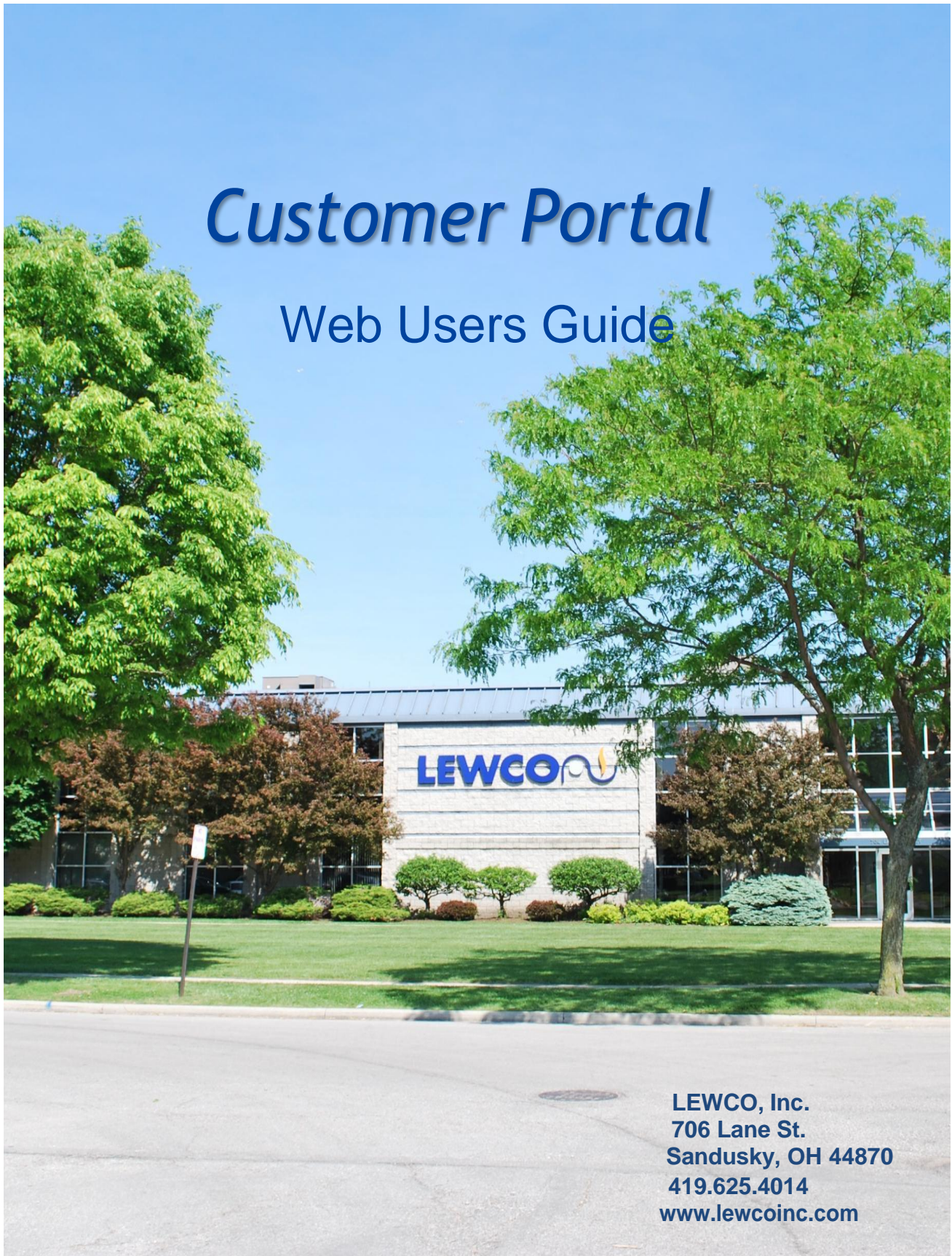


Customer Portal

Web Users Guide



LEWCO, Inc.
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Sandusky, OH 44870
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www.lewcoinc.com

Preface

About LEWCO

LEWCO, Inc. is a world-class industrial equipment manufacturer, focused on providing customer value, promoting the growth and well-being of our people, and ensuring the financial strength and security of our organization. Located in north central Ohio, our 165,000 sq. ft. facility houses a complete professional staff of sales, engineering and skilled trade personnel and the most modern metal manufacturing equipment available that work together to produce Industrial Ovens and Unit Handling Conveyors. We utilize state of the art solid modeling design software and CAD/CAM processes including CNC laser cutting, CNC press brake, CNC turret punch, CNC sawing, CNC mill and robotic welding in the manufacturing of our ISO 9001:2008 quality products.

LEWCO, Inc. Core Values

LEWCO, Inc. strives to lead the industries in which we compete through continuous improvement of the LEWCO Customer Value Proposition. LEWCO's Customer Value Proposition is the summation of product quality, on-time delivery, customer service, and price. Product Quality includes every detail of the physical product as well as LEWCO services. On-time Delivery applies to all customer deliverables including quotations, approval drawings, finished products, and installations. LEWCO Customer Service reflects that our customers are a top priority. We are responsive, helpful and professional. We strive to be Price competitive as evidenced by an ongoing effort to reduce cost. To achieve our mission, we recognize and commit to service our Internal Customers. Our people are the organization's greatest asset. We work to develop them and make them successful. We are concerned with the overall health and safety of our people. We promote and provide a safe and healthy workplace. The financial strength and security of our organization is only ensured through profitability which is everyone's responsibility to protect.

