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.
## Contents

Preface ......................................................................................................................... 2

About LEWCO – LEWCO Core Values ................................................................. 2

Introduction .................................................................................................................. 5

Customer Portal Conventions .............................................................................. 6

Overview of Basic Concepts ................................................................................. 6

Typical Customer Portal Steps ............................................................................. 7

Starting Customer Portal ....................................................................................... 7

Splash Screen ........................................................................................................... 7

Login Dialog ............................................................................................................... 8

Understanding the Home Page ............................................................................. 9

Navigation Bar .......................................................................................................... 9

Entity Search Grids .................................................................................................. 10

Searchable Fields by Entity .................................................................................... 11

Quotes and Orders ..................................................................................................... 12

Understanding the Quote Dialog ......................................................................... 13

Information Area ....................................................................................................... 14

Header Tab ................................................................................................................ 14

Items Tab .................................................................................................................... 17

Configure Dialog ..................................................................................................... 18

Working with Quotes ............................................................................................... 19

Creating a Quote ........................................................................................................ 19

Finding a Quote .......................................................................................................... 20

Editing a Quote .......................................................................................................... 20

Working with Expired, Lost or Abandoned Quotes ........................................... 21

Deleting a Quote ........................................................................................................ 21

Converting a Quote to an Order ............................................................................. 21

Working with Orders ................................................................................................ 22

Finding an Order ....................................................................................................... 22

Deleting an Order ..................................................................................................... 22

Proposals .................................................................................................................... 23

Understanding the Proposal Dialog ................................................................. 23

Printing your Quote ................................................................................................. 23

PDF Format Requirements ..................................................................................... 24
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 proceeded 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.

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.
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
Understanding the Quote Dialog

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.
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.
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.
**Items Tab**

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

<table>
<thead>
<tr>
<th>Shipping Policy:</th>
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</tr>
</thead>
<tbody>
<tr>
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<td>▼</td>
</tr>
<tr>
<td>Shipping Method:</td>
<td>▼</td>
</tr>
<tr>
<td>Freight Terms:</td>
<td>▼</td>
</tr>
<tr>
<td>Requested Ship Date:</td>
<td>▼</td>
</tr>
</tbody>
</table>
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.

![Image of Quote screen]

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

![Image of printed quote]

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
Email: rbodyke@lewcoinc.com

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

<table>
<thead>
<tr>
<th>Quote No.</th>
<th>Leadtime</th>
<th>Prepared On</th>
<th>Valid Through</th>
<th>Currency</th>
</tr>
</thead>
<tbody>
<tr>
<td>SQAA000009-1</td>
<td>10 Business Days</td>
<td>1/5/2016</td>
<td>2/4/2016</td>
<td>USD</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Item</th>
<th>Qty</th>
<th>Description</th>
<th>Unit Price</th>
<th>Extended Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>1</td>
<td>Gravity Roller Conveyor</td>
<td>$236.00</td>
<td>$236.00</td>
</tr>
</tbody>
</table>
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

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.