

Order Entry Guide Revised 2/19/2019

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Preface (new!)

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

My Profile menu

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



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, not all options may appear. Users can view and maintain personal information (such as First Name, Last Name, Email Address and Phone), change their system password (if enabled), and more. Select the Save button if any changes were made, or select the Cancel button or Close button in the upper right to exit the page.

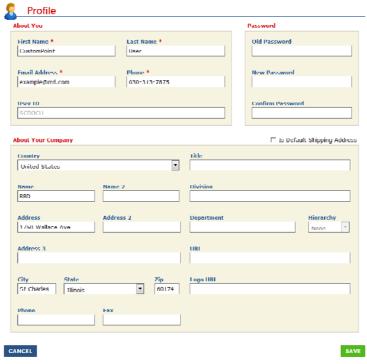


Figure 3: The Profile page (accessed by clicking the Personal Information My Profile menu option)

Personal Address Book option

Refer to the *Personal Address Book section* of this Guide for more details, if your account has Personal Address Book enabled as a Checkout workflow.

Settings and Preferences option (updated!)

Profile-level options are available for individual shopping Preferences for things 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 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 **OFF- 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: (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).

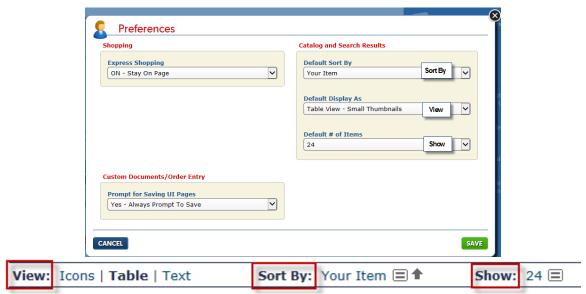


Figure 5: The Preferences page (select the Settings & Preferences option on the My Profile menu)

The **Prompt for Saving UI Pages** preference is available in the Custom Documents/Order Entry section on the Preferences pop up (as shown in **Figure 5**). This setting defaults to Yes –Always Prompt to Save, but 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 will generate the Save Changes prompt 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 for User Defined Fields and more)

Those accounts utilizing some of the more advanced profile setup options will see a Custom Fields option under the My Profile menu. **Figure 6** shows an example of a "Profile User Defined Field" which was set up to capture the 'Full Name with Initial' information on users (for use on custom documents, etc.).



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

CustomPoint Menu Bar

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

There is a **Show All** option available (click the \equiv 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.

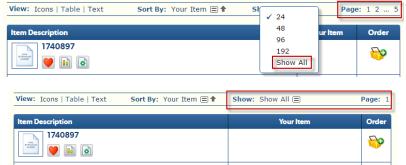


Figure 9: The Show All option eliminates the paging, putting all the items on a single page.

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)

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.

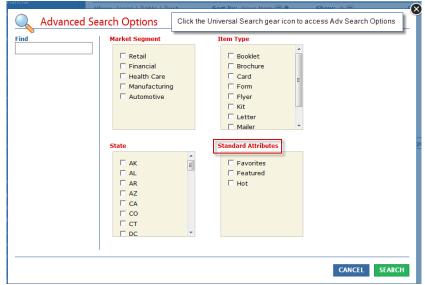


Figure 11: Click the gear icon in the Universal Item Search field to access the Advanced Search Options page

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.

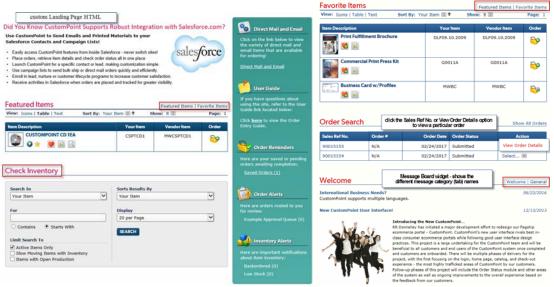


Figure 12: (left) Home Page widgets and the side panel, (right) different widgets setup for another user group

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 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



Figure 14: Icons view

Table view

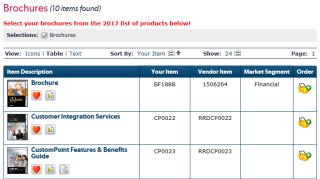


Figure 15: Table view

Text view



Figure 16: Text 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.