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Introduction

LEWCO Customer Portal is a quoting and ordering system that works the way you do. It makes creating Quotes and Orders fast and easy, allowing you to create multiple Quotes and Orders simultaneously.

We created the LEWCO Customer Portal with you in mind. If questions arise while using the portal, feel free to contact us at conveyorsales@lewcoinc.com


Customer Portal is a web browser-based application that uses a multi-dialog approach. A multi-dialog approach means that you can open several Quotes, Orders, etc. at the same time and work with them all at once.

This *Introduction* section discusses the following topics:

- Customer Portal Conventions
- Key Features
- Basic Concepts
- Typical Customer Portal Steps
- Starting Customer Portal
- Navigating Customer Portal
- Changing System Settings

Customer Portal Conventions

Customer Portal has several basic conventions employed throughout the application. The following sections review these basic conventions.

- **Required Fields** – *Required fields* are text entry fields that require information in order for the system to operate. These field names are denoted by a (*). All fields preceded by a (*) are *required fields*. You must provide information for these fields to continue building your Customer, Contact, Quote, etc.
- **Info Icon** – The  **Info** icon denotes entered information is either invalid or needs additional input. For example, if you enter alphabetical characters in a field that requires a numerical entry, the **Info** icon appears. Please note that tablet users will not be able to view Info icon tooltips due to touch-screen interface limitations.
- **Dropdown Menus** – *Dropdown menus* (or option lists) display a menu when clicked. They allow the user to type information into the box or select an item from the list.
- **Date Pickers** – *Date pickers* allow you to specify dates using a calendar-based interface.

Overview of Basic Concepts

Customer Portal uses a few basic concepts throughout the application. To help you organize your workflow, each of the concepts listed below have status controls within the system.

- **Contact** – Contacts are representatives affiliated with a Customer. You may specify several Contacts for each Customer, with one selected Contact as the default. You must associate all Contacts with a respective Customer. In order to create a Contact, you must first create a Customer.
- **Configured Item** – Configured Items are customizable products. They are available with application specific options, such as size or color.
- **Quote** – A Quote provides an interested Customer with pricing or specifications before they are ready to purchase an Item.
- **Order** – Orders are lists of the final purchased Items.
- **Proposal** – Proposals are the printed form of Quotes or Orders. Proposals are the final product you send to your Customer. Customer Portal produces Proposals in the Adobe PDF format, so you may save the Proposal as a file to email it, or print the Proposal to paper to send it.

Typical Customer Portal Steps

Many items require that you create a different item first. For example, you cannot create an order without an existing quote to link to it.

The basic workflow for working with Customer Portal is as follows:

1. Create a Quote
2. Configure Product(s)
3. Submit Quote to LEWCO if specific pricing is required
4. Create an Order
5. Print a Proposal (View and Print finalized Quotes or Orders)

Starting Customer Portal

Use the following steps to start Customer Portal:

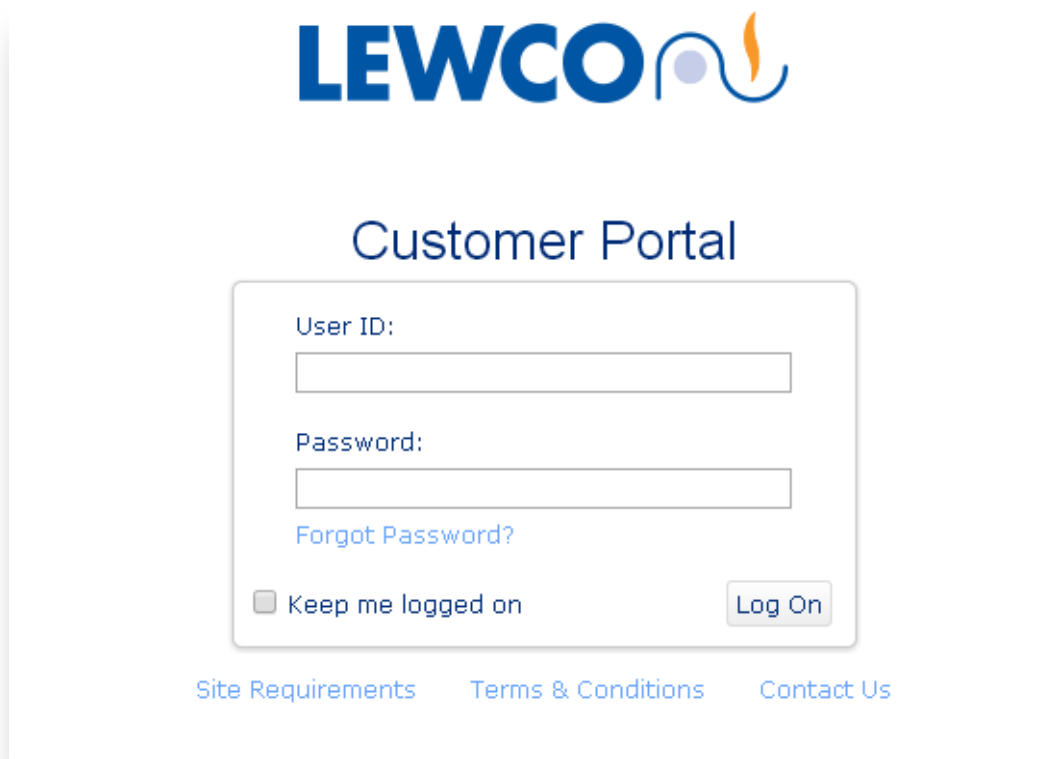
1. In your browser, navigate to the URL of the Customer Portal as supplied by LEWCO, Inc.
2. When you launch LEWCO Customer Portal, a Splash Screen may appear for a brief time while the application loads.



