radius Top Single Hung	3	\$2,921.25	1.59 %
CIR - Circle	6	\$2,565.00	1.40 %
CS-700 - 700 Series Casement	13	\$2,403.73	1.31 %
3100-DH - Double Hung	14	\$2,322.66	1.27 %
QRSH - QUARTER ROUND W/ SINGLE HUNG SASH	3	\$2,240.10	1.22 %
Overall Totals	1,391	\$183,442.98	100.00 %

- a. Clicking a part from the Part column will display ordered option sales screen detailing the options sales for the selected part.

Purchase History

Starting Date: 

Ending Date: 

Customers Orders Parts Options

53 options found between 6/9/2005 and 7/9/2008.

Options	Quantity	Total Sales	Percentage
P CCOLW-CONTOUR COLONIAL GRIDS	6	\$267.92	8.56 %
P VDIAS-V-GROOVE DIAMOND GRIDS - SASH	8	\$266.24	8.51 %
P FULL-FULL SCREEN	67	\$214.23	6.85 %
P CMR-CENTER MEETING RAIL	14	\$207.84	6.64 %
P D6C6W-R-10 SB60/CLEAR/SB60	12	\$206.24	6.59 %
P VSPW-V-GROOVE SINGLE PRAIRIE GRIDS	4	\$203.08	6.49 %
P BG-BEIGE	53	\$181.34	5.80 %
P WHT/BR-WHITE / BROWN	3	\$172.62	5.52 %
P BCOLW-BRASS PENCIL COLONIAL GRIDS	2	\$160.32	5.12 %
P C2COLW-CONTOUR TUTORNE COLONIAL GRIDS	3	\$155.77	4.98 %
P IG-STD-IG STANDARD GLASS	469	\$150.37	4.81 %
P KRY-KRYPTON	149	\$139.96	4.47 %
Overall Totals	6,354	\$3,128.84	100.00 %

b. Clicking the **P** will display a screen detailing part sales for the chosen dates for the selected option.

Purchase History

Starting Date:

Ending Date:

Customers **Orders** **Parts** **Options**

9 parts found between 6/9/2005 and 7/9/2008 with option code CCOLW.

Part	Quantity	Total Sales	Percentage
2LS-700 - 700 Series 2 Lite Slider	3	\$97.98	11.67 %
3100-DH - Double Hung	4	\$46.24	5.51 %
3100-PW - Picture Window	4	\$114.69	13.66 %
3700-2LS - 2 Lite Slider	1	\$30.39	3.62 %
AW-700 - 700 Series Awning	2	\$37.40	4.45 %
CS-700 - 700 Series Casement	2	\$48.03	5.72 %
DH-700 - 700 Series Double Hung Window	6	\$267.92	31.90 %
OCT - Octagon	1	\$26.06	3.10 %
PD-700 - 700 Series PD Patio Door	1	\$171.16	20.38 %
Overall Totals	24	\$839.87	100.00 %

4. Clicking the **Options** button will display a screen detailing option sales for the chosen dates. The screen displays the total option sales for the given time period and percentage of total sales for each option.

Purchase History

Starting Date:

Ending Date:


Customers **Orders** **Parts** **Options**


158 options found between 6/9/2005 and 7/9/2008.

Options	Quantity	Total Sales	Percentage
P 430-430 GLASS FOR 4 PANEL DOORS	5	\$2,425.45	14.02 %
P DTCCW-TEMP CLEAR/CLEAR	20	\$1,735.87	10.04 %
P STN401-STN401 STYLE DOOR	4	\$1,581.48	9.14 %
P 1COLR-ONE COLOR PAINTING	9	\$1,277.82	7.39 %
P 406-406 GLASS FOR FLUSH DOORS	2	\$1,073.14	6.21 %
P CCOLW-CONTOUR COLONIAL GRIDS	24	\$839.87	4.86 %
P C2COLW-CONTOUR TUTONE COLONIAL GRIDS	16	\$789.03	4.56 %
P K/K-AB-KNOB/KNOB PHOENIX AB	12	\$591.24	3.42 %
P LO/WHT-LIGHT OAK / WHITE	11	\$582.78	3.37 %
P BG-BEIGE	115	\$520.22	3.01 %
P IG-STD-IG STANDARD GLASS	772	\$477.58	2.76 %
P KRY-KRYPTON	181	\$386.18	2.23 %
Overall Totals	10,272	\$17,294.07	100.00 %

- a. Clicking the P will display a screen detailing part sales for the chosen dates for the selected option.

Purchase History

Starting Date: 

Ending Date: 

1 part found between 6/9/2005 and 7/9/2008 with option code 430.

Part	Quantity	Total Sales	Percentage
STEELDOOR - Steel Entry Door Series	5	\$2,425.45	100.00 %
Overall Totals	5	\$2,425.45	100.00 %

Support Files

The Support Files page allows the Web Center user to download documents and files from the manufacturer. These files may be downloadable by all Web Center users (perhaps a generic sales brochure), by the customer associated with the login (perhaps a price book for the customer), or by site (perhaps tax tables for the city the site is located in).

Exiting

Click the "Sign out" link in the upper right corner of the screen.