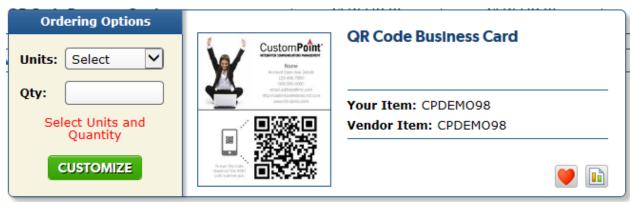


Figure 18: The Item Rollover pop-up



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.



Figure 20: The Item Details page (with or without the Pricing & the Pricing grid enabled)

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

Order Templates

The **Order Templates** page (refer to **Figure 22**), 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 setup 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 will be displayed for use on the Order Templates page for later (similar to **Figure 22**), and you are returned to the current order for submission. To delete a template from the Order Templates page, select the appropriate checkbox for it on the left (which enables delete functionality). Click the enabled Delete Selected button (see **Figure 22**). Then click the Delete button on the confirmation pop-up that appears.



Figure 22: The Order Templates page

Copy Recent Orders (updated!)

The **Copy Recent Orders** page (refer to **Figure 23**), 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 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 will depend on the type of order copied. Review the order carefully as you go thru the checkout process, editing the order as needed.



Figure 23: The Copy Recent Orders page (with a search ran)

Note: When viewing your own orders in the Order Search module, the Copy Order option is available on the Action menu 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 24**. There is also a **Saved Orders** option under the Orders menu as well (refer to **Figure 25**). There are some additional Saved Orders options available to those accounts using team sharing functionality and attributes as well now.



Figure 24: The Order Reminders saved orders link (blue panel on the right side of the Home page)



| Order Name | Date and Time | Saved By | Items | Continue Order |
|------------------------------------|---------------------|----------|-------|----------------|
| System Saved - 08/28/2018 10:55 AM | 08/28/2018 10:55 AM | System | 1 | ₩ |
| Check on Bus Card details | 08/28/2018 10:41 AM | SCDOCU | 3 | ₩ |

Figure 25: The Saved Orders page showing a System Saved Order as well as a named saved order.

Figure 25 shows an example of a System Saved order, the Saved By column shows 'System' for the first order on the list. This occurs 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 26 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 will be determined based on where the order was in the check out process when the order was selected to be saved.

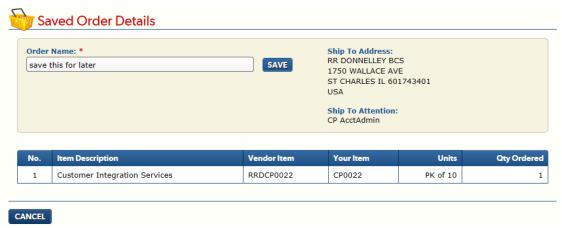


Figure 26: The Saved Order Details page

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 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).

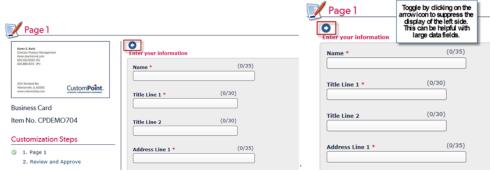


Figure 27: The custom document customization steps show the expand/collapse toggle icon.

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.

