II. ACEN® Working Website™ Tools - Portfolio™

Your ACEN Working Website™ is made up of a collection of modular Working Website™ Tools, customized for your specific needs. The Working Website™ Tools work together seamlessly to exchange information with your clients, customers, suppliers, employees, or associates.

Using the Working Website™ tools, your ACEN website works for you, 24/7—with a minimum of effort on your part. What's more, as with all ACEN Tools, there's no technical knowledge required.

Many Working Website™ Tools use the ACEN Contact Manager database as a basis for exchanging information. The Contact Manager is an electronic list of contacts important to your business. Detailed information about the Contact Manager can be found in Section I of this document.

• Overview

The Working Website™ Tools that use the contact database are:

1. **Library**™, a tool to post and share documents and information in a variety of useful ways;

2. **Portfolio**™, where you can post your best work for the world to come and see, and target the most important folks—your customers and contacts;

3. **Notifier**™, a place to store your news, bulletins, and events, and broadcast them to your contacts; and

4. **BidGetter**™, where you can easily post and track your job bidding online.

• Definitions

Before we go further, let's demystify some jargon with a few definitions:

Contact is an individual associated with your website or business, such as a client, customer, or supplier (you decide how to classify your contacts). A contact is eligible to receive news and information about your company via your ACEN Working Website™ Tools. Typically, contacts manage their own accounts, deciding what options they do and don't want.

Document is an electronic file, such as a Microsoft Word file or PDF (Acrobat) file that is posted on your website. Typically, a document is associated with a specific project posted on your site. Interested users of your website can easily download, view, and/or print these documents.
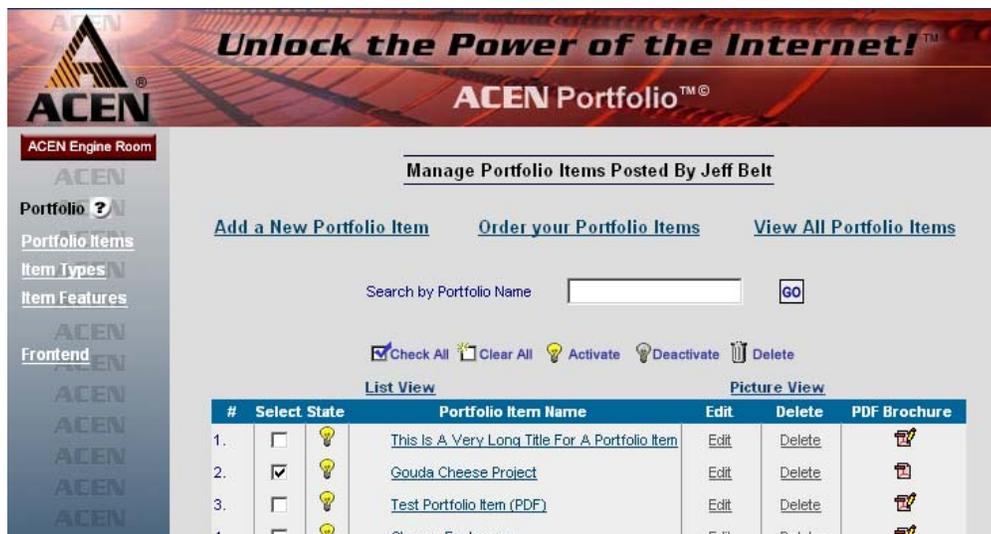
2. Portfolio™

Portfolio™ allows you to present your best and most important work to the world, and it automatically targets the people most important to you—your customers and contacts. Best of all, as projects progress and change, Portfolio™ allows your website to stay relevant and up-to-date.

