
User guide for
TruFrame Customer Portal



If you require any further guidance on using the TruFrame Customer Portal, please contact customer.portal@truframe.co.uk

1

Introduction

The TruFrame Customer Portal is a secure web based application that enables you to quickly and easily find information relating to your quotes, orders and deliveries.

The site can be accessed at the following address:
<http://customer.truframe.co.uk>

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Requesting Access

To request access to the TruFrame Customer Portal please email customer.portal@truframe.co.uk or call us on 01664 410 140.

We will need the following information from you in order to process your request:

- Company Name
- First Name
- Last Name
- Email Address

Once we have this information, we will setup an account with your details and you will receive an email asking you to confirm your account. You will need to click the link within this email before you will be able to login to the account.

Clicking the **Complete Registration** button in the email will take you to the confirmation page where you need to set your password.

You are receiving this email as you have signed up to the TruFrame Customer Portal



Test you're almost there...

...and now you are only one step away from using the TruFrame Customer Portal account. Just click the button below to activate your account:

[Complete Registration](#)

Your online username for the TruFrame Customer Portal is **test.user@testcompany.com**. Please use this username whenever you login to your account at <https://customer.truframe.co.uk/>.

Any Questions?

If you have any questions about using the TruFrame Customer Portal feel free to call our technical support team on 01664 410140 (ext 2282).

Regards,
The team at TruFrame

 See how Kevin gets the Complete Package with TruFrame - <https://www.youtube.com/watch?v=caetsqxjsW8>

This email was sent automatically. Please don't reply to it as we won't be able to send you a response. To ensure our emails reach you inbox all you have to do is add this email address to your address book or set it as a safe-sender. This document is strictly confidential. It's only intended to be used by the intended recipient. If you've received this in error please contact the sender and delete it immediately after.

2 Requesting Access

Enter a password and click **Submit** to complete the process and log you in.



Confirm Your Account

Thank you for confirming your email address, please set a password for your account and click Confirm to complete the process and login.

Password

Confirm password

3

Logging In

You are only able to login once you have confirmed your account and set a password, please use your registered email address and password.

If you would like your login to be remembered so that you do not have to enter your details every time you access the site, then tick the **Remember me (a)** button. The site requires the use of cookies in order to store basic settings and secure your login. By signing into the site you are giving you consent to our use of cookies for this purpose.

If you have forgotten your password then you can click the **Forgot your password (b)** button that will email you a link enabling you to reset your password.



Customer Portal

Email Address

test.user@testcompany.com

Password

.....

(a) Remember me?

Log in

Forgot your password?

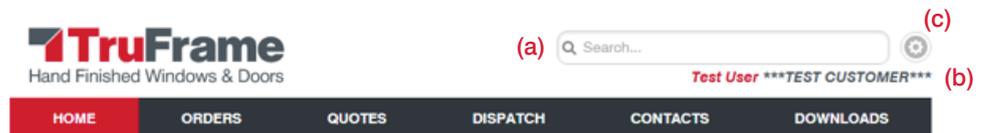
(b)

By signing in you agree to TruFrame's **Conditions of Use** and **Cookies Policy**.

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Site Navigation

When you are logged in you will see the site navigation as shown below.



There are six main pages which can be accessed using the black navigation bar. The page which you are currently viewing will always be highlighted in red – the example shows that the user is currently on the Home page.

Searching (a)

A search bar is visible at all times and will search for orders and quotes based on either the order (or quote) number or the reference provided by you. Entering a minimum of 3 characters text within the search bar will show the first five matching autocomplete items; you can select one of these or enter further letters to restrict the search further. Pressing the enter key will take you to the search results page for the text entered allowing you to view all the results.

User Information (b)

Below the search bar you will find your username and company name – in the example here, we can see that “Test User” has logged on from the company “***TEST CUSTOMER***”.

Actions Menu (c)

The Actions Menu is accessed by clicking the grey cog icon that is to the right of the search box

When the cog icon is clicked a pop out menu will appear and show your available options



The screenshot shows the TruFrame website dashboard. The header includes the TruFrame logo and a search bar. Below the header is a navigation menu with options: HOME, ORDERS, QUOTES, DISPATCH, and CONTACT. The main content area displays sections for 'Orders to Confirm', 'Recent Orders', and 'Recent Quotes'. A table titled 'Deliveries Due' is visible, with columns for 'Order' and 'Reference' for two dates: 21/09/2015 and 22/09/2015. On the right side, a 'Choose an action' menu is open, listing options: Change Password, User Administration, Animations (toggle off), Page Caching (toggle on), and Logout.

- **Change Password** – will take you to a page enabling you to change your password, you will need to enter your current password as well as your new one.
- **User Administration** – if you have been setup with a Customer Administrator account then you will see this option; this will take you to a page where you can add and edit other users within your company.
- **Animations** – here you can enable and disable the page transition animations (fade in and out) that occur when you change page. Enabling this may have an impact on performance and is only recommended on fast computers.
- **Page Caching** – when enabled this will attempt to improve performance of the site by pre-loading the main pages when you first access a page (other pages will be loaded in the background). Pages that are loaded will also be cached in memory to speed up access and prevent the need to download each time you go to a page.
- **Logout** – will end your session and log you out of the site.

