

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™

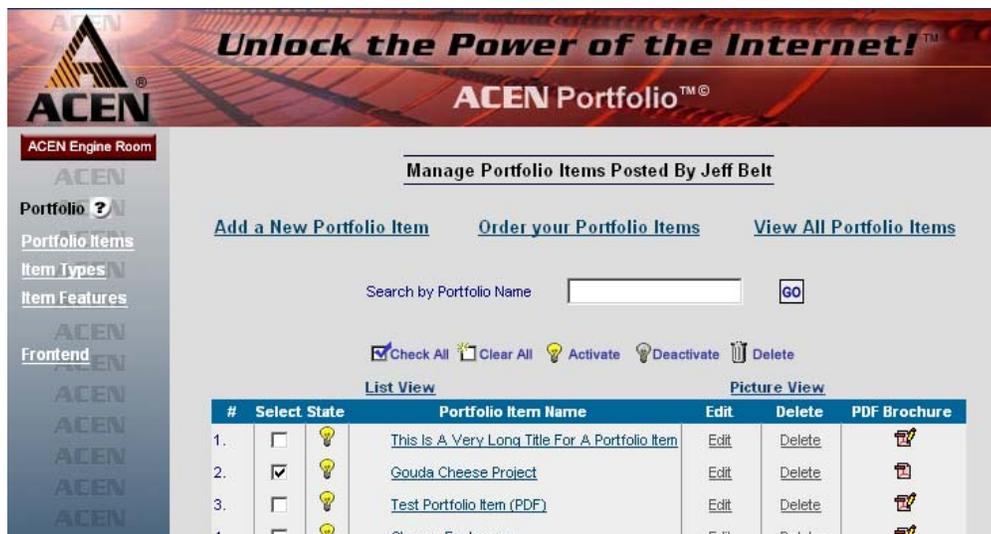
Portfolio™ allows you to present your best and most important work to the world, and it automatically targets the people most important to you—your customers and contacts. Best of all, as projects progress and change, Portfolio™ allows your website to stay relevant and up-to-date.

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



The Portfolio™ page.

The Portfolio™ module is displayed:



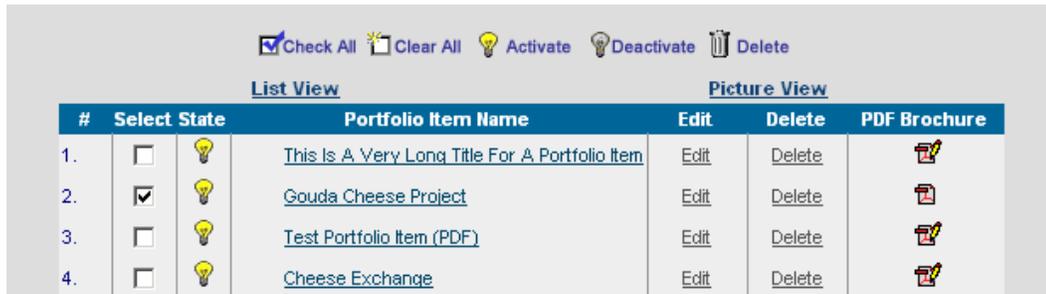
The Portfolio™ module consists of three sections:

- 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 screenshot shows the Portfolio Items page interface. At the top, there is a toolbar with icons for 'Check All', 'Clear All', 'Activate', 'Deactivate', and 'Delete'. Below the toolbar, there are two tabs: 'List View' (selected) and 'Picture View'. The main content is a table with the following columns: '#', 'Select', 'State', 'Portfolio Item Name', 'Edit', 'Delete', and 'PDF Brochure'. The table contains four rows of data.

#	Select	State	Portfolio Item Name	Edit	Delete	PDF Brochure
1.	<input type="checkbox"/>		This Is A Very Long Title For A Portfolio Item	Edit	Delete	
2.	<input checked="" type="checkbox"/>		Gouda Cheese Project	Edit	Delete	
3.	<input type="checkbox"/>		Test Portfolio Item (PDF)	Edit	Delete	
4.	<input type="checkbox"/>		Cheese Exchange	Edit	Delete	

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.