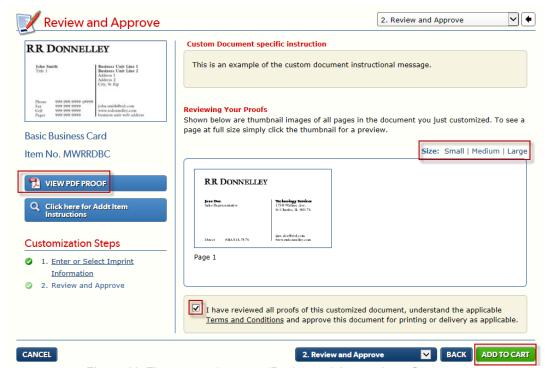


Figure 28: The custom document 'Review and Approve' proofing page

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.



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.



Figure 30: 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. 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 indicate).



Figure 31: The Electronic File Delivery Destinations page examples



Figure 32: The Order Summary page examples (click the Wicon 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**.

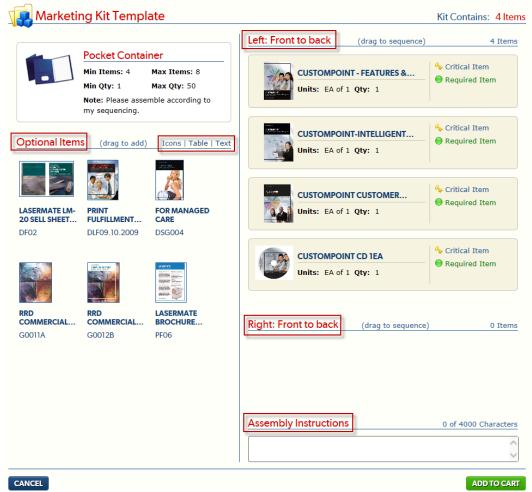


Figure 33: The Kit Editor page (initial view)

Figure 34 demonstrates how the optional item added 'For Managed Care' has an local 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 backordered 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.

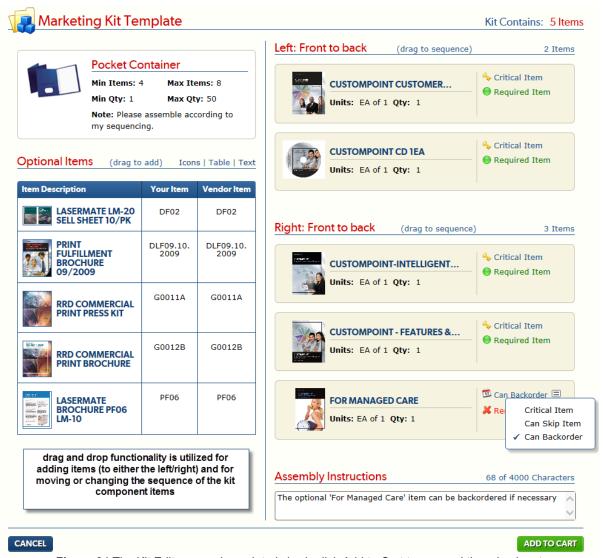


Figure 34 The Kit Editor page (completed view); click Add to Cart to proceed thru check out

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.

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 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 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.

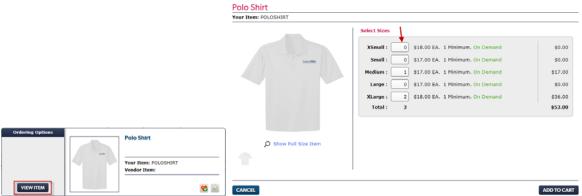


Figure 35: The Promo Item Details page

Produced On-Demand Items

Click the **View Item button** to be taken to the Promo Item Details page to start. **Figure 36 (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 36 (right)**. Make your Logo selection for this customized polo shirt, click the **Update Preview** button, and click the **Next** button. This becomes very similar to a custom document item order, as your next step is proofing – you need to ensure all is correct!