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Home

The Home page enables you to find information about the most recent orders, quotes and dispatch information at a glance.

There are up to four sections to the page – Orders to Confirm, Recent Orders, Recent Quotes and Deliveries Due (if there are no orders that need confirming then this section will not show). The first three of these sections are displayed in collapsible areas which show a + icon when they are collapsed – clicking on these will expand them to show the contents and the icon will change to a -. This can be seen in the screen-shots below:

If the information you see displayed here is **incorrect**, please logout and contact TruFrame support.

The screenshot shows the TruFrame Home page. At the top, there is a search bar and a user profile icon. Below this is a navigation menu with the following items: HOME (highlighted in red), ORDERS, QUOTES, DISPATCH, CONTACTS, and DOWNLOADS. The main content area features three collapsible sections: 'Orders to Confirm' (with a red badge showing '2'), 'Recent Orders', and 'Recent Quotes'. Below these is a 'Deliveries Due' section with a table showing orders due on 08/12/2015, 09/12/2015, and 10/12/2015. The table has columns for Order and Reference. The first row shows order 99000015 with reference 'QUICK ORDER'. The second row shows order 99000017 with reference 'JOB 12'. There are navigation arrows on the left and right sides of the table. At the bottom of the page, there is a footer with contact information: TruFrame Trade Frames Ltd, Units 2KLM Hudson Road, Saxby Road Industrial Estate, Melton Mowbray, Leicestershire, LE13 1BS. Contact details include phone number 01664 410 140 and email customer.portal@truframe.co.uk.

Deliveries Due					
08/12/2015		09/12/2015		10/12/2015	
Order	Reference	Order	Reference	Order	Reference
99000015	QUICK ORDER				
99000017	JOB 12				

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Test User Test Company

HOME ORDERS QUOTES DISPATCH CONTACTS DOWNLOADS

(a) Orders to Confirm (i) 2

Order	Reference	Status	Ordered	Delivery	Invoice	Net Price
99000017	JOB 12	(c)	01/12/2015	08/12/2015	INV 0002	£1,352.89
99000014	CONFIRM TEST	(c)	01/12/2015	07/12/2015		£375.28

(b) Recent Orders

Recent Quotes

Deliveries Due

08/12/2015		09/12/2015		10/12/2015	
Order	Reference	Order	Reference	Order	Reference
99000015	QUICK ORDER				
99000017	JOB 12				

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Orders to Confirm (a)

This section will show any current orders that you need to confirm along with basic information for each item. You may click on the Order number or Reference to open a Job Screen showing detailed information for the order. If there are no orders that require confirmation then this section will not be visible. A counter in the header (i) allows you to see how many items require confirmation at a glance and when the section is collapsed.

Recent Orders and Recent Quotes (b)

These sections will show the last ten orders or quotes that you have made along with basic information for each item. You may click on the Order/Quote number or Reference to open a Job Screen showing detailed information for the order.

Status Icons (c)

A number of icons are used on the Home page and also the Orders and Quotes pages, hovering the mouse over the icon will give a description of its meaning. A full list can also be found in Appendix 1.

Deliveries Due (d)

This section will show any deliveries that are scheduled in the last seven days and up to one month in the future. Navigation arrows will appear when you mouse over the table, allowing you to navigate forwards and backwards. Each day can show up to 10 scheduled orders within this page. If there are more than 10 orders then a link will be shown enabling you to go to the Dispatch page where you can see a full list of items for delivery (+3 more... in the example below).

Q Search...⚙Test User Test Company

HOME ORDERS QUOTES DISPATCH CONTACTS DOWNLOADS

+ Orders to Confirm 14

+ Recent Orders

+ Recent Quotes

Deliveries Due (d)

09/12/2015		10/12/2015		11/12/2015	
Order	Reference	Order	Reference	Order	Reference
				99000011	TEST JOB 1
				99000018	TEST JOB 2
				99000019	TEST JOB 3
				99000020	TEST JOB 4
				99000021	TEST JOB 5
				99000022	TEST JOB 6
				99000023	TEST JOB 7
				99000024	TEST JOB 8
				99000025	TEST JOB 9
				99000026	TEST JOB 10
				+ 3 more...	

←

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6

Orders

The Orders page enables you to find information about all of the orders that you have placed.

Data is presented in a tabular format showing:

- **Order** - the TruFrame order number
- **Reference** – the reference number provided by you
- **Status** – icons showing the current status of the order
- **Colour** – the frame colour
- **Frames** – the number of frames in the order
- **Ordered** – the date the order was placed
- **Delivery** – the date that the order is scheduled for delivery
- **Invoice Number** – our reference number for the order
- **Net Price** – the total net cost of the order

The Order and Reference values are clickable and will take you to the Job screen showing detailed information for the order.

All columns with the exception of Status are sortable by clicking the column header (marked by a red triangle below (a)). In the screen-shot below, the Ordered column is sorted in descending order and so shows the most recent orders first (this is the default sorting for the Orders screen).