3. After the application loads, the Customer Portal Login dialog appears.

Login Dialog

The Login dialog provides application security for LEWCO Customer Portal.




The screenshot shows the LEWCO Customer Portal login interface. At the top is the LEWCO logo, which consists of the word "LEWCO" in blue and a stylized orange and blue flame icon. Below the logo is the text "Customer Portal". The login form is a white box with a light gray border. It contains the following elements: a "User ID:" label above a text input field; a "Password:" label above a text input field; a blue link "Forgot Password?" below the password field; a checkbox labeled "Keep me logged on" below the password field; and a "Log On" button to the right of the checkbox. At the bottom of the form are three blue links: "Site Requirements", "Terms & Conditions", and "Contact Us".

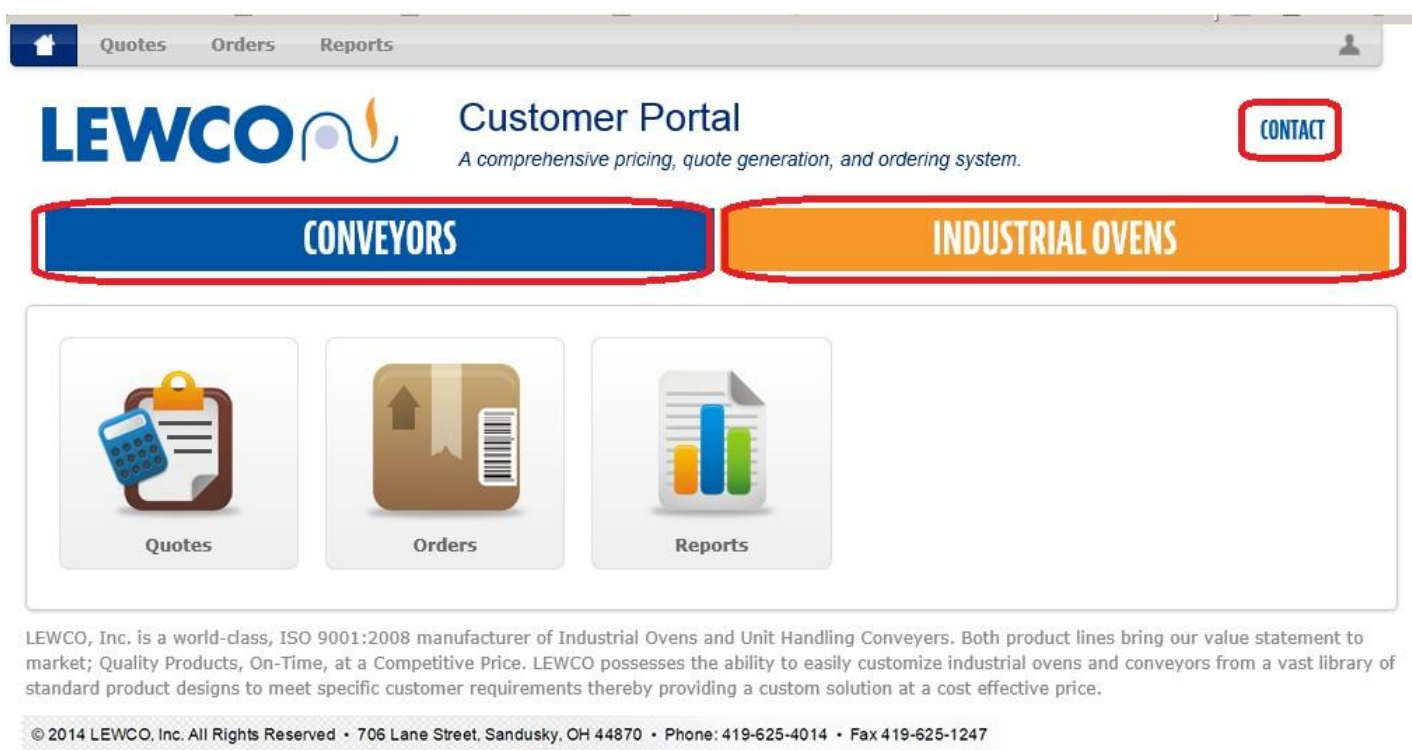
Customer Portal login controls and features include:

- **Site Requirements** – Lists third-party applications required for Customer Portal use.
- **Terms and Conditions** – LEWCO, Inc.'s web configurator and nondisclosure agreement.
- **Contact Us** – Allows an email to be initiated and sent to LEWCO, Inc. Customer Service Personnel.
- **User ID** – Enter your assigned user identification into the *User ID* field.
- **Password** – Enter your password into the *Password* field.
- **Keep me logged on** – Optionally, check the *Keep me logged on* box to have the computer remember your login credentials for the active session, which is until the browser's cookies are cleared (varies by browser and settings).
- **Log On** – submits your login credentials.
- **Forgot Password?** – Click the **Forgot Password?** link to obtain your password.

Understanding the Home Page

The Customer Portal Home Page will appear after a successful login. The Home Page provides quick and easy access to the entities of Customer Portal.


- Clicking on an icon will take you directly to that entity's search grid.
- Create *New Quotes* or *Orders* by clicking the  in the corner of each entity's icon.
- The *System Messages* toolbar displays any messages sent to your account from LEWCO Inc. On the left side of the System Messages toolbar is an icon that displays whether the message is of type: *information*, *warning*, or *critical*. On the right side of the System Messages toolbar are message navigation tools to help scroll through multiple messages.