To view Portfolio ™, click on the Portfolio link from the main Contact Registry Page (see below):
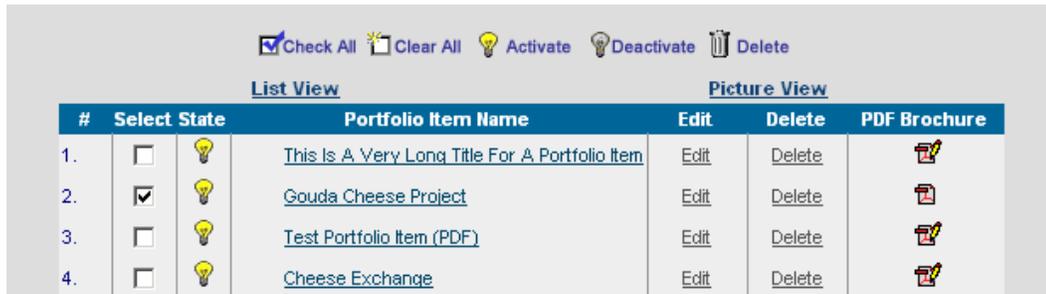

The Portfolio™ page.

The Portfolio ™ module is displayed:

The Portfolio™ module consists of three sections:

a. a list of **Portfolio Items**;

b. a list of **Item Types** (where you define different types of items); and

c. a list of **Item Features** (where you add any other categories/attributes you may desire).

Click on the links at left to navigate between these three sections. Note that **Portfolio Items** is displayed by default.

• Portfolio Items List

The Portfolio Items page contains a listing of topics (posted by you, by default):

The Portfolio Items page.

Three general options are displayed at the top of the page:

Add a New Portfolio Item enables you to add a new portfolio item by entering a title and description, then selecting access permissions (who will be able to see it on your website).

Order Your Portfolio Items allows you to choose the order of displayed portfolio items.

View Portfolio Items/View My Portfolio Items displays a list of all portfolio items, or just the ones you've posted. (Note that you can only edit you own portfolio item.)

The Portfolio Items Toolbar

The Portfolio Items page includes a toolbar that allows you to edit and manipulate the portfolio items in the list:

Portfolio Items List toolbar.

You can modify individual portfolio items directly, or modify multiple items at once. The principle is this: to modify an individual item, click on the desired icon in that item's row; to modify multiple items, select the item that you want to modify, and then click on the desired icon in the toolbar.

Example Portfolio Item list.

For example, if we want to delete the "Gouda Cheese Project" topic (see figure above), we simply click on the "Delete" under the Delete column in that item's row. If we want to delete both "Gouda Cheese Project" and "Cheese Exchange," we select these two contacts by checking *both* checkboxes ☑ corresponding to each item, and then clicking "Delete" 🗑 Delete in the Toolbar (see figure above).

Here are some definitions:

Check All selects all displayed items

Clear All clears the checkboxes of all the displayed items.

Activate makes the selected items "active" or visible on the website.

Deactivate makes the selected items "invisible" or "inactive" on the website. This is a convenient way to temporarily "shut-off" a item.

Delete permanently removes the selected items from the database (as in our example above).

Individual Item Controls

Each item in the portfolio item list has several useful controls, defined as follows:

Light Bulb 💡 or 💡 allows you to activate/deactivate any item. The yellow bulb indicates a visible item; a gray bulb indicates an invisible item. Click to toggle the item on/off.

Portfolio Item Name clicking on the topic name displays summary of that item (see "View Item Information" below). Note that clicking on the column label sorts the list by item name.
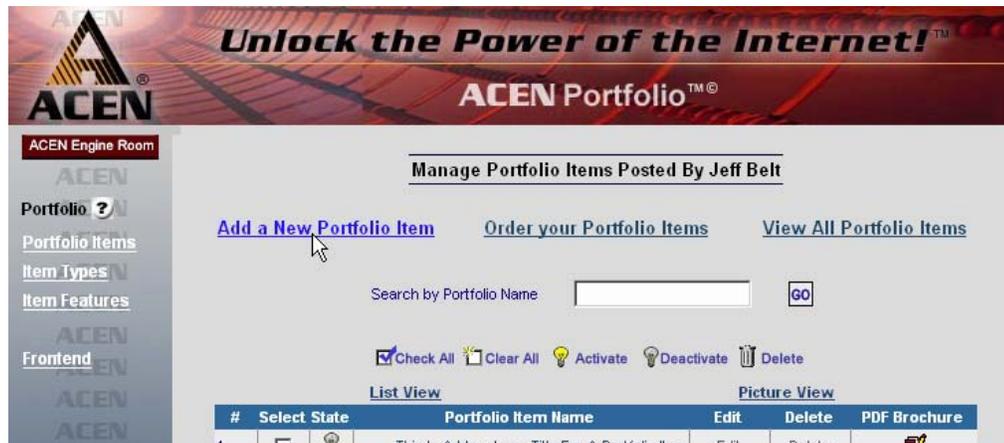
Edit allows you to edit that item.