Order	Reference	Status	Colour	Frames	Ordered (a)	Delivery	Invoice No	Net Price
99000030	TEST JOB 14			0	01/12/2015	11/12/2015		£0.00
99000027	TEST JOB 11			0	01/12/2015	11/12/2015		£0.00
99000013	TESTING 3		White	3	01/12/2015	04/12/2015	INVOICE 1	£130.00
99000015	QUICK ORDER		White	2	01/12/2015	08/12/2015		£1416.10
99000018	TEST JOB 2			0	01/12/2015	11/12/2015		£0.00
99000019	TEST JOB 3			0	01/12/2015	11/12/2015		£0.00
99000011	TEST JOB 1		White	2	01/12/2015	11/12/2015		£334.75
99000017	JOB 12		White	9	01/12/2015	08/12/2015	INV 0002	£1352.89
99000028	TEST JOB 12			0	01/12/2015	11/12/2015		£0.00
99000029	TEST JOB 13			0	01/12/2015			£0.00

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6 Orders

At the bottom right of the screen there is a drop-down box that allows you to select the number of items visible per page – currently showing 10 Items. Changing this will immediately reload the page to show the new number of items.

Pagination links are at the bottom left of the screen allowing you to move backwards by clicking the < link, select a specific page by clicking its number, or move forward by clicking on >. When three dots are displayed that indicates there are more pages so in the screen-shot above clicking on page 5 would change the pagination controls so that more pages are visible.

The page you are current viewing is always highlighted in red.

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Quotes

The Quotes page enables you to find information about all of the quotes that you have placed.

Data is presented in a tabular format showing:

- **Quote** - the TruFrame quote number
- **Reference** – the reference number provided by you
- **Status** – icons showing the current status of the quote
- **Colour** – the frame colour
- **Frames** – the number of frames in the quote
- **Quoted** – the date the quote was requested
- **Net Price** – the total net cost of the order

The Quote and Reference values are clickable and will take you to the Job screen showing detailed information for the quote.

All columns with the exception of Status are sortable by clicking the column header. A red triangle indicates the column that is currently sorted by and the direction of sorting. In the screen-shot below, the Quoted column is sorted in descending order and so shows the most recent quotes first (this is the default sorting for the Quotes screen).

Search...⚙️

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HOME ORDERS QUOTES DISPATCH CONTACTS DOWNLOADS

Quote	Reference	Status	Colour	Frames	Quoted	Net Price
20093499	DOOR QUOTE		White	1	01/12/2015	£356.35
20093500	2 DOORS		White	2	01/12/2015	£644.60
20093501	TEST QUOTE		White	1	01/12/2015	£1514.69
20093502				0	01/12/2015	£0.00

< 1 >

15 Items

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At the bottom right of the screen there is a drop-down box that allows you to select the number of items visible per page – currently showing 10 Items. Changing this will immediately reload the page to show the new number of items.

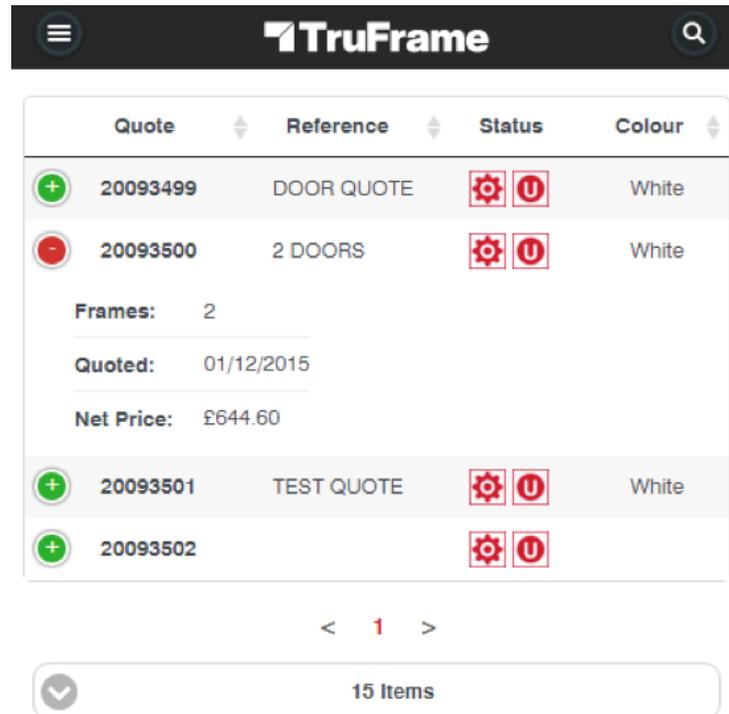
Pagination links are at the bottom left of the screen allowing you to move backwards by clicking the < link, select a specific page by clicking its number, or move forward by clicking on >. When three dots are displayed that indicates there are more pages so in the screen-shot above clicking on page 5 would change the pagination controls so that more pages are visible.

The page you are current viewing is always highlighted in red.

Viewing Orders and Quotes on Small Screens

When viewing the Orders or Quotes pages on smaller screens, or when your browser window is not full screen then not all columns may fit across the screen. In this case the last columns will be hidden and a green + icon will be displayed that allows you to expand the row and show the additional information that did not fit onto the screen.

This functionality is also used when viewing on a mobile device. See screenshot below:



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Dispatch

The Dispatch is used to display all of the scheduled order deliveries for your company.

