Order Entry Guide

Revised 2/27/2024

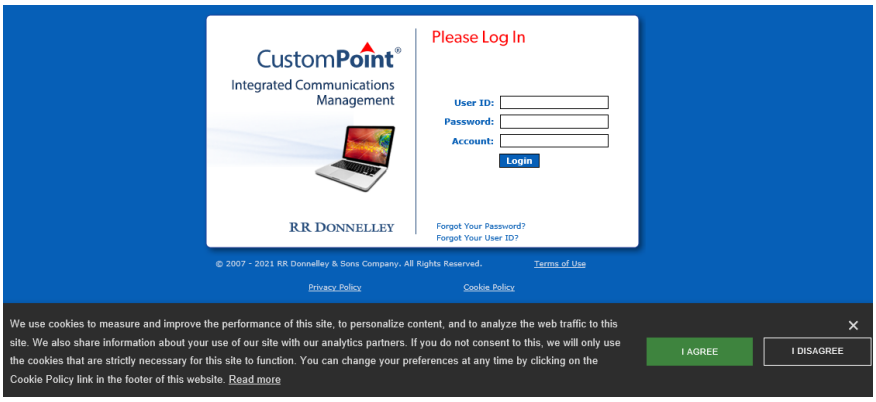
Table of Contents

Preface 2
Introduction 3
Home Page Features 3
My Profile menu 3
Personal Information option 3
Settings and Preferences option 4
Custom Fields option (Advanced Profile setup) 5
Personal Address Book (PAB) option (updated!) 6
PAB Address Maintenance (updated!) 6
PAB Import/Export options (updated!) 7
CustomPoint Menu Bar 8
Catalog Browsing 8
Universal Item Search with Predictive Search 9
Advanced Search Options page 10
Home Page Widgets 10
Home Page Side Panel for High Value Messages, Order Reminders, Alerts 11
Order Entry Basics 11
View (Icons, Table, Text) / Sort By / Show options bar 11
Item Rollover 13
Item Details Page 13
Quick Item Entry 14
Order Templates 14
Copy Recent Orders 14
Saved Orders 15
Customizable Item Ordering 16
Custom Document proofing 16
Electronic File Delivery (EFD) ordering (updated!) 17
Kit Template ordering 19
Promotional Item ordering 21
Shopping Cart Features 22
Checkout (Delivery Options) Workflows 24
Personal Address Book (updated!) 24
Manually Enter Address (updated!) 25
Searching 'Your Company's Master List of Approved Addresses' (updated!) 26
Finalizing the Order Details (updated!) 27
Reviewing Order Summary Information & Submitting the Order (updated!) 27
Order Confirmation (updated!) 28
HTML email with a button link to the Printable Confirmation detail (updated!) 29
Checking the Status of Orders (updated!) 31
Appendix A: Advanced Ordering Scenarios (updated!) 32
List Ordering 32
Using the 'Saved Distribution List w/ Addresses Only' option 32
Using the cart checkbox 'Order Using a Distribution List with Items and Quantities' 38
Using the 'Order From a File' menu option 44

Preface

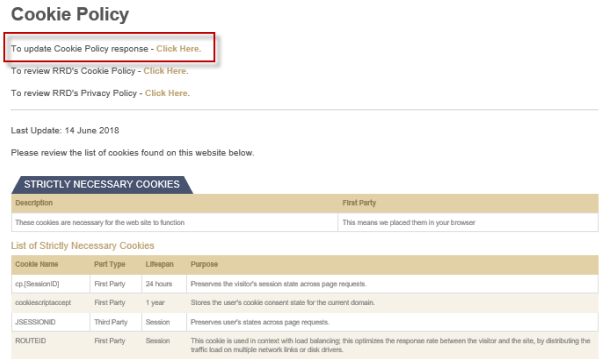
General Data Protection Regulation (GDPR)

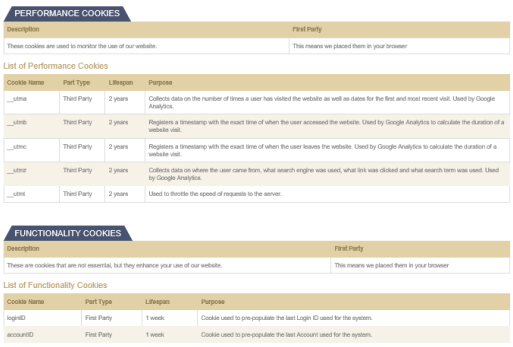
The CustomPoint Login page was updated for GDPR requirements in 2018 (and streamlined in 2020 as shown below). Below displays the updated Cookie acceptance footer message with 'I Agree' or 'I Disagree' buttons and the 'Read More' link option regarding cookie usage.



This footer message potentially only displays once per device (and per browser used) if you select the 'I Agree' or 'I Disagree' answer option. The Cookie Policy link can be clicked at any time to review/change your response. Not selecting an 'I Agree' or 'I Disagree' answer has the footer message continuing to display on subsequent pages.

Clicking the "Read More" option takes you directly to the Cookie Policy page. Click the first link highlighted below to update your Cookie Policy response (it brings up the standard Cookie acceptance footer message (shown above).The Cookie Policy page lists the Strictly Necessary Cookies and provides Lists of Performance and Functionality Cookies used (as shown below).





Note: Selecting the 'I Disagree' answer removes all *non-essential cookies* (leaving only those cookies that are listed as **Strictly Necessary Cookies).**

The ***Privacy Policy***, ***Cookie Policy, and Terms of Use*** links display under the Login area (and in the footer area throughout CustomPoint for your review at any time). Places like Administration and Manage Catalogs, where the CustomPoint Classic interface pages have the left/right frameset due to the site tree, the links are present on the *right* frameset as shown below on the right).

Introduction

This guide covers the overall Home page, personal settings and order entry features of the CustomPoint application. The basic checkout workflow options that can be enabled for use in CustomPoint order entry are covered, and there is an appendix that covers the more advanced *list ordering* workflows.

Note: Some of the options displayed on the following printscreens may not appear based on specific business requirement configuration.

Home Page Features

The **Welcome area** of the Home page identifies the first name/last name of the user ID currently logged in (refer to **Figure 1**). For those using advanced features, such as Order on Behalf (OOB) or Alternate Profiles (when a specific Company or Member has been selected), a specific icon and mouseover will be shown following the name in the Welcome greeting area as well upon login.

Select **Sign Out** to log out of CustomPoint. The **Cart** (shopping basket icon) displays a **cart count** of 0 initially and becomes a link to the shopping cart once items are present in the cart. There is a **Help** menu (providing access to the Support Contact service if assigned, Help/About, etc.) There is also the ability to have a **customized Application Name** (where **Figure 1** shows 'CustomPoint 8.0') and all CustomPoint vendor references can be set to not show as well.

Figure 1: The Home Page banner area, with the menu bar and universal item search field shown

My Profile menu

The menu options appearing under **My Profile** (refer to **Figure 2**) are dependent on the user's administrative settings. Not all options may appear under the My Profile menu as shown below.

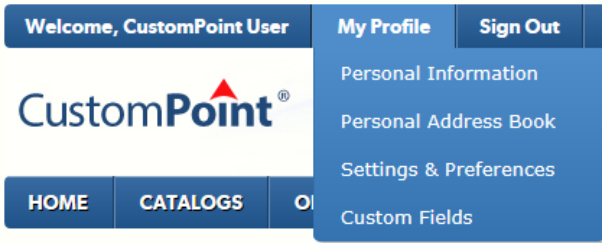


Figure 2: **My Profile** menu options example

Personal Information option

The **Personal Information** menu option links to the Profile page (refer to **Figure 3**). The fields appearing here are based on specific administrative settings for your account, so not all options may appear. Users can view and maintain personal information (such as First Name, Last Name, Email Address and Phone), change their CustomPoint password (if enabled), and more. Select the Save button if any changes were made or select the Cancel button or the Close (X) icon in the upper right to exit the page.

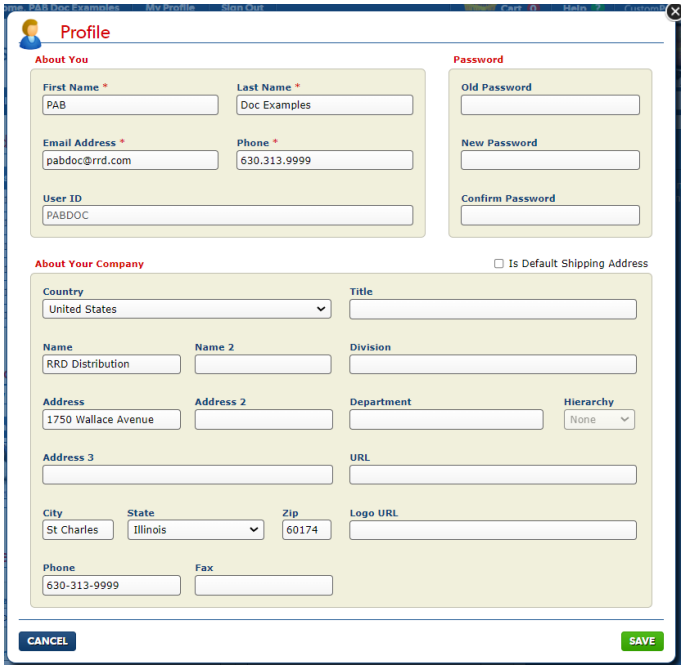


Figure 3: The Profile page (accessed by clicking the **Personal Information** My Profile menu option)

Settings and Preferences option

Profile-level options are available for *individual* shopping Preferences such as Express Shopping. As a new user, you are prompted to save your own preference the first time you add an item to the cart (refer to **Figure 4 left**). Clicking the Stay Here button means express shopping, as you can add all your items for the order prior to going to the cart page (this is the **ON – Stay on Page preference**). Clicking the View Cart button means the user is taken to the cart immediately after adding/selecting each item (this is the **ON- Go to Cart preference**). This Express Shopping choice can be edited at any time by selecting the My Profile/Settings & Preferences menu option (refer to **Figure 4 right**).

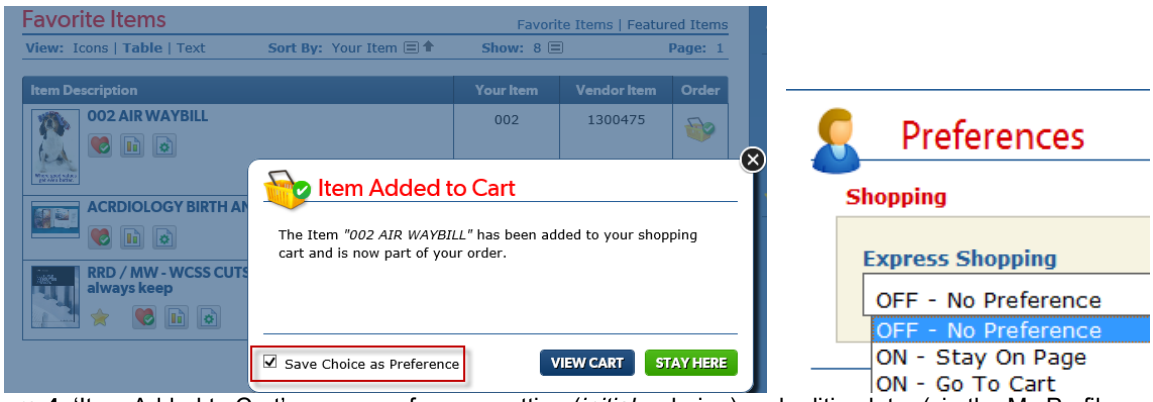


Figure 4: 'Item Added to Cart' pop-up preference setting (*initial* ordering) and editing later (via the My Profile menu)

There are *profile-level* Preferences options available in the **Catalog and Search Results** section also. If the user group level setting for Allow Catalog View Selection is enabled, as a user, you can set your own display preference (refer to **Figure 5 below** and the *View/Sort By/Show options bar* section in this guide). *Default Display* options include: **Icon View** – Large Thumbnails, **Table View** – Small Thumbnails, and **Text View** – No Thumbnail. The *Default # of Items* preference available values are 24, 48, 96, 192 for all three View options. The available values for the *Default Sort By* preference are controlled by admin settings (Your Item and Item Description are always available).

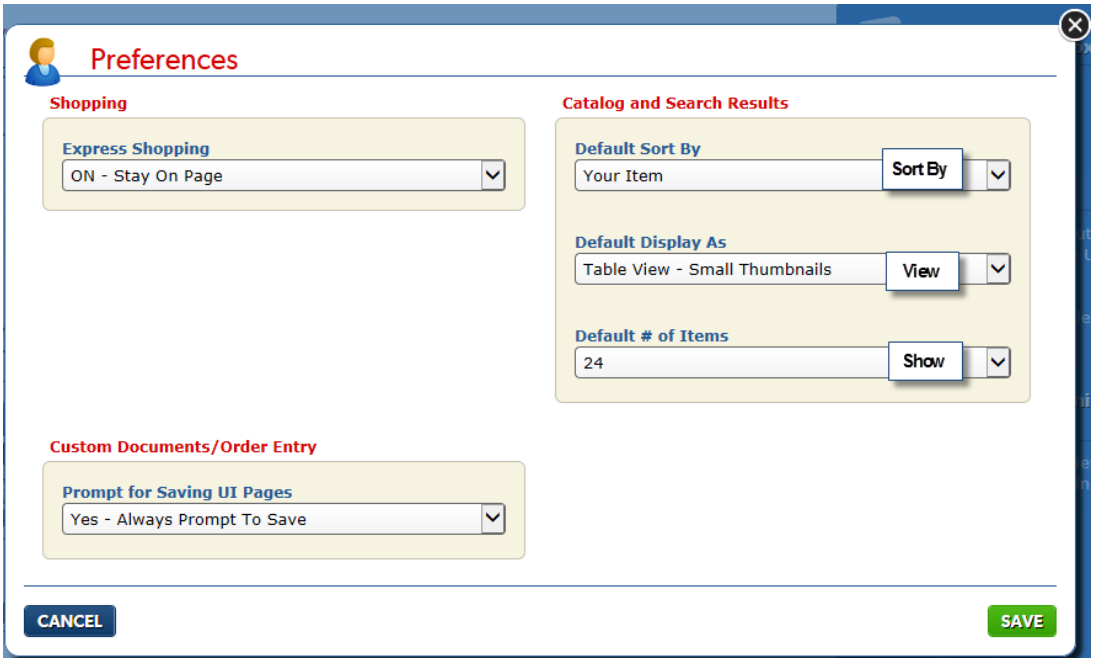


Figure 5: **Preferences** page (My Profile menu *Settings & Preferences* option) and the catalog browsing/item header

The **Prompt for Saving UI Pages** preference is in the Custom Documents/Order Entry section on the lower left of Preferences pop up (as shown in **Figure 5**). This setting defaults to Yes –Always Prompt to Save. This can be changed to No- Automatically Save My Changes if you find the Save Changes pop-up disruptive during your ordering of custom documents. **Note**: Only selecting the Back button or selecting to go to a previous page generates the Save Changes prompt that this preference controls. Clicking the Next button in the custom document ordering workflow automatically validates the data entered and saves for you.

Custom Fields option (Advanced Profile setup)

Accounts utilizing some of the more advanced profile setup options (such as profile User Defined Fields (UDFs), site attributes and more) will see a Custom Fields option under the My Profile menu. **Figure 6** shows a "Profile User Defined Field" set up to capture the 'Full Name with Initial' information on users (for use on custom documents and more).

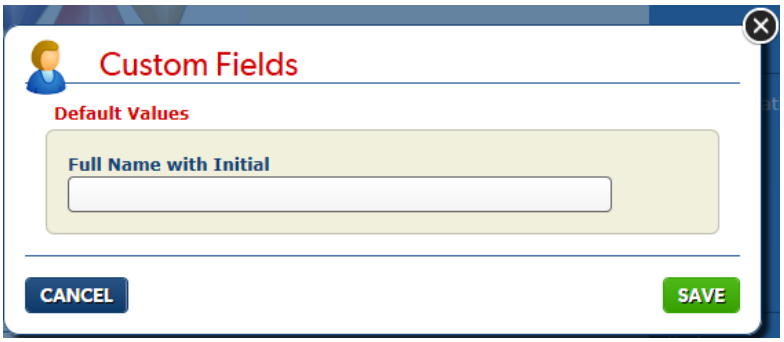


Figure 6: The **Custom Fields** page (which may be an option on the My Profile menu)

Personal Address Book (PAB) option (updated!)

This menu option only appears when PAB entry is enabled as an order entry workflow for your account. This section covers the setup and maintenance of a Personal Address Book and how all U.S. addresses go through enhanced USPS® validation to ensure the shipping address is deliverable. Refer to the *Personal Address Book section* later in this guide for details on using the PAB during checkout.

PAB Address Maintenance (updated!)

Select the Personal Address Book menu option listed under My Profile to perform PAB maintenance. The Address Book page (shown in **Figure 8 right**) has the Addresses list for addresses previously added (and it displays any profile address(es) as view only/non-editable) in the PAB Addresses list. **Note**: Editing of a *profile address* is done on the Profile page. Highlight an existing address on the left to edit it on the right side of the page, clicking the Save Address button to save or the Cancel button at the bottom to cancel your changes. Clicking the **Add New Address** link on the top left clears any address information from the Add or Edit Address fields on the right. Enter the *new* address information on the right side and click the **Save Address** button. Adding/editing PAB entries goes through USPS® validation when you click the Save Address button now. A Please Verify Address pop-up may appear asking for *additional* delivery information (such as the apartment/suite, floor or building#) refer to the message example in **Figure 7** below; or it may provide a Suggested Address (as shown in Figure 8). **Note**: De-select the Suggested Address radio button and select the Address Entered radio button *IF* you need to stay with the address as you had manually entered it.

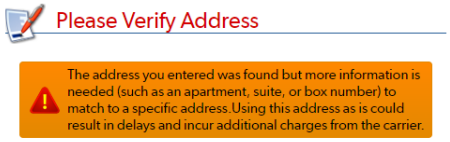


Figure 7: USPS® validation (Please Verify Address pop-up) may ask for additional delivery information

When entering new PAB addresses, it is recommended to enter the key delivery address information in the first address field using the appropriate abbreviations and formatting (**APT** x; **STE** x; **FL** x; **BLDG** x). Any overflow address information can be put in the Address 2 field. Dropping punctuation and abbreviating are used to get the address to fit (as the **Figure 8 left** example shows). When you click the **Use This Address** button, the address is added to the PAB formatted for future use (as it had been suggested), and the USPS confirmation message 'Address is Valid' in green is shown at the top of the Address Book page.

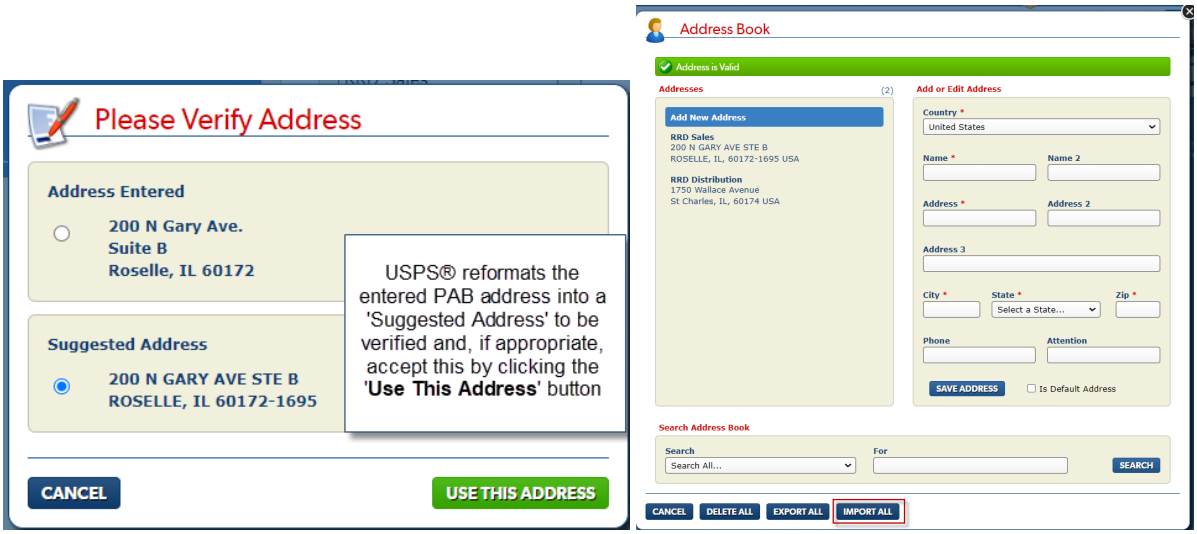


Figure 8: IF saving a manually entered address brings up the Please Verify Address pop-up, after verifying the USPS® Suggested Address (with a *defaulted* radio button) you can click the 'Use This Address' button to put the reformatted address into the PAB Addresses list on the Address Book page for future use

Refer to **Figure 9**, this example shows how you can mark a PAB address as 'Is Default Address' and it appears at the top of the addresses in the list with a ✓ checkmark on the Address Book page. In checkout, 'Your Default Address' becomes the first option in the Address Source dropdown list. Setting a default Ship To order filter or marking the profile address checkbox 'Is Default Shipping Address' on the Profile page are other methods to set a *default* shipping address. **Figure 9 left** (and **center**) shows a PAB search example (under the address listing, selecting a search criteria from the Search dropdown and entering/selecting the 'For' (State=Illinois addresses in this example), and see the search results and address count display on the top of the search results. To remove an address from the address book, just click on that address to highlight it (it displays on the right side to ensure you are deleting the proper address), and then you can select the **Delete** icon that appears in the upper right area of the address. After you click Delete on the Delete Address confirmation pop-up (shown in **Figure 9 right**, there to prevent accidental deletions), the address is removed, and the address book count is updated.