The following sections describe the controls and features available for Customer Portal navigation.

Navigation Bar

The Navigation Bar is located at the top of the Customer Portal application and contains contextual controls for Customer Portal as a whole. These controls include:

- **Home** –The  **Home** button returns the user to the Home Page.
- **Quotes** – Choose to create a *New Quote* or *Search* existing Quotes. See the Working with Quotes section for more information on creating and editing Quotes.

- **Orders** – Choose to create a *New Order* or *Search* existing Orders. See the Working with Orders section for more information on creating and editing Orders.
- **Conveyors** - By choosing Conveyors, you will be redirected to the conveyor product page on lewcoinc.com
- **Ovens** - By choosing Industrial Ovens, you will be redirected to the industrial oven product page on lewcoinc.com
- **Users Options** – The  **User Options** button contains the following menu options:
 - **My Profile** – Displays the profile and user-level Application Settings for the user currently logged in.
 - **My Company Profile** – Displays the company information linked to the user currently logged in.
 - **Help** – The **Help** option opens the Customer Portal user guide.
 - **Logout** – The **Logout** option logs the current user out of the system and returns the application to the Login dialog.

Entity Search Grids

The addition of *Search Grids* for each Customer Portal entity provides a way to quickly search for Quotes and Orders. Navigate to Search Grids by clicking on an entity from the Navigation Bar and selecting **Search** from the dropdown menu.

[Home](#)
[Quotes](#)
[Orders](#)
[Reports](#)

Quote Search

On-Behalf-Of:

[+ New Quote](#)

	Dealer	Name	ERPID	ID	Last Modified by	Modified on	Status
	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	LEWCO Inc			SQAA000001-1	Admin, Onbehalf	10/20/2014	Working

Page 1 of 1
Viewing 1 - 1 of 1

Typing in the text boxes at the top of column will filter the respective column to include only results which *contain* the typed text. Clear search filters using the icon.

Clicking on the column header itself will sort results in ascending and descending order alphabetically. If a search returns a list of more than results than can be displayed, the remaining entries will be paginated. Page navigation tools are found towards the bottom of the grid.

Once a search has returned the desired result, use the icon to access the action menu and interact with the record. Standard actions include **Open**, **Copy**, and **Delete**. Quotes and Orders also include **Print** and **Export** options.

Searchable Fields

Quotes/Orders –Dealer, Name, ERPID, ID, Last Modified by, Modified on, Status

Quotes and Orders

This section discusses how to create Quotes and Orders. You can create a Quote and convert it to an Order. You can also create an Order without creating a Quote.

This section contains the following information:

- Quote and Order Terms and Definitions
- Creating, Editing, and Deleting a Quote
- Creating, Editing, and Deleting an Order


The Quote dialog is where you create a new Quote for a customer. In the Quote dialog, the user adds and configures items, sets pricing, and adds information to the Quote *header* and *comments*.

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Information Area

The *Information* area allows you to provide basic information about your Quote.

The following items are available in the *Information* area:

- **Quote ID** – The *Quote ID* display generates and shows a Quote number automatically.
- **Location** – The Dealer Location menu is utilized currently.
- **Customer** – The *Customer* menu will display your own *Company Name*, *City*, and *State*
- **Quote Name** – The *Quote Name* text box allows you to give the Quote a unique reference name. Enter a reference to make the Quote search process easier.
- **Version** – The *Version* dropdown allows you to select the version number of the Quote you wish to display. Click the  icon to create a new version. Quote versions with a status of *Lost* or *Abandoned* will be removed as a selection from the *Version* dropdown. Each version is its own entity and is identified by number at the end of the Quote ID. When a version of a Quote is converted to an Order, any other versions of the Quote will become inactive.

Header Tab

The *Header* tab allows you to add additional information about the Quote. This information entered only applies to this Quote. If you change the Ship-to Address, for example, the address changes only for this particular Quote. The system does not save the new address record.

Header	Pricing	Items	Comments
Quote Information			
P.O. Number:	<input type="text"/>	Project:	<input type="text"/>
Quote Status:	<input type="text" value="Open"/>	Job:	<input type="text"/>
Created by: Smith, John 2/15/2012		Last Modified by: Smith, John 2/15/2012 Available to: 3/16/2012	
Address Information			
Bill-to:	Acme Inc.	Ship-to:	<input type="text" value="East Location"/>
Address 1:	123 Main St.	Name:	<input type="text" value="East Location"/>
Address 2:	<input type="text"/>	Address 1:	345 Oak St.
Address 3:	<input type="text"/>	Address 2:	<input type="text"/>
City:	Columbus	Address 3:	<input type="text"/>
State:	<input type="text" value="Ohio"/>	City:	Columbus
Zip:	43240	State:	<input type="text" value="Ohio"/>
Country:	<input type="text" value="United States"/>	Zip:	43240
		Country:	<input type="text" value="United States"/>
Shipping Information			
Shipping Policy:	<input type="text"/>	Freight Terms:	<input type="text" value="Prepaid"/>
Carrier:	<input type="text" value="FedEx"/>	Requested Ship Date:	2/24/2012
Method:	<input type="text" value="International Priority Overnight"/>		
Payment Information			
Payment Method:	<input type="text" value="On Account"/>	Payment Terms:	<input type="text" value="Net 10"/>
Dealer Currency:	USD	Reporting Currency:	USD
Exchange Rate:	1 USD/USD		
Contact Information			
Contact:	<input type="text" value="Johnson, Joe (CNB000006)"/>	Phone:	555-555-5555
E-mail:	JJohnson@tdci.com	Mobile:	<input type="text"/>
		Fax:	<input type="text"/>