The default view is a grid showing the current month and any orders that are to be delivered.

The left side of the screen shows the date range of the current view (September 2015), navigation options and three datepickers.

You can move forwards and backwards by clicking the arrows, or "today" will take you to today within the context of the view you are in. You can also click a specific date within one of the three datepickers which will take you to the month containing that date when in month view, or the week containing that date when in week view. If you are in day view then you will go directly to the selected date.

Like the orders and quotes screens, the job and reference numbers are clickable and will take you to the Job view where you can see detailed information regarding the selected item.

The screenshot displays the TruFrame Dispatch interface. At the top, the TruFrame logo and tagline "Hand Finished Windows & Doors" are visible, along with a search bar and user information "Test User ***TEST CUSTOMER***". A navigation menu includes HOME, ORDERS, QUOTES, DISPATCH (highlighted), CONTACTS, and DOWNLOADS.

The main content area shows a calendar for September 2015. The calendar is in a grid view with columns for Monday through Friday. The current date is September 9th, 2015, which is highlighted in yellow. The calendar shows several orders with their job and reference numbers:

Day	Order Reference
Monday, 14th	90229235 KFV stable doi
Tuesday, 15th	90234726 ROGAL TEST I
Wednesday, 16th	90229235 KFV stable doi
Thursday, 17th	
Friday, 18th	
Monday, 21st	
Tuesday, 22nd	90234726 ROGAL TEST I
Wednesday, 23rd	
Thursday, 24th	
Friday, 25th	
Monday, 28th	
Tuesday, 29th	
Wednesday, 30th	
Thursday, 1st	
Friday, 2nd	
Monday, 5th	
Tuesday, 6th	
Wednesday, 7th	
Thursday, 8th	
Friday, 9th	

On the left side of the calendar, there are three datepickers for "month", "week", and "day". The "month" datepicker is currently set to "September 2015".

At the bottom of the page, the TruFrame Trade Frames Ltd. contact information is provided: Units 3KLM Hudson Road, Saxby Road Industrial Estate, Melton Mowbray, Leicestershire, LE13 1BS. Contact details include the phone number 01664 410 140 and the email address ITSupport@truframe.co.uk.

8 Dispatch

By clicking the red icon next to the date, a PDF of your “delivery summary” will be downloaded, listing details for each order scheduled for delivery that day (a).

The screenshot shows the TruFrame web application interface. At the top, there is a search bar and the user name 'Test User Test Company'. Below this is a navigation menu with tabs for HOME, ORDERS, QUOTES, DISPATCH (highlighted in red), CONTACTS, and DOWNLOADS. The main content area displays a calendar for December 2015 and January 2016. The date Friday, 11/12/2015 is selected, and a list of orders is shown for that day. A red icon next to the date indicates that a PDF delivery summary can be downloaded. The list of orders includes:

- 99000011 TEST JOB 1
- 99000026 TEST JOB 10
- 99000027 TEST JOB 11
- 99000028 TEST JOB 12
- 99000030 TEST JOB 14
- 99000018 TEST JOB 2
- 99000019 TEST JOB 3
- 99000020 TEST JOB 4
- 99000021 TEST JOB 5
- 99000022 TEST JOB 6
- 99000023 TEST JOB 7
- 99000024 TEST JOB 8
- 99000025 TEST JOB 9

Report layout



Test Company
Printed by: Test.User
Date Printed: 01/12/2015

DAILY DELIVERY SUMMARY FOR 08/12/2015

JOB NO.	REFERENCE	FRAMES	GLASS UNITS	PANELS	WELDED CILLS	PACKS
99000015	QUICK ORDER	2				
99000017	JOB 12	9			1	
TOTALS		11			1	

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Contacts

The Contacts page shows the main contact information for TruFrame along with a more specific departmental contacts list.

The departmental list has a collapsible section for each department which can be expanded by clicking on the + icon.



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Test User ***TEST CUSTOMER***

- HOME
- ORDERS
- QUOTES
- DISPATCH
- CONTACTS**
- DOWNLOADS

Main Telephone	01864 410140
Main Fax	01864 410141
Sales Fax	01864 562935
Sales Email	sales@truframe.co.uk

Departmental Contacts List

- + Accounts
- + Processing
- Sales
 - National Sales Manager Paul Tranter ext 2230 / 07980 999 654 paul.tranter@truframe.co.uk
 - Customer Services Administrator Charlotte Street ext 2232 charlotte.street@truframe.co.uk
 - Senior Sales Co-ordinator Sarah Walker ext 2233 sarah.walker@truframe.co.uk
- + Marketing
- + Dispatch
- + Purchasing
- + Production
- + Quality Control
- + Technology
- + Orders/Quotes/Confirmations

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Downloads

The Downloads page contains links to documents available for you to download. Downloads are arranged into categories displayed within a “card” grouping. A link to the downloads page on the main TruFrame website is also available.

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Q Search...

*Test User ***TEST CUSTOMER****

HOME ORDERS QUOTES DISPATCH CONTACTS **DOWNLOADS**

TruFrame Website Downloads

- [Click here to access downloads on the TruFrame website](#)

Online Ordering

- [Connecting to Remote-App](#)
- [Truframe Satellite Master](#)

11

Job View

Clicking on an order number, quote number or reference will open the Job View.

