



The Deerbrook Web Style Guide

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Introduction

This document details the visual design specifications used for the Deerbrook Insurance Prototype as well as the visual style to be used for the development of the new Deerbrook Insurance Application. The visual design is based on the following two primary templates: the *Agency Dashboard* and the *Customer Data Window*.

AGENCY DASHBOARD

AGENT DASHBOARD DEERBROOK INFORMATION YOUR AGENCY INFORMATION ACCOUNT ADMINISTRATION HELP

START A QUOTE > **FIND A CUSTOMER** enter name or policy #
Get a Bridged Quote >> e.g. Jane Smith or 123456789

OPEN POLICY WINDOWS

Name	Status	Date Last Modified	
New Policy 1	Incomplete		<input type="button" value="close"/>

ACTIVE QUOTES

Name	Status	Date Last Modified	
Debbie Campbell	Ready to Complete	Oct 31, 2005	<input type="button" value="dismiss"/>
Christopher Haas	Ready to Complete	Oct 31, 2005	<input type="button" value="dismiss"/>
Brian Hedges	Incomplete	Oct 31, 2005	<input type="button" value="dismiss"/>
Catherine Sobotka	Incomplete	Oct 31, 2005	<input type="button" value="dismiss"/>
New Policy	Incomplete	Dec 7, 2005	<input type="button" value="dismiss"/>

[view last 30 days](#)

CANCELED POLICIES

Name	Action Required By	
Jeffrey Rodriguez	Nov 7, 2005	<input type="button" value="dismiss"/>
Jim McMillan	Nov 8, 2005	<input type="button" value="dismiss"/>
Edna Fong	Nov 8, 2005	<input type="button" value="dismiss"/>

[view all](#)

UPCOMING RENEWALS

Name	Action Required By	
Elizabeth Genolio	Nov 7, 2005	<input type="button" value="dismiss"/>
Robert Ayers	Nov 9, 2005	<input type="button" value="dismiss"/>
Kurt Souders	Nov 9, 2005	<input type="button" value="dismiss"/>

[view all](#)

Deerbrook Service Center:
1-800-349-7342

URGENT NEWS

[Binding Restrictions in Tazewell and Sangamon Counties in Effect Due to Recent Flooding](#)
Oct. 21, 2005

[Scheduled Maintenance: System will be down from 12-7pm \(CST\) Oct. 31, 2005](#)
[view archives](#)

WEEKLY NEWS

Week of Oct 31, 2005
[IL Agents: Deerbrook 3 is on the way!](#)

[Allstate 2005 Giving Campaign Now Open and Extended Until 11/1](#)

[Message from Deerbrook Insurance: Encompass/Deerbrook Field Leadership Integration Enablement Pilot Announcement](#)

[Deerbrook Rate Changes! Find Out How Your Agency Can Benefit](#)
[view all news](#) | [view archives](#)

ENCOPASS
INSURANCE

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CUSTOMER DATA WINDOW

Agency Pop-Up - Microsoft Internet Explorer

[Return to Agency Dashboard](#)

New Quote

Created: 12/20/2005 2:25 PM [SAVE QUOTE](#)

Quoted Premium:

[RATE](#) [RATE WITH MVR & LOSS HISTORY](#) [ISSUE POLICY](#)

Status: Incomplete

19 Remaining to Quote **29** Remaining to Issue

Application for Illinois [change risk state](#)

▼ Policy Owner Name & Address

8 Remaining to Quote **9** Remaining to Issue

Policy Effective Date | 12/20/2005 |

PERSONAL

* First Name:
Middle Name:
* Last Name:
* Marital Status:

ADDRESS

* Address Line 1:
Address Line 2:
* City:
* State/Province:
* Zip:
Owns primary residence? Yes No
Less than 6 months at address Yes No

CONTACT

* Primary Phone:
Secondary Phone:

HISTORY

* Prior Insurance? Yes No
Lapse: No lapse 30 day lapse
Expiration Date:
BI Liability Limit:
Continuous Liability Insurance: Months

[ADD COAPPLICANT](#)

Drivers

▶ Driver 1 **8** Remaining to Quote **10** Remaining to Issue

Vehicles

▶ Vehicle 1 **3** Remaining to Quote **4** Remaining to Issue

▶ Coverages

▶ Premium Overview & Billing **0** Remaining to Quote **6** Remaining to Issue

Deerbrook Service Center: 1-800-349-7342

[Return to Agency Dashboard](#)



Creative Brief

Deerbrook currently has little in the way of a visual identity system. The design of the Deerbrook application utilized the Deerbrook's logo, its brochure, the current application, and a suggested web palette.

Brand Attributes

The design was created by taking into consideration the following brand attributes:

- Inexpensive
- Fast, efficient, and able to adapt
- Reputable (by merit of association with Allstate)
- Easy for agents to do business with
- A simple and direct means by which any customer can have access to a vehicle

Visual Direction

In order to establish an appropriate visual design approach for the prototype, Adaptive Path ("AP") first developed a series of *Visual Explorations* of color, type, and photography.

