

New file structure location: [LINK](#)



Quotes Orders Billing | Weston XYZ Hardware, Inc.

DMSI Agility



Seach



Weston XYZ Hardware, Inc.

For walkthrough video with verbal explanations and interactions shown, please see link attached to the Jira ticket.

1 Full navigation component expand and collapse states

The navigation will be collapsed by default and expand upon hover. The expanded state can be pinned to remain expanded at all times, as it is today. The navigation will collapse upon hover leave if not pinned open.

Collapsed state: [Click](#)

Expanded state: [Click](#)

2 Section expand on hover is context-dependent

When the user hovers over the collapsed menu, if their cursor enters the Favorites menu area on hover, Favorites will expand to show items under Favorites. If their cursor enters Main Menu on hover, the main menu section will expand instead. The sections within the Main Menu will be collapsed by default.

Favorites is expanded: [Click](#)

Main Menu is expanded: [Click](#)

3 Toggling section expand between Favorites and Main Menu

If the user clicks from Favorites to Main Menu, Favorites will collapse and Main Menu will expand. The reverse is also true. This change happens on click, not on mouse hover, and the behavior is the same if the menu is pinned or unpinned. There is not a scenario where Favorites and Main Menu are both expanded at the same time.

4 Future state: global search

In the future, we will look to implement a global search capability. It will reside at the top by the logo as shown.

5 Branch

As implemented today, the branch change for the session will be in the main menu navigation component. the branch for the current tab will be displayed at the top right along with the company name.

6 Future state: notifications

A notifications icon will be in the top right. The exact specifications for various states and the full notifications experience will be explored when we better understand the expected functionality.

7 User Icon

As implemented today, the user icon will allow access to user profile settings, about, and log out options.

8 Help

As implemented today, the help icon will open the WalkMe menu.

9 Managing Favorites

Users in Classic are able to save and group favorites into folders, including window access links as well as favorite viewers and reports (edit and run links). We will move this from the home dashboard into the menu so that these are accessible from anywhere.

The more menu when favorites is expanded in the main navigation will provide a manage option, which will open a management experience.

More menu - [Click](#)

Manage favorites - [Click](#)

Management will happen at the branch level and when the user changes their system branch the favorites will update in the menu accordingly. They will select the branch from this window and all updates made will be reflected for that branch. - [Click](#)

The user can add favorites group(s) as desired, which will function like folders to help organize their favorites. Clicking the add favorite group icon will open a modal where they can name the group (folder). Back on the manage favorites window they can also drag and drop to update the display order, group (combine into a folder), or ungroup (remove from a folder).

Add Favorites Group button- [Click](#)

Add Favorites Group window - [Click](#)

The user will choose which window they would like to include by using the finder icon on the next available row, which will open the finder window as implemented today when they add favorites.

Finder icon - [Click](#)
Activity finder - [Click](#)

Within manage favorites will be options for managing favorite viewers and reports. The user can hide/show the viewers and reports section within their favorites panel from the more menu next to the related option, or open another modal to manage their favorite viewers or reports. If the viewers or reports section(s) are hidden, the eye icon will change from open to closed on the manage favorites window and the viewers and/or reports section will not show in the main navigation.

More menu - [Click](#)

Manage favorite viewers - [Click](#)

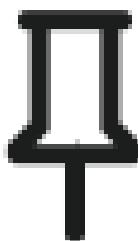
(mocked up for viewers, reports will operate in the same way)

To choose a viewer or report, the user will click the finder icon on the next available row and select from a viewer or report finder.

Finder icon - [Click](#)

Viewer finder - [Click](#)

As with the favorites window, the viewer and report management windows will allow drag and drop to reorder or regroup. The 'x' icon will remove the viewer or report from favorites but will not delete the viewer or report.



[Home](#) [Label X](#) [Label X](#) [Label X](#)

Search > Page Title

Lorem Ipsum

[+ Create New](#)

Label	Label	Label	Label	Label	Label
Title	Title	Title	Title	Title	Title
<input type="text"/>					
Title	Title	Title	Title	Title	Title
<input type="text"/>					
Title	Title	Title	Title	Title	Title
<input type="text"/>					

Search

▼ Devel Resources

- » Add a Favorite to the Main Menu
- » Add Notes and Hot Notes
- » Change Branch from the Main Menu
- » Change Branch in Customer Information
- » New Change Language Preference
- » Edit Columns in Viewer Criteria
- » Edit Viewer Criteria
- » Manage Individuals Authorized to Charge
- » Manage Print Defaults
- » Navigating Contacts in the Customer Information Window
- » New Navigating Stock Status in the Items Dashboard
- » Navigating the Customer Information Window
- » Search for Windows from the Main Menu
- » Switch To Progressive Web Mode
- » Use Grid Features to Configure and Customize Columns
- » Use Tab Features to Open New Windows
- » Using Maintenance Windows
- » Using the Viewer Dashboard
- » Viewing Invoices and Payments

Manage Favorites



Drag and drop rows to reorder and regroup.