Delete 🗑 permanently removes the selected item from the database (as in our example above).

PDF Brochure 📄 allows you to automatically create a downloadable PDF (Acrobat) document to your portfolio item. You may also preview the PDF using this tool.

Adding/Editing Portfolio Items

To add an item, click on "Add a New Portfolio Item" from the main Portfolio Items page (also see "Portfolio Items List," above):

Portfolio Item list.

To edit a particular item, click on the "Edit" link (from the Portfolio Items page, above) or on the Modify icon (from the "Topic Information" page; see section below):

Adding/editing information for a Portfolio Item.

You may now add/edit the items on the form, including the item name, description, e-mail, images, etc.

Item Editing Toolbar

While editing a portfolio item, a toolbar appears at the top of the page:

Portfolio Item Editing Toolbar.

Here are some definitions:

View displays the "Portfolio Item Information" page (see section below).

Modify allows you to edit the attributes of the item (this is the page you're currently on).

Slide Show allows you to create an online slide show for this item (see "Slide Show," below).

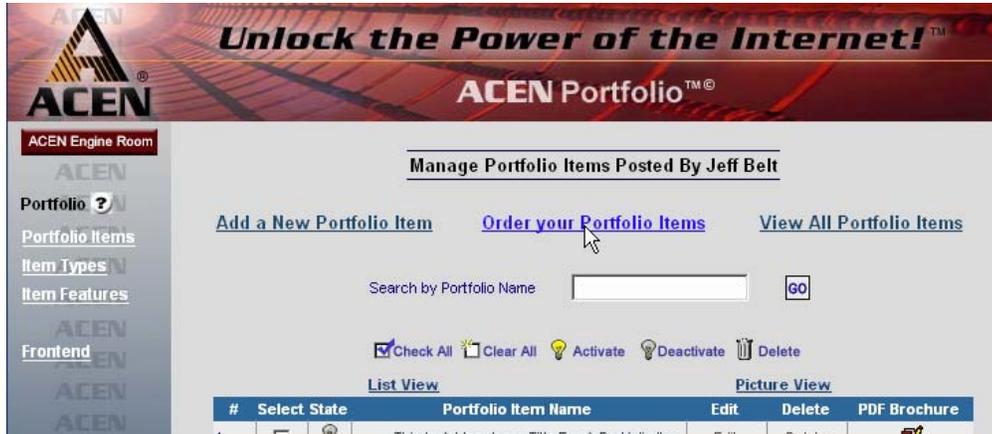**Reorder Slides** enables you to order the slides in a slide show (see "Slide Show," below).

Create PDF allows you to create or update a PDF for this item.

Customer Feedback displays any customer feedback received for this item.

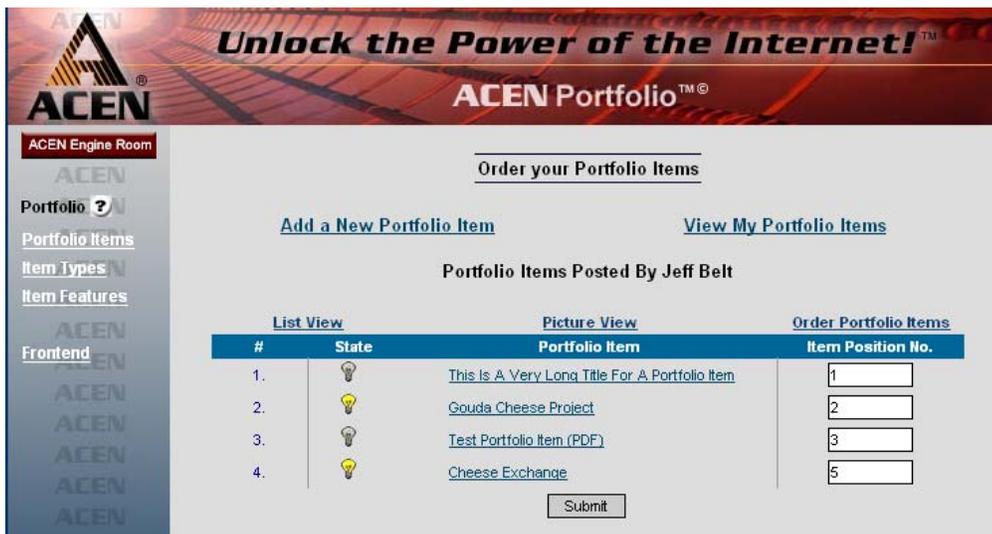**Delete** permanently deletes the currently displayed item.