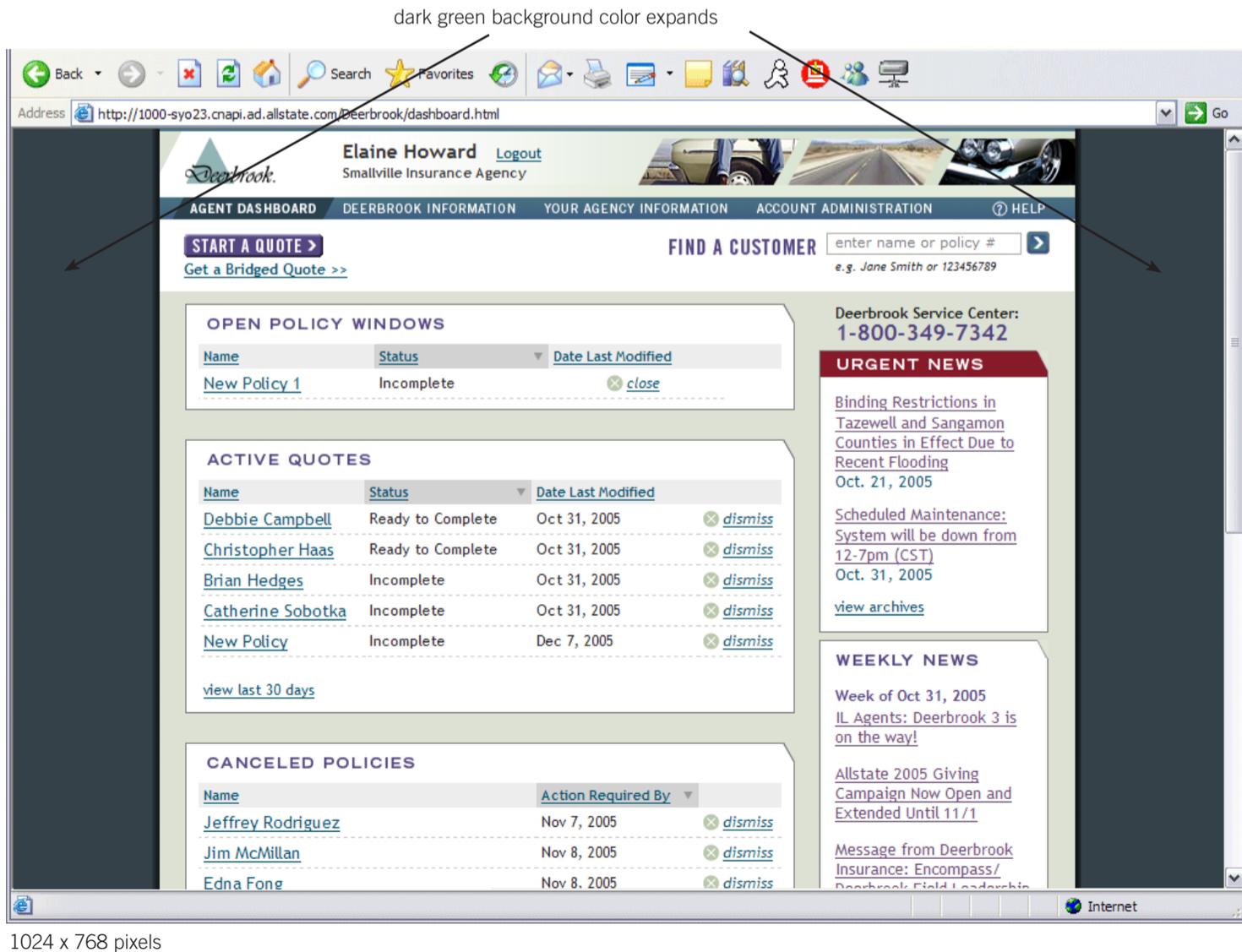
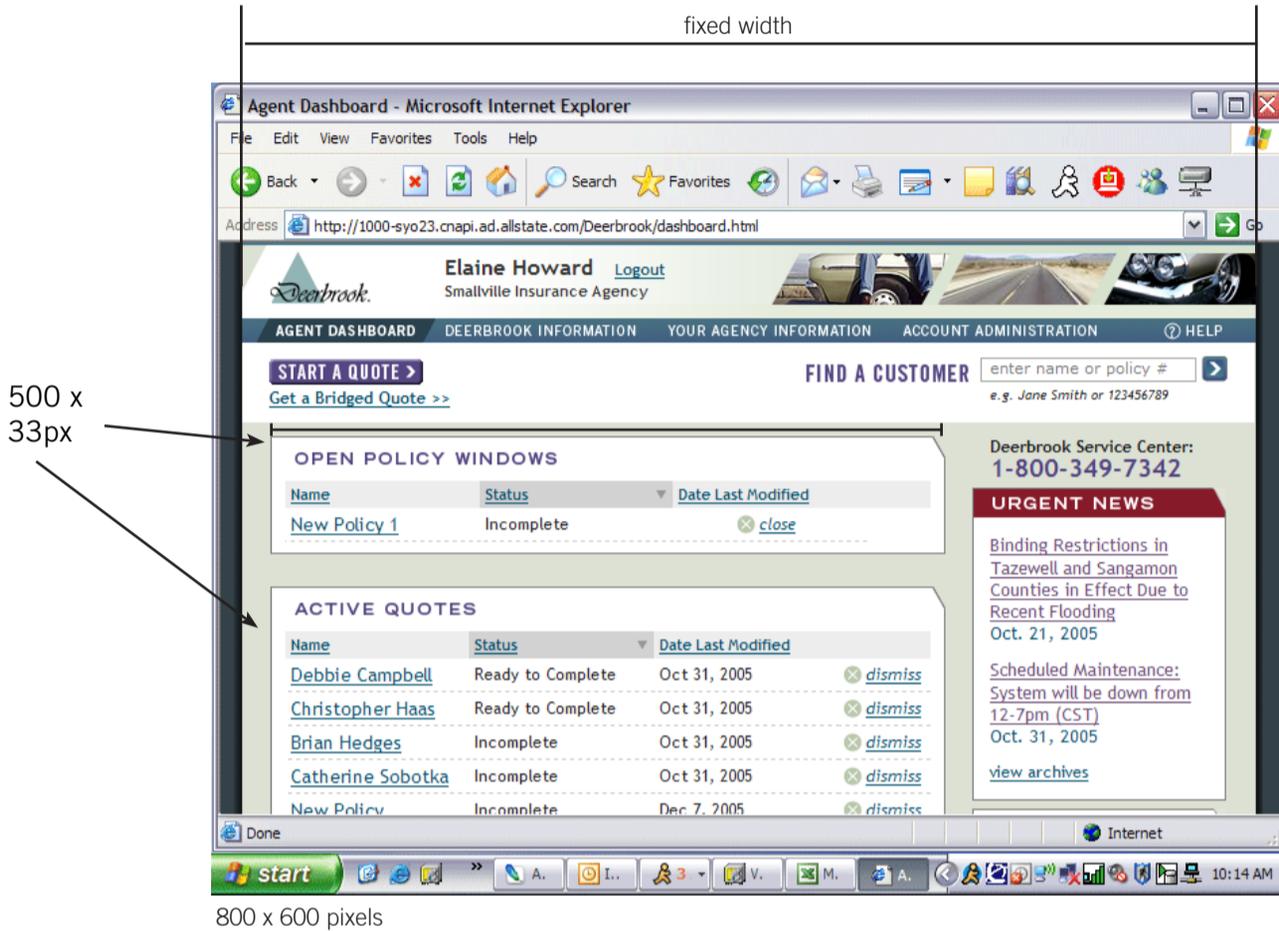
Previously, AP had developed a prototype for the Encompass Agent Desktop. AP then used this prototype as a basis upon which to create *four distinct design directions* in order to generate the discussions required to establish a useful look and feel for the Deerbrook prototype. As a result of this discussion, certain general conclusions were made about the visual design direction:

- The visual direction should be indicative of the target customer, and be visually appealing to Deerbrook agents.
- The application should have a look that suggests movement and speed, yet be a comfortable enough place for agents to use the systems for an extended period of time. The application should not be overly graphical, and should not appear to be slow as a result of processing graphics. It should make efficient use of graphical elements to achieve a forthright, bright style appropriate to the target market.
- The color palette should be comfortable to look at, while using shapes and graphical devices that are clear, sharp, and emphasize movement.
- The efficient, modern look of sans-serif typefaces is more appropriate than the staid, conservative look of serif typefaces.
- Photography can help establish this as a "Deerbrook space", by using specific imagery evocative of the target market. For more detail on the strategy established for photography, please refer to the *photography* section.

Page Structure

AGENCY DASHBOARD

The *Agency Dashboard* screen is designed to fit a monitor set on 800 x 600 pixel ("px") resolution to eliminate horizontal scrolling. When the design extends beyond 800 pixels wide, the design remains a fixed size and centered in the screen. The remainder of the screen, which is comprised of a dark green background color expands.



