# **II. ACEN® Working Website™ Tools - Portfolio™**

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

Using the Working Website<sup>™</sup> 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<sup>™</sup> 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<sup>™</sup> Tools that use the contact database are:

- 1. Library<sup>™</sup>, a tool to post and share documents and information in a variety of useful ways;
- 2. **Portfolio**<sup>™</sup>, 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<sup>™</sup>, a place to store your news, bulletins, and events, and broadcast them to your contacts; and
- 4. **BidGetter**<sup>™</sup>, 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<sup>™</sup> 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<sup>™</sup>

Portfolio<sup>™</sup> 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<sup>™</sup> allows your website to stay relevant and up-to-date.

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

A.	Unlock the Power of the Internet!"	
ACEN Engine Room	Manage Contact List <u>View My Contacts</u>	
<u>Contact List</u> <u>Add Contact</u> I <u>mport Contacts</u> <u>Download</u>	<ul> <li>Below is the list of all contacts for your company who were Registered in one of the three ways below:</li> <li>1. By people in your company from the backoffice</li> <li>2. While requesting a newsletter bulletin from your website.</li> <li>3. Via a 'Contact Us' Form on your website if you have one.</li> </ul>	
Group Manager Portfolio Notifier Library Bidgetter Status Frontend	To narrow your Contact List, Search for Contacts by below Criteria and Click Go Master Group Select All C Contact Type Select All C Email, Contact or Company Hame GO You are viewing List of YOUR Contacts under Master Group All Groups Contact Type All Contact Types Keyword	
ALEN	View Company Listings in Alphabetical Order OR <u>View All Companies</u> A 臣 도 臣 臣 臣 도 단 ! J K L M N 으 면 으 R S I U V W X Y Z	
AREA	There are no Contacts.	

The Portfolio<sup>™</sup> page.

The Portfolio <sup>™</sup> module is displayed:

	U	nlock	the Power of th	e li	nter	net!
ACEN	K	×	ACEN Portfolio	ic .	1	
ACEN Engine Room			Manage Portfolio Items Posted By	/ Jeff B	elt	
Portfolio ?	Add	a New Portfol	<u>io Item Order your Portfolio Item</u>	<u>s</u>	View All I	Portfolio Items
Item Types N Item Features		:	Search by Portfolio Name		GO	
ACEN Frontend			🗹 Check All 🎦 Clear All 💡 Activate 💡 Deacti	ivate 🔟	Delete	
			List View	Pic	<u>ture View</u>	
ACEN	#	Select State	Portfolio Item Name	Edit	Delete	PDF Brochure
ACCOL	1.		This Is A Very Long Title For A Portfolio Item	Edit	Delete	1 and a second s
PALEIN	2.	V 8	Gouda Cheese Project	<u>Edit</u>	Delete	Ð
ANGEN	3.	□ 💡	Test Portfolio Item (PDF)	Edit	Delete	2
AMEN	4		Cheese Exchange	Edit	Delete	<b>1</b>

The Portfolio<sup>™</sup> 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):

			🗹 Check All 🎽 Clear All 💡 Activate 💡 Dead	ctivate 🔟 D	)elete	
			List View	Pict	ure View	
#	Select St	ate	Portfolio Item Name	Edit	Delete	PDF Brochure
1.		8	This Is A Very Long Title For A Portfolio Item	<u>Edit</u>	<u>Delete</u>	1
2.	· • •	8	Gouda Cheese Project	<u>Edit</u>	<u>Delete</u>	1
3.		8	Test Portfolio Item (PDF)	<u>Edit</u>	Delete	7
4.		8	Cheese Exchange	<u>Edit</u>	Delete	7

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:

Check All	🎦 Clear All	Ŷ	Activate	Peactivate	🗍 Delete

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.

	Check All 🎦 Clear All 💡 Activate 🖓 Deactivate 🔟 Delete								
			List View	Pict	ure View				
#	Select	State	Portfolio Item Name	Edit	Delete	PDF Brochure			
1.		8	This Is A Very Long Title For A Portfolio Item	<u>Edit</u>	<u>Delete</u>	1			
2.		8	Gouda Cheese Project	<u>Edit</u>	<u>Delete</u>	Ē			
з.		8	Test Portfolio Item (PDF)	<u>Edit</u>	Delete	1			
4.		8	Cheese Exchange	Edit	Delete	1			

#### 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 is corresponding to each item, and then clicking "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**  $\[ \ensuremath{\mathfrak{g}} \]$  or  $\[ \ensuremath{\mathfrak{g}} \]$  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** *method* 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):