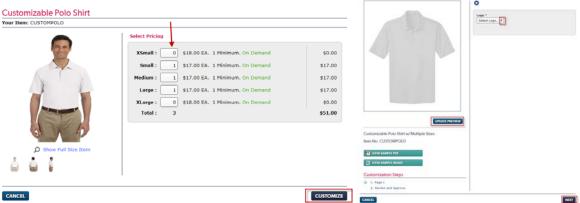


Figure 36 (left): The Promo Item Details page for a customizable polo shirt and (right) Page 1 of the UI

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 37**. 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.

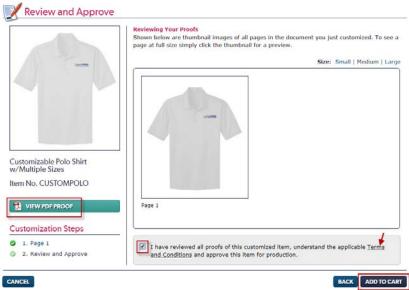


Figure 37: The Review and Approve page

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 (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items. Customizable items have an additional option (Figure 38 displays an example Shopping Cart page with three items.) providing navigation back into the custom document UI for editing purposes. All item types have the standard (Figure 38 displays an example Shopping Cart page with three items.)

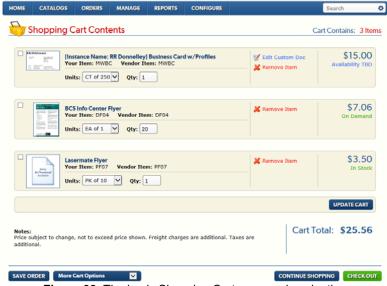


Figure 38: The basic Shopping Cart page and navigation

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 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 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). 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.

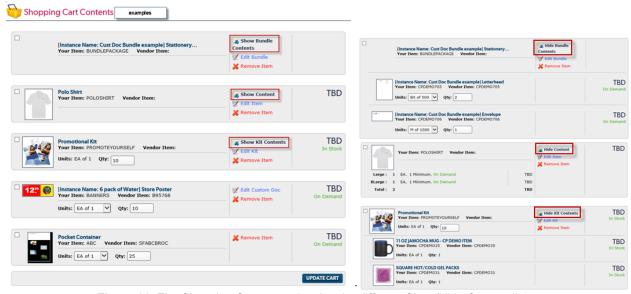


Figure 39: The Shopping Cart page showing the different Show/Hide Content links

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 Order 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. Using the select checkbox(es) on the left and the '**Save Selected to New Order'** option, allows particular item(s) to be put on a saved order while continuing 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 40: (left) The More Cart Options dropdown list, and (right) the Checkout Options dropdown list options

Checkout (Delivery Options) Workflows

Personal Address Book

This section covers using the 'Your Personal Address Book' address source option during checkout to select the shipping address for an order. **Figure 41** demonstrates how coming into the Delivery Options page, the address(es) will be shown under the Addresses Found section 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 information or correct the shipping address, see the **Personal Address Book Maintenance section** for additional info.

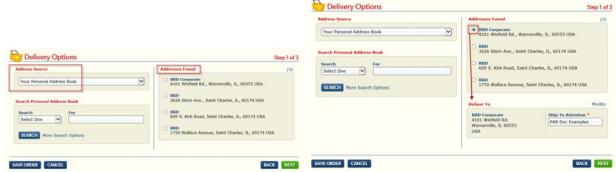


Figure 41: The Delivery Options page



Figure 42: The Delivery Options page – PAB Modify functionality

Select one of the Search dropdown options available to help locate a different personal address book address to select for the order, refer to **Figure 36**.



Figure 43: The 'Search Personal Address Book' search options

To search your personal address book, select one or more of the search options. Then enter/select the appropriate search criteria for each option in the 'For' field. Multiple Search Options can be entered. (Select the **More Search Options** link to get additional search fields to appear) at one time. With the search criteria entered, select the **Search** button for the search to be performed. The search results are returned in the Addresses Found section on the right. Refer to **Figure 43** for an example search with the search results displayed. Select **Next** on the Delivery Options page to complete the rest of the checkout process for this order.