Quote Information Section

- **P.O. Number** – The *P.O. Number* text box allows you to assign a customer purchase order number to the Quote.
- **Quote Status** – The *Quote Status* option list allows you to assign a status to the Quote. Status options include:
 - *Working: Quote is available to be modified by the representative. No LEWCO interaction required.*
 - *Ordered: An order has been placed for the corresponding quote.*
 - *Lost: This quote was lost to the customer in favor of a competitor.*
 - *Expired: This quote is more than 30 days old*

- *Abandoned: This quote is no longer required for the customer's application.*
- *History: The order has been shipped and no further action is required.*
- *Forwarded to Estimating: Forwarded to LEWCO to review and complete the quote.*

If you select *Lost* or *Abandoned*, the system saves the Quote, but the Quote is closed and no longer editable. To work with this Quote again later, you must export the Quote and import it into a new Quote. *Lost* and *Abandoned* still have meaning when an opportunity was not won, so it is important to retain the disposition of those Quote versions.

- **Created by/On** – The *Created by* field displays the name of the user who created the Quote or Order. The *On* field beside it displays the date the user created the Quote or Order.
- **Last Modified by/On** – The *Last Modified by* field displays the name of the user who modified the Quote or Order most recently. The *On* field beside it displays the date the user modified the Quote or Order.
- **Available to** – The *Available to display* shows an automatically generated expiration date. The default expiration date for a Quote is thirty days; only LEWCO, Inc. can override this setting.

Address Information

- **Bill-to** – The *Bill-to* section on the *Header* tab displays your Bill-to address.
- **Ship-to** – The *Ship To* section on the *Header* tab displays the preferred Ship-To address. You can select the **Use Bill-to Address** check box if the ship to and bill to addresses are the same or you can enter a new Ship-to address.

Shipping Information

The *Shipping Information* section allows you to enter the shipping preferences for this Order. For example, you can select if you want the Order shipped in full or shipped as a partial shipment, as items become available for shipping. You can select the freight terms, a carrier, method, and ship date in this section.

Payment Information

This information can only be modified by LEWCO personnel.


Contact Information

The *Contact Information* section allows you to select the primary contact for this Quote. You can also enter the contact's e-mail address, phone numbers, and fax number in this section.




The *Items* tab allows you to add items, or manage those items currently on your Quote or Order.

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The *Item Selection* section contains the following controls:

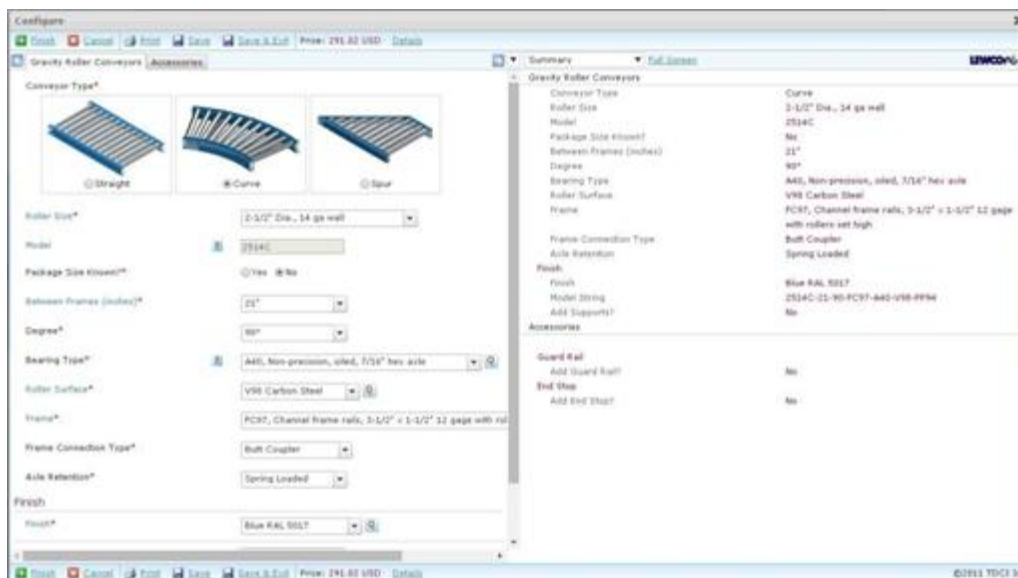
- **Item** – The *Item* dropdown menu is a searchable option list which allows you to select a configurable item. To select an item, scroll through the paginated list with the mouse or arrow keys. Alternately, typing in the Item dropdown will filter the list to include only items which *contain* the typed characters. Clicking the  icon next to the dropdown will display a grid containing sortable fields pertaining to your items as well as searchable item categories. The default grid fields include *Name*, *Item Number*, and *Description*. Once you choose the item, any options that relate to that item appear in the *Configuration Options* area below it.
- **Quantity** – The *Quantity* text box allows you to enter the quantity for each item. The default quantity is one. You can also update the quantity after you add it to the shopping cart.
- **UOM** – The *UOM* displays the unit of measure for each item after the *Quantity* text box. All items have a UOM of each (ea.).
- **Label** – The *Label* text box allows you to assign a label to your item. This helps you identify the item later. You can also assign a label after you add the item to the shopping cart.
- **Description** – The *Description* column displays a brief description of the item.
- **Price** – The *Unit Price* column displays the price for each unit.