Summary information is shown at the top of the page including order number, reference and date, delivery information and any notes that have been made against the order.

If an order has a WER rating then this will be shown and an icon next to this will allow you to download the WER Certificate for the order.

Likewise, if an order is certified as Secure by Design then this will be shown and an icon will allow you to download the certificate.

A Documents collapsible section holds links to any documents stored against the job such as the order confirmation, acknowledgement and so on. Clicking any of the documents will download it to your computer or open it in your browser (depending on your browser's configuration).

Below the documents you will find a clickable image depicting each job item. Pricing information is shown at the bottom of the page in another collapsible section.

If the order requires confirmation a button will appear on your order

Your order will not be processed until you have clicked to confirm

Job: 99000013

Order	99000013	Invoice Number	INVOICE 1
Reference	TESTING 3	Invoice Date	04/12/2015
Date Ordered	01/12/2015	WER Rating	A+ (12)
Glazed	No	Secure By Design	Yes
Confirmed	No	Delivery Date	04/12/2015
		Delivery Info	
		Drivers	

Confirm Order

Notes:
Here are some test notes regarding this order....

Documents

Item: 1
Qty (3) O/A Sizes 1000mm x 1000mm (Style: 1)

Pricing

99000030 TEST JOB 14 01/12/2015 11/12/2015 £0.00

11 Job View

When clicking a Job Item, the view changes to drill down into the detail for that particular item.

Detailed pricing information is shown along with collapsible sections with details on any options for the job item and details of the glass requirements.

To return from the job item to the main job view, **click the X icon** in the top left corner of the job item view.

Job: 99000013

Linear SBD Casement Qty (3) O/A Sizes 1000mm x 1000mm (Style: 1) White £130.00

Pricing	Qty	Unit	Gross	Disc.	Nett
Base price 1000 x 1000	3	Each	£96.00		£96.00
White 150mm Cill	3.3	m	£21.45		£21.45
Screw Retainer	11.82	m	£3.55		£3.55
Glazing Clips	3	off	£9.00		£9.00
Total			£130.00		£130.00

Options

Colour	White
Cill colour	White
Frame (Head)	LSW012 57mm EnergyPlus Frame
Frame (Cill)	LSW012 57mm EnergyPlus Frame
Frame (Left jamb)	LSW012 57mm EnergyPlus Frame
Frame (Right jamb)	LSW012 57mm EnergyPlus Frame
Bead type	LSW041 28mm Sculp Bead
Cill	LSL150 150mm Cill
Drainage	Concealed Drainage
Screw retainer	Required
Viewed from	Viewed from outside
Reinforcing rule	Standard Reinforcing
Glazed in/out	Glazed in

Glass

Qty	App	Width	Height	Description
3	A1	916	886	4 20 4 Clear Tuff Total+ - 20mm Black Edgetech - 20

The image changes to show measurements, and can be expanded to large size and back by **clicking on the image** itself.

Job: 99000013

Linear SBD Casement Qty (3) O/A Sizes 1000mm x 1000mm (Style: 1) White £130.00

1000

A1
T3

970

1000

99000028 TEST JOB 12 01/12/2015 11/12/2015 £0.00

12

User Administration

To request Customer Administrator access please email customer.portal@truframe.co.uk or call us on 01664 410 140.

If your account has been setup as a Customer Administrator then you will be able to add, edit and delete user accounts for your company and also reset your user's passwords.

The User Administration page is accessed by clicking the Action Menu icon at the top right of the screen (grey cog) which opens a pop-out menu, and selecting User Administration.

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Search... ⚙️

Test User *TEST CUSTOMER*****

HOME ORDERS QUOTES DISPATCH CONTACTS DOWNLOADS

Administration

Add Edit Delete Deleted Users

Q

Email	First Name	Last Name	Locked
<input type="checkbox"/> simonscoble@gmail.com	Test	User	<input type="checkbox"/> Off

You will be presented with a list of user accounts within your company showing email, names and a Locked flip switch.

The locked flip switch enables you to quickly unlock a user's account should they entered an incorrect password too many times.