Add	a new Portfolio	Item	Back to all Portfolio Items					
		Manage	Portfolio Item					
View 60	Modify	Slide Show	Reorder Slides	Ð	Customer Feedback	Delete		
	Por	tfolio Item: G	ouda Chees	se Proje	ect			
		Add / Edi	t Portfolio Ite	m				
Portfolio Item N	ame Goud	la Cheese Project						
Description We made some cheese! Our clients loved it!								
	Cros	sville Ceramics 💌						
Image	Pleas 04_1 (brows	e upload Landsoap _jpg se and select an im. Rotate left ⓒ No r	e style photos here age to upload a n otation O Rotat	e(Image wid ew picture d e right	Ith must be > ima Browse or replace the exis	ge height)  ting picture)		
Document Attac	hment (Brow	se and select a file <sup>.</sup>	to upload a new d	locument of	Browse	 ing document.)		
Document Title	,		•		•	, i		
Active Portfolio	ltem 💽 y	es O No						
Post to ACEN	The F Locat	<sup>r</sup> ortfolio Item must h or.	ave at least 2 slid	les, in order	to display it in th	e ACEN		
		Subm	it Reset					

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**

		Manage	Portfolio Item			
View	Modify	Slide Show	Reorder Slides	5	Customer Feedback	Delete
<u>60</u>	<b>1</b>		<b>.</b>	Ш	G 21	DÎ

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):

ACEN Engine Room	ACEN Portf Manage Portfolio Items P a New Portfolio Item Order your Portfo	osted By Jeff Belt lio Items View All Portfolio Items
ACEN Engine Room	Manage Portfolio Items P	osted By Jeff Belt lio Items View All Portfolio Items
ortfolio 🌒 Add	a New Portfolio Item Order your Portfo	lio Items View All Portfolio Items
em Types	·	
entreatures	Search by Portfolio Name	GO
ontend	Check All 🏠 Clear All 😵 Activate	
ACEN	List View	Picture View
ACEN #	Select State Portfolio Item Name	Edit Delete PDF Brochure

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:

	Unio	ock th	e Power of the	Internet!
ACEN		La -	ACEN Portfolio <sup>™®</sup>	1
ACEN Engine Room			Order your Portfolio Items	
Portfolio ?	Ad	ld a New Por	tfolio Item View	My Portfolio Items
Portfolio Items	A			my i oraono acenia
Item Types			Portfolio Items Posted By Jeff Bel	t
Item Features				
ACEN	List	View	Picture View	Order Portfolio Items
Frontend	#	State	Portfolio Item	Item Position No.
ACEN	1.	T	This is A Very Long Title For A Portfolio Iter	
ACEN	2.	V V	Gouda Cheese Project	2
ACCOL	3.	P	Test Portfolio Item (PDF)	3
ALEN	4.	8	Cheese Exchange	5
ACEN			Submit	

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:

Ad	d a new Portfolio	<u>Item</u>		<u>Back to</u>	) all Portfolio Iten	<u>15</u>
		Manage	Portfolio Item			
View	Modify	Slide Show	Reorder Slides	Ð	Customer Feedback	Delete

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:

1	Unio	ck the	Powe	r of ti	he l	ntern	etl
ACEN	X	4	ACEN	Portfolio	<sup>™©</sup>	1	
ACEN Engine Room	A	dd a new Portfolio	<u>o Item</u>		Back to	all Portfolio Iten	<u>18</u>
Portfolio ?			Manage	e Portfolio Item			
Portfolio Items Item Types Item Features	View 60	Modify K	Slide Show	Reorder Slides	Ð	Customer Feedback	Delete D
ACEN Frontend		Portf	folio Item: Te	est Portfolio	Item (I	PDF)	
ACEN ACEN	You can n website. T Everytime them of the	otify the Contacts in 'he contacts below you edit this Item or e updates. <u>Click</u> he	n your Contact Reg will receive a web add documents or re to send an emai	istry via email that site link in their em photos to this Iten I.	this Portfo ail that the n you may	lio Item has been p y can click on and want to send an er	osted on your go to your site. nail and notify
	Test Portfolio Iter	n (PDF) 🔹 🙀 Pho	tos				
	Description	_					
	Item Type Chi	eese ardinating Floor and					

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:

1		Inla	ck	the	Power of t	he	Inte	ernet!"
ACEN		2	5	4	ACEN Portfoli	o <sup>™©</sup>	-/	
ACEN Engine Room					Manage Portfolio Item	Types		
Portfolio ?			A	dd a New	ltem Type 0	rder yo	ur Item T	vpes
Item Types Item Featurys				Search k	w Portfolio Item Type		60	
				Search		@ <b>_</b>	00	
ACEN	#	Select	State	Image	Portfolio Item Type	e w Dea Edit	Delete	Display Area
ACEN	1.		8	X	The Cambridge	Edit	<u>Delete</u>	Portfolio
ACEN	2.		8		Textured Tile	Edit	Delete	Portfolio
ACEN	3.	Г	8	-	Coordinating Floor and Wall	Edit	Delete	Portfolio
AFEN	л		<b>@</b>		Clazed Mall	Edit	Delete	Portfolio

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:



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.