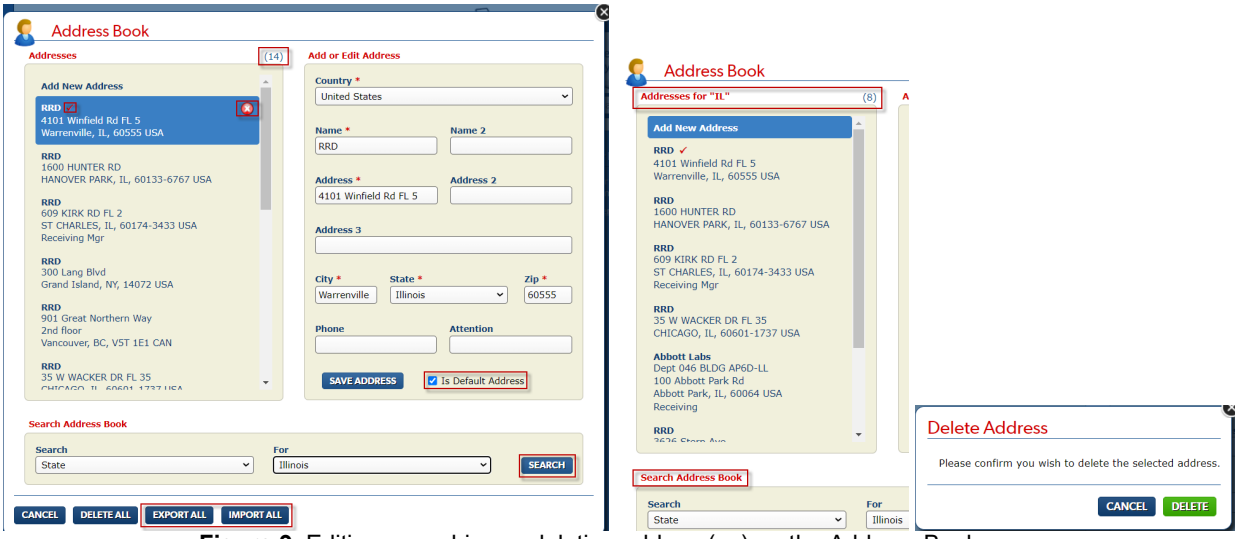


Figure 9: Editing, searching or deleting address(es) on the Address Book page

PAB Import/Export options (updated!)

All personal address book users have the ability to export their PAB addresses to a Microsoft Excel™ .xls file (and can resave it as .xlsx). Click the **Export All button** (shown at the bottom of **Figure 9 left**) and you can pick up the filename starting with PABAddresses 'PABAddresses_*1234567890123*.xls' file from your Download folder. **Note**: No profile address(es) are exported/imported – those are unique to the user (as is setting default address(es) unless it is an order filter set at a user group level).

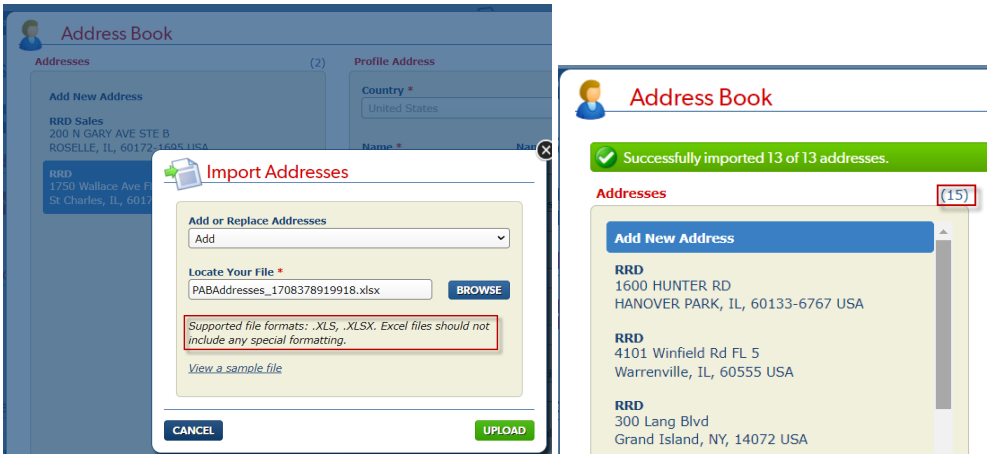


Figure 10: The Import Addresses pop-up and a successful import confirmation message

There is also an **Import All** option available to all personal address book users (refer back to the bottom of **Figure 9 left**). Clicking the Import All button brings up the Import Addresses pop-up (**Figure 10 left**) and there is a *View a sample file* link available. This sample file is a template for creating PAB addresses in a spreadsheet format (there is field level help in the spreadsheet that explains which fields are required and the maximum field length allowed for the field. For example, Country is required and you must enter the 3-character country code of USA for the United States (enter CAN for Canada, GBR for the UK (Great Britain), etc.). With a file of addresses to import (.xlsx is preferred), click the **Import All button** and select to do an **Add** (which adds to the existing address list) or select **Replace** (to replace any existing PAB addresses with the file you are importing). The Replace option has a confirmation message, so it is clear that the Replace option is going to delete the existing PAB addresses and import those in the file. With the import mode (Add/Replace) and the import file specified (using the **Browse button**), click the **Upload button** at the bottom of the pop-up to complete the import process. **Figure 10 right** shows an example of the successful import message, the address count being updated and the addresses being added as specified.

CustomPoint Menu Bar

CustomPoint has a **menu bar** appearing on all screens (most Order Entry users will see Home, Catalogs and Orders options on their menu bar), refer to **Figure 11.** Accounts using an order wizard don't see a Catalogs menu for browsing (based on their setup). Just remember the menu bar is always there to speed navigation around the system. The Home page is always just a single click away. Refer to the *Home Page Widgets section* in this guide for customizing the Home page to do more for you.

Catalog Browsing

Figure 11 left shows how the catalog categories display for fast browsing access when you hover over the Catalogs menu option with your mouse. It is dependent on the account catalog setup if there are additional (sub) categories to drill down and view. Refer to **Figure 11 right** examples of how the main category (such as Brochures) either displays additional categories or it shows the message that there are no additional categories to display.

Figure 11: Mouse over the **Catalogs** menu to see the available categories/(sub)categories of items to browse

Figure 12 demonstrates how the **Selections checkboxes** become breadcrumbs when drilling down into a subcategory to show where you are currently. Simply uncheck the 'Large Category Test' checkbox to return to the highest level category ('Regression Items' category in this example) in one step.

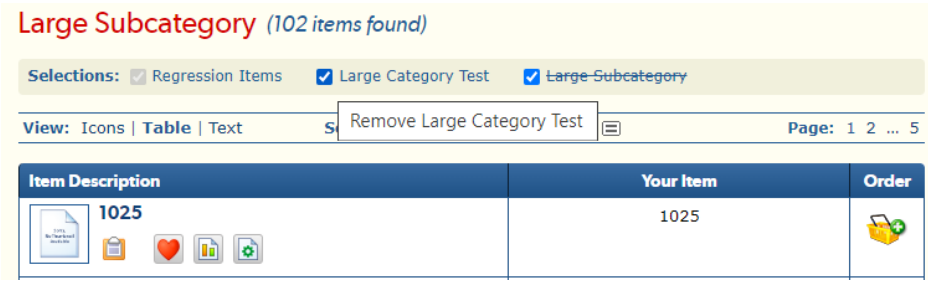


Figure 12: The Selections checkboxes act as breadcrumbs, deselect a checkbox to return to the higher subcategory

There is a **Show All** option available (click the icon to see the Show menu options) as shown below. Click the Show All option during catalog browsing to remove the paging on a large result set (putting all the category items/search results on a single page) for easier browsing, see the **Figure 13** examples. The Large Subcategory had 5 pages of items, but with selecting the Show All option and sorting, you can quickly scroll down a single page of items to locate the desired item.

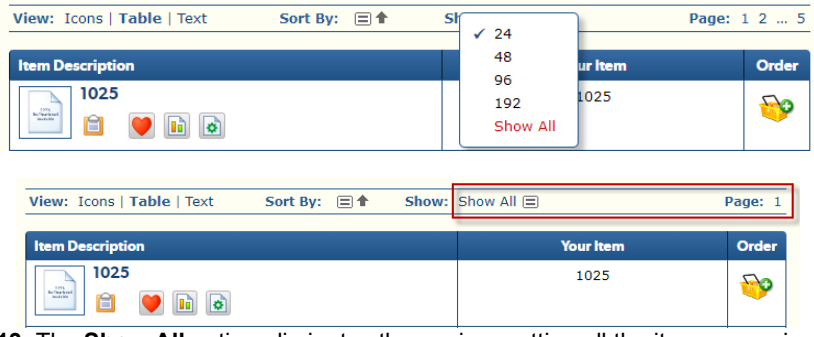


Figure 13: The **Show All** option eliminates the paging, putting all the items on a single page.

Universal Item Search with Predictive Search

The **universal item search** is the *single* search field on the right side of the menu bar (refer to **Figure 14** for an example search for items with '***rrd***'). Entering a minimum of 3 characters in the field returns Predictive Search results. Up to 10 results may return (showing Your Item# and the item description with an Add to Cart/Customize icon for selection). Hitting the Enter key (without clicking on any of the predictive search results, links/icons, etc.) takes you to the regular search results page.

For those accounts that use Manage Items, there is a way to setup the ability to search Keyword value(s) via this Search as well. Simply enter a partial item number, item description, or keyword value (when setup) and hit Enter for fast order entry search results. With your search results returned, you can drill further down into those results (especially useful when a large number of results were returned) by using attributes to more quickly find what type of item you are looking for (see **Figure 14** also).

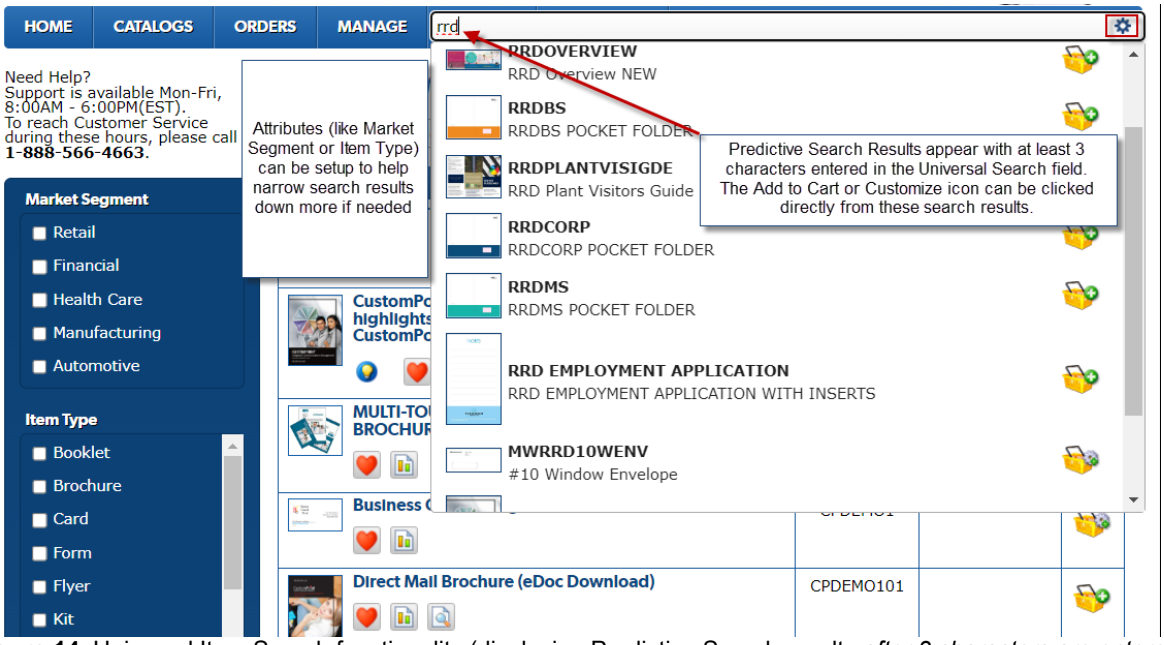


Figure 14: Universal Item Search functionality (displaying Predictive Search results *after 3 characters are entered*)

Advanced Search Options page

If you have more search criteria to enter/select, click the gear icon (⚙) in the Universal Item Search field to go directly to the **Advanced Search Options** page. Refer to **Figure 15**; here you can make your attribute(s)/Standard Attribute(s) selections along with entering the partial item number or item description in the Find field and click the Search button at the bottom of the page. **Note**: Attributes only appear if they have been configured for your account.

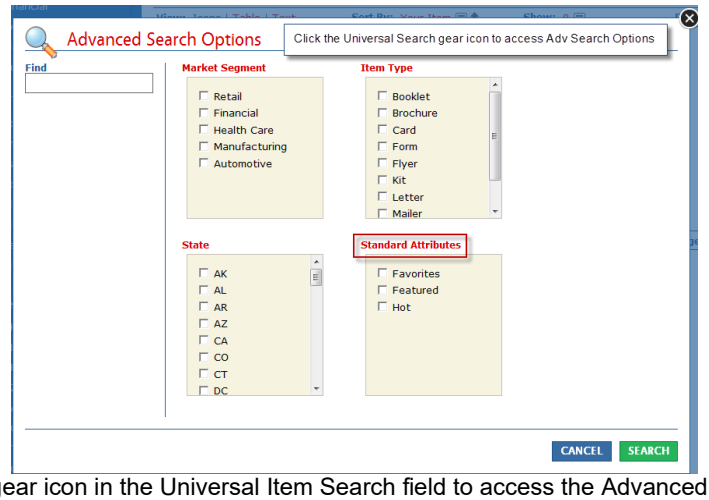


Figure 15: Click the gear icon in the Universal Item Search field to access the Advanced Search Options page

Home Page Widgets

Adding widgets to the Home Page gives the ability to create a functional dashboard for users with their most commonly used functions available all in one place. **Figure 16 left and right** shows how **Home Page widgets** can be setup differently (at the user group level, based on assigned services and other administration settings) on the same site. Widget options include the following:

- **Landing Page HTML**: a customizable HTML section that can be set up to provide information.
- **Featured Items/Favorite Items**: can be separate widgets or grouped together on the Home page to save space. Sequencing determines which one shows on top (see **Figure 16** examples). Messaging appears under the Favorite Items heading when there aren't any items marked yet. Featured Items display based on the assigned catalog(s) setup for the user.
- **Order Search**: shows the last 10 orders for the user (*Recent Orders must be enabled* at the user group level for this widget to appear on the Home page).
- **Recent Items**: this is an alternative to the Order Search widget, with an item-centric view of the recent orders. This widget shows all the *line items* for the last 30 orders (over the last 90 days).
- **Check Inventory**: provides the ability to search for an item's inventory level information.
- **Message Carousel**: use the '*Carousel*' Message Category Name to set up a carousel of messages to rotate through on the Home page. This can be in addition to the high value messages (set up for display on the right side) and the regular message board messaging.
- **Message Board**: can display up to 5 categories of messages, click the message category name to display the messages for that category.
- **Routed Orders**: (for those using Routing & Approval functionality) this widget only appears for those set up as approvers in the user group, providing a Sales Ref No. column link to jump into a particular order awaiting approval from the home page. This widget is *in addition* to the approval queue Order alert link that automatically appears for approvers in the sidebar on their Home Page.
- **Order Wizard**: Conversational ordering wizard is an advanced feature requiring special setup.
- **Order for Another User/OOBO + Wizard**: Advanced capability requiring special setup for both.
- **Key Profile Selection/Key Profile Search**: Advanced capability requiring special setup for both.

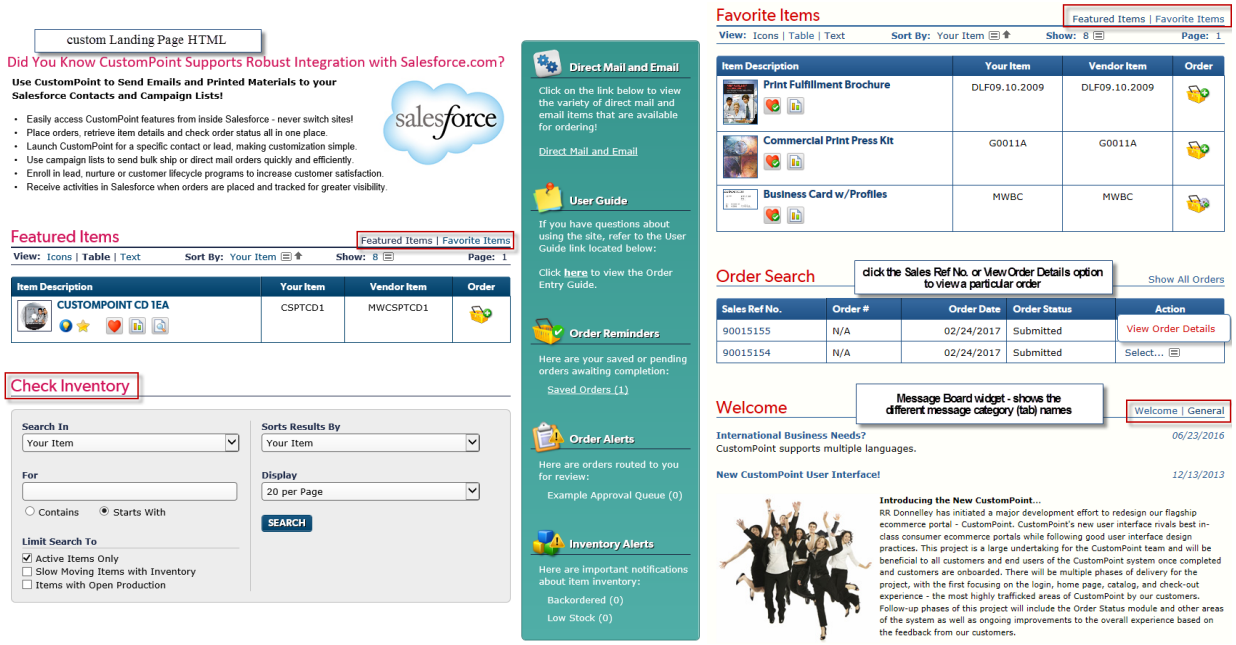


Figure 16: (**left**) Home Page widgets and the side panel, (**right**) different widgets setup for another user group

Home Page Side Panel for High Value Messages, Order Reminders, Alerts

Refer to the panel shown on the right side of the Home Page in **Figure 16 (left)**. There is an example of two **High Value Messages** displayed, the **Order Reminders** section (with a link to Saved Orders), an **Order Alerts** section (for the link to the appropriate Approval Queue – specific to an approver on an account using Routing & Approval), and an **Inventory Alerts** section. The alerts that can also appear here can vary widely between users based on administrative settings. The **Message Board** can be set up as a Home Page widget (see **Figure 16 (right)** bottom), and just those messages designated as 'High Value' message(s) appear at the top of the Home Page side panel as shown.

Order Entry Basics

View (Icons, Table, Text) / Sort By / Show options bar

The following section covers some of the Order Entry basics. To see an example of the **View/Sort By/Show** options bar, refer to **Figure 17**. Click the icon next to the **Show** field and make your dropdown selection by clicking on one of the available number options. This controls the number of items to be displayed on the page.

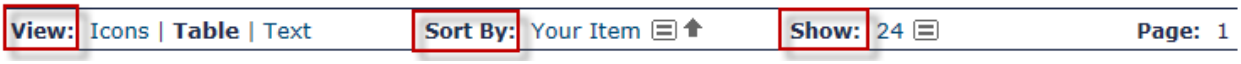


Figure 17: The View/Sort By/Show/Page bar that appears in Order Entry

Figures 18, 19, 20 below show an example of the different View options. **Note**: Not all users see all View options, and some may not see the Vendor Item or the extra (site attribute) *Market Segment* column (these are admin options/advanced setup options).

Icons view

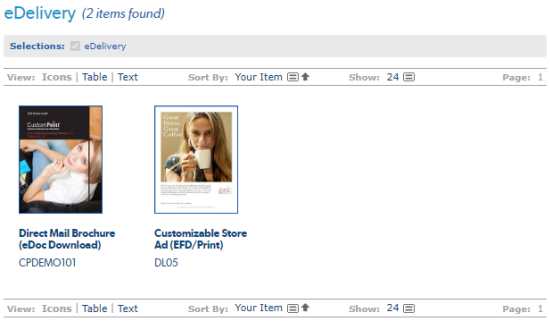


Figure 18: Icons view

Table view

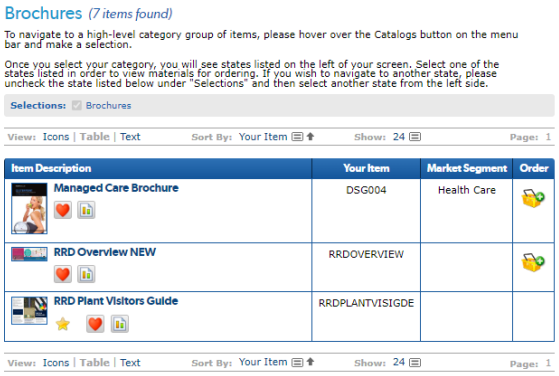


Figure 19: Table view

Text view

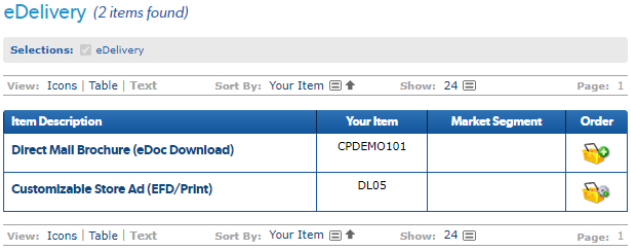


Figure 20: Text view

Sort By options

Click on the icon to get the **Sort By** dropdown selection options to display. **Figure 21** shows a couple of examples. Your Item, Item Description, or Vendor Item displays with a checkmark when that is the selected column to sort. Click the arrow icon (ascending order is , descending order is) to adjust the direction of the sort on any particular Sort By column. As a quick reference, the Sort By field always displays which column has the sort (and in which direction) on the bar.

Figure 21: The Sort By options available depend on administrative settings (some may not see Vendor Item).

Item Rollover

While browsing the catalog, as your mouse rolls over an item, you'll see the **Item Rollover** pop-up. There are quite a few options available to users for this pop-up (with the appropriate settings). You can click to Add to Cart (Customize button for custom document items, refer to **Figure 22**); enter Units and Qty and click the 'Check Current Pricing and Availability' when the appropriate settings are enabled (refer to the example shown in **Figure 23**), and mouse over other icons displayed for navigation/additional information.

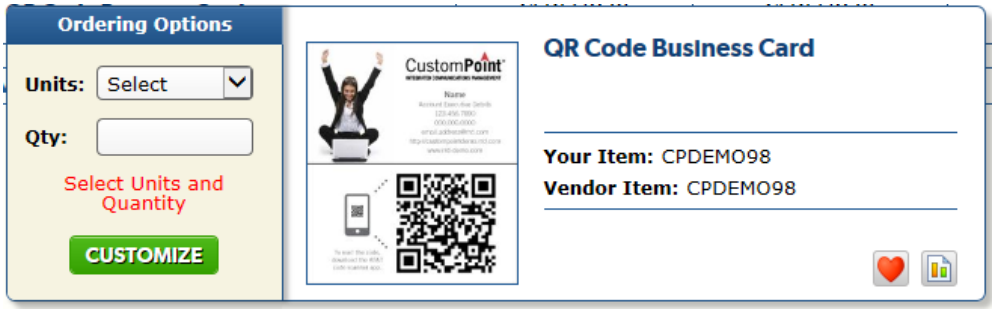


Figure 22: The Item Rollover pop-up

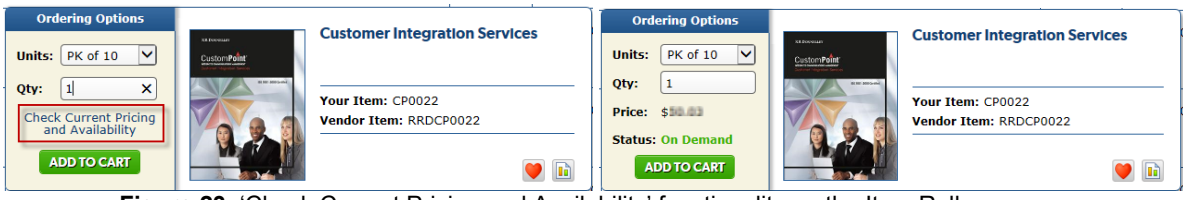


Figure 23: 'Check Current Pricing and Availability' functionality on the Item Rollover page

The item description field (shown on the upper right of the pop-up) also becomes a link, and when clicked takes you to the Item Details page for additional item information. Continue on for the *Item Details Page section* for additional information.