Branch

Weston



Viewers

Reports

Sales

Customer Information



+ Add Favorite Group

Cancel

Save

Manage Favorite Viewers

Hide Favorite Viewers

Manage Favorite Reports

Hide Favorite Reports

Manage Favorite Viewers



Drag and drop rows to reorder and regroup. Deleting a favorite viewer group or viewer will remove from your favorite viewers, but will not delete the actual viewer.

	Purchasing	
	Lorem Ipsum	
	Lorem Ipsum	
	Lorem Ipsum	
	<input type="text"/>	
	General	
	Sales	

+ Add Favorite Group

Cancel

Save

Viewer Finder



Search Criteria

Viewer Type

 ▼

Viewer Name

 ▼

Saved For

 Current user All users Security groupSearch

Search Results

Action	Viewer Name	Saved For	Display Type	Update Date	Updated By
<input type="checkbox"/>	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum
<input type="checkbox"/>	Lorem Ipsum	Lorem Ipsum	Lorem Ipsum	50	Items per page

50

▼

Items per page

< < > >>

CancelContinue



Shop All



Seach



Quick Order



Cost + Retail



John Smith



\$0.00



My Projects



Utilities



John Smith

Label

Label

Label

Label

Label

Add Favorite Group

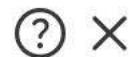


Favorite Group Name

Cancel

Save

About



Customer ID	
Frameworks Version	
Build	
Smart Client	Pro v12.1p_2023-09-22
Fluid	1.3-2025-02-27-19-09
Application URL	https://api-8101-1.dmsi.dev/AgilityFluid/
Display Device	desktop
User Agent	Agility (Mozilla/5.0 (Macintosh; Intel Mac OS X 10_15_7) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/134.0.0.0 Safari/537.36)
Available Resolution	1728 x 1012
Locale Name	default
Your IP	10.2.2.1
Your Timezone	America/Chicago (-05:00)
Date Format	mdy
Decimal Point	.
Numeric Separator	,
Internal Codepage	1252
Stream Codepage	1252
DB Codepage	platte:ISO8859-1
Server Time	03/11/2025 14:28:18.858-05:00
OpenEdge Version	12.5.3.0.1193

[Close \(O\)](#)

ProjectTitle

Quick Quote

ProjectTitle
PageTitle

ProjectTitle
PageTitle

ProjectTitle
PageTitle

Project Subtotal: \$12,345.67

Quote Subtotal: \$12,345.67

Item Subtotal: \$12,345.67

Item Subtotal: \$12,345.67

Item Subtotal: \$12,345.67

Submit Order

Create Project

Save Changes

Add to Project

Done

ProjectTitle
\$12,345.67

Quick Quote
\$12,345.67

PageTitle
Item: \$12,345.67

PageTitle
Item: \$12,345.67

PageTitle

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Home

Label ×Label ×Label ×

★ Favorites

☰ Main Menu

Search > Page Title

Lorem Ipsum

+ Create New

Label

Label

Label

Label

Title

× Cancel+ NewEdit✓ Save

Select an activity to add to your shortcuts



Customers

Items

Customers Copy

▼ Sales Orders & Quotes

▼ Purchasing

▼ Dispatch

▼ E-Commerce

▼ Inventory

▼ Accounts Receivable

Viewers

▼ Maintenance



Close (O)

Continue



Quotes Orders Billing | Weston XYZ Hardware, Inc.

Shop All

Search



Quick Order

Cost + Retail

John Smith

\$0.00



Quotes Orders Billing | Weston XYZ Hardware, Inc.

Shop All

Search



Quick Order

Cost + Retail

John Smith

\$0.00



Billing | Weston XYZ Hardware, Inc.



John Smith



Weston XYZ Hardware, Inc.

Locked

Cost + Retail



DMSI Agility

Label X



My Projects

Weston [XYZ Hardware, Inc.](#)



Utilities



John Smith



My Projects

Weston [XYZ Hardware, Inc.](#)

ProjectTitle

Project Subtotal: \$12,345.67



Submit Order



File

User Weston

Favorites

Main Menu

Viewers

- SO Viewers
- Purchasing Viewers

Reports

- Month End Reports
- Cash Drawer Activity Report

Customer Information

Sales Orders

Quotes

Stock Status

Main Menu

File

User Weston

Favorites

Main Menu

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Customer Information

Sales Orders

Quotes

Stock Status

Main Menu

File

User Weston

Favorites

Main Menu

Customers

Items

Sales Orders & Quotes

- Cash Drawer Reconciliation
- Cash Receipts
- Cash Receipts Batch ID Management
- Cash Receipts Entry
- Deposit Application
- Credit Memos
- Installed Sales
- Loyalty Plan Management
- Order Processing
- OrderPad
- Price Holds
- Project Management
- Quotes
- Sales Orders
- Shipments

Work Orders

- Schedule Manager
- Work Orders

Purchasing

- Suggested Purchase Orders

Dispatch

- Dispatches

Inventory

- On Hand Summary Viewer