Check All 🎽 Clear All 💡 Activate 💡 Deactivate								
#	Select	State	Image	Portfolio Item Type	Edit	Delete	Display Area	
1.		Ŷ	X	The Cambridge	<u>Edit</u>	Delete	Portfolio	
2.		8		Textured Tile	<u>Edit</u>	Delete	Portfolio	
3.		P		Coordinating Floor and Wall	<u>Edit</u>	<u>Delete</u>	Portfolio	
л		<b>.</b>		Clozed Moll	Edit	Delete	Portfolio	

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 recorresponding to each type, and then clicking "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):

ACEN Engine Room	Manage Portfolio Item Types
Portfolio ?	
Portfolio Items	Add a New Item Type Order your Item Types
Item Types	k∕
<u>Item Features</u>	Search by Portfolio Item Type G0
Frontend	🗹 Check All 🎽 Clear All 💡 Activate 🛛 💡 Deactivate
	# Select State Image Portfolio Item Type Edit Delete Display Area
ACEN	4 🗖 👳 🕅 The Combinidere Edit Delete Bertfelie

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.

Add a new t	tem Type	Back to all Item Types		
	Manage Portfolio Item Type			
View 60	Modify	Delete ŬĴ		
	Portfolio Item Type: The Cam	bridge		
Item Type Name	Add / Edit Portfolio Item Typ	e		
<b>Description</b> (used in Portfolio Keyword search)	Step into luxury with Essex Homes as we da: a spectatular design filled with tremendous ar state-of-the-art features. The Cambridge loca Lanoche Court in Brook Forest Estates leaves imagination. 110 characters left.	zzle you with Annenities and ted at 14		
Image Size: 205 x 145	Please upload Landscape style photos here(im. 300schicraft3_1_jpg (browse and select an image to upload a new p C Rotate left ⓒ No rotation C Rotate rig	age width must be > image height) Browse icture or replace the existing picture) ht		
Active Item Type	⊙ Yes C No			
	Submit			

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):

ACEN Engine Room	Manage Portfolio Item Types
Portfolio ?	
Portfolio Items	Add a New Item Type Order your Item Types
Item Types	45
Item Features	Soarah hu Bartfalia Bara Tursa



You can Mar Enter the Po	age the order of your Portfolio Ite sition No. of the Item Types in the	em Types in your Por box next to it and Cl	tfolio. LICK Submit.
300schicraft3 1	.ipg The Cambridge	300fedblda1(1).ipa	Textured Tile
0	Step into luxury with Essex Homes as we dazzle you with a spectatular design filled with tremendous amenities and state-of-th	0	A starter selection of various seamless wallpaper textures. This collection includesÅ 25 seamless, infinitelyÅ tileable textu
01(1).jpg	<b>Coordinating Floor and Wall</b> From the opulent to the rustic, creating the look you want has never been easier. Coordinating floor and wall tile will put t	04_1jpg	Glazed Wall Perfect for surfaces that don't have to withstand heavy traffic, glazed wall tile makes creating any room an adventure. Its u
03_1jpg	Floor Tile Endless possibilities. Lots of personality. From rustic to modern, you'll experience the full spectrum of styles and texture	300schlcraft3_1_ (1).jpg	Traditional Kitchen
02(1).jpg	Exterior Doors	300dcmexico1_2jj	pg liturgical

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:

Unio	ck th	e Power of	the In	teri	net
No.	Le.	ACEN Portfo	olio <sup>™©</sup>	1	
		Manage Portfolio Item F	Project Sizes		
To Edit an Submit. \ To enter	n existing Port 'ou can also D a new Project	folio Project Size click on its Ec elete or Activate/Deactivate the Size use the blank fields and t	dit icon and after n e State of an exisit then CLICK Submit	naking ch ng Portfol t.	anges C io Proje
Project Size		Submit Res	set Edit	Delete	State
Project Size	1	American Olean	Edit	<u>Delete</u>	8
Project Size	2	Crossville Ceramics	Edit	<u>Delete</u>	8
Project Size	3	Laufen International	Edit	<u>Delete</u>	8
Project Size	4	Ceramica Vogue	Edit	<u>Delete</u>	8
Project Size	5	Therma-tru	Edit	<u>Delete</u>	8
Project Size	6	Downtown Buffalo	Edit	<u>Delete</u>	8
Project Size	7	Italy	Edit	<u>Delete</u>	8
Project Size	8	Switzerland	Edit	<u>Delete</u>	8
Project Size	9				
Designet Size	40				

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.

Project Size	Name	Edit	Delete	State
Project Size 1	American Olean	<u>Edit</u>	<u>Delete</u>	Ŷ
Project Size 2	Crossville Ceramics	Edit	<u>Delete</u>	Ŷ

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**  $\[ensuremath{\mathfrak{g}}\]$  or  $\[ensuremath{\mathfrak{g}}\]$  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):

	Sub	mit Reset		
Project Size	Name	Edi	t Delete	State
Project Size 8	Switzerland	Ed	<u>lit</u> <u>Delete</u>	Ŷ
Project Size 9				
Project Size 10				

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):

Project Size	Name	Edit	Delete State
Project Size 1	American Olean	Edit	<u>Delete</u> 💡
Proiect Size 2	Crossuille Corozies	Edit	Delete 😡

Click on "Edit."

An editable field is displayed.

You may now change the name in that field:

	Submit Reset			
Project Size	Name	Edit	Delete	State
Project Size 1	American Olean		<u>Delete</u>	Ŷ
Project Size 2	Crossville Ceramics	<u>Edit</u>	<u>Delete</u>	Ŷ

Editing an item feature.

Click "Submit" when you are finished.