Item Details Page

The **Item Details** page (refer to **Figure 24 left**) provides additional information about the item, providing a Show Full Size Image link, a Pricing By Quantity breakdown (for users that see pricing and applicable items for the pricing grid), item instructions (if setup in Manage Catalogs), and much more depending on the item/item type. Similar to the Item Rollover pop-up, there is a 'Check Current Pricing and Availability' check on the bottom of the Item Details page (with pricing enabled) now. **Figure 24 right** shows an example of the grid & pricing disabled.

An item can be ordered from the Item Details page (entering the Units and Quantity is optional), click the Add to Cart or Customize button (for customizable items). Refer to the *Customizable Item Ordering section* for additional details.

Figure 24: The Item Details page (with or without the pricing & the pricing grid (applicable items) enabled)

Quick Item Entry

The **Quick Item Entry** page (refer to **Figure 25**) is a no frills/just let me enter my Item and Quantities page. This option is available from the Orders menu (based on an administrative setting being enabled). Up to 10 items can be added at a time, select the **Add Items To Cart** button. This is strictly for non-customizable item ordering, if a quantity is entered, it assumes each (EA) quantities for what is added in the cart.

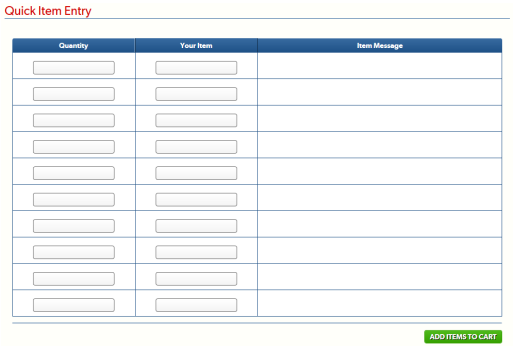


Figure 25: The Quick Item Entry page

Order Templates

The **Order Templates** page (refer to **Figure 26**) is a method to be used for those that do repetitive ordering. The Order Templates option is available from the Orders menu (based on an administrative setting). To set up an order template, create the order, select the shipping address and finalize the order. On the Order Summary page, prior to submitting the order, select the '**Save as Template**' option from the Checkout Options dropdown. Those users with access to create order templates may also be given the option to share the order template with others. On the Order Template Details page, give the order template a name and click Save. The order template is displayed for use on the Order Templates page for later (similar to **Figure 26**), and you are returned to the current order for submission. To delete a template from the Order Templates page (based on an administrative setting), select the appropriate checkbox for it on the left (which enables delete functionality). Click the enabled Delete Selected button (see **Figure 26**). Then click the Delete button on the confirmation pop-up that appears.

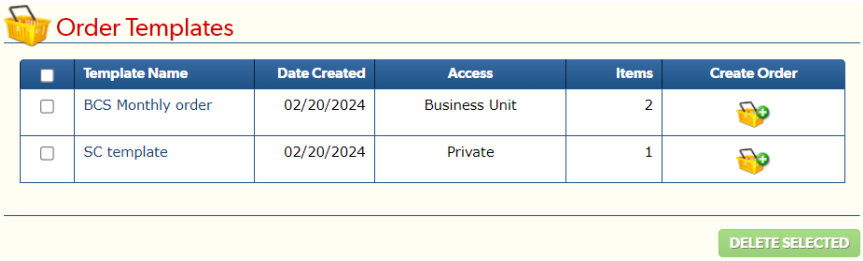


Figure 26: The Order Templates page

Copy Recent Orders

The **Copy Recent Orders** page (refer to **Figure 27**) is another method for creating a repeat order. The Copy Recent Orders option is available from the Orders menu (based on administrative settings). There are Search options at the top of the page to help locate a particular order (the search options can vary as well based on admin settings enabled). Some of the basic search options are by Sales Ref No., Order No., and Purchase Order # (note that the custom label setup appears here).

Clicking the Sales Reference No. column link for the order (or selecting the *View Order Details* option off the Action menu) provides shipping/billing information, line details (Items Ordered and related item details), and the order type (if it was an order request sent to a project manager or if it routed to an approver) on the Order Details Print page.

Select the **Copy Order** option (off the Action menu) to copy the order. You are taken to the Shopping Cart page for the selected order. There may be messages about customizable items needing to be reviewed prior to selecting to Check Out; this depends on the type of order copied. Review the order carefully as you go thru the checkout process, editing the order as needed.

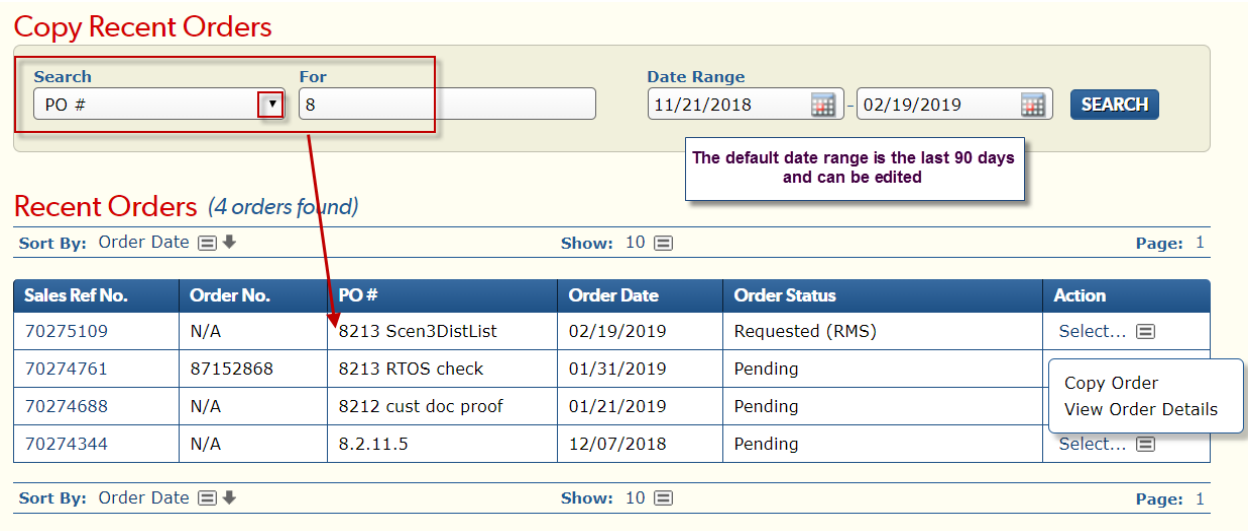


Figure 27: The Copy Recent Orders page (with a search ran for PO# starting with '8')

Note: When viewing your own orders in the Order Search module, the Copy Order option is available on the Action menu for the appropriate order types there as well (this uses similar functionality to Copy Recent Orders).

Saved Orders

Most users have access to the Save Order button during the checkout process, but there is also an administrative option that can disable the Saved Orders option available now from all types of orders.

With Saved Orders enabled, there are 2 places to access these orders: a **Saved Orders** link appears under the Order Reminders section on the Home Page, as shown in **Figure 28**. There is also a **Saved Orders** option under the Orders menu as well (refer to **Figure 29**). There are some additional Saved Orders options available to those accounts using team sharing functionality and attributes as well.

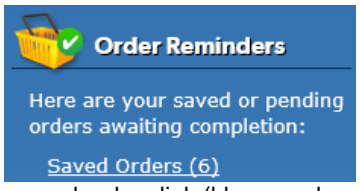


Figure 28: The Order Reminders saved orders link (blue panel on the right side of the Home page)

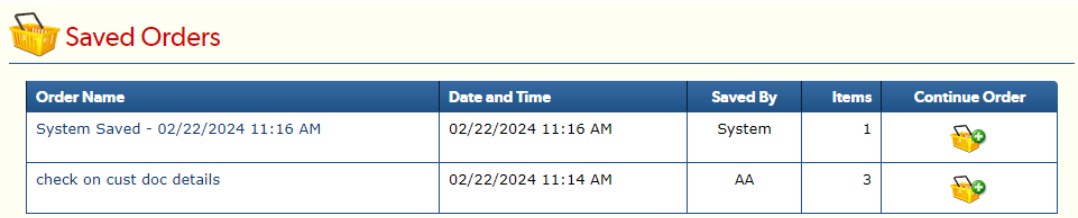


Figure 29: The Saved Orders page showing a System Saved order as well as a named saved order.

Figure 29 shows an example of a System Saved order, the Saved By column shows 'System' for the first order on the list. This could occur when there is an order in process and the browser window with the CustomPoint order session accidentally gets closed or there is a power outage, etc. Users can pull up and complete any of their saved orders. Click the **Continue Order icon** for an order and you are taken to the Shopping Cart page for the selected order.

Figure 30 shows an example of when the **'Save Order' option** is selected**.** The Saved Order Details page appears and prompts for an Order Name. Click the Save button to complete the save order process. Seeing the address information appearing on the Saved Order Details page is based on where the order was in the checkout process when the order was selected to be saved.

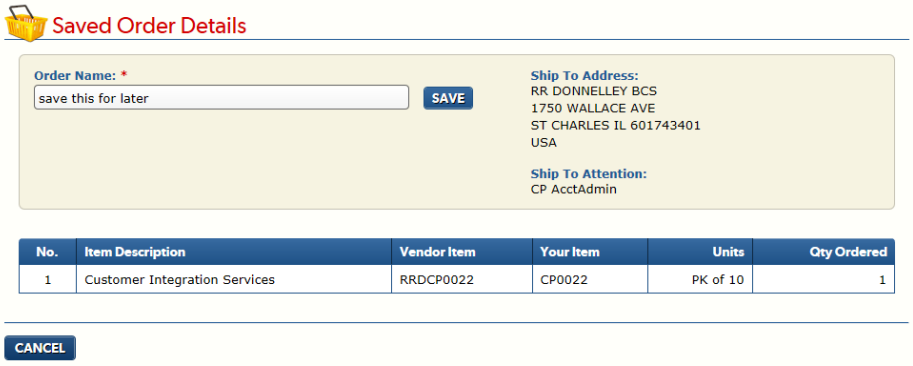


Figure 30: The Saved Order Details page

Customizable Item Ordering

The following section highlights some item customization methods. Customization is very account/item specific. The following covers the general functionality applying to all items of that item type.

Custom Document proofing

Selecting to order a custom document item, such as a business card, starts with clicking the **Customize button**. This takes you into the custom document user interface (UI) page, to complete step 1. **Figure 31** demonstrates the **expand/collapse toggle icon** shown at the top of customization pages, it can be helpful when proofing UI's with large formatted paragraph fields (to be able to review more on the page).

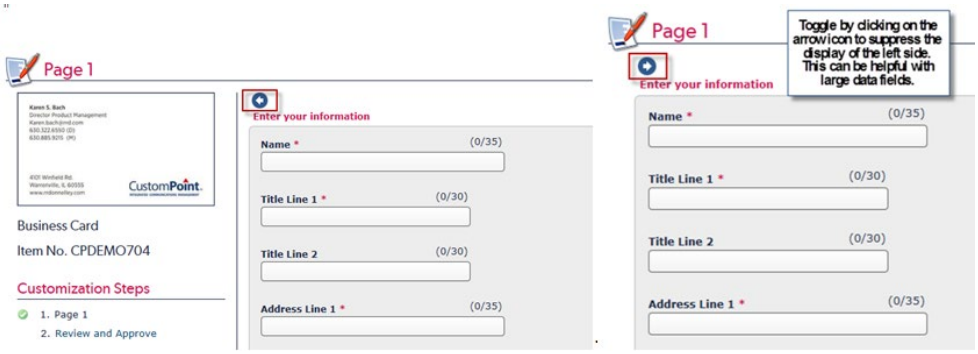


Figure 31: The custom document customization steps show the expand/collapse toggle icon.

Some custom document UI's have many pages/steps, click the Next button to proceed thru the different steps; these are just single UI page examples here. Step 2: '*Review and Approve*' is the final (proofing) step for both. **Figure 32** shows are (4) Size viewing options for the proof: Small/Medium/Large. If you click on the image itself, the Full Size view will be shown. It is also recommended to click the **View PDF Proof button** while reviewing imprint information for accuracy. Confirm proofing is complete by clicking the checkbox under the image; this enables the Add to Cart button.

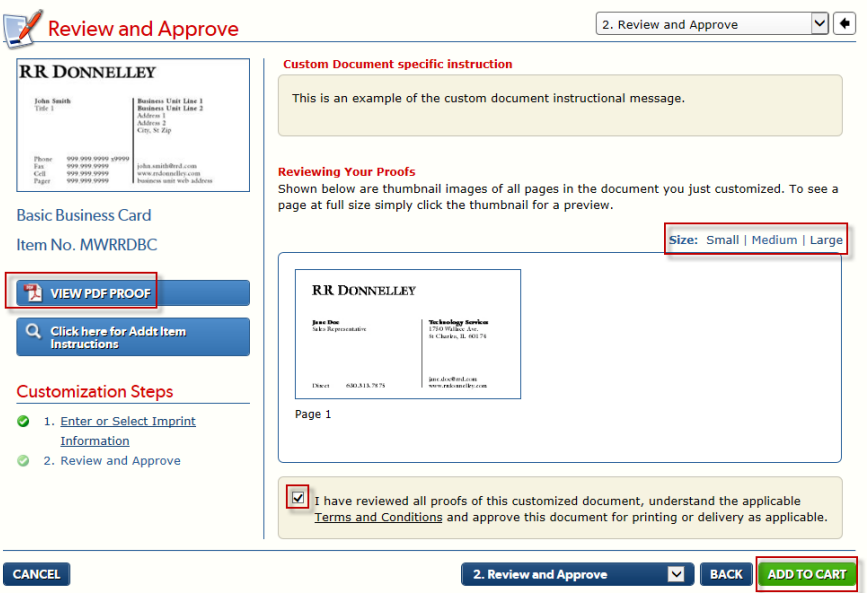


Figure 32: The custom document 'Review and Approve' proofing page

Electronic File Delivery (EFD) ordering (updated!)

Electronic File Delivery items, also known as eDelivery or EFD items, may go through a custom document UI (unless it's a static item). When arriving at the shopping cart, there may be additional Output selections to be made depending on how the EFD item has been setup for ordering. **Figure 33** demonstrates how an item setup as 'eDelivery Preferred' can be changed to 'eDelivery + Print' or just 'Print Delivery' on the Shopping Cart page. When 'eDelivery + Print' or 'Print Delivery' is enabled, the Units and Qty fields appear in the shopping cart requiring entries/selections. Fee amounts display for the selected eDelivery options (FTP, Digital, Print, etc.) on the shopping cart page, and all is summed up for the item in the price displayed (above the fee lines) in the last column (refer to **Figure 34**).

Figure 33: An example EFD item with **Output** selections on the Shopping Cart page

With multiple EFD items (*that allow Output selection*) in the cart, **Figure 34** demonstrates how to use the ***Preferred Output*** dropdown to have a single output selection be applied to all applicable EFD items.

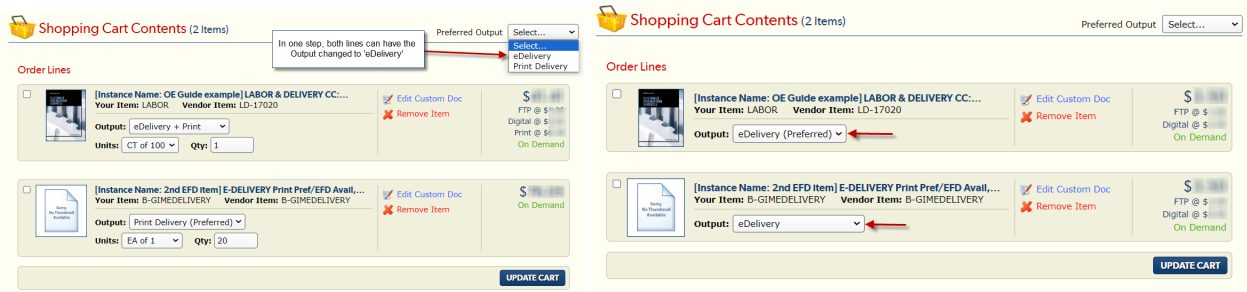


Figure 34: An example of using the Preferred Output dropdown selection option on applicable EFD items.

Selecting Checkout from the shopping cart page (for items being eDelivered) takes you to the Electronic File Delivery Destinations page for additional eDelivery selections to be made. The checkout breadcrumbs for EFD items show Step 1 of 4 in the upper right, refer to **Figure 35**. After making appropriate selections/entries for the EFD item (Email Settings and FTP Location sections), click the Next button to continue on to the Delivery Options page.

Figure 35: The Electronic File Delivery Destinations page examples

Figure 36 shows how the Order Summary page provides a way to ***edit*** the Email To/FTP Location information prior to submitting the order (click the icon). The Email and FTP Settings pop-ups (shown in **Figure 37**) eliminate the need to navigate back to the EFD Destinations page to update these EFD options. Click **Apply** to save your changes. There is also a mouseover that displays your *final* EFD selections/entries (click the icon after the item description), refer to **Figure 38**.

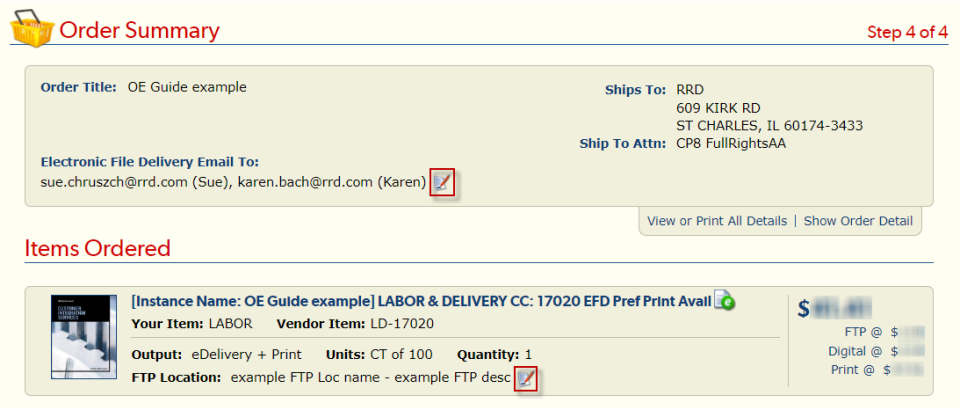


Figure 36: The Order Summary page example.

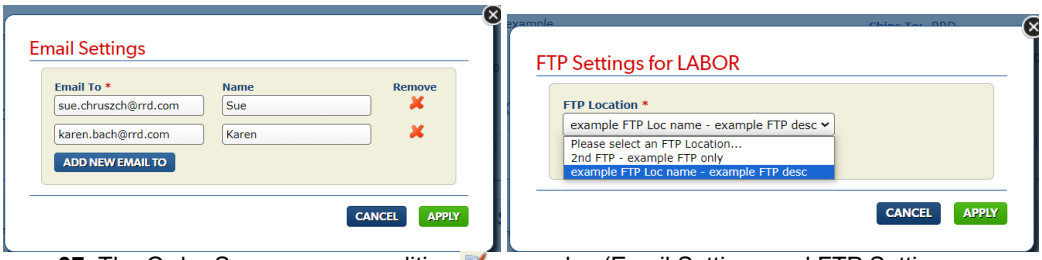


Figure 37: The Order Summary page editing examples (Email Settings and FTP Settings pop-ups).

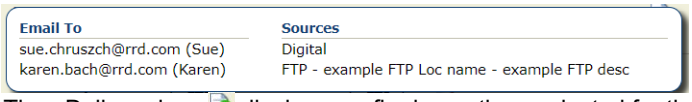


Figure 38: The eDelivery icon displays confirming options selected for the EFD item

Kit Template ordering

Selecting to order a kit template starts with selecting it from the catalog and clicking the **Customize button**. The Kit Editor page is shown. The page has been updated to show the kit template and component items 'Your Item' (and 'Vendor Item' where enabled). Refer to the example in **Figure 39**.

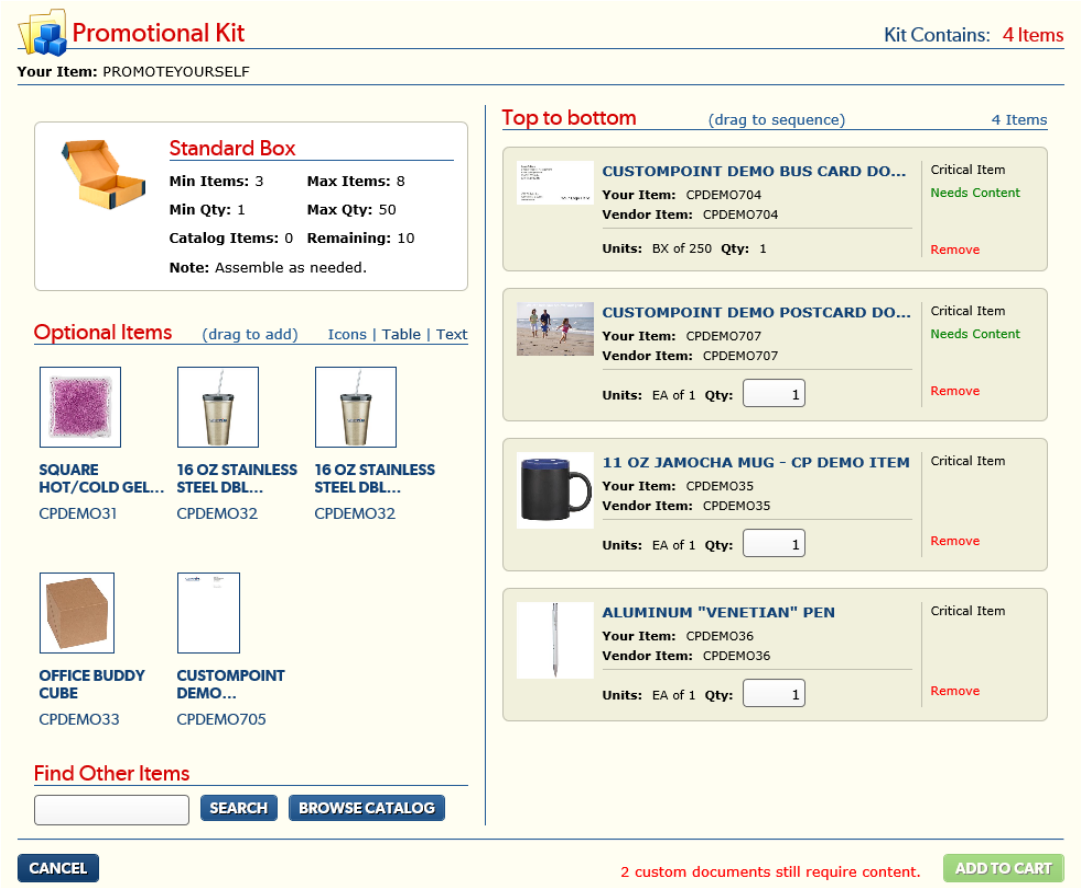


Figure 39: The Kit Editor page (initial view – Icon view for Optional Items area)

If there are custom document item(s) selected to be in this kit template, the **Needs Content** link appears (shown in **Figure 39** for the top two items). The **Needs Content** link goes into the custom document UI for the appropriate imprint data to be provided. When the imprint data entry is completed, the message in red stating '*x* custom documents still require content.' on the bottom of the page is removed, the Add To Cart button enables, and the page provides an **Edit Content** link on the custom documents. The page also then displays the **Instance Name** field information for the custom document, as shown in **Figure 40**. Select Add to Cart to proceed to the shopping cart page.