Manually Enter Address (during Order Entry)

Personal Address Book users can quickly enter a new address by selecting the 'Manually Enter Address' address source option and entering the address. This can be a one-time use address or click the **Add to Address Book checkbox** during order entry to keep the newly entered address for further use (refer to **Figure 44**). It is also recommended to always click the USPS **Validate** button to ensure the entered address is a deliverable address. Select Next to continue through the checkout process.



Figure 44: The 'Manually Enter Address' Address Source page options

Personal Address Book maintenance (My Profile menu)

Select the Personal Address Book (PAB) menu option listed under My Profile to perform personal address book maintenance. Click the **Add New Address** link on the top left to clear any address information from the Add or Edit Address display fields on the right. Enter the new address information on the right side and select the **Save Address** button. Refer to **Figure 45**, for how an address is selected on the left side of the page, and when it is a Profile Address displayed, it is not editable. A red checkmark appears next to the address when you select the **'Is Default Address**' checkbox during address maintenance steps (shown in **Figure 46**).

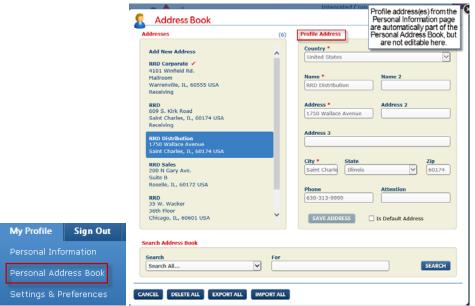


Figure 45: (left) The My Profile menu, and (right) the Address Book page

Click to highlight a particular address for editing, and the selected address will display on the right side. Make the appropriate edits to the address and select **Save Address**. Refer to **Figure 46**, to delete an address from the address book, click on that particular address to highlight it (and have it display on the right side), select the **Delete** icon that appears in the upper area of the address selection on the left side. After responding to the Delete Confirmation pop-up (there to prevent accidental deletions), the address removed, and the address book count is updated.

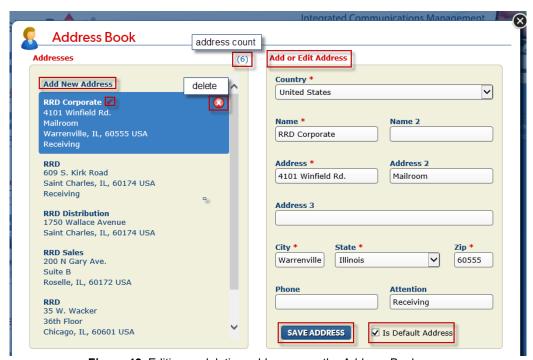


Figure 46: Editing or deleting addresses on the Address Book page

Personal Address Book (PAB) Import/Export options

All personal address book users have the ability to export their addresses to an .xls file. Click the **Export All button** (shown in **Figure 47**) and the following prompt will appear allowing you to save the uniquely named .xls file with the PAB Addresses. Refer to **Figure 48** for the Windows options (Open, Save or Cancel) that appear.



Figure 47: The Export All option brings up this option to save the Address Book as a file

There is also an **Import All** option available to all personal address book users (refer back to **Figure 45**). Clicking the Import All button brings up the Import Addresses pop-up (**Figure 48 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, click the **Import All button** and decide whether you are doing an **Add** (to the existing address list) or doing a **Replace** (of existing 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 all the existing 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 48 right** shows an example of the successful import message and the addresses being added.

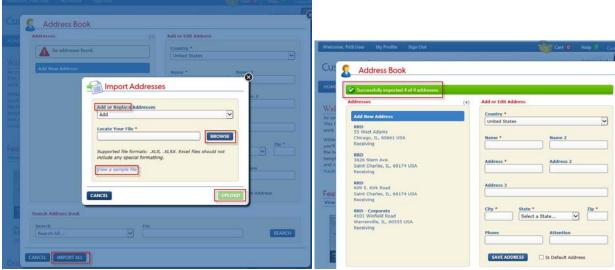


Figure 48: (left) The Import Addresses pop-up and (right) then a successful import message.