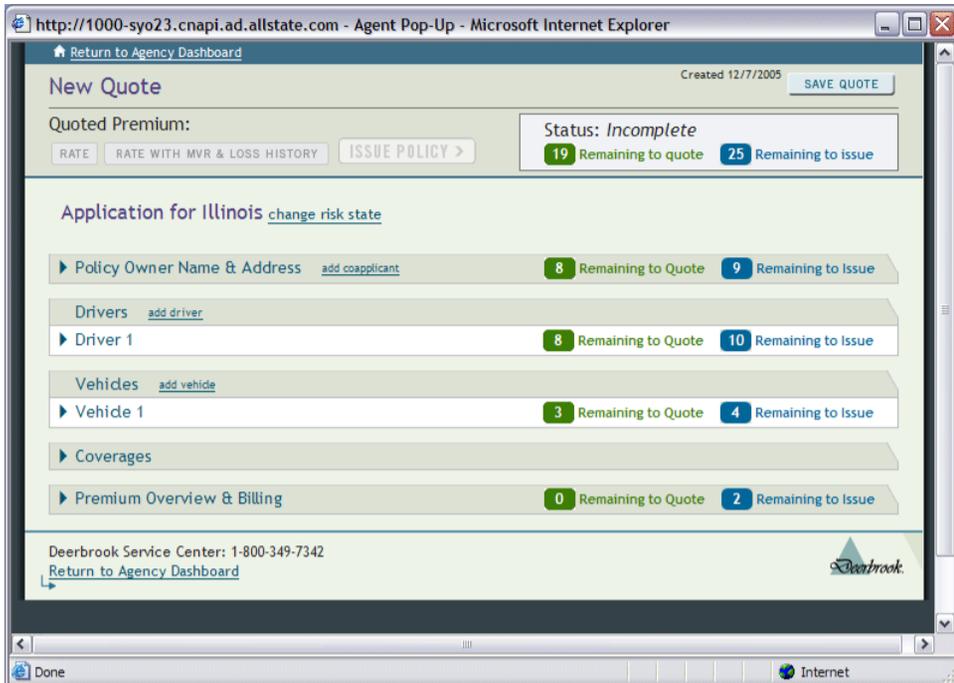
The screenshot shows the Agency Dashboard interface with various sections and annotations. The top navigation bar includes 'AGENT DASHBOARD', 'DEERBROOK INFORMATION', 'YOUR AGENCY INFORMATION', 'ACCOUNT ADMINISTRATION', and 'HELP'. Below this, there are buttons for 'START A QUOTE >' and 'Get a Bridged Quote >>', and a search box for 'FIND A CUSTOMER' with a placeholder 'enter name or policy #' and an example 'e.g. Jane Smith or 123456789'. The main content area is divided into three sections: 'OPEN POLICY WINDOWS', 'ACTIVE QUOTES', and 'CANCELED POLICIES'. The 'OPEN POLICY WINDOWS' section contains a table with columns 'Name', 'Status', and 'Date Last Modified', listing 'New Policy 1' with status 'Incomplete' and a 'close' button. The 'ACTIVE QUOTES' section contains a table with columns 'Name', 'Status', and 'Date Last Modified', listing several quotes with names like 'Debbie Campbell', 'Christopher Haas', 'Brian Hedges', 'Catherine Sobotka', and 'New Policy', each with a 'dismiss' button. The 'CANCELED POLICIES' section is partially visible at the bottom. On the right side, there are two news sections: 'URGENT NEWS' with a red header and text about 'Binding Restrictions in Tazewell and Sangamon Counties in Effect Due to Recent Flooding' and 'Scheduled Maintenance: System will be down from 12-7pm (CST) Oct. 31, 2005', and 'WEEKLY NEWS' with text about 'Week of Oct 31, 2005' and 'IL Agents: Deerbrook 3 is on the way!'. A 'Deerbrook Service Center: 1-800-349-7342' is also displayed. Annotations include dimensions like '500px', '188px', '15px', '20px', and '18px' for various elements, and font size indicators like 'I 11px' and 'I 10px'.

When navigating to other sections of the *Agency Dashboard*, the logo and the horizontal navigation remain persistent.

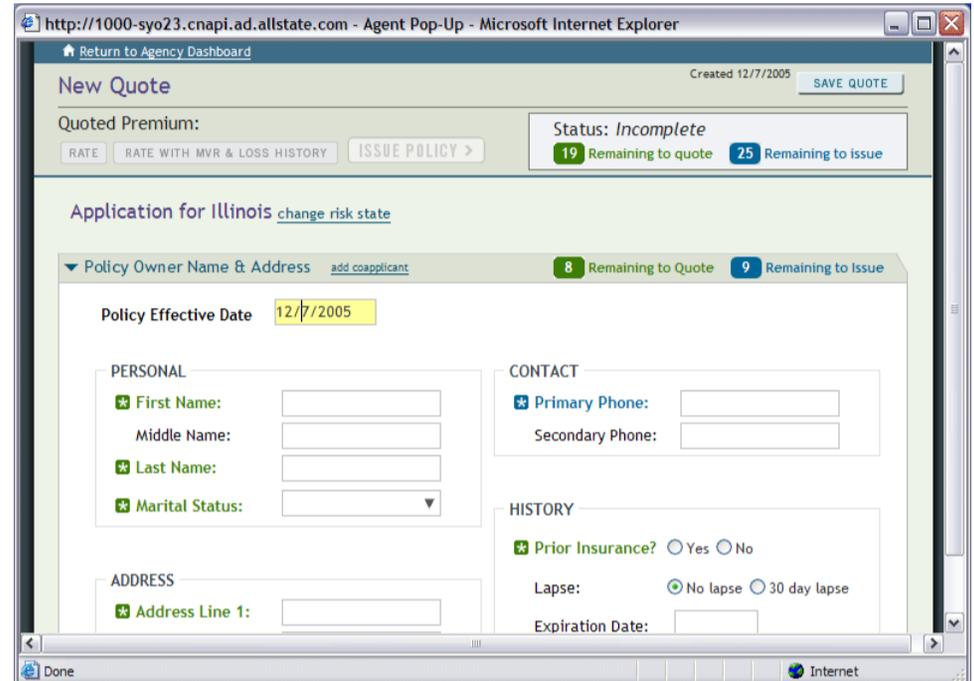
This screenshot shows the top portion of the Agency Dashboard, highlighting the persistent navigation and user information. The top left features the 'Deerbrook' logo. To its right, the user's name 'Elaine Howard' is displayed with a 'Logout' link, followed by the agency name 'Smallville Insurance Agency'. Below this is a horizontal navigation bar with 'AGENT DASHBOARD', 'DEERBROOK INFORMATION', 'YOUR AGENCY INFORMATION', 'ACCOUNT ADMINISTRATION', and 'HELP'. The main content area includes the 'START A QUOTE >' button, 'Get a Bridged Quote >>', and the 'FIND A CUSTOMER' search box with a placeholder 'enter name or policy #' and an example 'e.g. Jane Smith or 123456789'. The background features a collage of images related to insurance, including a car, a road, and a car's front end.