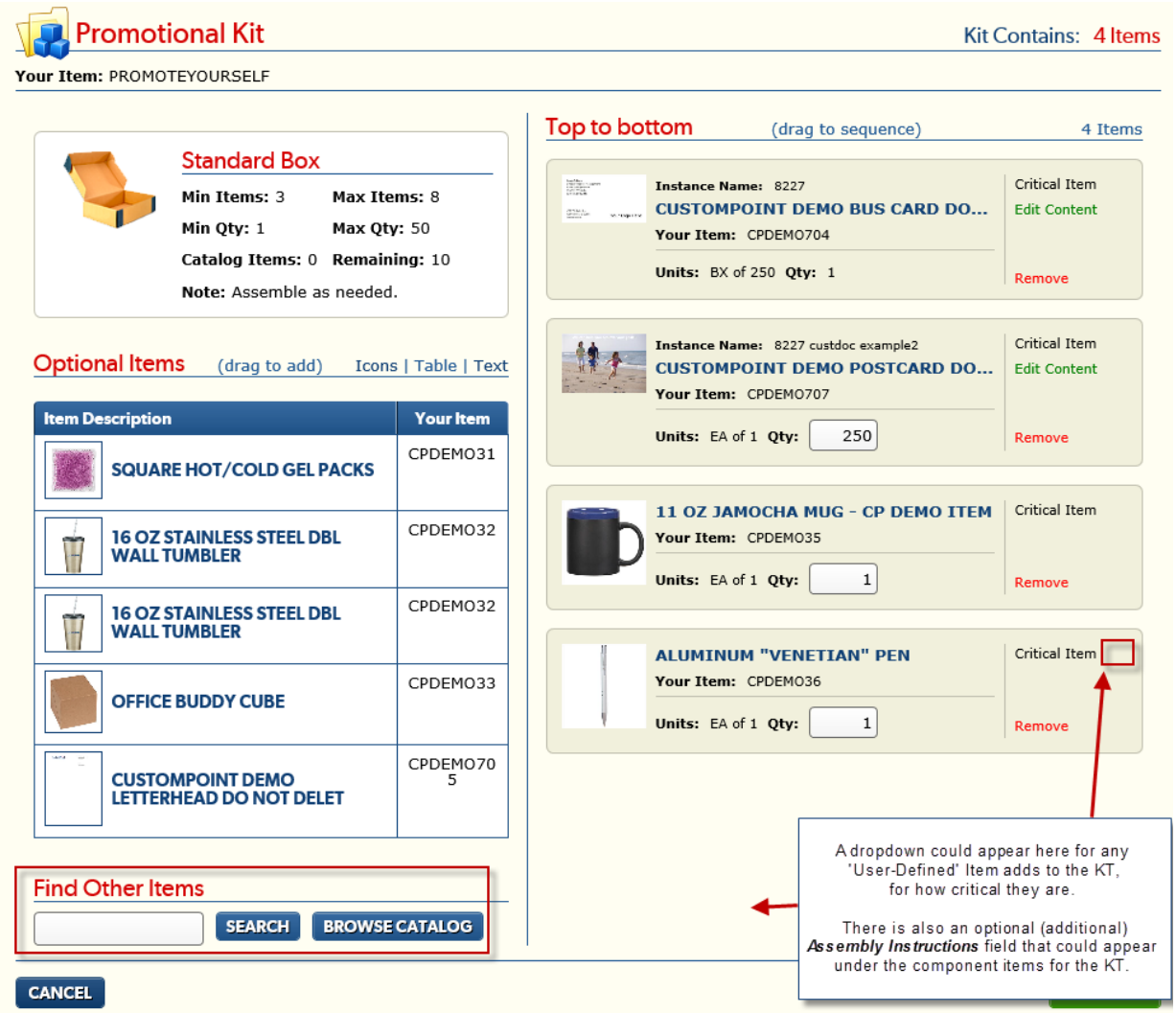


Figure 40 The Kit Editor page (completed view); click Add to Cart to proceed thru check out

Figure 40 notes how the additional 'User-Defined' item(s) added via the Find Other Items area could have a dropdown icon shown for selecting how Critical that item is to the entire kit template order. If the critical item runs out of stock and backorders, it can be selected to be skipped or backordered on an order by order basis. Once all the items have been put into the desired sequencing, additional Assembly Instructions (where enabled) could be entered on this example Kit Template

Once the kit template item is added to the shopping cart, the cart count will increase by 1. There is a **Show/Hide Kit Contents link** on the shopping cart to expand and show all the kit template component item(s) selected on the Kit Editor page (see the example in the Shopping Cart Features section). There also is an **Edit Kit** link shown for the kit template item, this link will direct back to the Kit Editor page (shown in **Figure 40**) if additional editing is necessary for any reason.

Promotional Item ordering

Promotional items can be inventoried items that are ready to be shipped (such as a pen or coffee mug, just click the Add to Cart icon like any other release item) or they can be customizable. A standard promotional shirt item would be an inventoried item available in various sizes. A polo shirt that allows the selection of a custom Logo would be a produced on-demand type item. See the examples below.

Inventoried Items

Click the **View Item button** on the Item Rollover pop-up to be taken to the Promo Item Details page, see **Figure 41 examples.** To order this standard Polo Shirt promotional item, view the different sizes available, the minimum order amount (with pricing and availability (for users with those admin settings enabled). As you enter your order quantity for the appropriate size(s), you will see a **Total** line appear at the bottom (giving the count and sum for the item as ordered so far). Click the **Add to Cart** button when you are done. You can continue shopping, this size/qty breakdown is viewable from the cart (see the **Show/Hide Content** link), and there is an **Edit Item** link to come back to this page to make any changes. There is a **Show Full Size Item link** for a larger view of this item available as well.

Figure 41: The Promo Item Details page

Produced On-Demand Items

Click the **View Item button** to be taken to the Promo Item Details page to start. **Figure 42 (left)** shows there is a **Customize button** for this Polo Shirt, as well as some additional views (side and back views, in addition to the *default* front view). Click those to view the particular image in the left frame or click the '**Show Full Size Item**' link to see the different views in that full size pop-up. After having provided the quantities for the different shirt size(s) desired, clicking the Customize button takes you to Page 1 of the user interface (UI), as shown in **Figure 42 (right)**. Make your Logo selection for this customized polo shirt, click the **Update Preview** button, and click the **Next** button. This is similar to a custom document item order, as your next step is proofing (on the Review and Approve page) – you need to ensure all is correct.

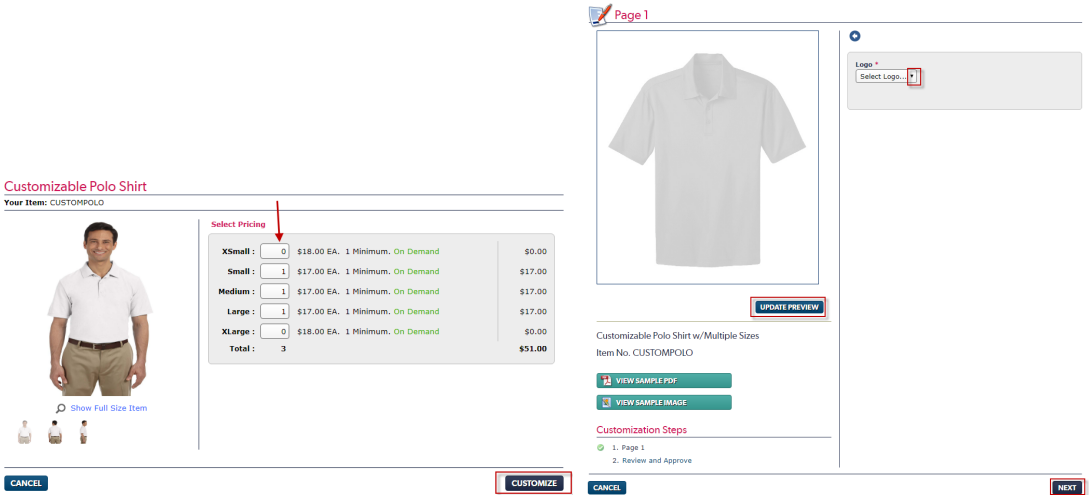


Figure 42: The Promo Item Details page for a ***customizable*** polo shirt and Page 1 of the UI

There are Small, Medium, and Large proof links provided in the upper right side of the page. Click the **View PDF Proof button** on the left on the Review and Approve page to double-check everything as customized on this item is correct. The Adobe PDF proof pop-up appears, and once reviewed, can be closed (which returns you to this page), as shown in **Figure 43**. Check the checkbox that you have reviewed the proofs of this customized item (which enables the Add to Cart button). Optionally you can click the **Terms and Conditions link** – (it opens a pop-up that explains why this proofing step is so important), and then close that. Finally, click the **Add to Cart** button to complete the checkout process.

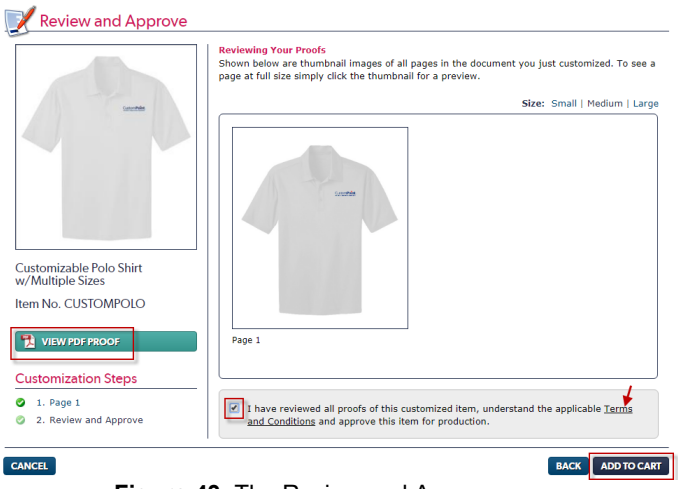


Figure 43: The Review and Approve page

Shopping Cart Features

Click the cart link (Cart 3) to view shopping cart contents. **Figure 44** displays an example **Shopping Cart** page with three items (with availability information 'In Stock' and 'On Demand' showing). Customizable items have an additional option (Edit Custom Doc) and a similar (Edit Bundle shown in **Figure 45**) providing navigation back into the custom document UI for editing purposes. All item types have the standard (Remove Item) option to remove just that item.

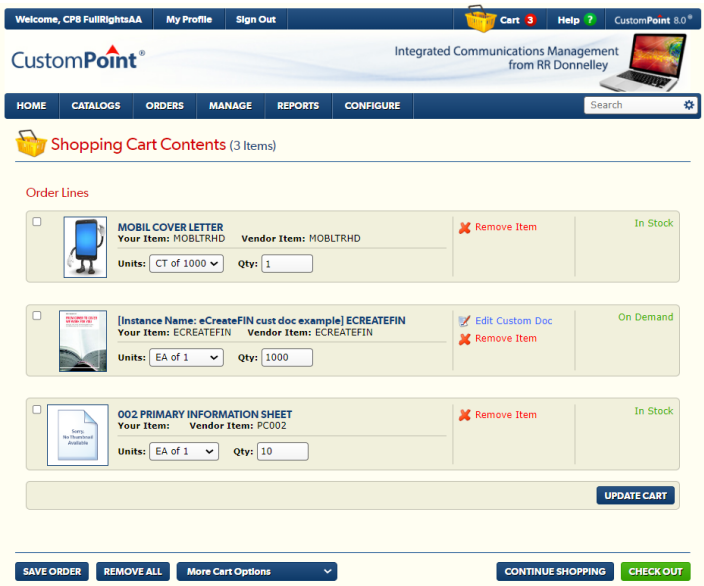


Figure 44: The basic Shopping Cart page and navigation

Users can click the **Continue Shopping** button, click on the **Catalogs menu** (and then one of the categories listed), or perform a **Universal Item Search** for adding additional items to the shopping cart. Click Update Cart for updated pricing and/or availability (data appears based on user settings). Select **Check Out** to proceed with the order to completion. Kit and Promotional Items also have their (Edit Kit and Edit Item) links as well to take you back to the appropriate maintenance page for any changes.

Figure 45 shows examples in the cart of the different ***show/hide functions*** (mentioned previously). The custom doc bundle (show/hide **Bundle Contents**) is a specialized scenario where there is a Master UI used for multiple custom docs. This defaults in the cart to show the custom document items as units and qty must be specified for each custom document individually in the bundle. The (show/ hide **Kit Contents**) for kits/kit templates expands to show all the kit components as shown below (the order quantity is specified for the kit). The (show/hide **Content**) appears for promotional items similarly as it did on the Promo Item Details page, where the different size(s) and quantities were specified/summed.

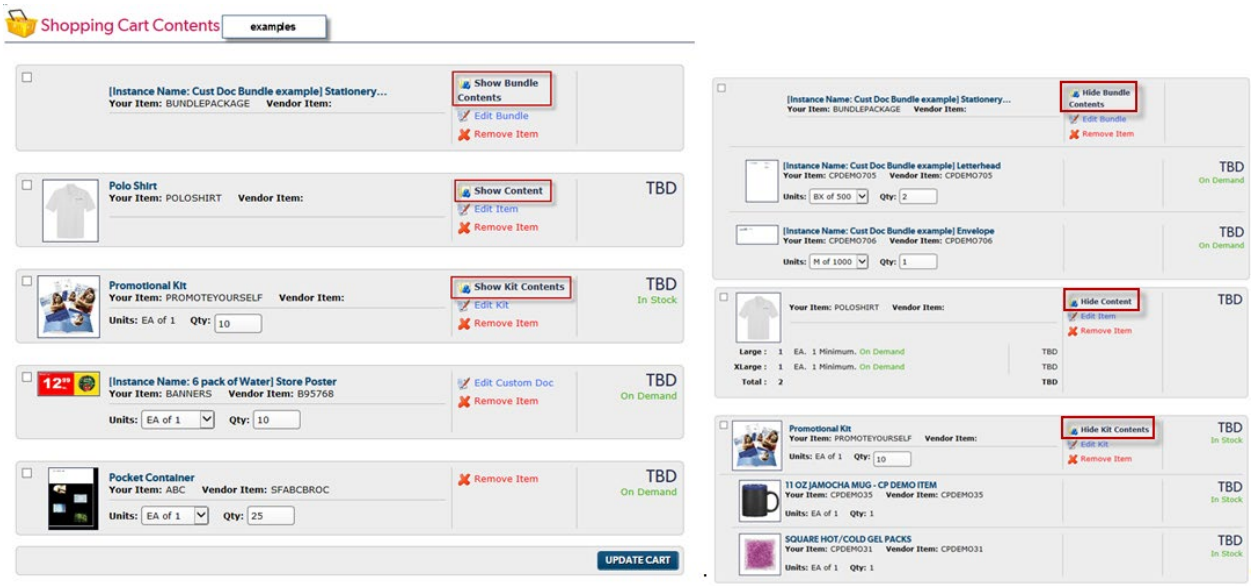


Figure 45: The Shopping Cart page showing the different Show/Hide Content links

Refer back to **Figure 44** (bottom left for the Save Order button and *More Cart Options* dropdown list) and see **Figure 46 left** for **More Cart Options** dropdown options. Selecting the 'Save Order' button takes the user to the Saved Order Details page to save the order for later processing (see the *Saved Orders section* for more details). To clear the cart of *all* items, click the '**Remove All**' button. Check the select checkboxes on the left in the cart for the appropriate item(s), click the **'Remove Selected'** option to remove one or more items from the cart in a single step. Using the select checkbox(es) on the left and the **'Save Selected to New Order'** option, allows particular item(s) to be put into a saved order while continuing on with the existing order. Another option appearing in the **Checkout Options** dropdown (on the Order Summary page) is the 'Save as Template' for those users that utilize order template functionality (see the *Order Templates section* for more details).

Figure 46: The More Cart Options dropdown list, and the Checkout Options dropdown list options

Checkout (Delivery Options) Workflows

Personal Address Book (updated!)

This section covers using the 'Your Personal Address Book' address source option during checkout to select the shipping address for an order. **Figure 47** demonstrates how coming into the Delivery Options page, the PAB address(es) are shown under the Addresses Found section with a PAB address count (10) displayed automatically. If there is only a single default address, it is selected for you. There could be multiple addresses displayed here for quick selection for shipping to your own address, your corporate office, etc. Selecting an address brings up the Deliver To section with a **Modify** function.

Note: This Modify function is strictly on a ***per order basis*** to quickly add additional delivery information or correct the address, see the ***Personal Address Book Maintenance section*** for additional information about keeping the PAB addresses updated. The Modify function in order entry checkout may not be needed as much with enhanced USPS® validation correcting the PAB delivery addresses as they are added to the PAB.

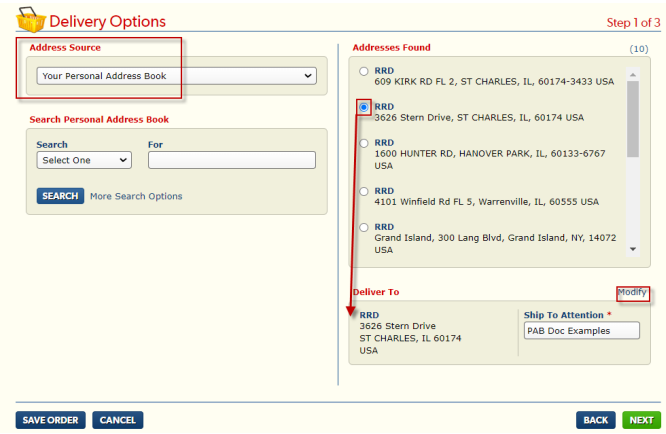


Figure 47: The Delivery Options page (has a Modify option for PAB Addresses for the ***current*** order only)

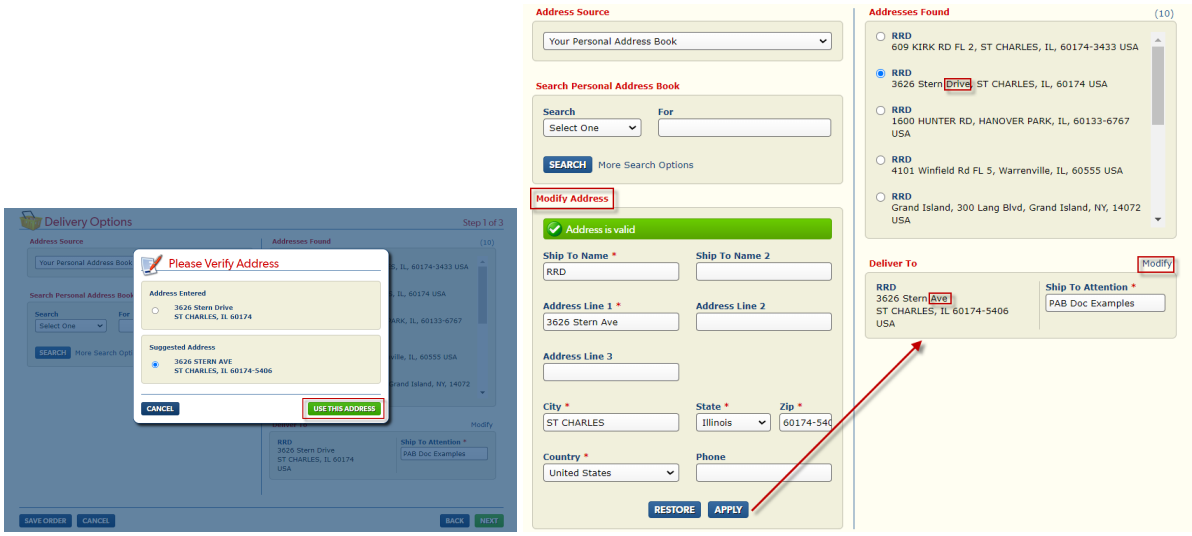


Figure 48: The PAB 'Modify' functionality (and USPS Validation) helps with correcting any delivery address issues

After accepting the USPS Suggested Address on the pop-up (shown in **Figure 48 left**), click the **Apply** button (which updates the Deliver To address for the order, refer to **Figure 48 right**) and then click the **Next** button to complete checkout for this order. Please remember that the PAB (under the My Profile menu) still needs that address corrected for *future* use though.

To search your personal address book in checkout, select one *or more* of the Search dropdown options (click the **More Search Options** link to get the *additional* search fields to appear). Search options such as Company Name, Ship To Attention, City or Zip are 'contains' searches that require at least a partial entry in the 'For' field, where the State and Country fields are a *single* selection from a dropdown list.

