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Preface

General Data Protection Regulation (GDPR)

The CustomPoint Login page has been updated for GDPR requirements in 2018 (as shown below). This displays the new ‘Authenticated site’ footer message with the ‘I Agree’, ‘I Disagree’ and ‘Read More’ option buttons regarding cookie usage.

The GDPR footer message only displays once per device (and per browser used), if you select either the ‘I Agree’ or ‘I Disagree’ answer option. After selecting your answer, it switches to a cookie icon that appears in the left corner of the CustomPoint page footer area. The cookie icon 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. This 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).

There are new Privacy Policy and Cookie Policy links displayed under the Login page (and in the footer area throughout CustomPoint for your review at any time). In places like Administration and Manage Catalogs, where the CustomPoint Classic interface pages have the left/right frameset due to the site tree, the cookie icon and links are present on the right frameset as shown below on the right).
Introduction

This guide serves to cover the order entry basics of the CustomPoint application. There are different checkout options that can be enabled for use in CustomPoint order entry, refer to the Checkout Workflows section for applicable 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 new menu bar and universal item search field shown.

Figure 4: (left) 'Item Added to Cart' pop-up preference setting and (right) editing later (via the My Profile menu).

There are profile-level Preferences options available in a section called Catalog and Search Results. 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 are: 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).
CustomPoint has a **new menu bar** appearing on all screens (most Order Entry users will see Home, Catalogs and Orders options on their menu bar), refer to **Figure 7**. Those accounts that utilize an order wizard may not see a Catalogs menu option (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 7 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 7 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 7](image1)

**Figure 7**: Mouse over the **Catalogs** menu to see the available categories/(sub)categories of items to browse

**Figure 8** 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 8](image2)

**Figure 8**: 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 9** examples.

![Figure 9](image3)

**Figure 9**: The **Show All** option eliminates the paging, putting all the items on a single page.
**Universal Item Search and the Advanced Search Options page (gear icon)**

The **universal item search** is the single search field on the right side of the menu bar (refer to **Figure 10** for an example search for items starting with ‘CP’). This utilizes the search appliance for the most efficient searching. 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. There are also Standard Attributes such as Favorites (item(s) you have made a Favorite), allowing you to scroll down and select a checkbox of the item type to narrow your search results.

![Figure 10: Universal Item Search functionality (utilizes the Search Appliance)](image)

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 11**; here you can make your attribute(s)/Standard Attribute(s) selections along with entering the partial item number or item description and click the Search button at the bottom of the page. **Note:** Attributes only appear if they have been configured for your account.
Figure 11: 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 12 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 setup to provide information.
- **Featured Items**: can be a separate widget or setup combined with user Favorites.
- **Favorite Items**: can be a separate widget for user Favorites or combined with Featured Items. Messaging appears under the Favorite Items heading when there aren’t any items marked yet.
- **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).
- **Check Inventory**: provides the ability to search for an item’s inventory level information.
- **Message Carousel**: Use the ‘Carousel’ Message Category Name to setup a carousel of messages to rotate thru 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.
- **Order Wizard**: Advanced feature requiring special setup.
- **Key Profile Selection/Key Profile Search**: Advanced capability requiring special setup.
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 12 (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 setup as a Home Page widget (see Figure 12 (right) bottom), and just those messages designated as ‘High Value’ message(s) appear at the top of the Home Page side panel as shown.

Additional Navigation and Methods for Adding Items

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 13. 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 13: The View/Sort By/Show/Page bar that appears in Order Entry

Figures 14, 15, 16 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 Market Segment column (these are admin options).

Icons view
Sort By options
Click on the icon to get the Sort By dropdown selection options to display. Figure 17 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 17: 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 18); 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 19), and mouse over other icons displayed for navigation/additional information.
Figure 18: The Item Rollover pop-up

Figure 19: ‘Check Current Pricing and Availability’ functionality on the Item Rollover page

The item description field shown in red (on the upper right of the pop-up) also becomes a link, when clicked, will take 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 20 left) provides additional information about the item, providing a Show Full Size Image link, a Pricing By Quantity breakdown (for users that see pricing), 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 20 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.
Quick Item Entry
The **Quick Item Entry** page (refer to **Figure 21**), 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). 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 21: The Quick Item Entry page](image)

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 27** 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 27: The custom document customization steps show the expand/collapse toggle icon.](image)

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 28** 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.