After you select an item, the following buttons become available on the Item Selection toolbar:

- **Configure** – The  **Configure** button allows for further product configuration. Click the button to launch a Configurator dialog that poses several more detailed questions about that particular item.
- **Add** – The  **Add** button allows you to add the selected item to your Quote.
- **Reset** – The  **Reset** button clears your *Configuration Options*. The system may no display **Reset** button, depending on the type of product you select.

Configure Dialog

The Configure dialog allows you to select more options for your configured items.








Working with Quotes

The following subsections describe aspects of working with Quotes. These subsections describe creating, finding, editing, converting to Orders, importing, exporting, and deleting Quotes from your database.

Creating a Quote

Creating a Quote is a simple process where you select a customer (optional) and then select the items to include in the Quote. If you Quote items that require specific options, you may further configure those items.

Use the following steps to create a new Quote:

1. Find the **Quotes > New** option on the Navigation Bar to create a new Quote. The Quote dialog displays.
2. Select the customer (optional) from the *Customer* dropdown menu.
3. Click the *Header* tab and enter the necessary information (i.e. contact information, details, and billing information).
4. Click the *Items* tab.
5. Under the *Item Selection* section, select an item to apply to the Quote from the *Item* dropdown menu. Once you have selected an item from the list, a variety of options specific to the selected item display under the *Configuration Options* section.
6. Next, enter a label for your item (i.e. "Packing Station") in the *Label* text box.
7. Enter the desired quantity in the *Quantity* text box.
8. Select the options for this item, click the  **Configure** button to launch the Configuration dialog.
9. If you have not completed configuring your item before you add it to the *Quote Line* section, a message will display and an **Info**  icon will appear beside any blank option or incorrect options. You must correct any required field before continuing.
10. Once you are finished with your Quote, use any of the following options:
 - **Place Order** – The  **Place Order** button displays the *Order Placement Terms* and converts the Quote into an Order.
 - **Order Placement Terms** – Dialog that displays the Quote's header information.
 - **Print** – The  **Print** button opens a dialog displaying your *Print Options*. Select your options and click the  **Print** button again to view the Quote Proposal in Adobe PDF format. Refer to the [Proposals](#) section for more detailed information.

Change Options

To set or change the configuration of your item, click the **Change Options** link. The dialog offers several detailed options that pertain to the specific item. There may be tabs on the left side of the dialog that you can choose different options. On the right side of the dialog, there will be a visual of the image and pricing information, etc. This dialog will look different and will have different options for each item. Once you are finished you can click the **Finish** button to save your changes or the **Cancel** button if you do not want to save your changes.

Copy



Click the **Copy** button to copy the associated item. An identical line item appears in your *Selected Items* list.

Finding a Quote

How to locate and edit an existing Quote:

1. Find the **Quote > Search** option from the Navigation Bar to use the Quote Search Grid.
 - a. Enter your search criteria information in the desired column's text box (i.e. *Customer, Name, PO#, ID, Last Modified by, Modified on, and Status*).

Note: The system does not support Wildcard searches using ***.

- b. Find the Quote you're searching for in the Search Grid. You can use the page buttons to move forward or backwards in the list.
- c. Click the  button next to the Quote name to open the action menu.
- d. In the action menu, select  **Open** to edit the Quote. Alternately, click anywhere on the highlighted Quote record to quickly open the selection.

Editing a Quote

Use the following steps to edit an existing Quote:

1. After finding the Quote you want to edit, you may add items, edit items, or delete items.
2. Add items to this Quote using the *Item Selection* section on the *Items* tab.
3. To edit existing items, click the line's **Change Options** link or click the **Remove** link to delete the individual line item.
4. **Comments** allows the user to enter note specific to the current line item.
5. **Export** allows the user to export the line item to an html file to allow it to be imported to a different quote.
6. **Copy** allows the user to copy the line item and change the configuration details if needed.

Working with Expired, Lost or Abandoned Quotes

The status of a Quote can be Working, Ordered, Lost, Expired, Abandoned, History, or Forward to Estimating.




Statuses of Working or Forward to Estimating are open quotes. This means that the Quote is active and you can work with an Open Quote using the Quote dialog.

A Quote that is Ordered, Lost, Expired, Abandoned, or History are *closed* Quotes that are no longer editable. If you need to work with these types of Quotes again later, export the Quote and then import it into a new Quote. Use the Quote Search dialog to find closed Quotes.

Deleting a Quote

You can delete an existing Quote at any time.

Use the following steps to delete an existing Quote:




1. There are two ways to delete a Quote. Select  **Delete** from the  **More...** menu on the Quote toolbar or from the  button on the Quote Search Grid.
2. A prompt appears, asking if you are sure you want to delete the Quote.
3. Click **Yes/OK** to delete the Quote or **No/Cancel** to exit the dialog without deleting the Quote.

Note: You cannot undo deletion of a Quote. Click **No/Cancel** if you decide you do not want to delete the selected Quote.

Converting a Quote to an Order

You can use the  **Place Order** button on Quote toolbar to convert a Quote to an Order.

You must have at least one item in the *Quote Lines* area. If you did not configure your items correctly, an error message displays. Make sure to check each tab for errors.

Once everything is correct and ready to submit, click the  **Place Order** button. The *Order Placement Terms* dialog displays. Ensure that the information is correct and click the  **Place Order** button to submit the Order to the manufacturer or the  **Cancel** button if you want to exit. When you do submit your Order, a message box appears with an order number and confirmation that you successfully placed your Order. Click the Order in the Search Grid to view the proposal.