CUSTOMER DATA WINDOW

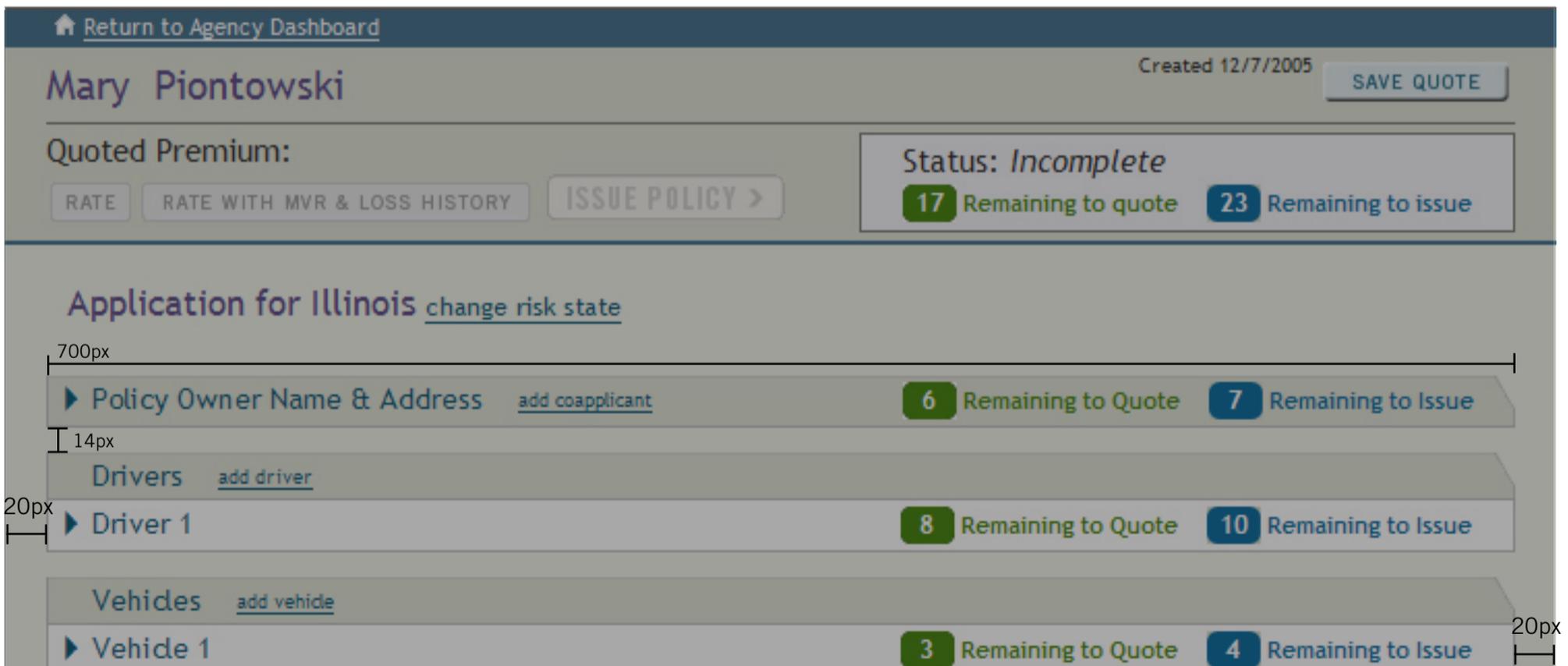
The *Customer Data Window* is designed to pop up in a full sized window. While the top area remains vertically fixed, the user has the ability to make the window as large or as small as possible.