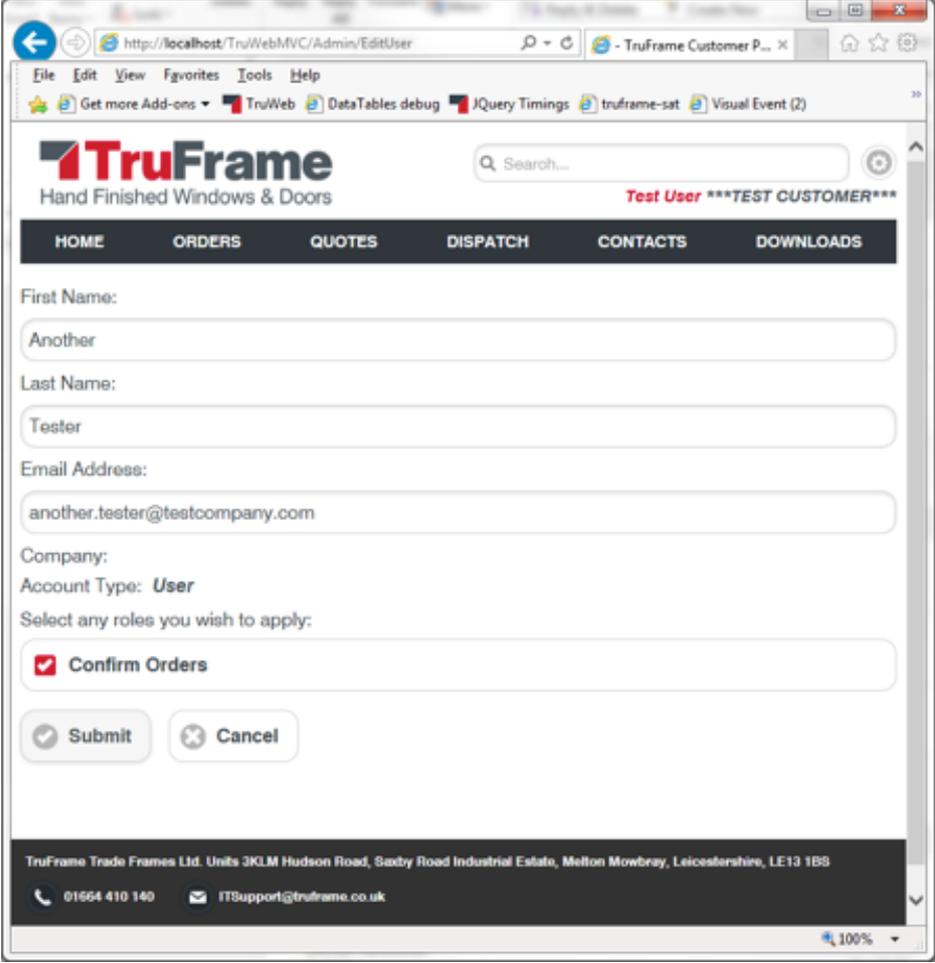
If you have a large number of users, these can be filtered by entering text within the filter bar – this matches text from the email address, first name or last name.

Buttons near the top of the screen allow you to Add a user, Edit or Delete a user from the system. In order to Edit or delete you will need to select the account by clicking the checkbox to the left of the username. Only a single user can be edited at a time, but multiple users can be deleted. You are not permitted to delete your own account. Should you wish to delete all of your accounts for the TruFrame Customer Portal please contact us to do this on your behalf.

Adding a New User

Clicking the Add User button opens a form where you can input the required details of the user.

** Please note - you are responsible for any user accounts that you create using the administration functions – any accounts created will have full access to view your company's quotes, orders and delivery information. **



The screenshot shows a web browser window at the URL `http://localhost/TruWebMVC/Admin/EditUser`. The page header features the TruFrame logo and navigation menu with items: HOME, ORDERS, QUOTES, DISPATCH, CONTACTS, and DOWNLOADS. The form fields are as follows:

- First Name:
- Last Name:
- Email Address:
- Company:
- Account Type: **User**
- Select any roles you wish to apply:
 - Confirm Orders

Buttons for **Submit** and **Cancel** are located below the role selection. The footer contains contact information for TruFrame Trade Frames Ltd.

When creating a new user, all fields are mandatory. Only one account can be created per email address or name, you will be notified if a name or email address has already been taken. Please ensure you enter the email address carefully as an email will be sent to the account requiring it to be validated before the new user will be able to login.

Please note - no password is set at this point – the user will set this themselves when they confirm their email address

A list of checkboxes will be displayed for roles that you can apply to the user. Currently this contains just Confirm Orders but this may be expanded in future.

Editing a User

A user can be edited by checking the box next to their name and clicking **Edit**. The form displayed is the same as when adding a user but you are not required to enter a password. If you leave the password fields blank then the password will remain as it currently is. Should you enter a password then that will be set for the user when you save the form.

The screenshot shows the TruFrame user management interface. At the top left is the TruFrame logo with the tagline 'Hand Finished Windows & Doors'. To the right is a search bar and a settings gear icon. Below this is a navigation menu with links for HOME, ORDERS, QUOTES, DISPATCH, CONTACTS, and DOWNLOADS. The main content area displays the details for a user named 'Test User' from the company '***TEST CUSTOMER***'. The form includes fields for First Name (Another), Last Name (Test), and Email Address (another.test@testcompany.com). There are also fields for New Password and Confirm New Password, which are currently empty. The account type is 'User' and the role 'Confirm Orders' is selected. At the bottom of the form are 'Submit' and 'Cancel' buttons. A footer bar at the very bottom contains contact information: TruFrame Trade Frames Ltd, Units 3KLM Hudson Road, Saxby Road Industrial Estate, Mellon Mowbray, Leicestershire, LE13 1BS, phone number 01664 410 140, and email ITSupport@truframe.co.uk.

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Search...