Ordering Portfolio Items

To order portfolio items, click on "Order Your Topics" from the main Topics page (see "The Portfolio Item List," above):

Ordering portfolio items link.

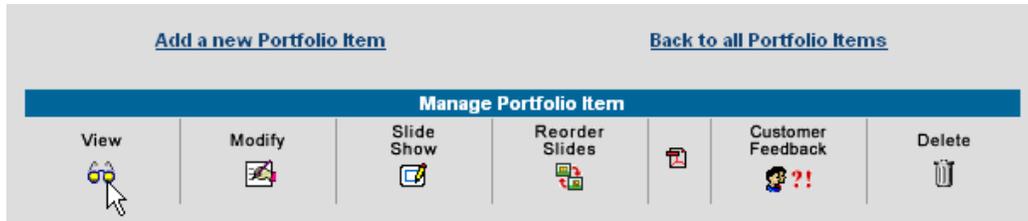You may now re-order the portfolio items in the list by changing the numbers under "Item Position No." at right:

Ordering portfolio items page.

Click "Submit" when you are done.

* **Note**: to sort alphabetically by name, change all the Position Numbers to "1."

Portfolio Item Information Page

The Portfolio Item Information page contains basic information about the item, including the item's documents. To go to the Click on the "View" link in the Editing Toolbar:

Click on "View" in the toolbar.

The Portfolio Item Information page will be displayed. The Information page contains basic information about the topic, including the option to e-mail contacts:

Portfolio Item Information page.

* **Note**: on this page, information is **not** editable.

• **Item Types**

The Item Types page contains a listing of item types. Here, you define categories or "Item Types," for your portfolio according to your own specific requirements. Click on the "Item Types" link at left to go to the Item Types section:

The Item Types page.

Two general options are displayed at the top of the page:

Add a New Item Type enables you to add a new item type by entering a name and description, then selecting an image to represent the type (if desired).

Order Your Item Types allows you to choose the displayed order of item types.

The Item Types Toolbar

The Item Types page includes a toolbar that allows you to edit and manipulate the item types in the list:

Item Types toolbar.

You can modify individual portfolio items directly, or modify multiple items at once. The principle is this: to modify an individual item, click on the desired icon in that item's row; to modify multiple items, select the item that you want to modify, and then click on the desired icon in the toolbar.

Example Item Type list.

For example, if we want to delete the "Textured Tile" type (see figure above), we simply click on the "Delete" under the Delete column in that item's row. If we want to delete both "Textured Tile" and "The Cambridge" types, we select these two items by checking *both* checkboxes ☑ corresponding to each type, and then clicking "Delete" 🗑 Delete in the Toolbar (see figure above).

Here are some definitions:

Check All selects all displayed types.

Clear All clears the checkboxes of all the displayed types.

Activate makes the selected types "active" or visible on the website.

Deactivate makes the selected types "invisible" or "inactive" on the website. This is a convenient way to temporarily "turn-off" an item type.

Delete permanently removes the selected types from the database (as in our example above). Note that this does not delete any Portfolio Items that may be associated with this type.

Adding/Editing Item Types

To add an item type, click on "Add a New Item Type" from the main Portfolio Items page (also see "Item Types" above):

Click on "Add a New Item Type" link.