The *Customer Data Window* opens with all subsections closed



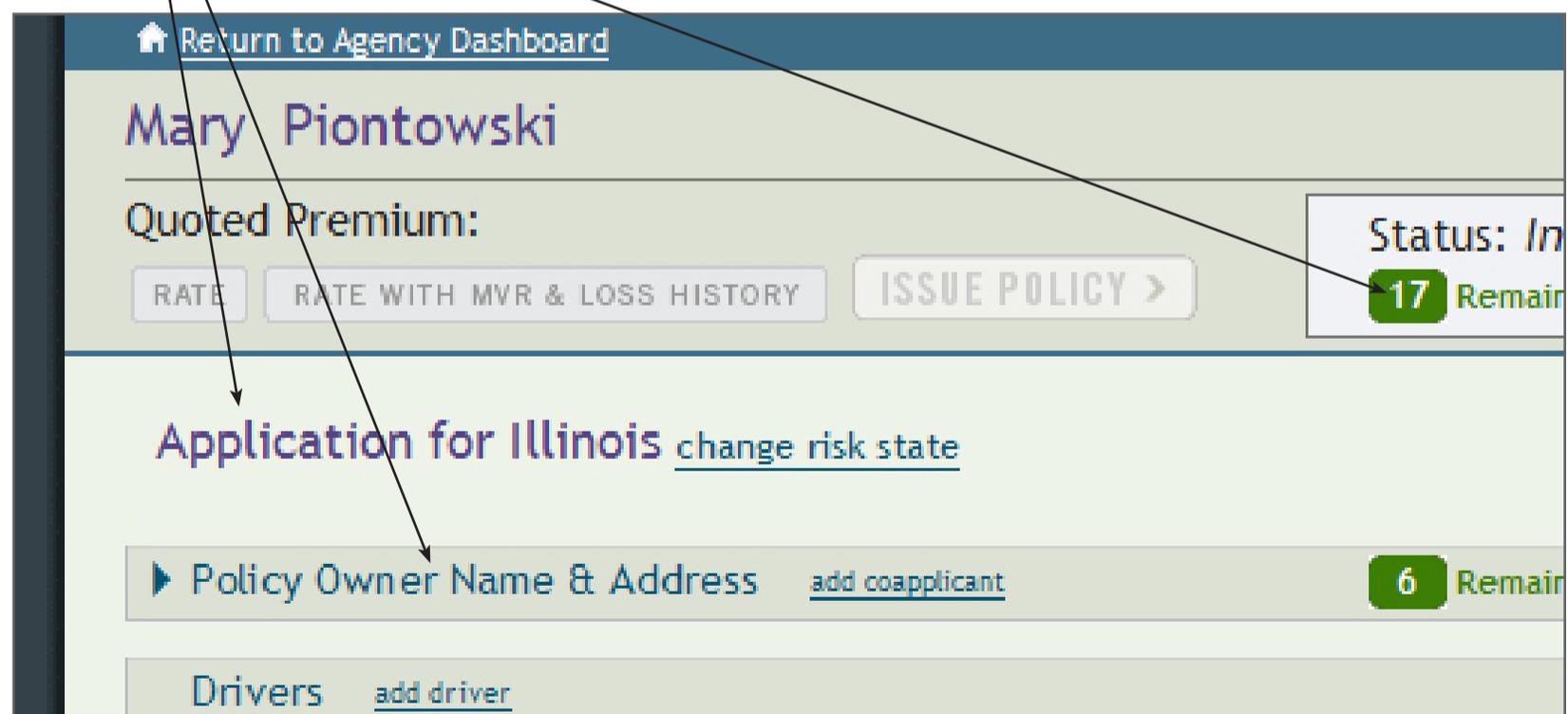
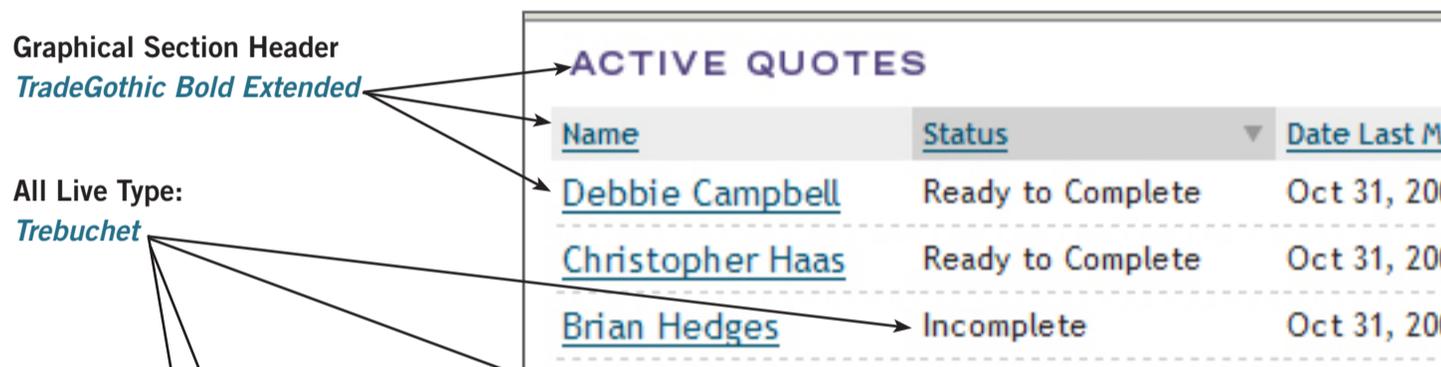
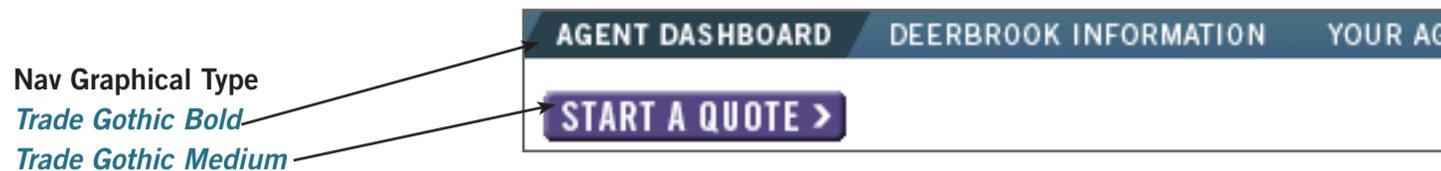
After the user click on a subsection header, a subsection opens up. The cursors will also default to the first field, thus eliminate a mouse click.



Typography

The *Trade Gothic* family is used for graphical type. This efficient, functional typeface creates a clean impression of speed and efficiency.

The font face *Trebuchet* is used for all live type, to facilitate readability and clarity at all sizes.



Color

Color is utilized for both aesthetic purposes as well as status indicators.

- Teal**
Used as an action color, as the link color, as the background color for the navigation, and as a button color.
- Red**
Used as an alert color, for the Alert Icon, and in the Urgent News header.
- Purple**
Used as a highlight color to call out certain items such as headers.

Live Type

- Body Text**
#252525
Jane Smith
- Link Color**
#00526f
[Jane Smith](#)
- Hover Color**
#309
[Jane Smith](#)
- Active Color**
#063
[Jane Smith](#)

The design includes a variety of colors in the palette. Careful consideration has been given to how each color is used. It will be critical to adhere to the rules related to palette. New colors should not be introduced to the UI unless absolutely necessary, to avoid a busy interface design.

Logo Turquoise #8bafb0
Highlight Purple #554582
Background #eef3e8
Alert Red #CC0000

Deerbrook
Elaine Howard Logout
Smallville Insurance Agency

AGENT DASHBOARD DEERBROOK INFORMATION YOUR AGENCY INFORMATION ACCOUNT ADMINISTRATION HELP

START A QUOTE >
Get a Bridged Quote >>

FIND A CUSTOMER
enter name or policy #
e.g. Jane Smith or 123456789

OPEN POLICY WINDOWS

Name	Status	Date Last Modified
New Policy 1	Incomplete	close

Deerbrook Service Center:
1-800-349-7342

URGENT NEWS
Binding Restrictions in

Policy Dashboard

towski Created 12/7/2005 SAVE QUOTE

um:

WITH MVR & LOSS HISTORY ISSUE POLICY >

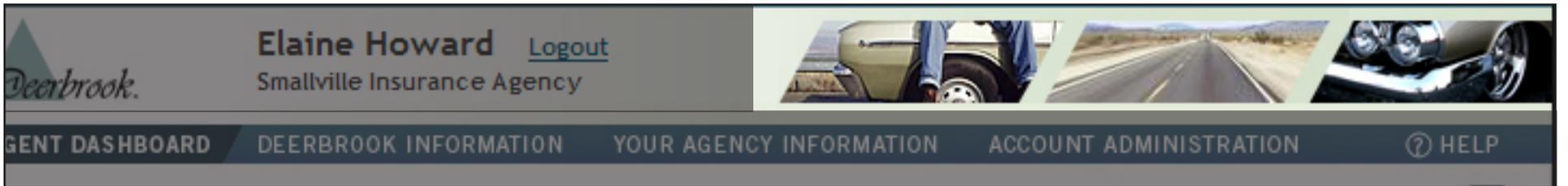
Status: Incomplete

17 Remaining to quote 23 Remaining to issue

n for Illinois [change risk state](#)

Remaining to Quote Green #3D7E05
Remaining to Issue Blue #006699

Photography



Images in the top right area of the *Customer Data Window* serve multiple purposes. The intent is to have at least three sets of images which would change whenever the page is refreshed, and for these sets to evolve over time.

The purpose of the image sets is to:

- Provide additional color. This is the only place where the look of the page can be influenced with the introduction of additional color.
- Influence the identity of this as a Deerbrook space, by presenting images associated with the target consumer.
- Create visual interest. This page is largely text, and the addition of these images helps to give life to the page.
- Augment the impression of speed and movement on the page.