Searching 'Your Company's Master List of Approved Addresses'

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 49** displays an example list of Search options (this is configurable what all search options appear here or if this is even an option seen during checkout for users). Select the More Search Options link when you know you are going to use multiple search options for this search.

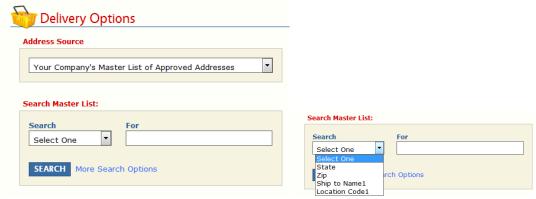


Figure 49: The Delivery Options page with an example of some of the Search Master List selections

Refer to **Figure 50** 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 (14) displayed. With so many search results returned, consider narrowing the search criteria further to eliminate having to scroll thru so many results (e.g. enter the full zip code instead of a partial zip code, and select the Search button again).

When the proper shipping address has been located and selected in the Addresses Found section, the Deliver To section will appear at the bottom 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 not required. Select **Next** on the Delivery Options page to complete the rest of the checkout process for the order.

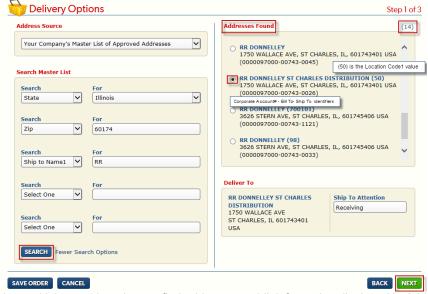


Figure 50: Using multiple search options to find addresses, add't information displayed in Addresses Found

Finalizing the Order Details

This section covers completing the Order Details page information for an order. **Figure 51** displays an example Order Details page (the options that appear on this page are configurable. More or less options could appear in this area). Required fields display with a red asterisk (*), and some fields could display a 'toggle' (designated by the icons) between a dropdown list and an entry field; select the icon to see it change (where applicable). Default information can also be setup 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 51** displays breadcrumbs in the upper right on the page (**Step 3 of 4**) to outline where you are at in the process.



Figure 51: Example of an Order Details page

Reviewing Order Summary Information & Submitting the Order

This section covers options available on the Order Summary page for reviewing an order. **Figure 52** displays an example Order Summary page. Across all order entry pages, icons designate additional information on a mouseover, the eDelivery icon is displayed confirming options selected on the Electronic File Delivery Destinations page (refer back to the *Electronic File Delivery (EFD) Ordering section* for more details).

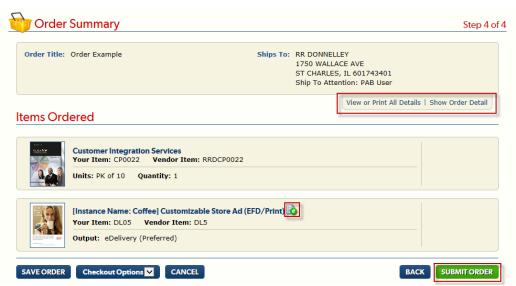


Figure 52: Example Order Summary page

Selecting the **View or Print All Details link** on the Order Summary page links to the Order Summary Details page (refer to **Figure 53**) for an example. Select the **Print** button for a printed copy, clicking the Close icons on the browser windows when done.

Selecting the **Show(Hide) Order Detail link** on the Order Summary page displays the Order Detail page information again (refer to **Figure 52**) for an example.

Select the **Submit Order** button after reviewing the order for accuracy. Select the **Back** button or **Cart link** at any time during the ordering process to go back and make any necessary changes before submitting the order for processing.