Shipping Information – Must be filled in before placing order.

Shipping Information

Shipping Policy:	<input type="text"/>	Freight Terms:	<input type="text"/>
Shipping Carrier:	<input type="text"/>	Requested Ship Date:	<input type="text"/>  
Shipping Method:	<input type="text"/>		

Working with Orders

The following subsections describe aspects of working with Orders. These subsections describe creating, finding, editing, and deleting Orders in your database.

Finding an Order

Use the following steps to find an existing Order:




1. Find the **Order > Search** option from the Navigation Bar to use the Order Search Grid.
 - a. Enter your search criteria information in the desired column's text box (i.e. *Customer, Name, PO#, ID, Last Modified by, Modified on, and Status*).

Note: The system does not support Wildcard searches using ***.

- b. Find the Order you're searching for in the Search Grid. You can use the page buttons to move forward or backwards in the list.


Deleting an Order

Users with the proper Order privileges can delete an existing Order at any time. Use the following steps to delete an existing Order:

1. There are two ways to delete an Order. Select  **Delete** from the  **More...** menu on the Order toolbar or from the  button on the Order Search Grid.
2. A prompt will appear, asking if you are sure you want to delete the Order.
3. Click **Yes/OK** to delete the Order or **No/Cancel** to exit the dialog without deleting the Order.

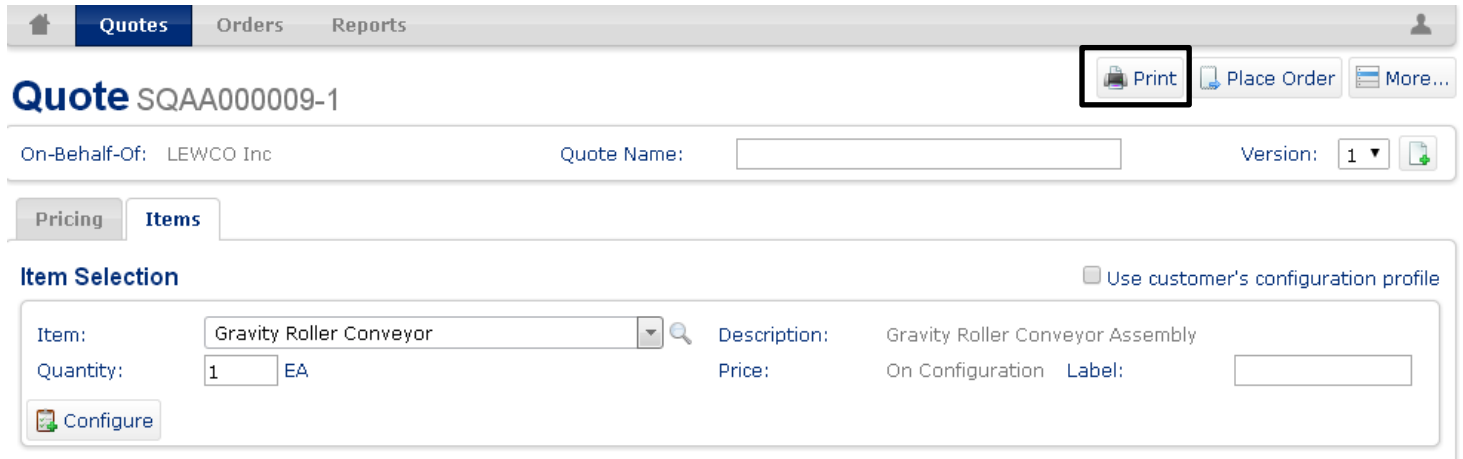
Note: You cannot undo deletion of an Order. Click **No/Cancel** if you decide you do not want to delete the selected Order.

Understanding the Proposal Dialog

Once you have completed your Quote or Order, you may want to view and print it. Click the  **Print** button to view your Quote or Order proposal.