<input checked="" type="checkbox"/> Check All <input type="checkbox"/> Clear All  Activate  Deactivate  Delete						
List View				Picture View		
#	Select State		Portfolio Item Name	Edit	Delete	PDF Brochure
1.	<input type="checkbox"/>		This Is A Very Long Title For A Portfolio Item	Edit	Delete	
2.	<input checked="" type="checkbox"/>		Gouda Cheese Project	Edit	Delete	
3.	<input type="checkbox"/>		Test Portfolio Item (PDF)	Edit	Delete	
4.	<input checked="" type="checkbox"/>		Cheese Exchange	Edit	Delete	

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.

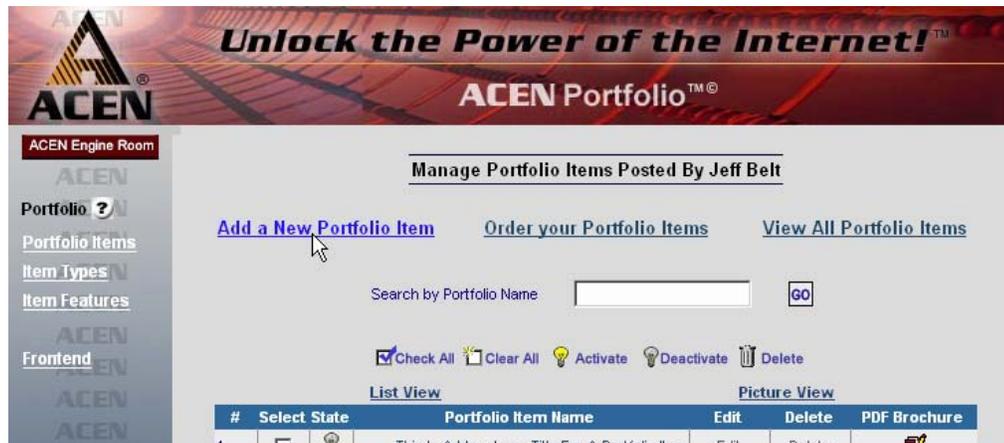
Edit allows you to edit that item.

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):

The screenshot shows the "Add/Edit Portfolio Item" form. At the top, there are two links: "Add a new Portfolio Item" and "Back to all Portfolio Items". Below these links is a "Manage Portfolio Item" section with several icons: View, Modify, Slide Show, Reorder Slides, Customer Feedback, and Delete. The form is titled "Portfolio Item: Gouda Cheese Project" and has a sub-header "Add / Edit Portfolio Item". The form fields are:

- Portfolio Item Name:** Gouda Cheese Project
- Description:** We made some cheese! Our clients loved it!
- Image:** A dropdown menu showing "Crossville Ceramics" and a "Browse..." button. Below the image field, there is a note: "Please upload Landscape style photos here (Image width must be > image height)" and a file name "04_1_.jpg". There are also radio buttons for "Rotate left", "No rotation", and "Rotate right".
- Document Attachment:** A "Browse..." button. Below the document attachment field, there is a note: "(Browse and select a file to upload a new document or replace the existing document.)"
- Document Title:** An empty text field.
- Active Portfolio Item:** Radio buttons for "Yes" (selected) and "No".
- Post to ACEN:** A note: "The Portfolio Item must have at least 2 slides, in order to display it in the ACEN Locator."

 At the bottom of the form, there are "Submit" and "Reset" buttons.

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).

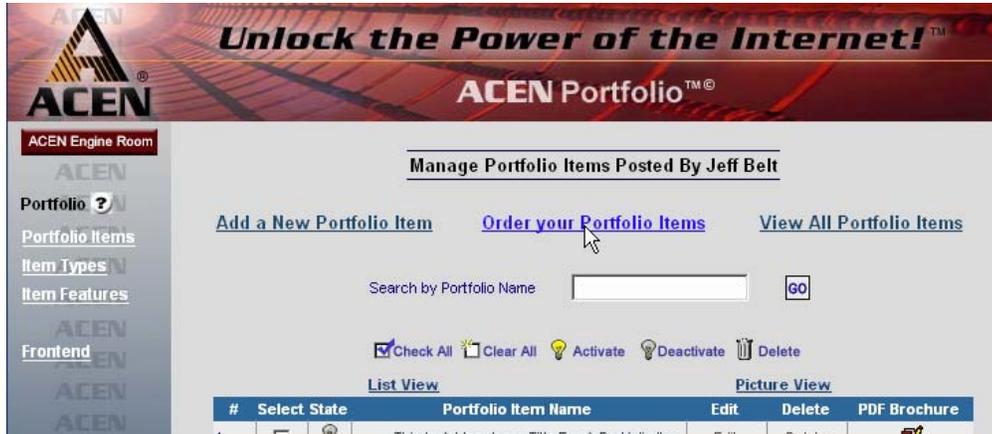
Create PDF allows you to create or update a PDF for this item.