Suggested Subject Matter

Images can highlight a personal connection with a vehicle, or with the experience of liberation afforded by that vehicle, or simply accent the sense of motion and speed. The tone is subdued. These are not images that feature people, but instead suggest the uniqueness of individual owners through the uniqueness of their vehicles. Faces are to be avoided. The viewer isn't supposed to identify with the particular characteristics of the owner, rather, they should identify with their uniqueness, and how their vehicle becomes an extension of that uniqueness. It is effective to have vehicles seen from the point of view of the owner.

Any additional images should be placed in a visual composition "comp" to review whether or not the colors work with the other colors on the page. Colors do not necessarily have to be duplicates of the existing color palette they can even employ complementary colors to help give life to the page.



Recommended

Highlights an individual's very personal moment and connection with an automobile without showing that individual's face.



Recommended

Emphasizes the personal experience of driving, and provides an impression of liberation and speed.



Recommended

Suggests the work that went into the vehicle, which suggests the owner's personal connection.



Recommended

Has a sense of motion, but contextualized as a specific place, rather than simply an abstract sense of motion.



Recommended

Cars in motion often seem to work well. Older cars can often seem more personal than new cars.



Recommended

Unique settings, unique vehicles help create an impression of the possibility of having access to a car.



Not Recommended

This is not about couples. The use of other colors is encouraged, but use carefully. This red would be too dominant on the page.



Not Recommended

This is not about families. It is not about people having fun with their cars. The tone should be more subdued.



Not Recommended

This is not about the upwardly mobile, and this is not about new, mass-produced, expensive cars.

Page Elements

LOGOS

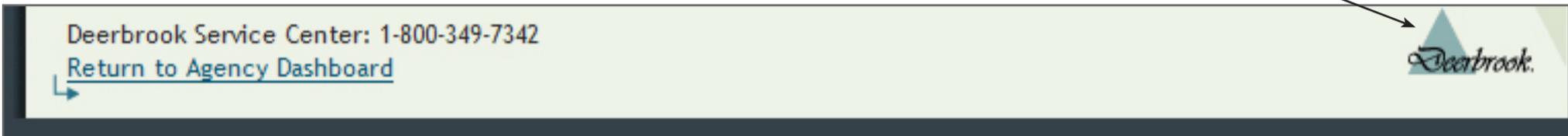
On the *Agency Dashboard*, the Deerbrook logo anchors the page in the top left corner, while maintaining a fixed amount of white-space around it.



The Encompass logo is centered above the footer, and roots the page by association with Deerbrook logo. The Allstate logo is not used.



On the Customer Data Window, the Deerbrook logo is smaller and sits in the bottom right corner.



TOP AREA

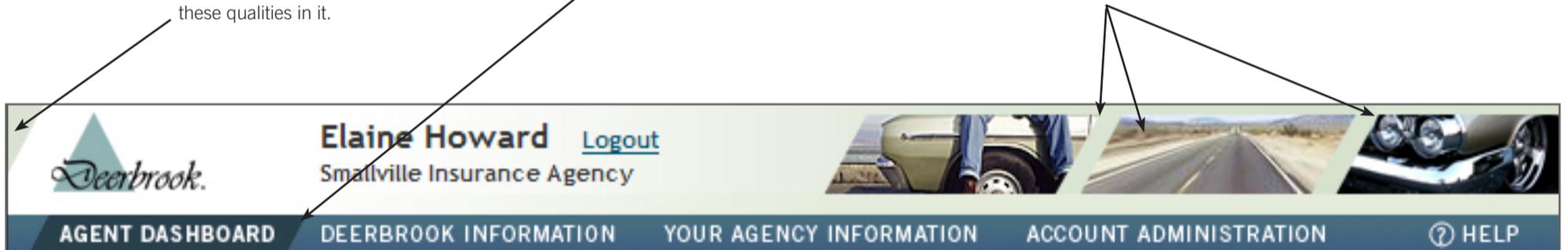
The top area of the *Agency Dashboard* sets the visual tone for the prototype, framing the logo with an angled color area in the top left corner, highlighting the name of the person who has logged in, and using imagery on the right side to support the identity of this space.

Angles are used throughout the design to enhance a visual impression of speed and movement.

The angle in the top left corner frames the logo in such a way as to enhance these qualities in it.

Angles are used in the navigation to similar effect.

Angles are also used to frame the photography, to give create a continuous movement across the top area.



BUTTONS

Standard Button

Default



Hover



Active (when clicked)



Disabled



A sample button is available as a *layered Adobe Photoshop file* from which similar buttons can be created.

Type: Trade Gothic Medium
 Link Color: #246e88
 Tracking: 80
 Background Color: #DEEAED



Emphasis Button ("Start a Quote", "Issue Policy", "Issue Endorsement")

Default



Hover



Active (when clicked)



Disabled



ICONS

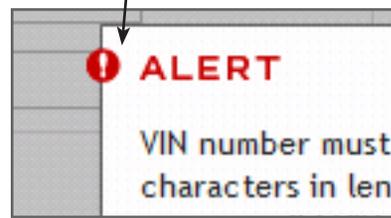
Nav Help Icon



Help Icon



Alert Icon



Ready Icon

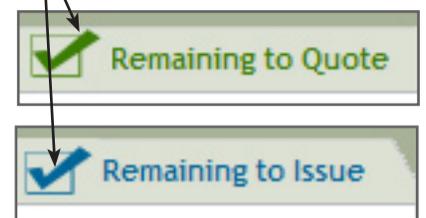


TABLE ELEMENTS

The below screen shot displays a sample table from the application.

<p>PERSONAL 326px</p> <p>First Name: Mary 20px</p> <p>Middle Name: Alloicious 11px</p> <p>Last Name: Piontowski</p> <p>Marital Status: Single</p>		<p>CONTACT</p> <p>Primary Phone: 73727 312</p> <p>Secondary Phone: 45</p>
<p>ADDRESS</p> <p>Address Line 1: 555 20px</p> <p>Address Line 2: 555 20px</p> <p>City: 54</p> <p>State/Province: IA</p> <p>Zip: 54</p> <p>Owens primary residence? <input type="radio"/> Yes <input checked="" type="radio"/> No</p>		<p>HISTORY 14px</p> <p>* Prior Insurance? <input checked="" type="radio"/> Yes <input type="radio"/> No</p> <p>Lapse: <input checked="" type="radio"/> No lapse <input type="radio"/> 30 day lapse 20px</p> <p>Expiration Date: 5/0/2000</p> <p>BI Liability Limit: Greater than 100/300</p> <p>Continuous Liability Insurance: 45 Month</p> <p>ADD COAPPLICAN</p>

Table Attributes

Width: 666px;
Padding-right: 10px
padding-bottom: 10px
padding-left: 10px
padding-top: 10px

Field Spacing

Padding-right: 4x
padding-bottom: 5px
padding-left: 4px
padding-top: 0px



RequiredForQuote
color: #3d7e05
font-weight: bold
background image: ../image/star_quote.gif
border-width: 0px