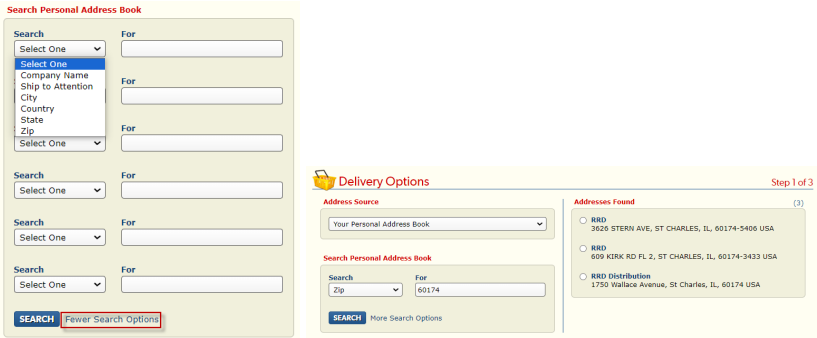


Figure 49: The 'Search Personal Address Book' Search options and an example with search results

Multiple search options can be selected/entered or click the **Fewer Search Options** link as shown in **Figure 49 left**. With the appropriate search criteria entered, select the **Search** button for the search to be performed. The search results and count are returned in the Addresses Found section on the right. Refer to **Figure 49 right** for an example search with the (3) search results displayed. Select the appropriate PAB Address radio button and click **Next** on the Delivery Options page to complete the rest of the checkout process for this order.

Manually Enter Address (updated!)

If enabled in administration, users can quickly enter a new address by selecting the 'Manually Enter Address' address source option and entering the new Ship To address. This can be a one-time use address or for PAB users they optionally can click the **Add to Address Book checkbox** on the bottom left, keeping the newly entered address for possible future use (refer to **Figure 50**). The newly added address does go through USPS® validation to ensure the entered address is a deliverable address. Select **Next** to continue through the checkout process.

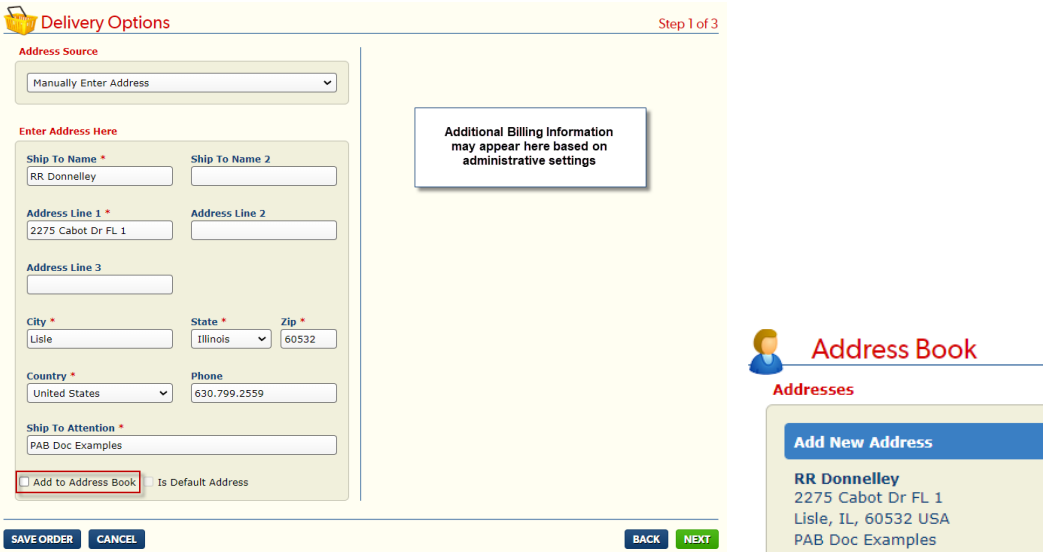


Figure 50: The 'Manually Enter Address' Address Source page options

Searching 'Your Company's Master List of Approved Addresses' (updated!)

This section covers using the 'Your Company's Master List of Approved Addresses' address source option during checkout to select the shipping address for an order. **Figure 51** displays an example list of Search options (this is configurable what all search options appear here or if this is an option seen at all during checkout for users). Select the **More Search Options** link when you know you are going to use multiple search options for this search.

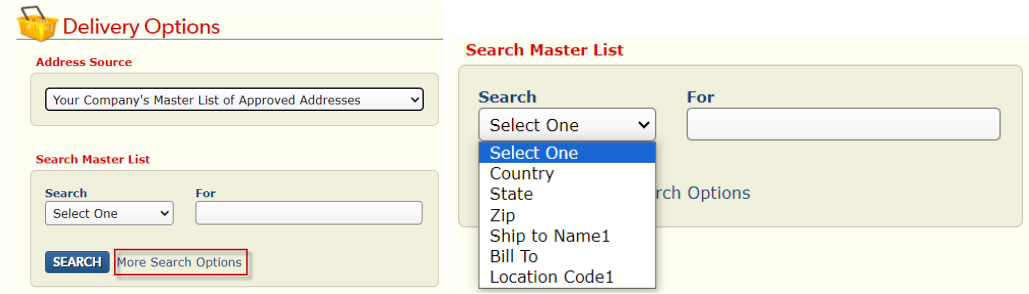


Figure 51: The Delivery Options page displaying some of the Search Master List options

Refer to **Figure 52** for the example search using State=Illinois, Zip starting with '601', and a Ship To Name1 starting with 'rr' in the search options. Select the **Search button** for the search to be performed. The search results are displayed in the Addresses Found section on the right of the page, along with the search result count of (31) displayed. With so many search results returned, consider narrowing the search criteria further to eliminate having to scroll through so many results (e.g., enter the full zip code instead of a partial zip code, and select the Search button again). When Location Code 1 value is unique for a particular address, you could just search that ***single*** field for the known Location Code 1 value.

When the proper shipping address has been located and the radio button selected in the Addresses Found section, the Deliver To section appears at the bottom right of the page. This confirms the address selection and shows the Ship To Attention field. The Ship To Attention is a configurable field option, in this example, it displays as editable and required. Select **Next** on the Delivery Options page (Step 1 of 3 checkout breadcrumbs show in the upper right that there are a couple more steps) to complete the rest of the checkout process for the order.

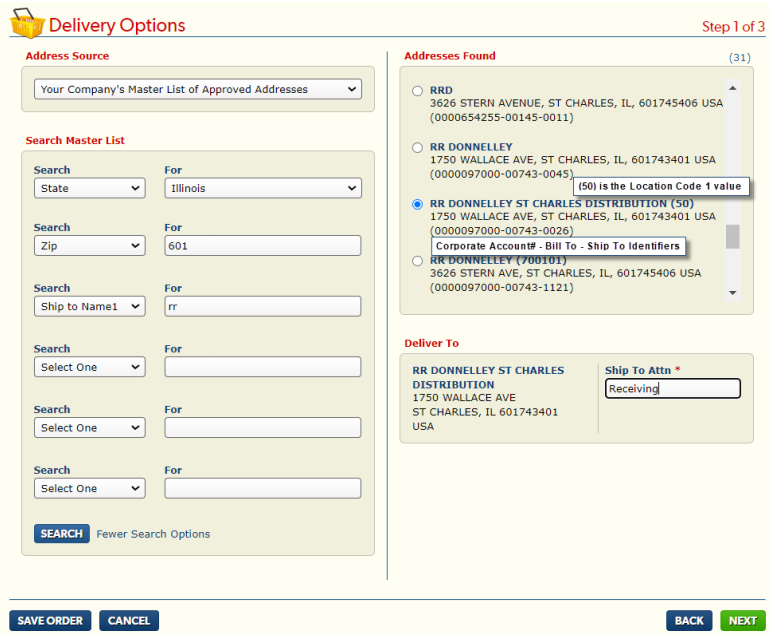


Figure 52: Using multiple search options to find an address, information displayed in Addresses Found explained

Finalizing the Order Details (updated!)

This section covers completing the Order Details page information for an order. **Figure 53** displays an example Order Details page (the options that appear on this page are configurable, so more options could appear in this area). Required fields (like PO # and the Customer Information section fields shown below) display with a red asterisk (*), and editable fields could be setup to display a 'toggle' (designated by the icons). This toggle provides a method to flip between a dropdown list selection and a manual entry option; select the icon to see it change to the '*other*' method option (where applicable). **Figure 53** displays the Cost Center as a dropdown list, and the toggle icon shows you can change it to a manual entry. Default information can be set up to display for users to make this step easier and quicker.

Once the Order Details for the order have been finalized, select **Next**. The last step of the checkout process is reviewing the Order Summary Information and submitting the order. **Figure 53** also displays breadcrumbs in the upper right on the page (**Step x of x**) to advise where you are at in the checkout process. **Note**: When an order has an EFD item on it, the EFD Destinations page adds another step into the checkout process.

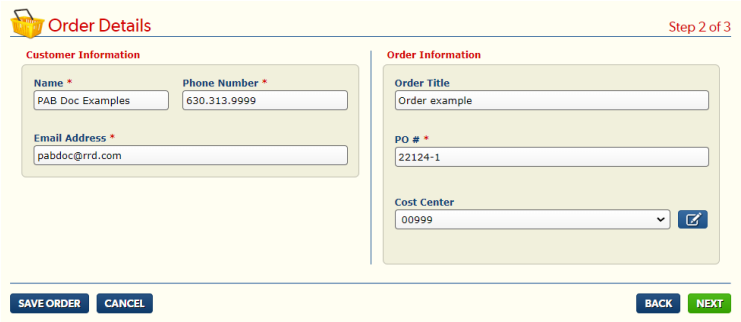


Figure 53: Example of an Order Details page

Reviewing Order Summary Information & Submitting the Order (updated!)

This section covers options available on the Order Summary page for reviewing an order. **Figure 54** displays an example Order Summary page (and what the **show/hide Order Detail toggle** does). Continue on to **Figure 55** for the **View or Print All Details link** taking you to the Order Summary Details page (that shows the additional details for customized items – such as custom documents imprint variables, kit template component details, etc.)

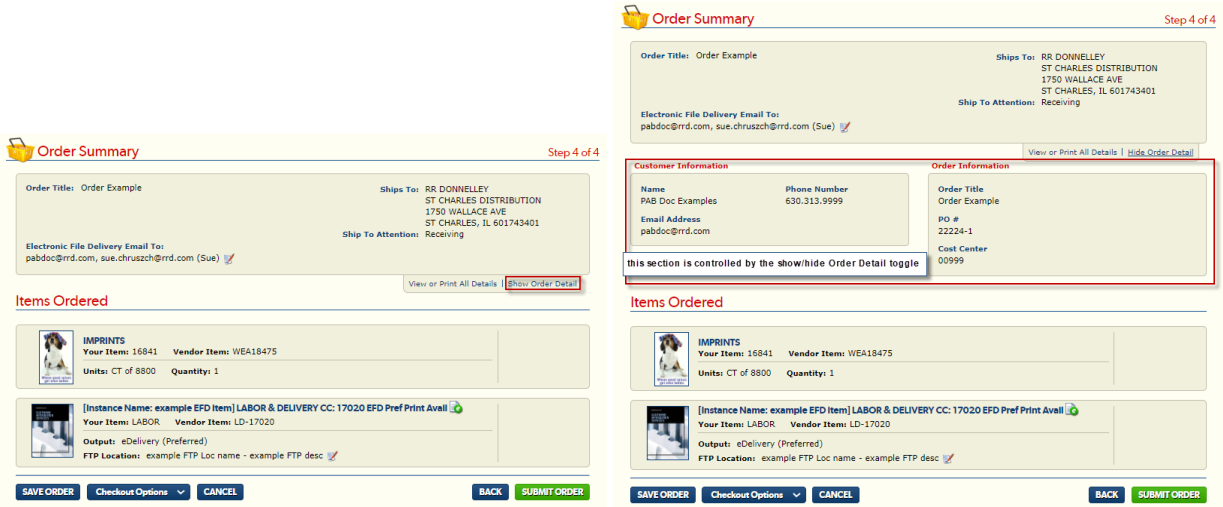


Figure 54: Example Order Summary page (and the Show/Hide Order Detail toggle)

Selecting the **View or Print All Details link** on the Order Summary page links to the Order Summary Details page ,refer to **Figure 55** below for an example. Select the **Print** button (at the top or bottom of the page) for a printed copy, clicking the Close icons on the browser windows when done.

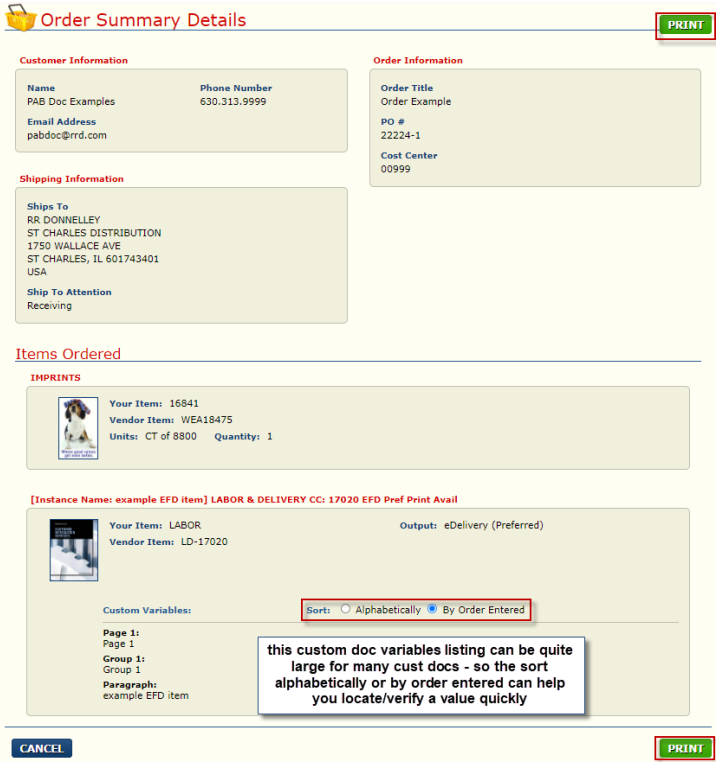


Figure 55: '**View or Print All Details**' option available on the Order Summary page (opens the ***Order Summary Details*** page shown here), click the **Print** button (at the top or bottom) for printing

Click the **Submit Order** button on the bottom of the Order Summary page (refer to **Figure 54**) after reviewing the order thoroughly. Select the **Back** button or **Cart link** on the menu bar at any time during the ordering process to go back and make any necessary changes to the order before submitting the order for processing.

Order Confirmation (updated!)

After submitting your order, a confirmation screen appears (similar to the example shown in **Figure 56**). Depending on the type of order/order request submitted - (or if the order is subject to Routing & Approval) - the wording is slightly different (*Order Confirmed* could be Order *Request* Confirmed or Order *Routed*). Depending on the type of order submitted and your settings, some button/options may or may not appear, such as Copy This Order. The Home button typically appears.

Figure 56: Example **Order Confirmed page** where you can select the link to print your Order Confirmation

Orders/order requests have a link to **Print this Order Confirmation**; refer to **Figure 57** for an example.

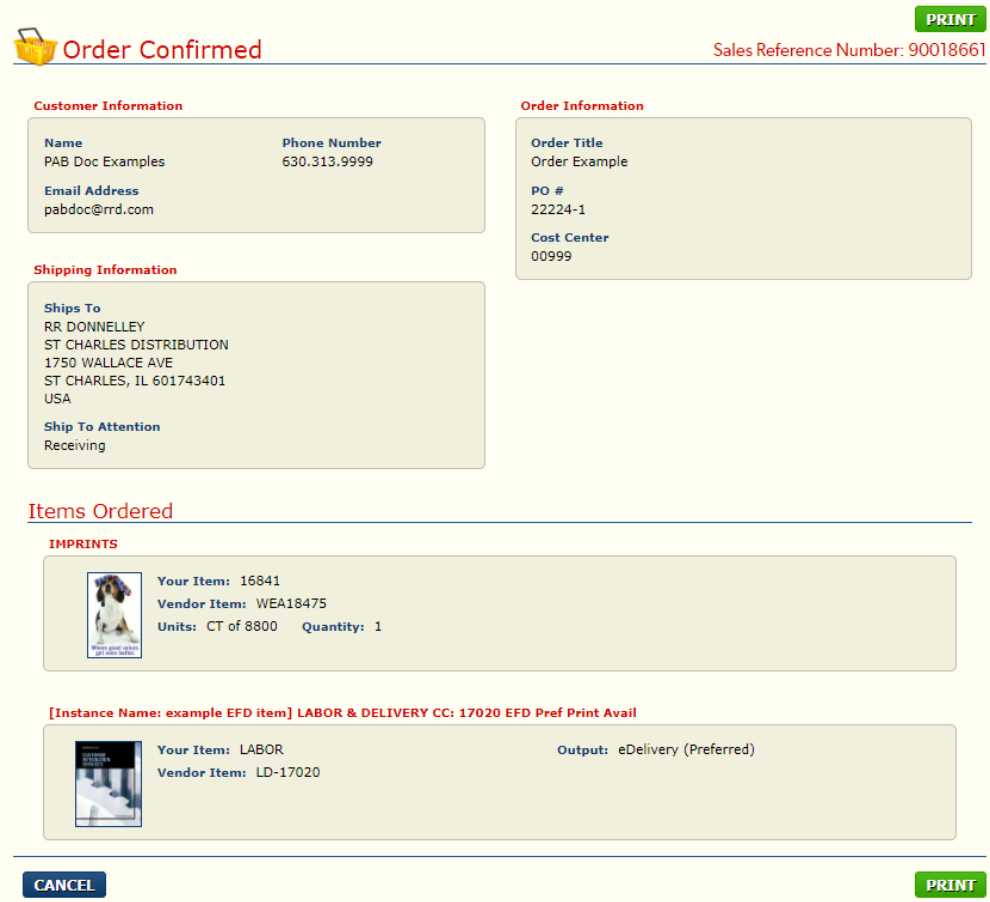
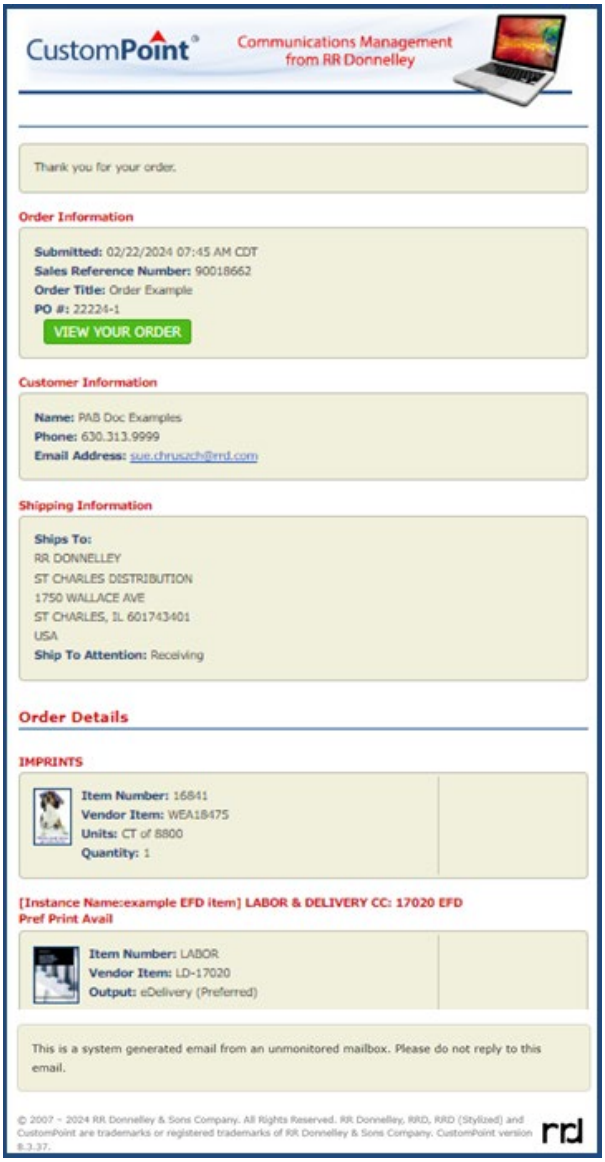


Figure 57: Example Order Confirmation page available for printing

HTML email with a button link to the Printable Confirmation detail (updated!)

Order Confirmation emails are sent as a streamlined HTML email, consistent with your business unit's branding/color scheme (see **Figure 58 left** for an example). A custom Email banner and other setup can be done on the Customize Email page at the Business Unit level. The HTML email provides a **View Your Order *link*** that takes you to a page with the Printable Confirmation page details (see **Figure 58 right**). The button label changes based on the type of order (View Your Order, View Your Order Request, View Your Demo Order, View Your Routed Order, etc.).



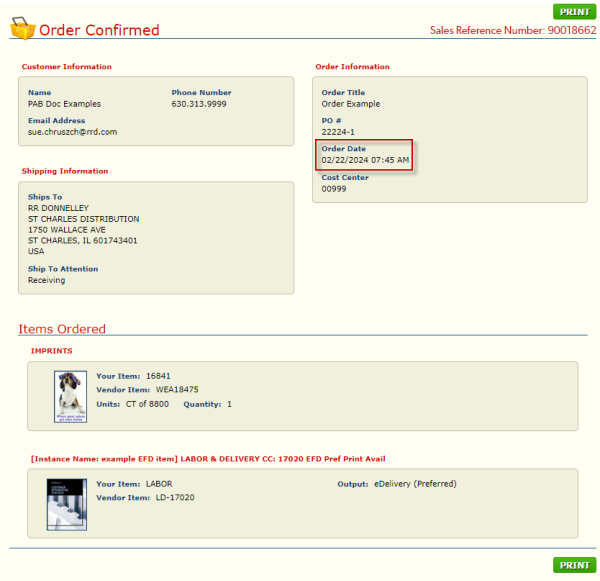


Figure 58: The HTML email confirmation links to the Order Detail Extended Printable page (shown on the right) by clicking the **VIEW YOUR ORDER** button.

The Order Detail Extended Printable page displays the following (for the different order types):

- **Order Date** (showing the Submitted Date/Time) is shown for all orders
- Order (Header) and Order Line **Messaging**
- **Routing Details table** information (assigned approval queue/approver, approver messages, results and dates)
- **Kit/Kit Template information** (Assembly instructions and Kit Contents)
- **Order Request** (List order) **information** and list details
- **Miscellaneous field information**: Billing Method, Carrier Details, Order Due Date, etc.

Checking the Status of Orders (updated!)

This section covers checking the status of submitted orders. **Figure 59** shows the Order Search widget available for setup on the Home page. There are 3 link options available. Clicking the **Show All Orders** link takes you to **Figure 60** below (the Recent Orders listing). The **Recent Orders** option must be enabled to get the Order Search widget to appear on the Home page (this is an optional setting). The **Sales Ref No.** and the **View Order Details** option (off the Action dropdown menu) are for jumping directly to a particular order's detail information (see **Figure 61 left**). When viewing an order, there is **Emails/Order Files link** (refer to **Figure 61 right**) that provides a view of any email(s) for the order and displays any applicable links to available custom document proofs/EFD files/list files for the order.