To edit a particular item type, click on the "Edit" link (from the Item Types page, above) or on the "Modify" icon (from the "Item Type Information" page; see section below):

Editing a Portfolio Item: click on "Edit" or "Modify."

You may now add/edit the items on the form, including the item type name, description, image, etc.
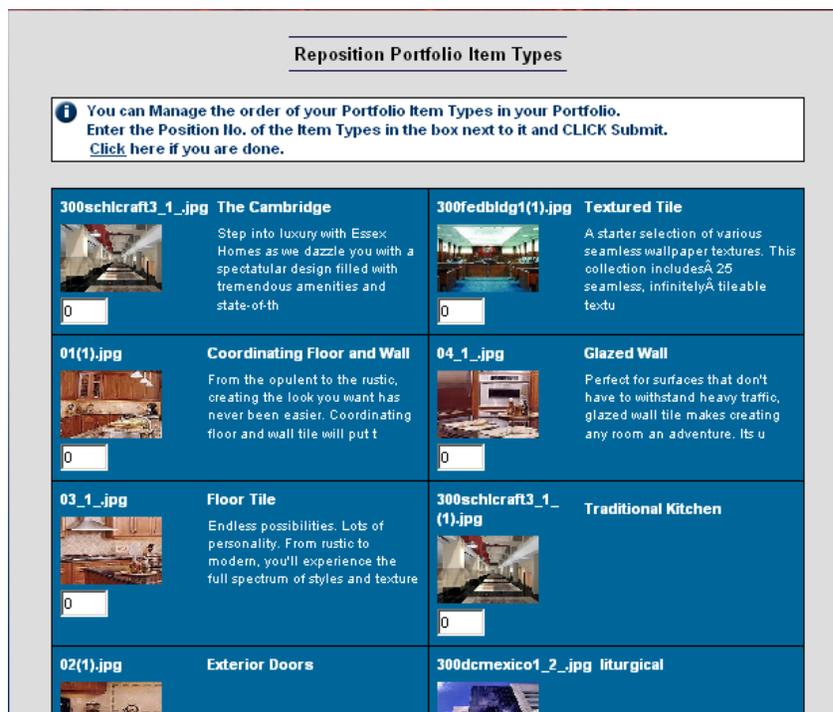

Adding/editing an item type.

Ordering Item Types

To order item types, click on "Order Your Item Types" from the main Item Types page (see "Item Types," above):

Click on "Order Your Item Types" link.

Ordering Item types.

You may now re-order the portfolio items in the list by changing the numbers under each item type picture. Click "Submit" when you are done.

* **Note**: to sort alphabetically by name, change all the Position Numbers to "1."

• Item Features

The Item Features page contains a listing of "Item Features." Item Features are categories or characteristics that you assign for your portfolio according to your own specific requirements. Some businesses desire to have additional criteria assigned to portfolio items independent of Item Type, and the Item Feature page fills this need. Note that" Item Feature" is independent of "Item Type."

Click on the "Item Features" link at left to go to the Item Features section:

The Item Features page.

Here you can modify individual items. To modify an individual item, click on the desired icon in that item's row.

Example Item Features list.

For example, if we want to delete the "American Olean" feature (see figure above), we simply click on the "Delete" under the Delete column in that item's row. Here are some definitions:

Edit allows you to change the feature name.

Delete permanently removes the selected item from the database (as in our example above). Note that this does not delete any Portfolio Items that may be associated with this item feature.

Light Bulb 💡 or 💡 allows you to activate/deactivate any item. The yellow bulb indicates a visible item; a gray bulb indicates an invisible item. This is a convenient way to temporarily "shut-off" an item type, so website users cannot see the item. Click to toggle the item on/off.

Adding Item Features

To add an item type, click in one of the blank fields in the main Item Features page (also see "Item Features" above):

Adding an item feature.

You may now enter a new name in that field. Click "Submit" when you are finished.

Editing Item Features

To edit a particular item feature, click on the "Edit" link (from the main Item Features page, above):

Click on "Edit."

An editable field is displayed.

You may now change the name in that field:

Editing an item feature.

Click "Submit" when you are finished.