Customer Feedback displays any customer feedback received for this item.

Delete permanently deletes the currently displayed item.

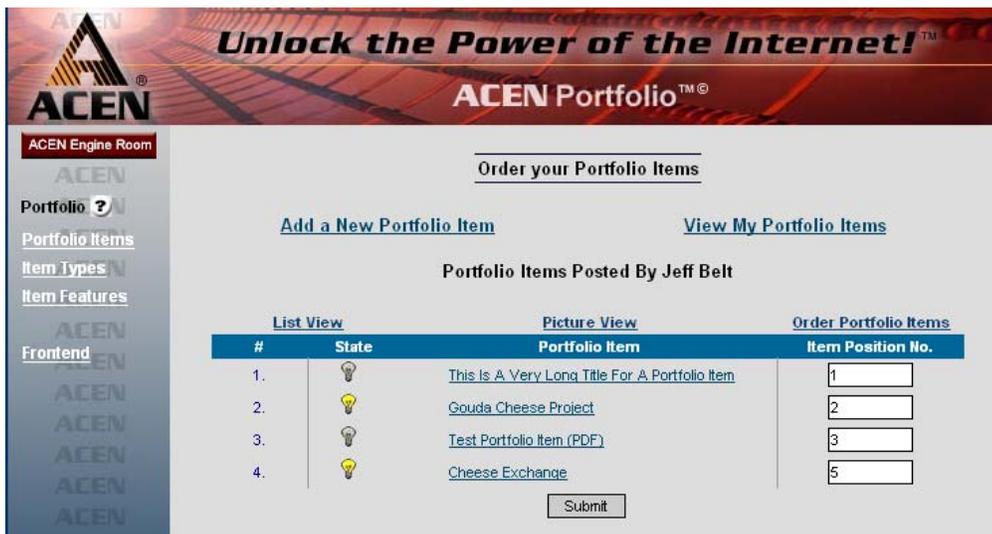
Ordering Portfolio Items

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:



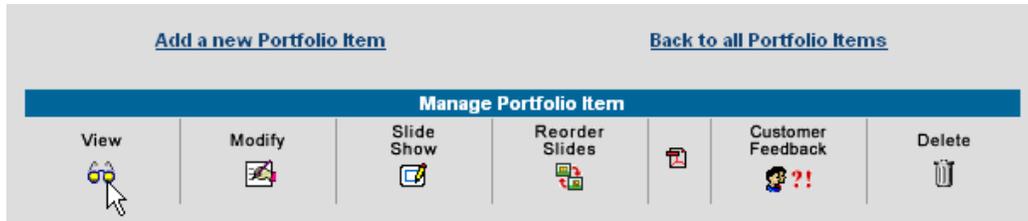
Ordering portfolio items page.

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 screenshot shows the 'Manage Portfolio Item Types' page. At the top, there's a banner with 'Unlock the Power of the Internet!' and 'ACEN Portfolio'. Below that, the page title is 'Manage Portfolio Item Types'. There are two main links: 'Add a New Item Type' and 'Order your Item Types'. A search bar is present with the text 'Search by Portfolio Item Type' and a 'GO' button. Below the search bar is a toolbar with four icons: a checked checkbox for 'Check All', a clear icon for 'Clear All', a lightbulb for 'Activate', and a greyed-out lightbulb for 'Deactivate'. The main content is a table with the following data:

#	Select	State	Image	Portfolio Item Type	Edit	Delete	Display Area
1.	<input type="checkbox"/>			The Cambridge	Edit	Delete	Portfolio
2.	<input type="checkbox"/>			Textured Tile	Edit	Delete	Portfolio
3.	<input type="checkbox"/>			Coordinating Floor and Wall	Edit	Delete	Portfolio
4.	<input type="checkbox"/>			Glazed Wall	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:



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.

#	Select	State	Image	Portfolio Item Type	Edit	Delete	Display Area
1.	<input type="checkbox"/>			The Cambridge	Edit	Delete	Portfolio
2.	<input type="checkbox"/>			Textured Tile	Edit	Delete	Portfolio
3.	<input type="checkbox"/>			Coordinating Floor and Wall	Edit	Delete	Portfolio
4.	<input type="checkbox"/>			Gleazed Wall	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 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.