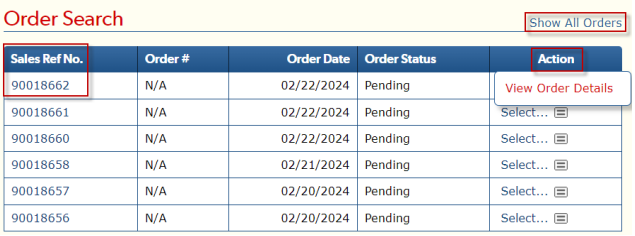


Figure 59: The Order Search widget on the Home page

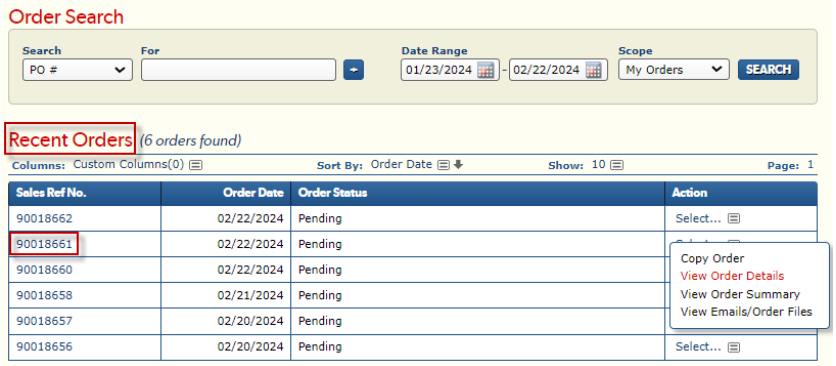


Figure 60: Selecting '**Show All Orders**' on the Order Search widget on the Home page, links to the **Recent Orders page** (here you have the Action menu options to select from for a particular order)

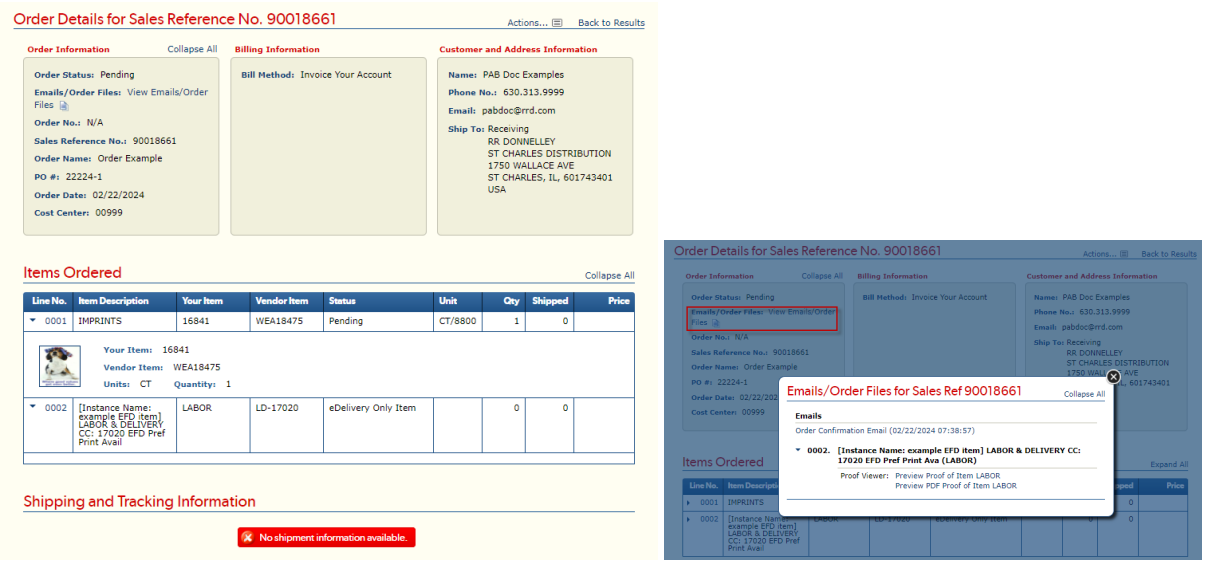


Figure 61: The **Order Details page** for an order and Emails/Order Files link

Appendix A: Advanced Ordering Scenarios (updated!)

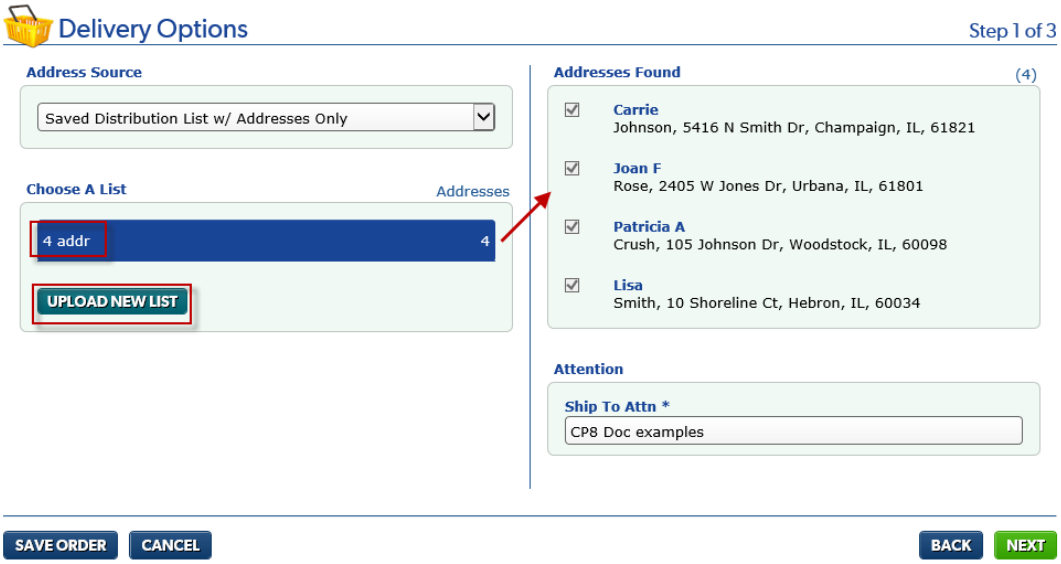
List Ordering

A distribution list is a set of names and shipping addresses for your intended recipients. When you provide us with a list we are able to ship the requested items and quantities on an order to each of these recipients. We prefer your list to be a Microsoft Excel™ spreadsheet (.xls, .xlsx or .csv file formats are accepted), so it can be copied over to our system. Along with names and addresses, a list may also contain item order information. The list ordering option(s) you have access to depend on the specific business requirement configuration.

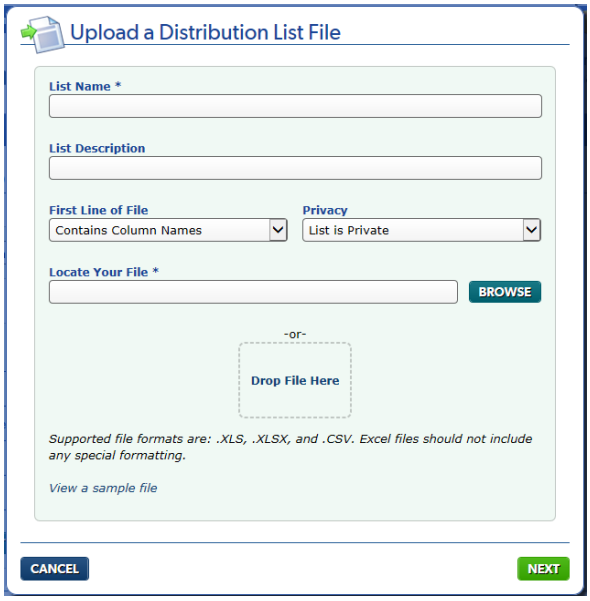
Using the 'Saved Distribution List w/ Addresses Only' option

Step 1: Select your item(s) for the order and click **Checkout**.

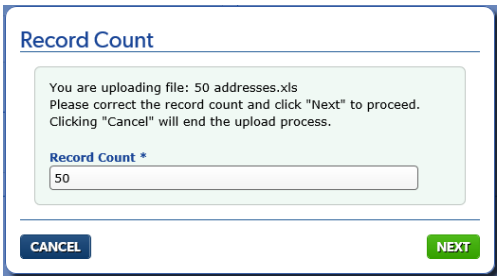
Step 2: Select the '**Saved Distribution List w/ Addresses Only**' option on the Delivery Options page (in the Address Source dropdown). You can select an *existing* saved distribution list (by clicking the list name in the Choose a List column and clicking Next on the Delivery Options page) OR proceed to the Step 3 below (and go thru the Upload New List process).



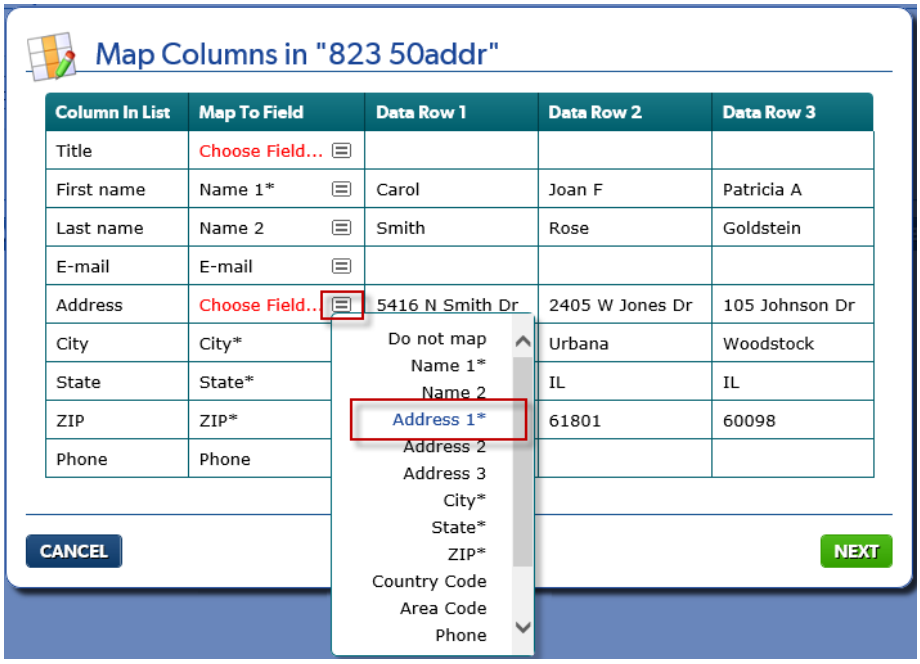
Step 3: Click the **Upload New List** button (bottom of the Choose a List section) and you are taken to the following page:



Step 4: Enter your **List Name**, *optional* List Description (this information displays as a mouseover under the List Name on the Delivery Options page), select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) and the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.

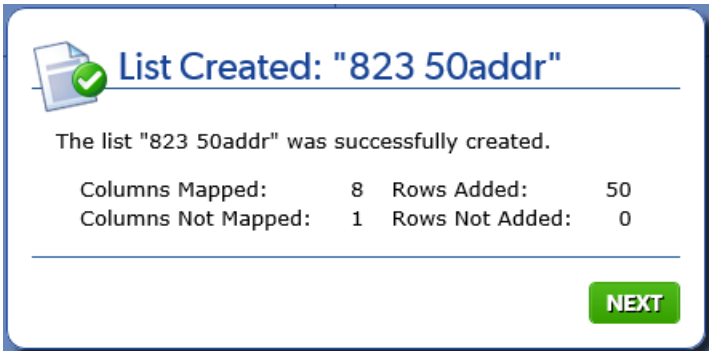


Step 5: **Confirm your Record Count** is correct then click **Next**. **Note**: If your spreadsheet has multiple worksheets, you will also be prompted to select the proper worksheet that contains the address information to map (click **Next** to proceed to the mapping step).

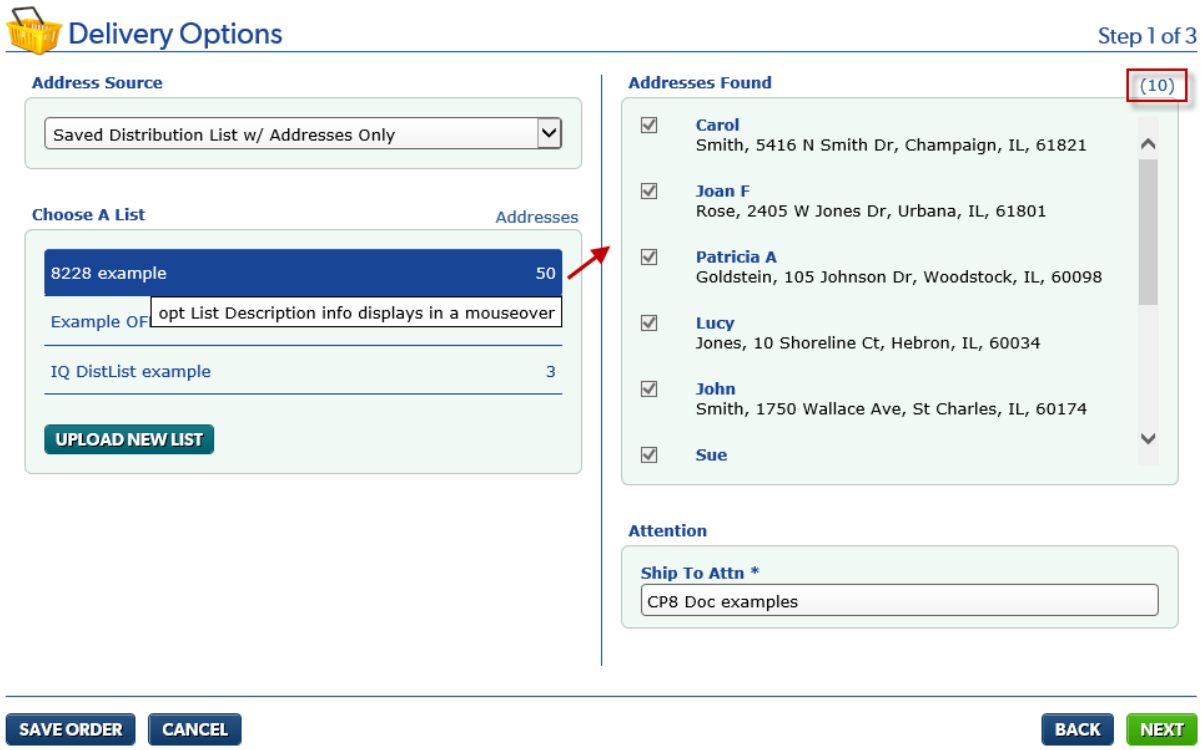


Step 6: **Click the icon to open the mapping options dropdown**. When the *Column in List* and *Map to Field* columns match, they will be auto-mapped for you (as the example above shows). There is a '**Do not map**' option that can be selected when needed. Click **Next** when all required fields are mapped properly.

Step 7: Confirmation of the mapping you just saved displays next on the **List Created page**. It displays the number of columns mapped and the number of rows added (which equates to the number of addresses the order will be sent to). Click **Next**.



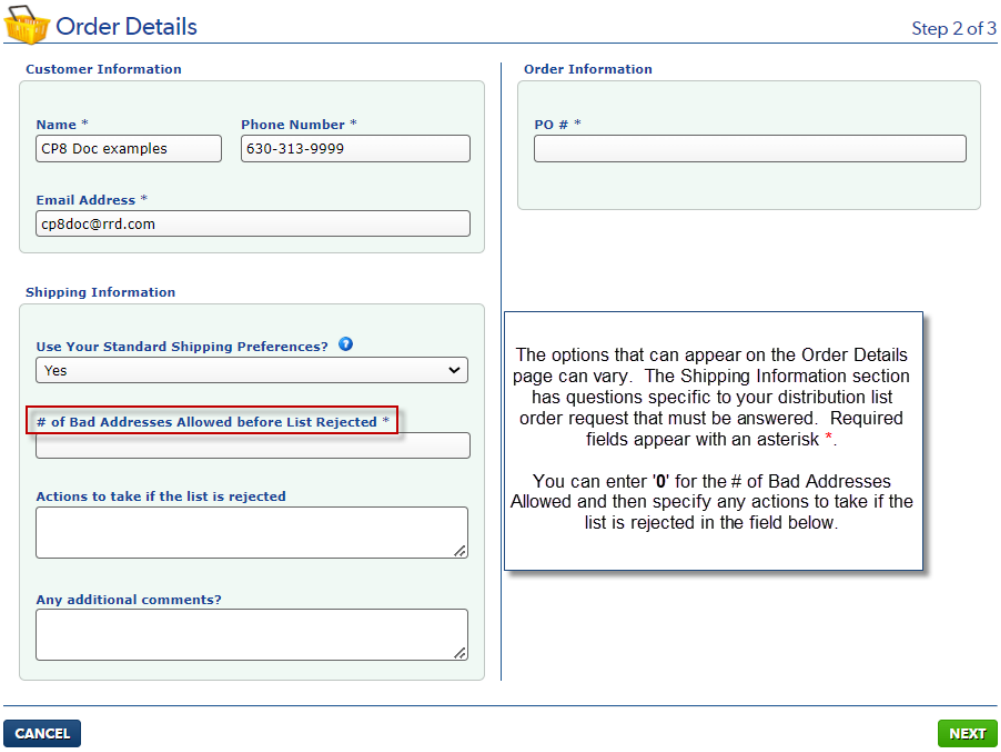
Step 8: The newly uploaded list is selected in the Choose a List section for you, **displaying the address data from the distribution list in the Addresses Found sectio**n. You can scroll thru and view these addresses (just the first 10 will be shown). The *optional* List description value (when entered) displays as a mouseover under the list name. Click **Next** to complete the rest of checkout for this order request.

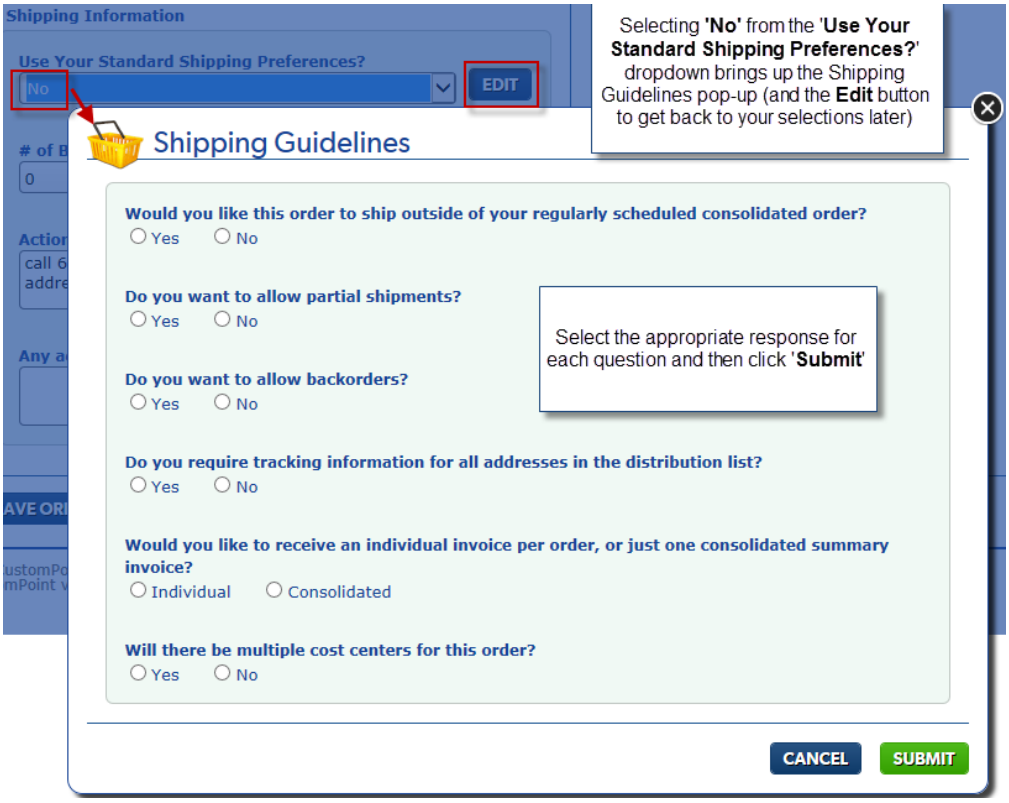


Step 9: **Answer the Shipping Information section questions on the Order Details page** that pertain to distribution list ordering.

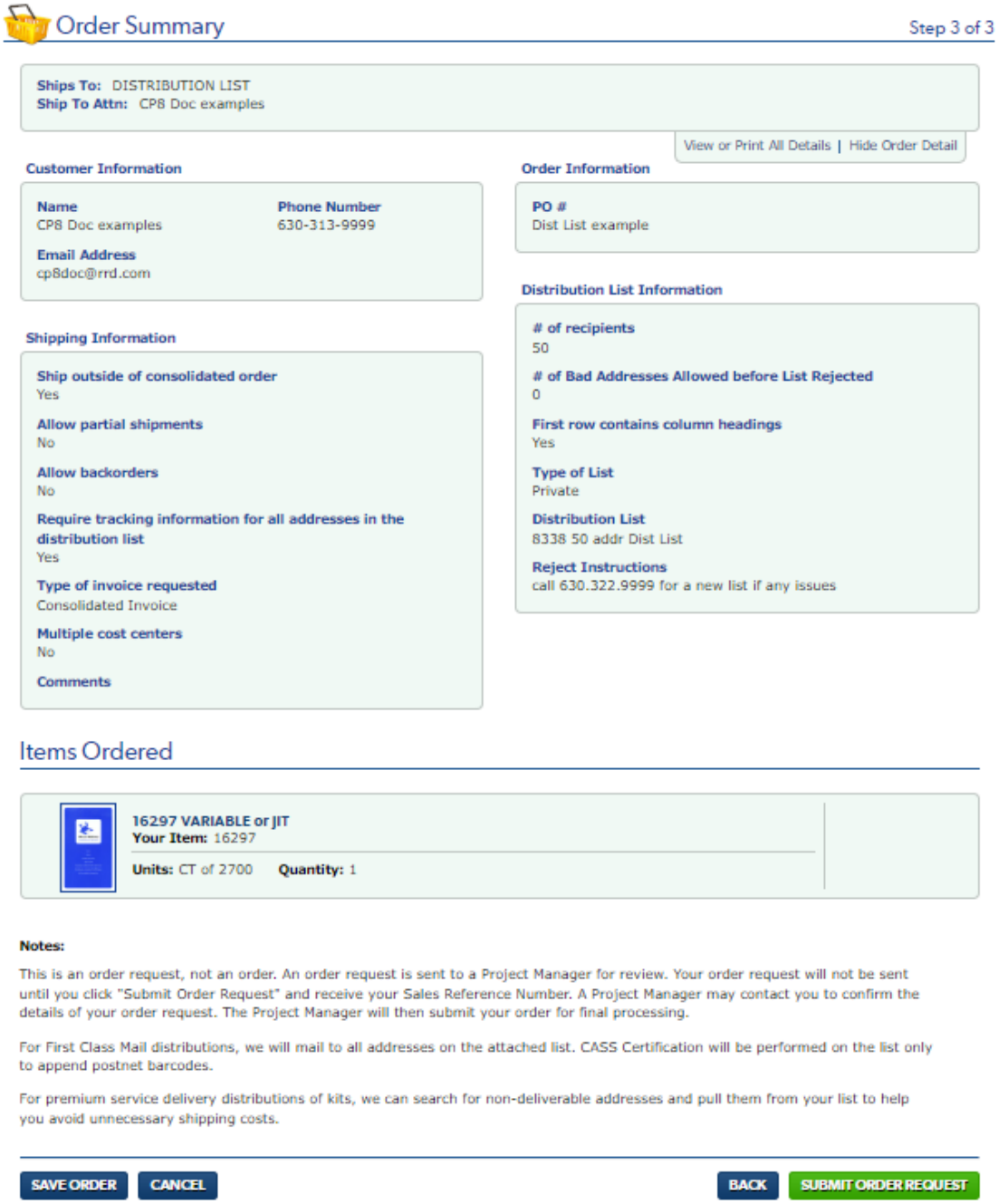
- Go with the default of 'Yes' for '**Use Your Standard Shipping Preferences?**' (or click 'No' and select the appropriate responses on the Shipping Guidelines pop-up and click Submit, see *example* below)
- Enter the appropriate number (e.g., '0' in this example) in the '**# of Bad Addresses Allowed before List Rejected**' field.
- Enter the appropriate instructions for the '**Actions to take if the list is rejected**' field.
- Enter additional comments/instructions in the '**Any additional comments?**' field as needed.