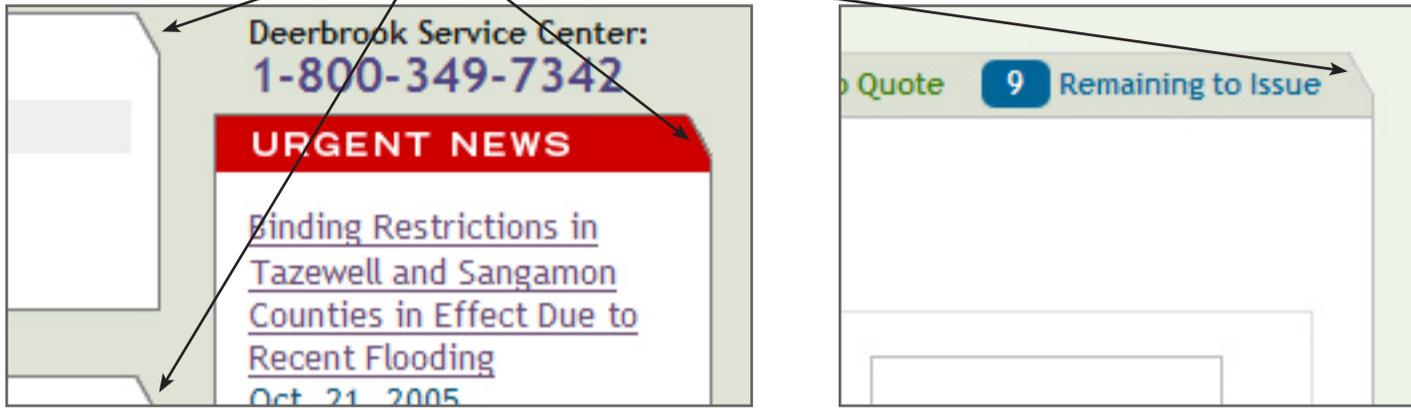


RequiredForIssue
color: #006699
font-weight: bold
background image: ../image/star_issue.gif
border-width: 0px

Field Width
 138px wide is the
 maximum width for
 a field.

CONTAINERS

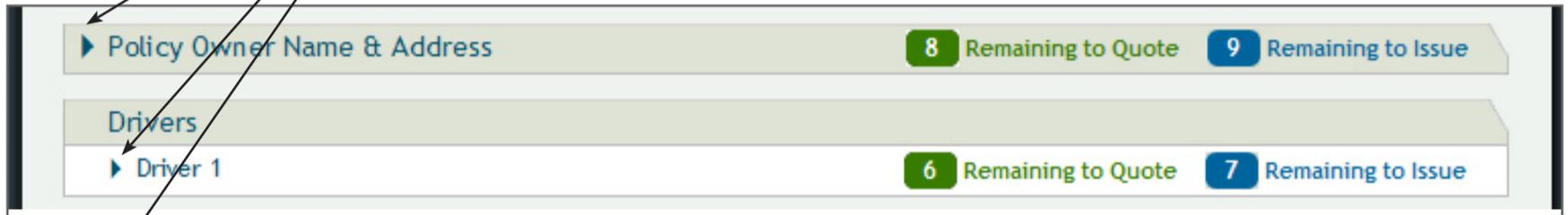
Sections are contained in a square shape with an angle in the top right corner



EXPAND/COLLAPSE

Sections are indicated by an arrow which will toggle between pointing right and pointing down to indicate that are expanded or collapsed.

Collapse



Expand

A screenshot of the 'Policy Owner Name & Address' section expanded. It shows a 'Policy Effective Date' of 12/8/2005. The section is divided into 'PERSONAL' and 'ADDRESS' sub-sections. The 'PERSONAL' section includes fields for First Name (Mary), Middle Name (Alloicious), Last Name (Piontowski), and Marital Status (Single). The 'ADDRESS' section includes fields for Address Line 1 (555), Address Line 2 (555), City (54), State/Province (IA), and Zip (54). There are also radio buttons for 'Owns primary residence?' (No selected) and 'Less than 6 months at address' (No selected). To the right, a 'CONTACT' section includes 'Primary Phone' (73727 312) and 'Secondary Phone' (45). Below that, a 'HISTORY' section includes a 'Prior Insurance?' question (No selected), 'Lapse' options (No lapse selected), 'Expiration Date' (5/0/2000), 'BI Liability Limit' (Greater than 100/300), and 'Continuous Liability Insurance' (45 Months). An 'ADD COAPPLICANT' button is at the bottom right.

EMBEDDED MESSAGING

When a form is not filled out correctly, the fields which require attention are highlighted in red.

Vehicles

Vehicle 1 3 Remaining to Quote 4 Remaining to Issue

VEHICLE INFORMATION

- * VIN Number:** 5454
- * Model Year:**
- * Make:**
- * Model:**
- Sub Model:
- Type:

ADDITIONAL INFORMATION

- Usage:
- Garage Location:
- Camper Unit? Yes No
- Anti-Theft:
- Damage? Yes No
- Interested Party? Yes No

In-line Error Handling

Fields with invalid data immediately are highlighting in red, accompanied by an in-line error message.

*** VIN Number:** 19823098

*** Model Year:**

*** Make:**

*** Model:**

Sub Model:

Type:

Usage:

Garage Location:

Camper Unit? Yes No

Anti-Theft:

Damage? Yes No

Interested Party? Yes No

ALERT

VIN number must be 17 characters in length. Please enter a valid VIN number.

ADD ID

And other actions result in an error popup that requires action on the part of the user.

ALERT

Binding restrictions are currently in effect. You can quote, but cannot issue until restrictions are removed.

CLOSE

CUSTOMER DATA WINDOW ELEMENTS

New Policy View

[Return to Agency Dashboard](#)

Created 12/7/2005 SAVE QUOTE

New Quote

Quoted Premium: RATE RATE WITH MVR & LOSS HISTORY ISSUE POLICY >

Status: *Incomplete*
19 Remaining to quote 25 Remaining to issue

Application for Illinois [change risk state](#)

▼ Policy Owner Name & Address [add coapplicant](#) 8 Remaining to Quote 9 Remaining to Issue

Policy Effective Date: 12/7/2005

PERSONAL	CONTACT
* First Name: <input type="text"/>	* Primary Phone: <input type="text"/>
Middle Name: <input type="text"/>	Secondary Phone: <input type="text"/>
* Last Name: <input type="text"/>	
* Marital Status: <input type="text"/>	

HISTORY

Form Fields

The layout of the form field pages utilize a two-column grid. Sections are distinguished by light shaded header as well as white space. It is important that consistent spacing between sections and individual elements is maintained to minimize visual confusion.

The wireframe shows a two-column grid layout for a form. The left column contains two sections: 'PERSONAL' and 'ADDRESS'. The right column contains two sections: 'CONTACT' and 'HISTORY'. Each section is enclosed in a light gray box with a header. The 'PERSONAL' section includes fields for First Name, Middle Name, Last Name, and Marital Status. The 'ADDRESS' section includes fields for Address Line 1, Address Line 2, City, and State/Province. The 'CONTACT' section includes fields for Primary Phone and Secondary Phone. The 'HISTORY' section includes a radio button for Prior Insurance, radio buttons for Lapse (No lapse or 30 day lapse), a date field for Expiration Date, a dropdown for BI Liability Limit, and a field for Continuous Liability Insurance in months.