[Add a new Item Type](#) [Back to all Item Types](#)

Manage Portfolio Item Type

[View](#) [Modify](#) [Delete](#)

Portfolio Item Type: The Cambridge

Add / Edit Portfolio Item Type

Item Type Name	<input type="text" value="The Cambridge"/>
Description <small>(used in Portfolio Keyword search)</small>	<input type="text" value="Step into luxury with Essex Homes as we dazzle you with a spectacular design filled with tremendous amenities and state-of-the-art features. The Cambridge located at 14 Lanoche Court in Brook Forest Estates leaves little to the imagination."/> <input type="text" value="110"/> characters left.
Image <small>Size: 205 x 145</small>	Please upload Landscape style photos here(Image width must be > image height) <input type="text" value="300schlcraft3_1_.jpg"/> <input type="button" value="Browse..."/> <small>(browse and select an image to upload a new picture or replace the existing picture)</small> <input type="radio"/> Rotate left <input checked="" type="radio"/> No rotation <input type="radio"/> Rotate right
Active Item Type	<input checked="" type="radio"/> Yes <input type="radio"/> No

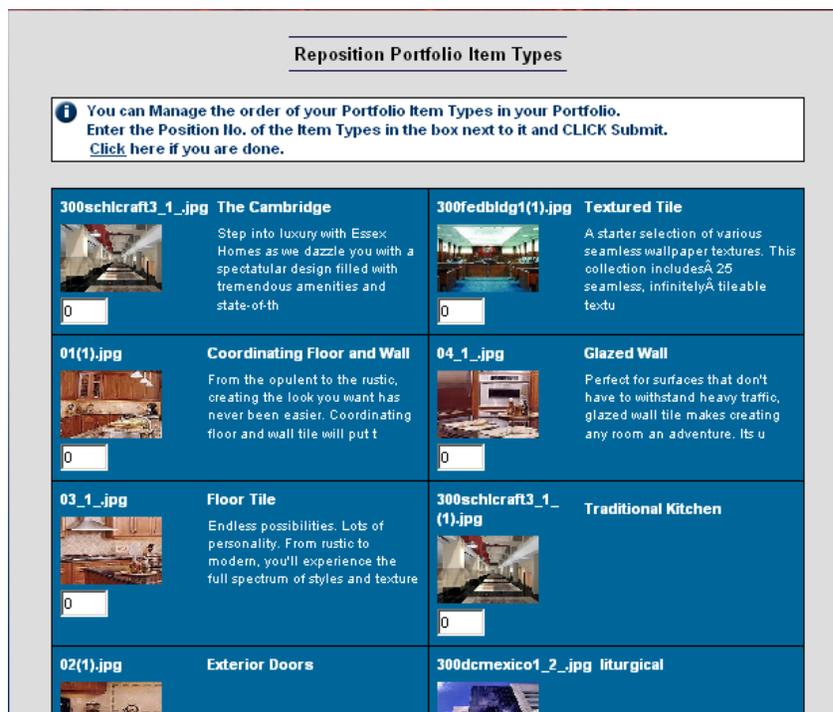
Adding/editing an item type.

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:

Project Size	Name	Edit	Delete	State
Project Size 1	American Olean	Edit	Delete	💡
Project Size 2	Crossville Ceramics	Edit	Delete	💡
Project Size 3	Laufen International	Edit	Delete	💡
Project Size 4	Ceramica Vogue	Edit	Delete	💡
Project Size 5	Therma-tru	Edit	Delete	💡
Project Size 6	Downtown Buffalo	Edit	Delete	💡
Project Size 7	Italy	Edit	Delete	💡
Project Size 8	Switzerland	Edit	Delete	💡
Project Size 9	<input type="text"/>			
Project Size 10	<input type="text"/>			

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	Edit	Delete	💡
Project Size 2	Crossville Ceramics	Edit	Delete	💡

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):

Project Size	Name	Edit	Delete	State
Project Size 8	Switzerland	Edit	Delete	
Project Size 9	<input type="text"/>			
Project Size 10	<input type="text"/>			

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	Delete	
Project Size 2	Crossville Ceramics	Edit	Delete	

Click on "Edit."

An editable field is displayed.

You may now change the name in that field:

Project Size	Name	Edit	Delete	State
Project Size 1	<input type="text" value="American Olean"/>		Delete	
Project Size 2	Crossville Ceramics	Edit	Delete	

Editing an item feature.

Click "Submit" when you are finished.