Click **Next** on the Order Details page to complete the rest of checkout for this order request.

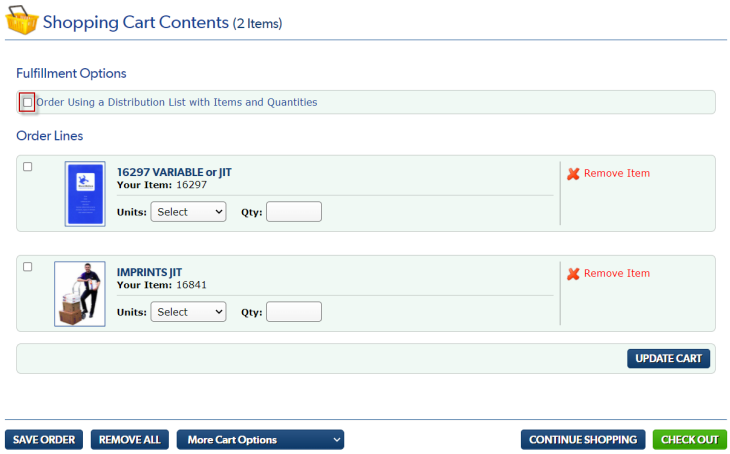

Order Details
Step 2 of 3
Customer Information
Name *
CP8 Doc examples
Phone Number *
630-313-9999
Email Address *
cp8doc@rrd.com
Order Information
PO # *
Shipping Information
Use Your Standard Shipping Preferences?
Yes
# of Bad Addresses Allowed before List Rejected *
Actions to take if the list is rejected
Any additional comments?
The options that can appear on the Order Details page can vary. The Shipping Information section has questions specific to your distribution list order request that must be answered. Required fields appear with an asterisk *.
You can enter '0' for the # of Bad Addresses Allowed and then specify any actions to take if the list is rejected in the field below.
CANCEL
NEXT


Shipping Information
Use Your Standard Shipping Preferences?
No
EDIT
Selecting 'No' from the 'Use Your Standard Shipping Preferences?' dropdown brings up the Shipping Guidelines pop-up (and the Edit button to get back to your selections later)
Shipping Guidelines
Would you like this order to ship outside of your regularly scheduled consolidated order?
Yes No
Do you want to allow partial shipments?
Yes No
Do you want to allow backorders?
Yes No
Select the appropriate response for each question and then click 'Submit'
Do you require tracking information for all addresses in the distribution list?
Yes No
Would you like to receive an individual invoice per order, or just one consolidated summary invoice?
Individual Consolidated
Will there be multiple cost centers for this order?
Yes No
CANCEL
SUBMIT

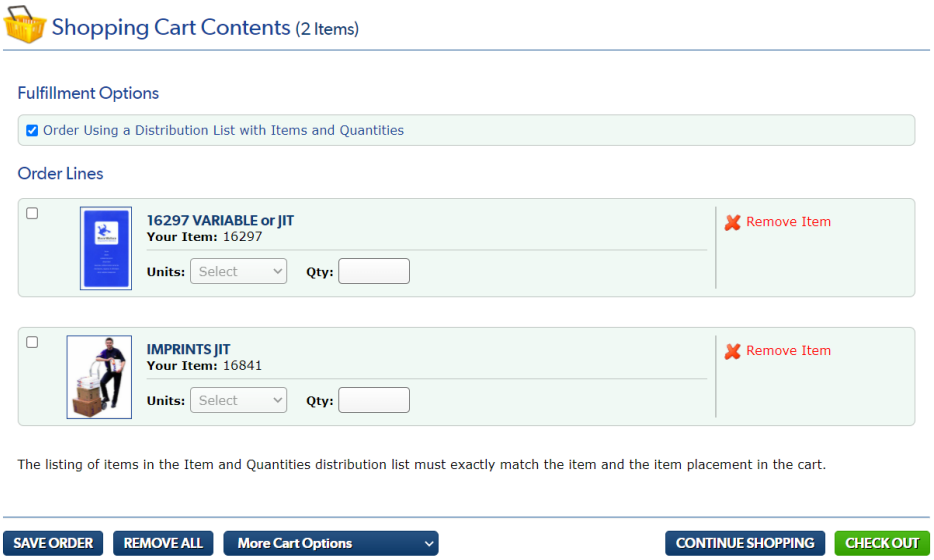
Step 10: Click **Submit Order Request** to submit this distribution list order request to the project manager.



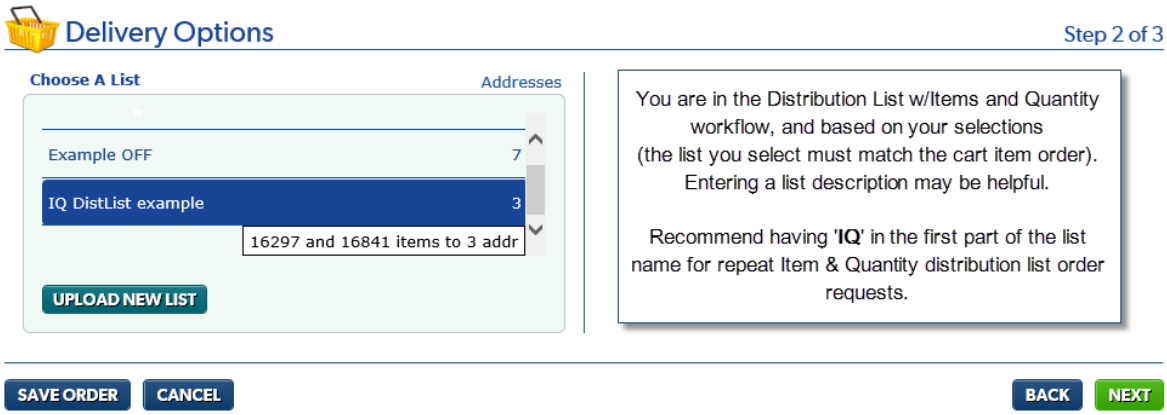
Using the cart checkbox 'Order Using a Distribution List with Items and Quantities'



Step 1: Select your item(s) for the order and then **click the checkbox 'Order Using a Distribution List with Items and Quantities'** when you have the appropriate items in the cart (in the proper order matching the list you are planning to use). With the checkbox checked, compare the example above with the following printscreen. The following happens when you check the checkbox at the top of the cart: 1) the Units and Qty fields are disabled (grayed), 2) the Update Cart button is removed, and 3) an instruction message appears below the cart.

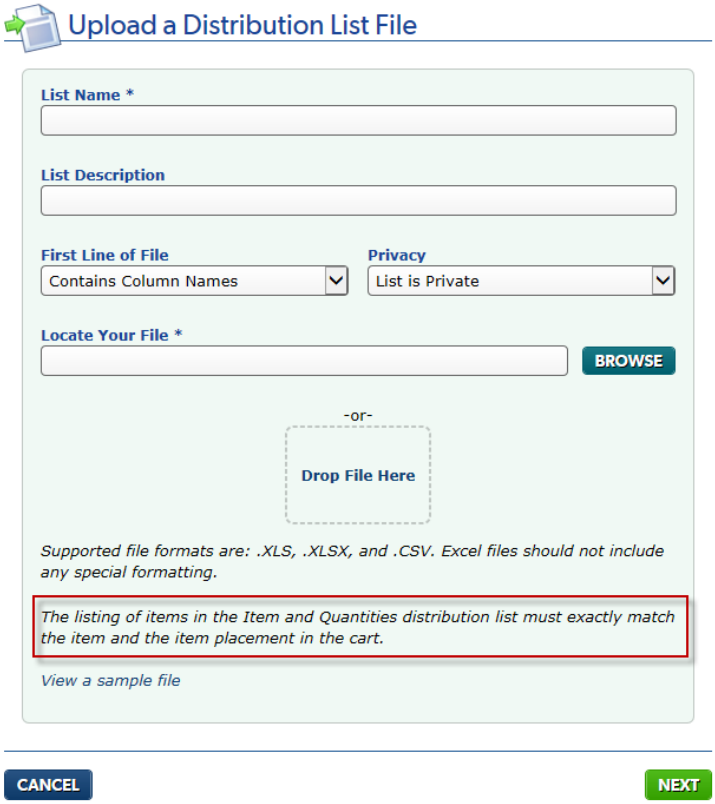


Step 2: Click **Checkout** when you are ready to upload/select your list. **Note**: The instruction that appears reads: '**The listing of items in the Item and Quantities distribution list must exactly match the item/item placement in the cart**'. The quantity ordered for the items (if that was entered prior to selecting the checkbox) does not matter (it will be ignored) – it will pull that from the specified file. Continue to the next step.

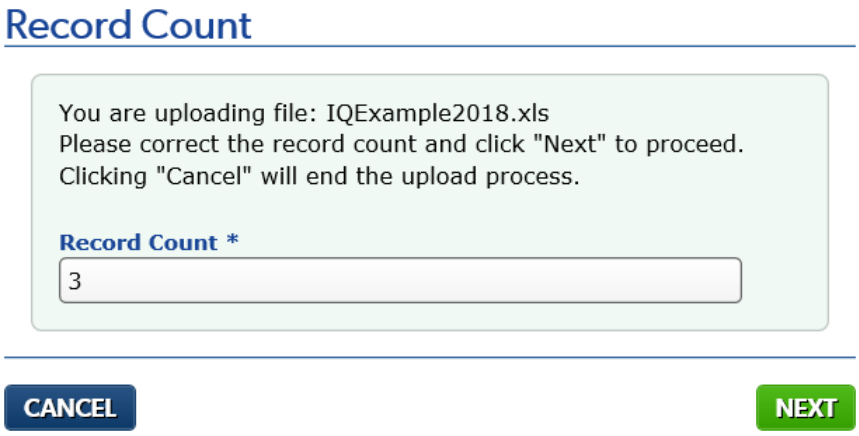


Step 3: You can select an *existing* saved distribution list by clicking the list name in the Choose a List column OR proceed to the next step. **Note:** It is a recommended naming convention to have '**IQ**' somewhere in the List Name, to be able to easily identify Item and Quantity lists (that require download/review to ensure the proper cart order).

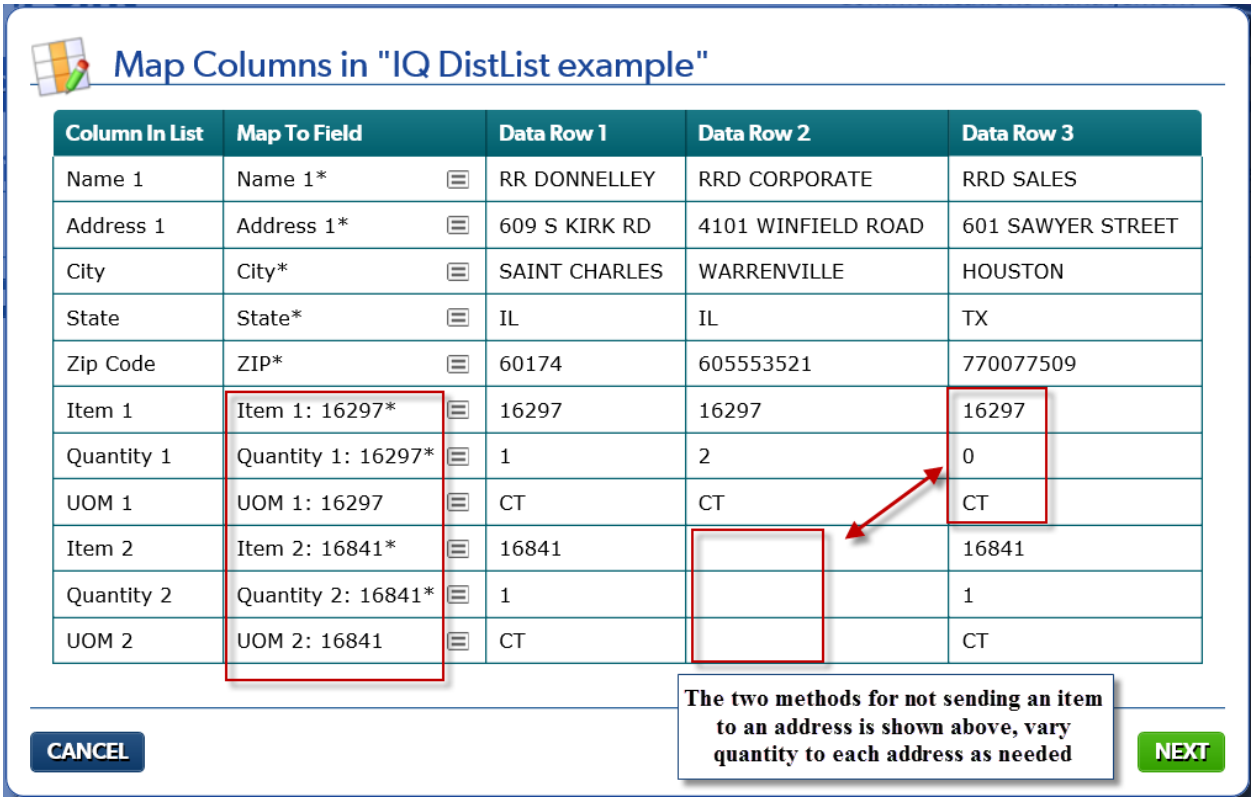
Step 4: Click the **Upload New List** button (bottom of the Choose a List section) and you are taken to the following page:



Step 5: Enter your **List Name**, *optional* List Description, select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) as well as the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.



Step 6: **Confirm your Record Count is correct** (example shown above) then click **Next**. **Note**: If your spreadsheet has multiple worksheets, you will also be prompted to select the proper worksheet that contains the address information to map (click **Next** to proceed to the mapping step).

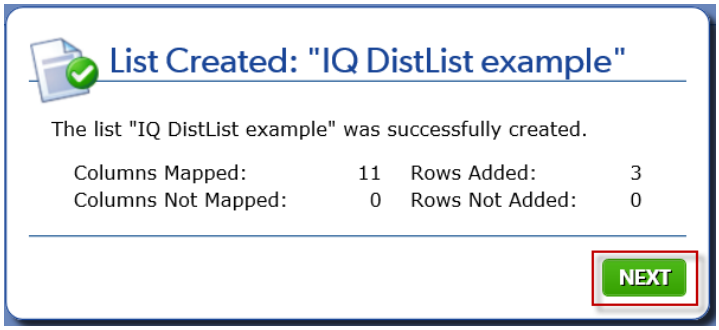


Column In List	Map To Field	Data Row 1	Data Row 2	Data Row 3
Name 1	Name 1*	RR DONNELLEY	RRD CORPORATE	RRD SALES
Address 1	Address 1*	609 S KIRK RD	4101 WINFIELD ROAD	601 SAWYER STREET
City	City*	SAINT CHARLES	WARRENVILLE	HOUSTON
State	State*	IL	IL	TX
Zip Code	ZIP*	60174	605553521	770077509
Item 1	Item 1: 16297*	16297	16297	16297
Quantity 1	Quantity 1: 16297*	1	2	0
UOM 1	UOM 1: 16297	CT	CT	CT
Item 2	Item 2: 16841*	16841		16841
Quantity 2	Quantity 2: 16841*	1		1
UOM 2	UOM 2: 16841	CT		CT

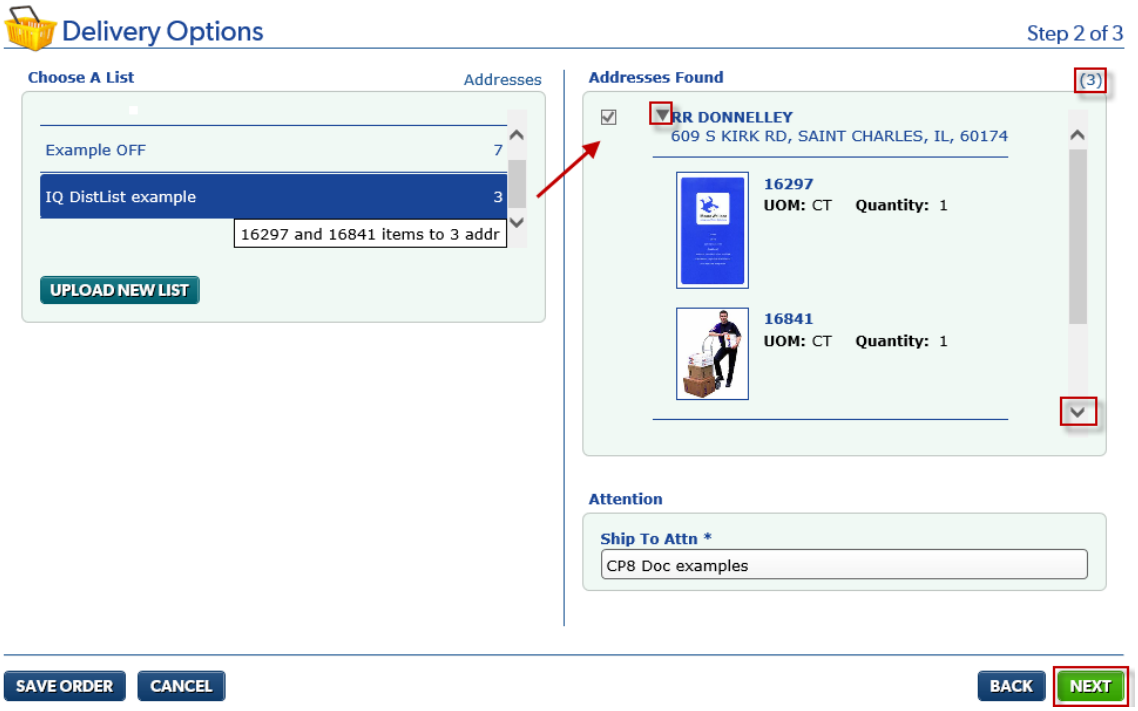
Step 7: The example above shows most of the required fields auto-mapping automatically (ZIP* was manually mapped to Zip Code). Any additional fields at the bottom that show 'Choose Field' in red can be reviewed and optionally mapped as needed. Click the icon to open the mapping options dropdown.

When the *Column in List* and *Map to Field* column data match, they are auto-mapped for you. The template file for the Items and Quantities distribution list workflow **allows for up to 10 items** and all the Customer Reference 1-25 fields. There is a '**Do not map**' option that can be selected, if you should happen to map an optional field and then decide you don't want it mapped, etc. Click **Next** when all required/optional fields are mapped appropriately.

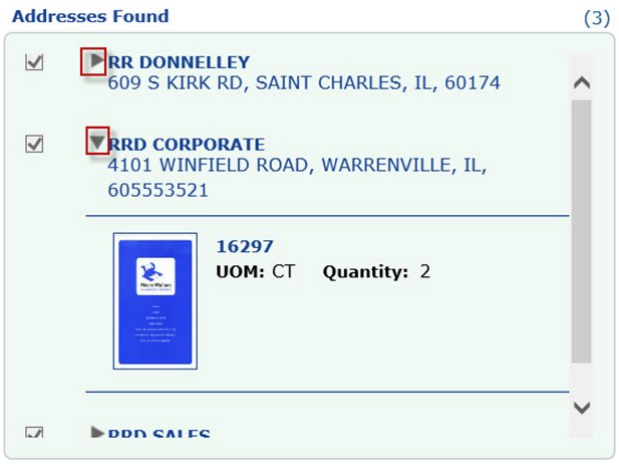
Step 8: Confirmation of the mapping you just saved displays next on the **List Created page**. It displays back the number of columns mapped and the number of rows added (which equates to the number of addresses the order will be sent to). Click **Next**.



Step 9: The newly uploaded list is selected in the Choose a List section for you, **displaying the address data from the distribution list in the Addresses Found section** on the right. You can scroll thru and view these addresses. Click the expand/collapse arrow icons ▶ ▼ for each address to see the items and quantities (with the item image or the No Image Available) for each item from the list. Click **Next** to complete the rest of checkout for this order request.



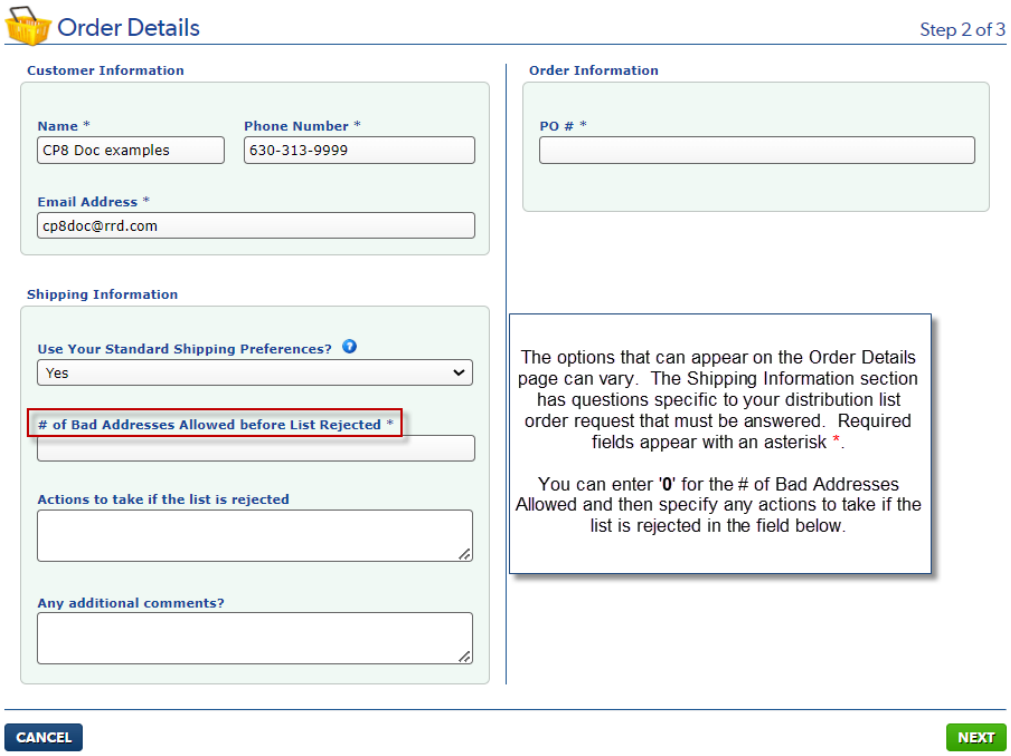
Note: The example above demonstrates how each address can get different item quantities, and below shows the not all items being sent to all addresses.