COUNTERS & REQUIRED FIELD INDICATION

Counters are positioned prominently in the upper right hand corner of the *Customer Data Window* to indicate the total number of fields remaining to be completed.

The screenshot shows a 'New Quote' application window. At the top right, it says 'Created 12/7/2005' and has a 'SAVE QUOTE' button. Below the title, there are buttons for 'RATE', 'RATE WITH MVR & LOSS HISTORY', and 'ISSUE POLICY >'. A status box indicates 'Status: Incomplete' with two counters: '19 Remaining to quote' and '25 Remaining to issue'. Below this is a section for 'Application for Illinois' with a link to 'change risk state'. A dropdown menu is open for 'Policy Owner Name & Address' with a link to 'add coapplicant'. At the bottom, there is a 'Policy Effective Date' field with the value '12/7/2005'. Three arrows point from the text above to the '19 Remaining to quote' counter, the '25 Remaining to issue' counter, and the '8 Remaining to Quote' counter in the dropdown menu.

Each form section also has counters that pertain to how many fields are remaining for that particular section. When all the fields required to issue a quote are complete, the “Remaining to Quote” counter disappears and is replaced by a green check. When all the fields that are required to issue are complete, a blue check icon appears in place of the “Remaining to Issue” counter. The asterisks disappear from the fields as well.

Return to Agency Dashboard

Jack Capalungan
Quoted Premium:

Created: 12/20/2005 7:17 PM [SAVE QUOTE](#)

Status: Incomplete
5 Remaining to Quote 13 Remaining to Issue

Application for Illinois [change risk state](#)

▼ Policy Owner Name & Address ✓ Remaining to Quote ✓ Remaining to Issue

Policy Effective Date | 12/20/2005 |

PERSONAL

First Name: Jack
 Middle Name: A
 Last Name: Capalungan
 Marital Status: Married

CONTACT

Primary Phone: 773 334 2929
 Secondary Phone:

HISTORY

Prior Insurance? Yes No

Form fields that are required for a quote are indicated by a green asterisk, while those required for issue are indicated by a blue asterisk. These asterisks match the size and the shape of the counters to provide the user with an additional means to associate fields that are remaining to quote and remaining to issue.

CONTACT

* Primary Phone:
 Secondary Phone:

HISTORY

* Prior Insurance? Yes No



Zero fields “Required to Quote” and thus a Quote is now ready to be obtained



Zero fields “Required to Issue” and thus a Policy is now ready to be obtained



Required to Quote



Required to Issue

Background Highlight

When there are multiple sections, and one section needs to be called out, a background can be applied as a highlight.

The screenshot shows a web form titled 'Vehicles'. At the top, there is a navigation bar with 'Vehicle 1' and a green badge indicating '3 Remaining to Quote'. Below this is a 'Coverages' section with a sub-section for 'Vehicle 1' highlighted in a light green background. The highlighted section contains a list of coverage options with corresponding dropdown menus:

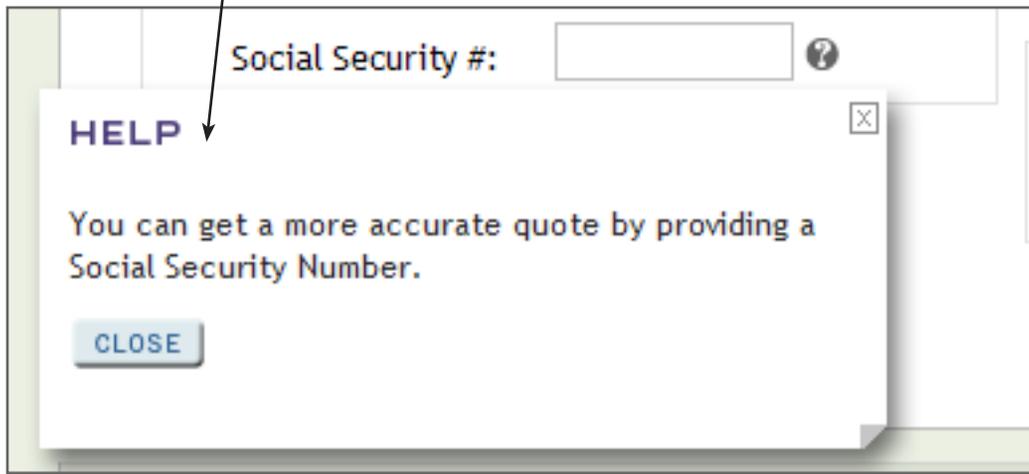
Coverage	Value
Bodily Injury	20,000/40,000
Property Damage	15,000
Medical Expense Benefit	No Coverage
Uninsured Motorist	No Coverage
Unins Moto Prop Damage	No Coverage
Collision	No Coverage
Comprehensive	No Coverage
Rental Reimbursement	No Coverage
Towing and Labor	No Coverage
Sound System Coverage	No Coverage

Line Separator

A dotted line is used instead of white space to distinguish areas within a form

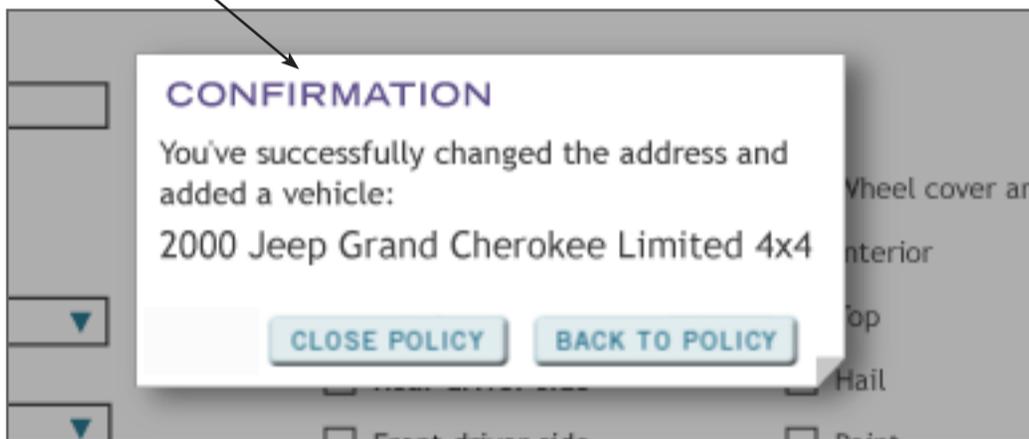
The screenshot shows a form with two distinct sections separated by a horizontal dotted line. The top section is for 'Credit Card' and includes fields for 'Number' and 'Exp. date', along with a 'PROCESS PAYMENT' button. The bottom section is for 'Process Returned Check' and includes a 'Check Number' field.

Contextual Help



Width: ???px
Location: ???
Header size: ???
Header Color: ???px

Confirmation



Weekly News