![Review and Approve](image)

**Figure 28:** The custom document ‘Review and Approve’ proofing page

**Electronic File Delivery (EFD) ordering**

Electronic File Delivery items, also known as eDelivery 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 29** 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 will appear in the shopping cart requiring entries/selections. Fees will display for the different eDelivery options (FTP, Digital, Print, etc.) on the shopping cart page.

![Shopping Cart](image)

**Figure 29:** An example EFD item with Output selections on the Shopping Cart page

With multiple EFD items (that allow Output selection) in the cart, **Figure 30** demonstrates how to use the **Preferred Output** dropdown to have a single output selection be applied to all 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. Refer to Figure 31, after making appropriate selections/entries for the EFD item and Email Settings, click the Next button to continue on to the Delivery Options page. Figure 32 shows how the Order Summary page provides a way to confirm/edit the Email To/FTP Location information prior to submitting the order (click the icon).

Figure 31: The Electronic File Delivery Destinations page examples

Figure 32: The Order Summary page examples (click the icon to view/edit the info).

Kit Template ordering
Selecting to order a kit template starts with selecting a kit item from the catalog and clicking the Customize button. The Kit Editor page will then be shown. Refer to the example shown in Figure 33.
Figure 34 demonstrates how the optional item added ‘For Managed Care’ has an icon 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 back ordered on an order by order basis. Once all the items have been put into the desired sequencing, additional Assembly Instructions could be entered on this example Kit Template. If there were custom document items selected to be in this kit template, the Needs Content link will appear. The Needs Content link will take you into the custom document UI to provide the appropriate imprint data. Select Add to Cart to proceed to the shopping cart page.
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 34**) if additional editing is necessary for any reason.

**Inventory Items**
Click the **View Item button** on the Item Rollover pop-up to be taken to the Promo Item Details page, see **Figure 35 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

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**Figure 34** The Kit Editor page (completed view); click Add to Cart to proceed thru check out

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<table>
<thead>
<tr>
<th>Item Description</th>
<th>Your Item</th>
<th>Vendor Item</th>
</tr>
</thead>
<tbody>
<tr>
<td>LASERMATE LM-20 SELL SHEET 10/PK</td>
<td>DF02</td>
<td>DF02</td>
</tr>
<tr>
<td>PRINT FULFILLMENT BROCHURE 09/09</td>
<td>DLF09.10</td>
<td>DLF09.10</td>
</tr>
<tr>
<td>R&amp;D COMMERCIAL PRINT KIT</td>
<td>G0011A</td>
<td>G0011A</td>
</tr>
<tr>
<td>R&amp;D COMMERCIAL PRINT BROCHURE</td>
<td>G0012B</td>
<td>G0012B</td>
</tr>
<tr>
<td>LASERMATE BROCHURE PF06 LM-10</td>
<td>PF06</td>
<td>PF06</td>
</tr>
</tbody>
</table>

*drag and drop functionality is utilized for adding items (to either the left/right) and for moving or changing the sequence of the kit component items*

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Assembly Instructions

60 of 4000 Characters

*The optional ‘For Managed Care’ item can be backordered if necessary*
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.

**Shopping Cart Features**

Click the cart link (Cart 3) to view shopping cart contents. **Figure 38** displays an example **Shopping Cart** page with three items. Customizable items have an additional option (Edit Custom Doc) and a similar (Edit Bundle) 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 38**: 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 & availability (available based on user settings). Select **Check Transfer** 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 39** 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.
Refer back to Figure 38 (bottom left for the Save Order button and More Cart Options dropdown list) and see Figure 40 left for More Cart Options dropdown options. Selecting the ‘Save Order’ button takes the user to the Saved Orders Details page to save the order for later processing (see the Saved Orders section for more details). Checking the select checkboxes on the left in the cart for the appropriate items, it is possible to utilize the ‘Remove Selected’ option to remove multiple items from the cart in a single step.

Figure 39: The Shopping Cart page showing the different Show/Hide Content links