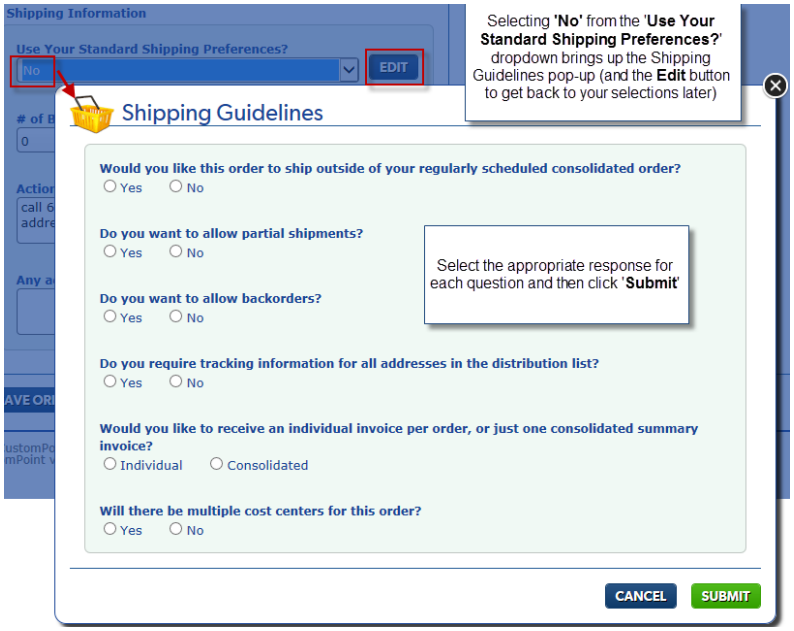


Step 10: Answer the **Shipping Information section questions on the Order Details page** that pertain to distribution list ordering.

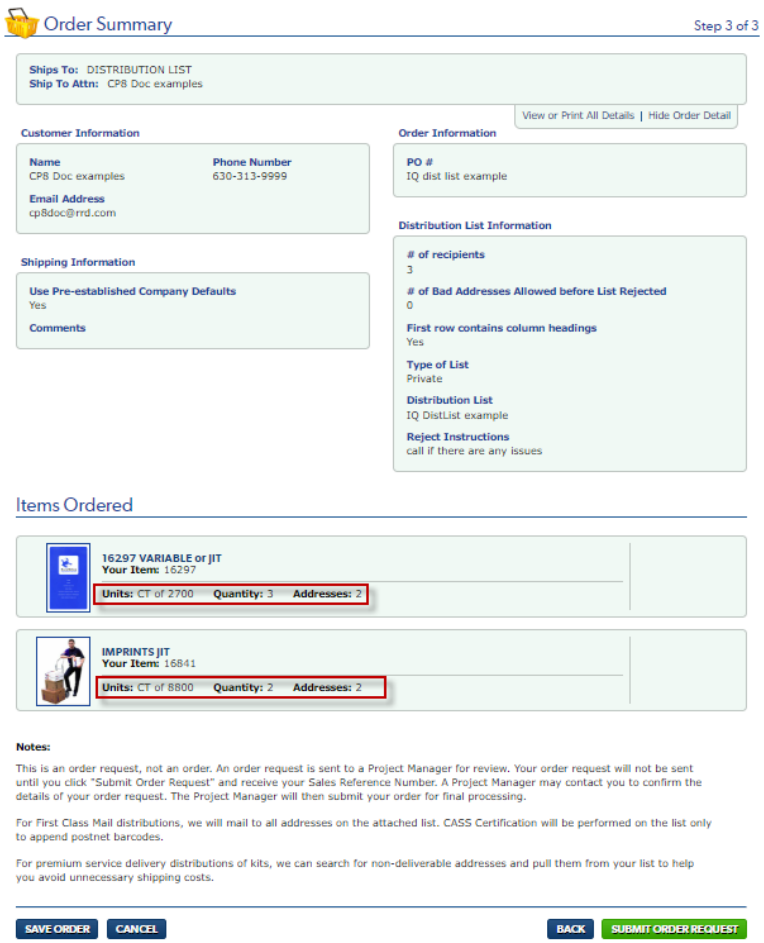
- Go with the default of 'Yes' for '**Use Your Standard Shipping Preferences?**' (or click 'No' and select the appropriate responses on the Shipping Guidelines pop-up and click Submit, see *example* below)
- Enter the appropriate number (e.g., '0' in this example) in the '**# of Bad Addresses Allowed before List Rejected**' field.
- Enter the appropriate instructions for the '**Actions to take if the list is rejected**' field.
- Enter additional comments/instructions in the '**Any additional comments?**' field as needed.

Click **Next** on the Order Details page to complete the rest of checkout for this order request.

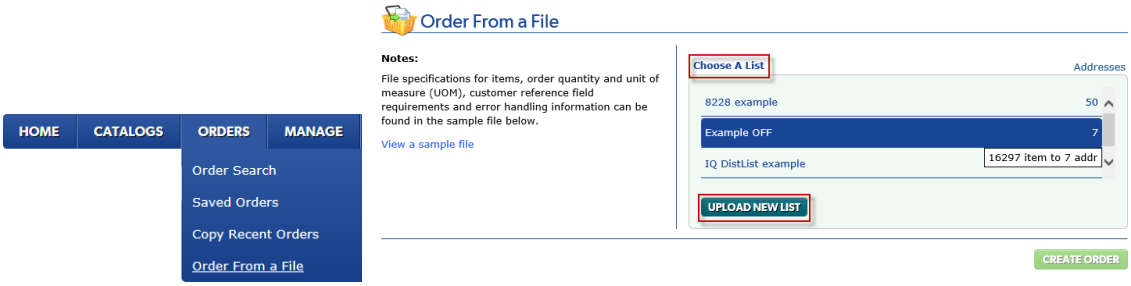




Step 11: Click **Submit Order Request** to submit this distribution list order request to the project manager.



Using the 'Order From a File' menu option

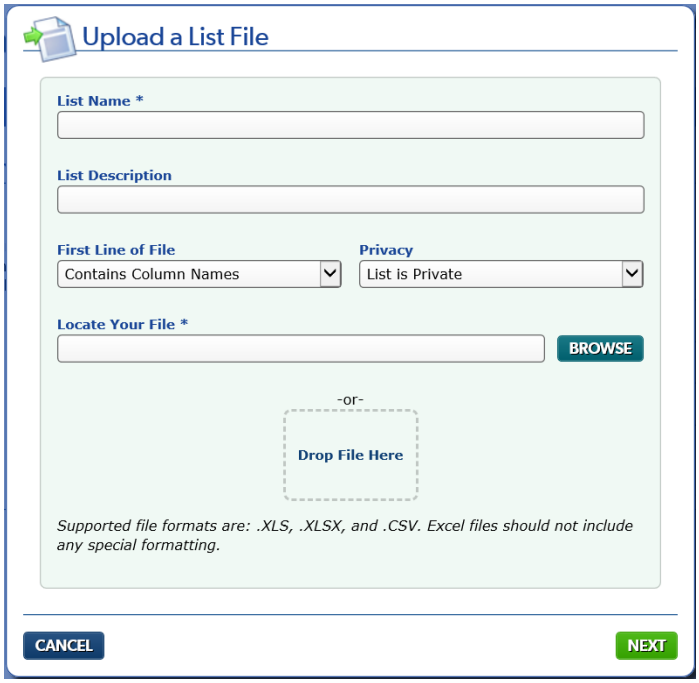


Step 1: Select the '**Order From a File'** option off the Orders menu on the Home page, and you will be taken to the Order From a File (OFF) page as shown on the right above.

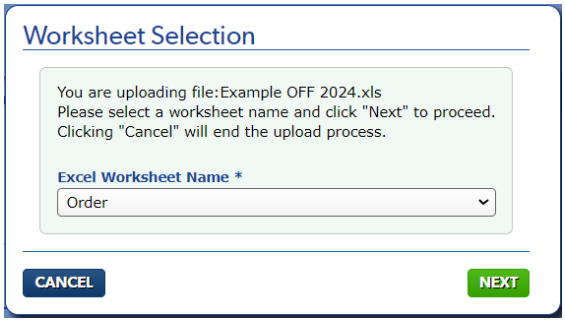
Note: Click the **View a sample file** link, if you need to create a new order file. There are tabs (sheets) in the spreadsheet for: 1) Template, 2) Sample and Helpful Info, and 3) OFF Error Info.

Step 2: Select the '**Upload New List**' button option on the Delivery Options page (in the Address Source dropdown) OR you can select an *existing* saved OFF list by clicking the list name in the Choose a List column.

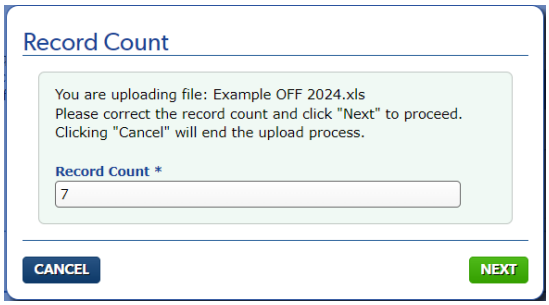
Step 3: Both options from Step 2 (Upload New List or selecting an existing OFF list) have mapping steps that must be done. This example walks you thru uploading a new OFF list. Clicking the '**Upload New List**' button takes you to the following page:



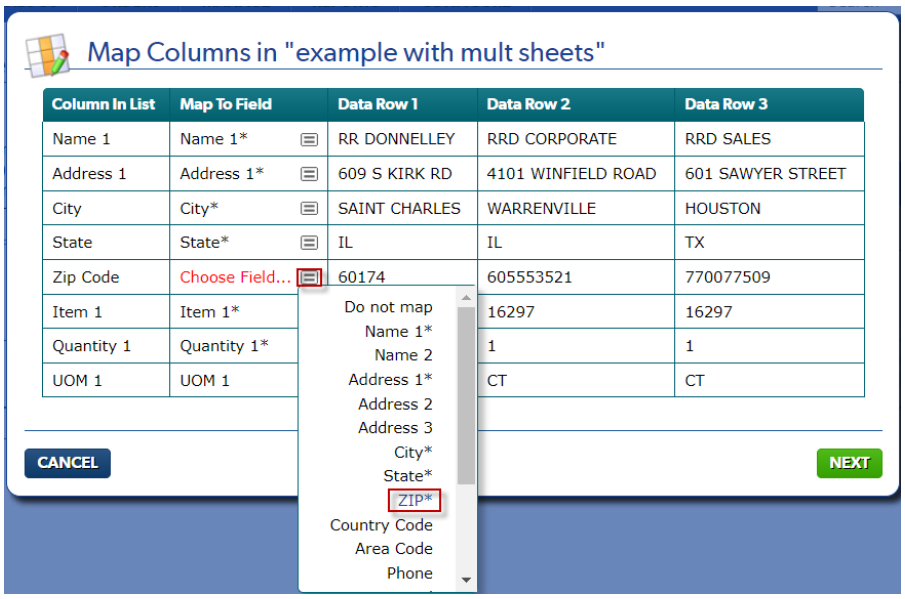
Step 4: Enter your **List Name**, *optional* List Description, select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) as well as the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.



Step 5: **Confirm your Worksheet selection is correct** (example shown above – this page only appears when there are *multiple sheets* in the list file) then click **Next**.



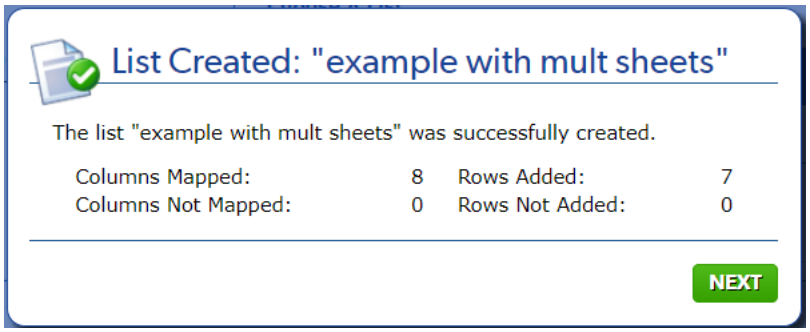
Step 6: **Confirm your Record Count is correct** (example shown above) then click **Next** to proceed to the mapping step.



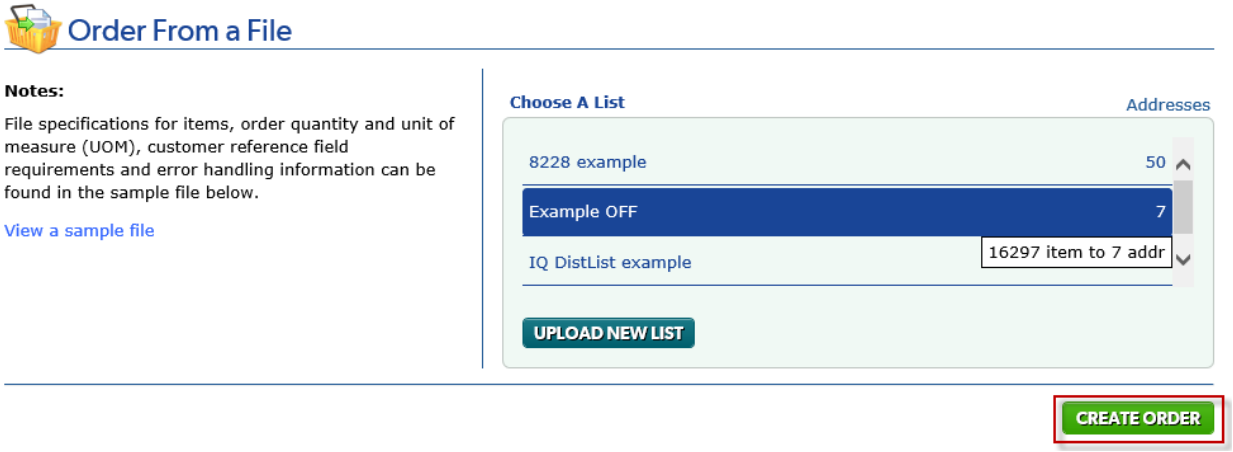
Step 7: The example above shows all but one field auto-mapping. The Zip Code field shows 'Choose Field...' in red indicating a selection must be made. Click the icon to open the mapping options dropdown and select the ZIP field to map to Zip Code.

When the *Column in List* and *Map to Field* column data match, they are auto-mapped for you. The OFF template file **displays columns for up to 10 items (with the related Quantity and UOM columns)** and all the Customer Reference 1-25 fields. Any unwanted columns can be

removed or just ignored during the mapping step. There is a '**Do not map**' option that can be selected, if you should happen to map an optional field and then decide you don't want it mapped, etc. Click **Next** when all required/optional fields for the order are mapped appropriately.



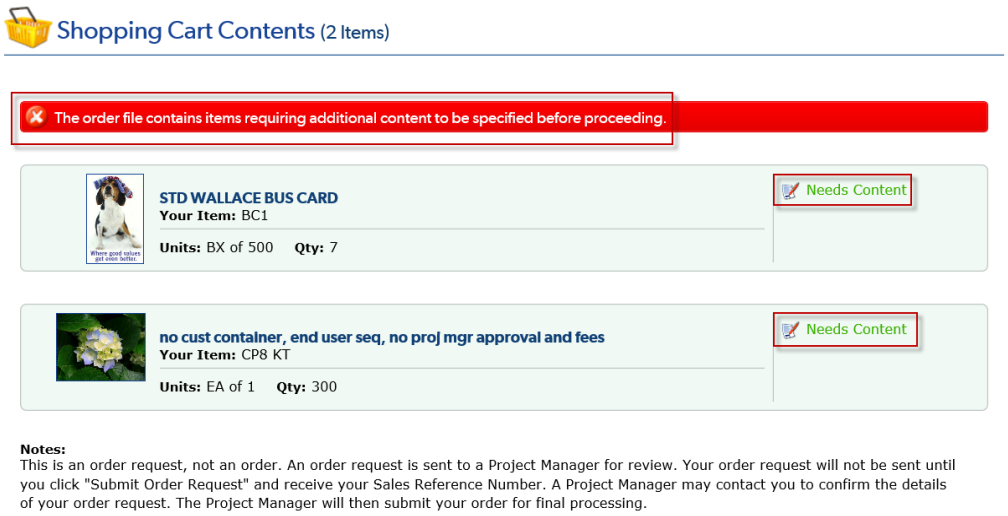
Step 8: Confirmation of the mapping you just saved displays next on the **List Created page**. It displays the number of columns mapped and the number of rows added (which equates to the number of addresses the order will be sent to). Click **Next**.



Step 9: You are returned to the Order From a File page, with the file you just mapped selected. Click the **Create Order** button (which is enabled now) to go the shopping cart page. The mapped items are displayed with their extended quantities based on your file.

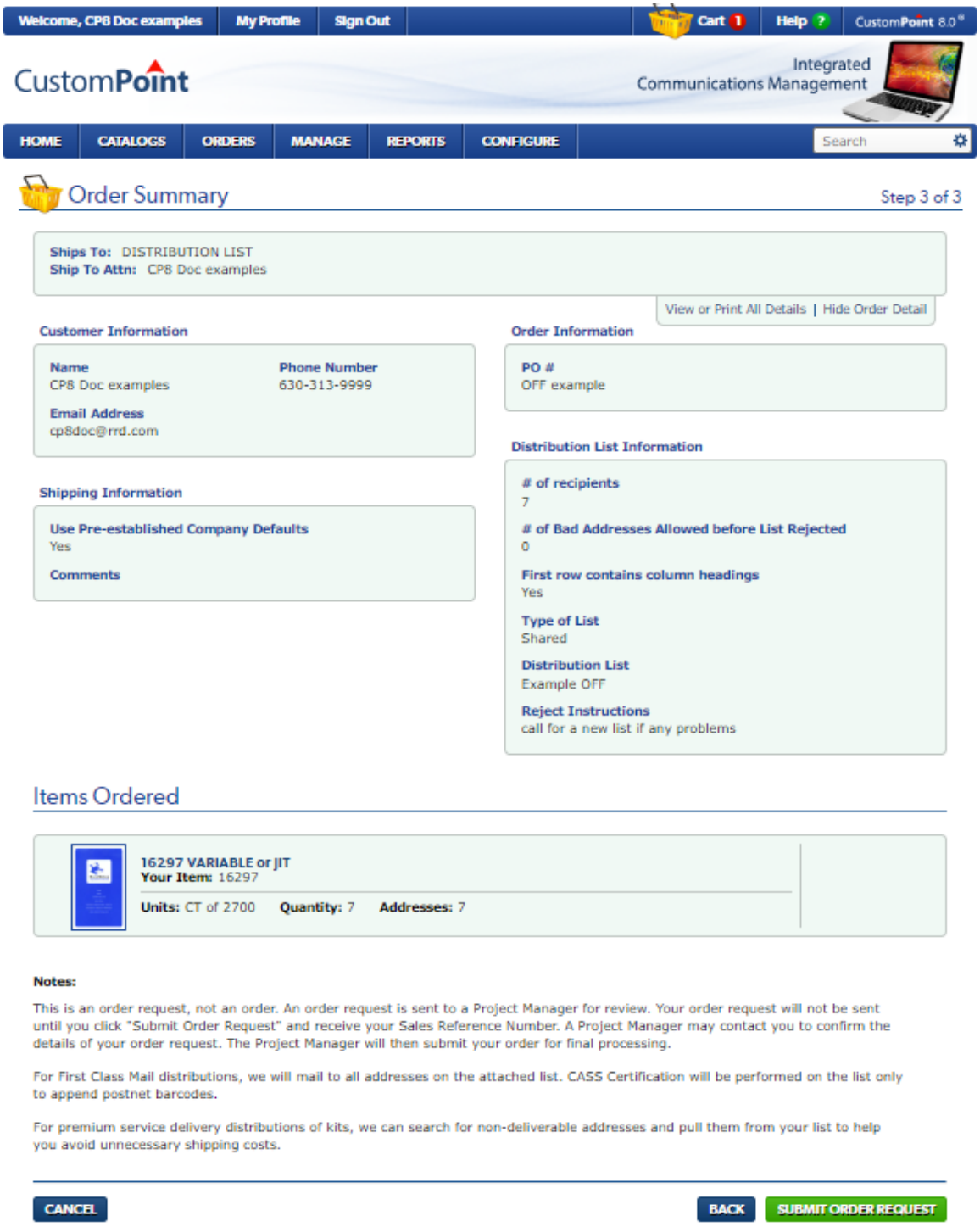
Step 10: Click the **Check Out** button to complete this OFF order request.

Note: If there are any Custom Document item(s) and/or Kit Template(s) on the order request, a cart message appears at the top stating '**The order file contains items requiring additional content to be specified before proceeding.**' with **Needs Content** link(s) on the particular item(s). The Needs Content links walk the user through completing the specifications for those item(s), returning them to the cart when done. *Example* shown below:



Step 11: Clicking Check Out takes you to the **Order Details page**. Answer the **Shipping Information section questions** that pertain to OFF ordering.

- Go with the default of 'Yes' for '**Use Your Standard Shipping Preferences?**' (or click 'No' and select the appropriate responses on the Shipping Guidelines pop-up and click Submit, see *example* below)
- Enter the appropriate number (e.g., '0' in this example) in the '**# of Bad Addresses Allowed before List Rejected**' field.
- Enter the appropriate instructions for the '**Actions to take if the list is rejected**' field.
- Enter additional comments/instructions in the '**Any additional comments?**' field as needed.

Click **Next** on the Order Details page to complete the rest of checkout for this order request.

Step 12: Click **Submit Order Request** to submit this OFF order request to the project manager.