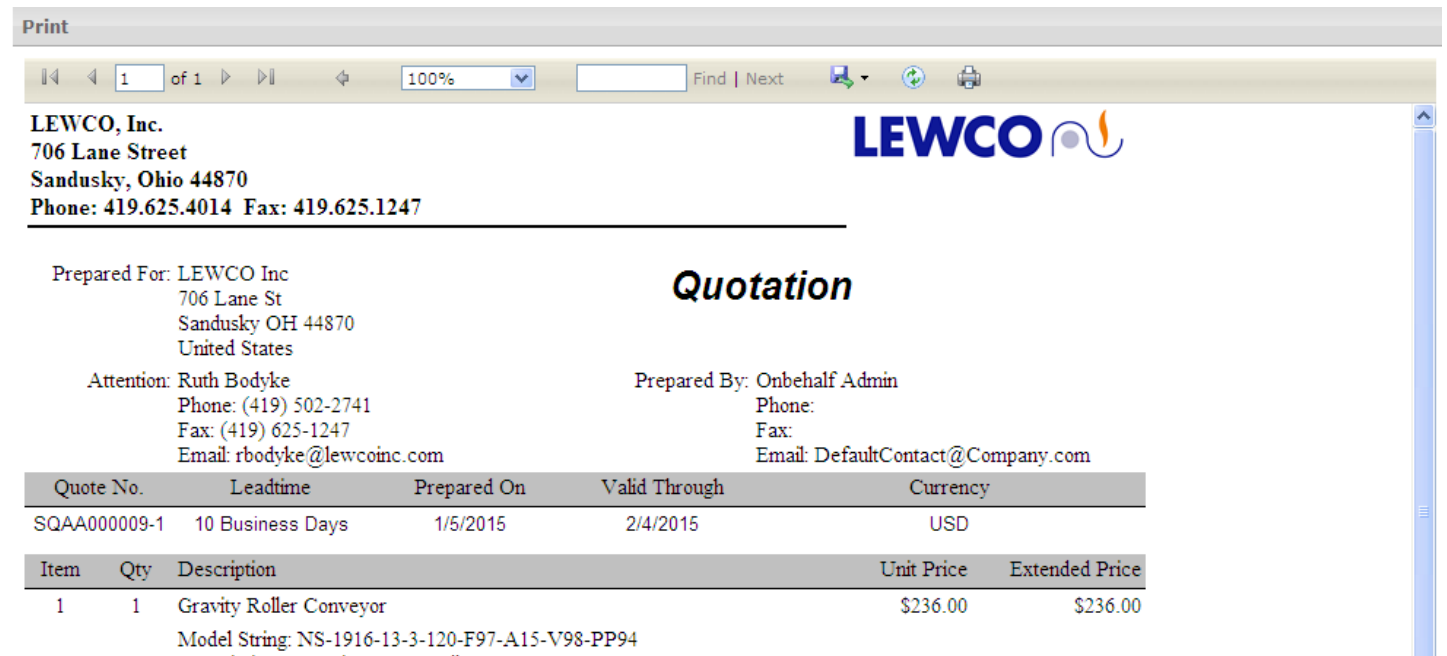
Printing your Quote

When printing your quote, you should first click the print icon on the top right-hand corner of your screen.



The screenshot shows the 'Quote' dialog for quote SQAA000009-1. The 'Print' button is highlighted with a red box. The dialog includes tabs for 'Pricing' and 'Items', and a section for 'Item Selection' with a search bar and a 'Configure' button.

A light box will appear, displaying your quote in detail, looking similar this:



The screenshot shows the 'Print' dialog with a detailed quote for LEWCO, Inc. The quote includes contact information, a prepared by field, and a table of items.

LEWCO, Inc.
706 Lane Street
Sandusky, Ohio 44870
Phone: 419.625.4014 Fax: 419.625.1247

Quotation

Prepared For: LEWCO Inc
706 Lane St
Sandusky OH 44870
United States
Attention: Ruth Bodyke
Phone: (419) 502-2741
Fax: (419) 625-1247
Email: rbodyke@lewcoinc.com

Prepared By: Onbehalf Admin
Phone:
Fax:
Email: DefaultContact@Company.com

Quote No.	Leadtime	Prepared On	Valid Through	Currency
SQAA000009-1	10 Business Days	1/5/2015	2/4/2015	USD

Item	Qty	Description	Unit Price	Extended Price
1	1	Gravity Roller Conveyor Model String: NS-1916-13-3-120-F97-A15-V98-PP94	\$236.00	\$236.00

Note: A print icon MAY OR MAY NOT appear in this light box depending on which web browser you are utilizing (internet explorer, google chrome, etc.)

If the icon DOES appear:

- Click on the printer icon
- Select the appropriate printer
- Print

If the icon DOES NOT appear (see image below):

- Click on the export icon
- Select to export it as a PDF (see *PDF Format Requirements* below)
- Print the PDF document

The screenshot shows a web browser window with a 'Print' dialog box open. The dialog box has a 'Print' icon and a 'Find | Next' search bar. The main content area of the browser displays the LEWCO, Inc. contact information and a table of quote data. The 'Print' dialog box is open, showing a list of export options: XML file with report data, CSV (comma delimited), PDF (highlighted), MHTML (web archive), Excel, TIFF file, and Word.

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Quote No.	Leadtime	Prepared On	Valid Through	Currency
SQAA000041-1	10 Business Days	3/31/2015	4/30/2015	USD

PDF Format Requirements

When you print a proposal, the print output directs to an Adobe *Portable Document File* (PDF). A PDF Reader, such as Adobe Reader X, is recommended to view proposals. If installed, the PDF opens in Adobe Reader X. Otherwise, Customer Portal will utilize your browser's default PDF Reader (if applicable) or Google Docs.

Note: Internet Explorer 9 requires that the following entries be added as Trusted Sites to allow proposals to be viewed from Google Docs.

- <https://docs.google.com>
- <https://www.google.com>

Proposal Layout

The proposal document is comprised of a cover page, pages that display the items that you selected, and a pricing summary at the end of the document.

The following paragraphs describe the proposal elements:

- **Cover Page** – The Cover Page contains the header information from the Quote or Order.
- **Items Pages** – The Items Pages display information about each line item in your Quote or Order. The format of each line item is a single line that displays basic information such as line number, part number, quantity, description, and price, and below the line item, an image of the ordered item, if available, and if the item is configured, a summary of configured options.
- **Pricing Summary** – The Pricing Summary is the last page of the proposal and summarizes the Order level pricing information for this Quote or Order.

Comments Tab

The **Comments** link displays a dialog window for adding comments to the respective line item. These comments will be saved for the line as well as displayed in the print view proposal. This option can be enabled or disabled via the Quote/Order Maintenance preferences in the Admin System.

The screenshot shows a dialog window titled 'Comments' with four tabs: 'Header', 'Pricing', 'Items', and 'Comments'. The 'Comments' tab is selected. Below the tabs, there are three sections, each with a 'Comments:' label and a text input field:

- Header**: The input field contains the text 'Header Comments'.
- Terms**: The input field is empty.
- Pricing**: The input field is empty.