Test User *TEST CUSTOMER*****

HOME ORDERS QUOTES DISPATCH CONTACTS DOWNLOADS

First Name:
Another

Last Name:
Test

Email Address:
another.test@testcompany.com

New Password:

Confirm New Password:

Company: *****TEST CUSTOMER*****
Account Type: **User**
Select any roles you wish to apply:
 Confirm Orders

TruFrame Trade Frames Ltd. Units 3KLM Hudson Road, Saxby Road Industrial Estate, Mellon Mowbray, Leicestershire, LE13 1BS
01664 410 140 ITSupport@truframe.co.uk

Deleting a User

A user can be deleted by checking the box next to their name and clicking **Delete**.

This will take effect immediately and the account will be moved to **Deleted Users** and the user will no longer be able to login.

Undeleting a User

Deleted users can be recovered by clicking the **Deleted Users** button – this takes you to a screen listing all of your deleted accounts. Simply check the box next to any of the deleted accounts required and click Undelete.

Should you wish just to return to the main administration page, click the **Back** button.

The screenshot shows the TruFrame user administration interface. At the top left is the TruFrame logo with the tagline 'Hand Finished Windows & Doors'. To the right is a search bar and a user profile indicator for 'Test User ***TEST CUSTOMER***'. Below this is a navigation menu with buttons for HOME, ORDERS, QUOTES, DISPATCH, CONTACTS, and DOWNLOADS. The main content area is titled 'Administration - Deleted Users' and contains an 'Undelete' button on the left and a 'Back' button on the right. Below the buttons is a search bar. A table lists deleted users with columns for Email, First Name, Last Name, and Locked. One user is listed with a checked checkbox in the first column.

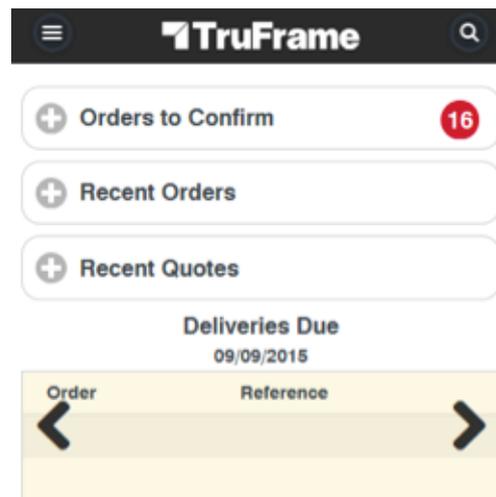
	Email	First Name	Last Name	Locked
<input checked="" type="checkbox"/>	another.test@testcompany.com	Another	Test	<input type="checkbox"/> Off

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Viewing on Mobile Devices

The TruFrame Customer Portal is designed to work on mobile devices.

When viewing on a mobile device, or a tablet with a small screen the majority of pages will display in a similar way but the site navigation will be different. A navigation menu is opened by clicking the menu icon at the top left of the screen and a pop-out menu will display from the left of the screen.

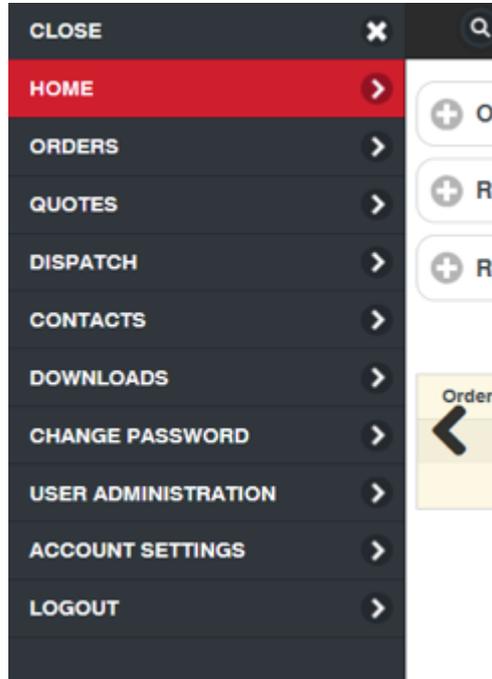


The page you are currently viewing is highlighted in red and all of the navigation options you would find on a desktop are visible.

On a mobile device we do not show the Actions Menu as for a desktop pc, these options are integrated into the main mobile navigation. The caching and transitions options can be found under Account Settings.

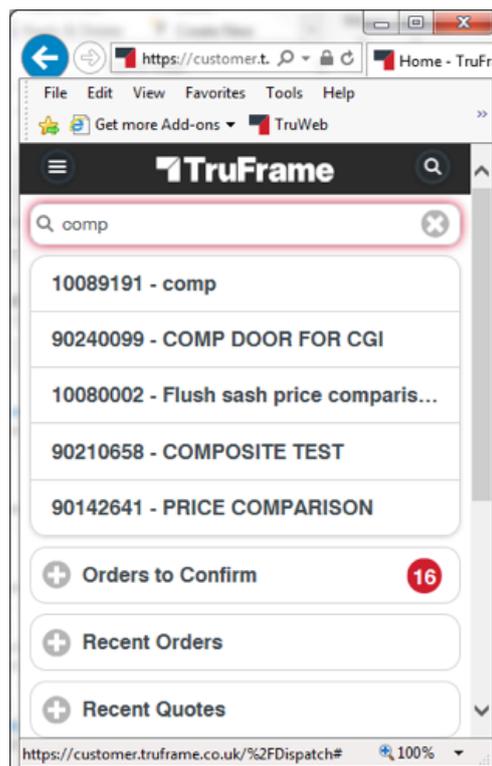
13 Viewing on Mobile Devices

Clicking the Close option, anywhere off the menu, or swiping left will close the menu.