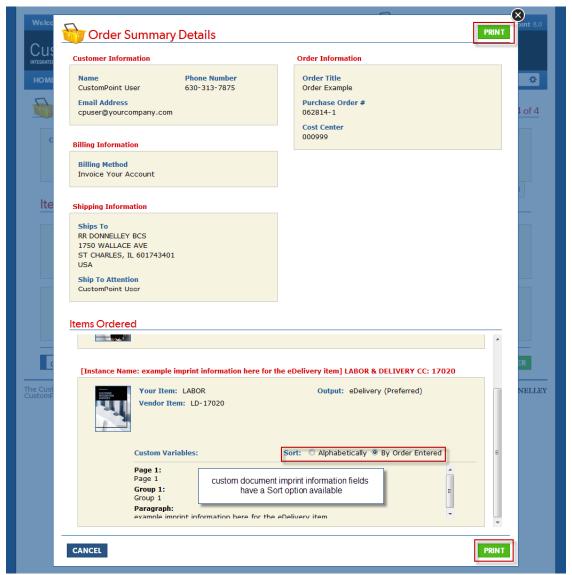


Figure 53: Example 'View or Print All Details' option on the Order Summary page, click the Print button for printing

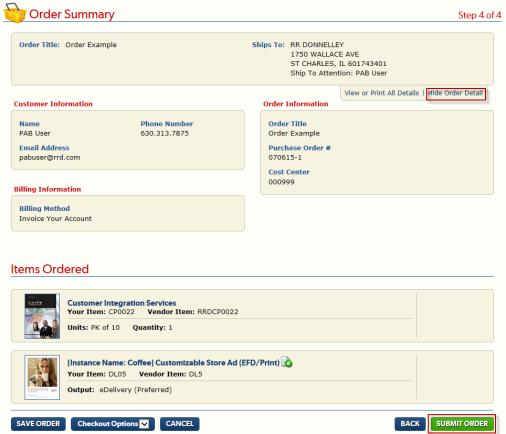


Figure 54: Example 'Show (Hide) Order Detail' option on the Order Summary page

Order Confirmation

After submitting your order, a confirmation screen appears (similar to the example shown in **Figure 55**). Depending on the type of order/order request submitted - (or if the order is subject to Routing & Approval) - the wording could be slightly different. Dependent on the type of order submitted, different button/options will appear, such as: Copy This Order. Order Status Page and Home selections will appear.

Orders/order requests will have a link to **Print this Order Confirmation**; refer to **Figure 56** for an example.



Figure 55: Example Order Confirmed page where you can select to print your Order Confirmation

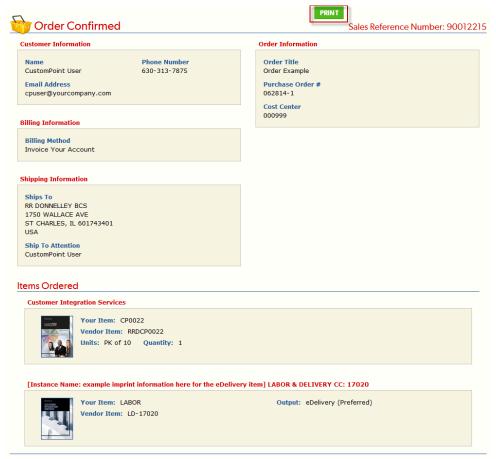


Figure 56: Example Order Confirmation page available for printing

HTML email with a button link to the Printable Confirmation detail

Order Confirmation emails are sent as a streamlined HTML email, consistent with your business unit's color scheme (see **Figure 57 left** for an example). There is the ability to specify a custom Email banner as part of the setup that can be done on the Customize Email page at the Business Unit level. The HTML email will not contain all the email table details as the order confirmation email did previously. If those details are wanted the Order Summary details page in Order Entry can be printed. The HTML email provides a **View Your Order** *link* that takes you to a page with the Printable Confirmation page details (see **Figure 57 right**). The button changes label based on the type of order (View Your Order, View Your Order Request, View Your Demo Order, etc.) **Note**: Any previous customizations on the email setup at the business unit level will still be applied.

