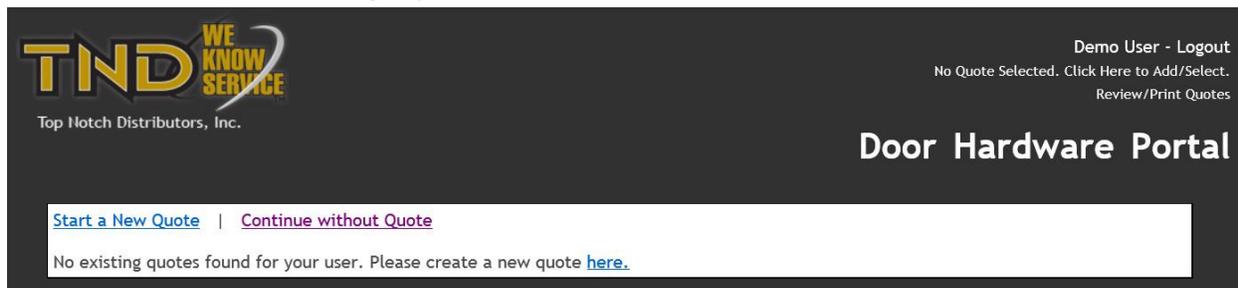


Top Notch Dist. DHPortal User Guide

Navigate to <http://www.topnotchinc.com/dhportal> and login with the credentials you have been provided.
(If you do not have credentials to login with, please contact us at 800-233-4210)

Once logged in, you will be asked to select from an already created quote or create a new quote. You can access the quote creation screen from the “Start a New Quote” link. (If you plan on simply checking stock or pricing without creating a quote, click the “Continue without Quote” link.)



The screenshot shows the top navigation bar with the TND logo and 'WE KNOW SERVICE' tagline. The user is logged in as 'Demo User' with a 'Logout' link. The page title is 'Door Hardware Portal'. Below the navigation bar, there are two links: 'Start a New Quote' and 'Continue without Quote'. A message states: 'No existing quotes found for your user. Please create a new quote [here](#).'

If you choose to start a new quote, you will be brought to the following screen. Input a name for the quote (Generally, your customer’s name), the markup type and percentage. Click “create” to create the quote:



The screenshot shows the quote creation form. The 'Quote Name' field contains 'Joe Somebody'. Under 'Select Markup Type', the 'Margin % Over Cost' option is selected. The 'Select Markup' dropdown is set to '25%'. A 'Create' button is visible at the bottom of the form.

You will now be brought to the Mount Selection page. If you created or chose an existing quote, you will see the quote you are currently building in the top right of the screen (You can change the existing quote or create a new one by clicking the “Change” link. You can also log out of the system with the “Logout” link):



The screenshot shows the top right corner of the page. It displays 'Demo User - Logout', 'Current Quote: Joe Somebody | Change', and 'Review/Print Quotes'. The page title 'Door Hardware Portal' is also visible.

On the Mount Selection page, you can choose a mount by clicking on its image or number (Mount finishes may vary from the mount at your location):



You will be brought to the Options Selection page. All controls are disabled until a function is selected. Select the proper function for your application. Once selected, the available finishes, handing and keyway (if applicable) will become selectable. Design becomes available when a finish is selected. Once all options are selected, click the “Continue” button. (Alternatively, you can click the “List View” link to see a list of all available options for the mount chosen)

Mount 15 - Clear Selections			
List View Please choose from the options below:			
Function	Finish		Handing <input type="button" value="Chart"/>
Select... ▾	<input type="radio"/> Aged Bronze 	<input type="radio"/> Bright Chrome 	<input type="radio"/> Lifetime Brass 
Keyway	<input type="radio"/> Matte Antique Nickel 	<input type="radio"/> Matte Brass & Black 	<input type="radio"/> Satin Nickel 
▾			Design <input checked="" type="radio"/> Ellipse <input type="radio"/> Round <input type="radio"/> Traditional   
<input type="button" value="Continue"/>			

You will now be brought to the Item Detail page. On this page, you can see specific details for the item you have selected as well as current stock levels (next day and total across all warehouses) and your company's price. If a quote is currently selected (Top Right) you will have the ability to add this item to the quote. Change the quantity in the box provided (if more than 1) and click "Add to Quote". If you want to revise your selections, click the "Change Mount Options" button at the top left of the item detail.