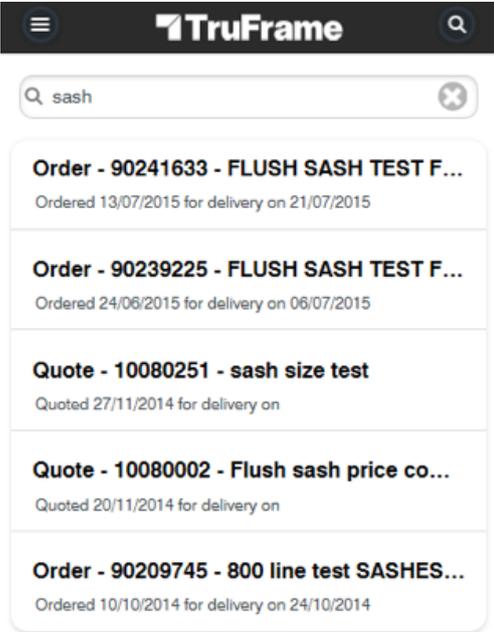


Searching on a mobile device works in the same way as for a desktop but in order to see the search box you must click the magnifying glass and the search box will appear near the top of the screen. Enter text into this (auto-complete should work as per a desktop pc) and select the option you want or press enter to show all results for search term entered.

In the screen-shot we can see that the user has clicked the magnifying glass and entered "comp" into the search box resulting in the first 5 matches on this being displayed – click one of the options to see the Job View.



Pressing enter when inputting the search text will take you to the search results page where all results can be seen and paged through:



< 1 2 >

Showing 1 to 5 of 8 results

Dispatch on Mobile Devices

The dispatch screen on mobile devices has a completely different appearance and is much simplified.

A scrollable list shows the day on the left and any deliveries due on that day on the right. As usual, clicking on the order number or the reference will open a Job View for the selected item.

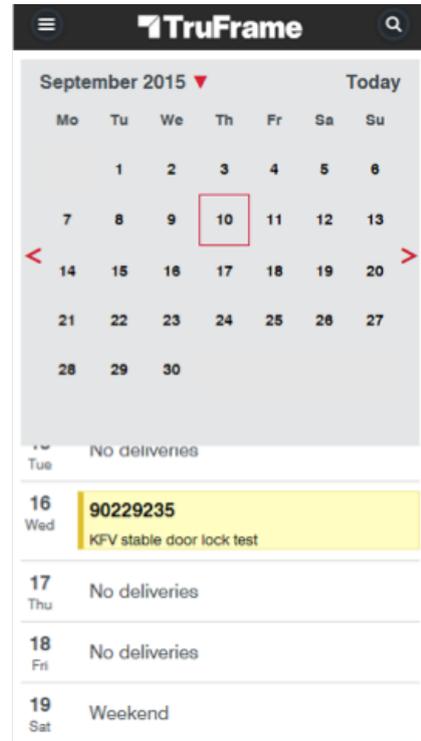
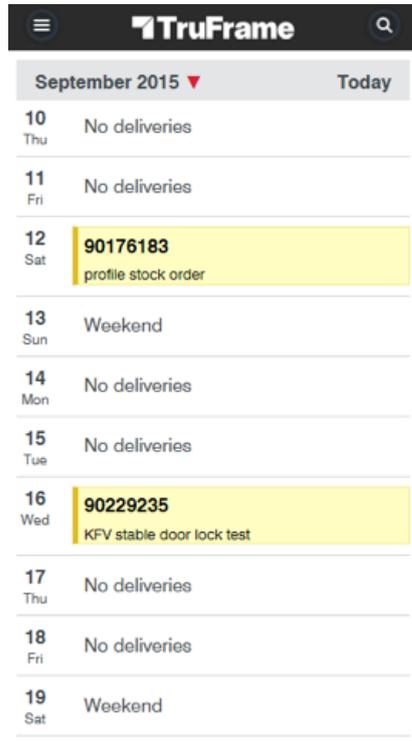
Scroll up to see older items and scroll down to see more recent items.

As you reach the end of the content, more items will automatically be loaded in so that you can keep scrolling indefinitely.

To jump directly to a specific day, click the current month to reveal a date picker. Selecting a day from this will jump to that date.

Within the date picker, you can move forwards and backwards a month by clicking the < > arrows or click Today to jump to today's date.

To close the date picker click on the month again.



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Getting Help

If you require further assistance with the TruFrame Customer Portal, please contact us on 01664 410 140 and we will be pleased to assist you.

If you encounter any issues or errors with that site then please contact us by email and if possible include a screen-shot of the problem and a description of what you were doing at the time / how we can replicate the issue.

You can contact us at the following email address:

customer.portal@trufame.co.uk

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Appendix 1

Status Icons

	Processed Order
	Cancelled
	Confirmed
	On Hold
	Pre Order
	Glazed
	Unglazed
	Satellite Order
	Invoiced
	Download WER Certificate
	Download Secure By Design Certificate
	Notes