[Change Mount Options](#)



Mount #15 - TND Item #: PSROUTSR003

Here is a great custom description for this item

Manufacturer:	Baldwin	List Price:	\$105.00
Design:	Round	Avail. Next Day:	8
Category:	Lockset	Total Avail:	16
SubCategory:	Knob	Knob/Lever:	
Series:	Reserve	Rose Design:	Traditional Square Rose
Function:	Passage	Keyway:	
Handing:	NA		
Finish:	Lifetime Brass 	Your Price:	\$52.50

When an item is added, you will be brought back to the options selection screen for that mount and a red message stating "Item(s) Added Successfully" will appear. From here, you can continue to work with this mount or click the TND logo in the top left to return to the Mount Selection page.

Mount 15 - [Clear Selections](#) **Item(s) Added Successfully**

[List View](#) Please choose from the options below:

Function	Finish			H
Select... <input type="button" value="v"/>	<input type="radio"/> Aged Bronze 	<input type="radio"/> Bright Chrome 	<input type="radio"/> Lifetime Brass 	NA <input type="button" value="v"/>
Keyway <input type="button" value="v"/>	<input type="radio"/> Matte Antique Nickel 	<input type="radio"/> Matte Brass & Black 	<input type="radio"/> Satin Nickel 	<input type="button" value="Elinse"/>

When you are finished adding items to the quote, click the "Review/Print Quotes" link in the top right corner from any screen. You will be presented with all the quotes you have created within your account. If the quote is less than 30 days old, it will show a valid status in green. If it is older, it will show an expired status in red. From this screen, an entire quote can be removed from the system by pressing the "Delete" button. To remove line items from a quote, print an estimate for your customer, or turn the quote into an order, click on the quote number or name:

[Start a New Quote](#)

Please select a quote to view:

Quote #	Quote Name	Date Created	Markup %	Markup Type	Status	Delete
62	Joe Somebody	8/14/2014 10:21:24 AM	25	Margin % Over Cost	Valid	<input type="button" value="Delete"/>

You will now be brought to the Quote Detail page. On this page, you have the ability to delete individual line items by using the X button in the Del column. If the quote is valid and the order has not been placed, you will have two buttons in the upper right; "Print Customer Estimate" and "Submit as Order". To print the customer estimate to PDF format, click "Print Customer Estimate":

Quote For: Joe Somebody - 8/14/2014 10:21:24 AM								<input type="button" value="Print Customer Estimate"/>				
<i>*This quote is valid for 30 days*</i>								<input type="button" value="Submit as Order"/>				
TND Item #	Mount	Qty	Category	Series	Function	Finish	Handing	List Price (ea)	Your Price (ea)	Customer Price (ea)	Line Total	Del
PSROUTSR003	15	1	Lockset	Reserve	Passage	Lifetime Brass	NA	\$105.00	\$52.50	\$65.63	\$65.63	X
TOTAL:											\$65.63	

The customer estimate will appear in a new window. Your company's name will appear at the top and the quote name and number (Reference number) will also appear. You can print this to your local printer using the on screen adobe controls or by pressing ctrl+p.

YourCompany											
Door Hardware Quote For: Joe Somebody - (Ref#:62) - 8/14/2014											
<i>*This quote is valid for 30 days*</i>											
Mount	Qty	Vendor	Category	Series	Function	Finish	Hand	Keyway	Price(ea)	Line Total	
15	1	Baldwin	Lockset	Reserve	Passage	Lifetime Brass	NA	Schlage C Keyway	\$65.63	\$65.63	
TOTAL:										\$65.63	

If "Submit as Order" is clicked, you will be brought to the confirmation screen. On this screen, a PO Number or Job Name must be inserted before clicking "Confirm order":

Please confirm that you would like to process the order for quote#: 62 - Joe Somebody	
*PO Number / Job Name: Joe Somebody - 1/1/2015	<input type="button" value="Confirm Order"/>
No, Cancel	

Once confirmed, you will see the following screen. You can click the TND logo in the top left to navigate back to the Mount Selection page:

Thank you for your order. You will receive an acknowledgement once the order has processed. Home
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If you access the quote again after the order has been placed, you will see the date the order was placed and the PO/Job information provided:

Quote For: Joe Somebody - 8/14/2014 10:21:24 AM								This order was placed on 2014-08-14.				
<i>*This quote is valid for 30 days*</i>								PO #: Joe Somebody - 1/1/2015				
TND Item #	Mount	Qty	Category	Series	Function	Finish	Handing	List Price (ea)	Your Price (ea)	Customer Price (ea)	Line Total	Del
PSROUTSR003	15	1	Lockset	Reserve	Passage	Lifetime Brass	NA	\$105.00	\$52.50	\$65.63	\$65.63	
TOTAL:											\$65.63	