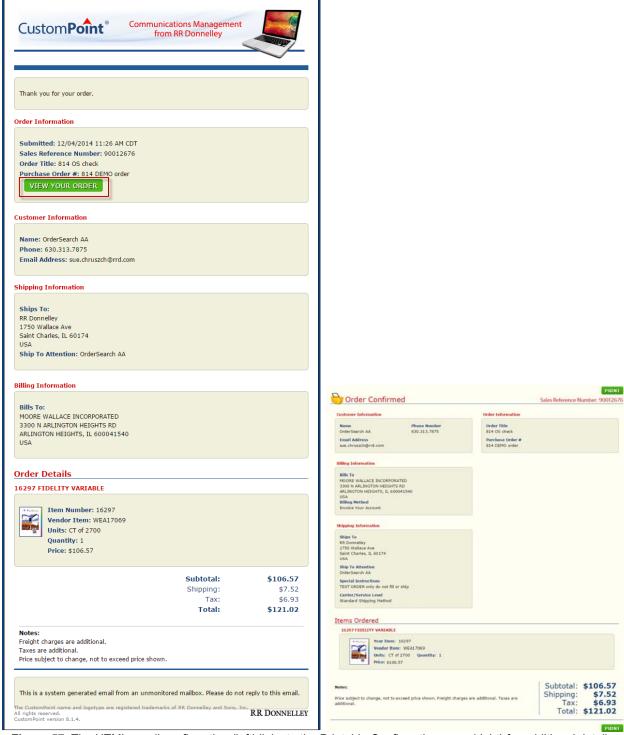


Figure 57: The HTML email confirmation (left) links to the Printable Confirmation page (right) for additional details.

Checking the Status of Orders

This section covers checking the status of submitted orders. **Figure 58** 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 59** 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 60**)

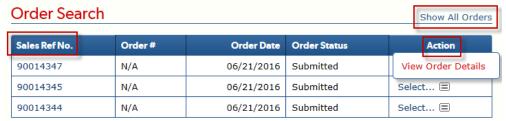


Figure 58: The Order Search widget on the Home page

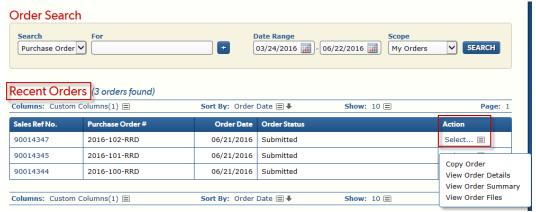


Figure 59: Selecting 'Show All Orders' on the Order Search widget on the Home page, links to the **Recent Orders** page (here you have the Action menu options to select from for a particular order)

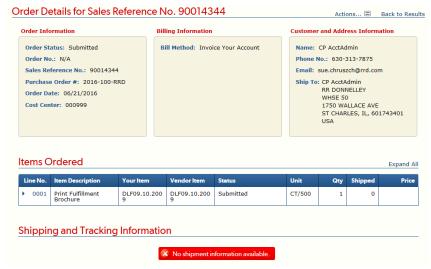


Figure 60: The Order Details page for an order

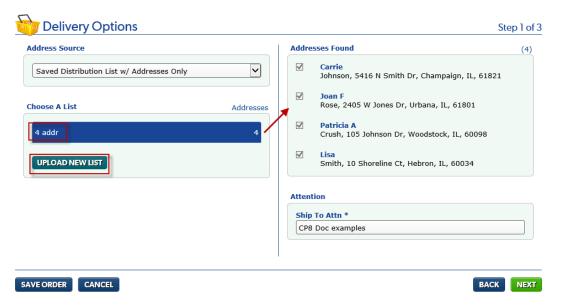
Appendix A: Advanced Ordering Scenarios

List Ordering

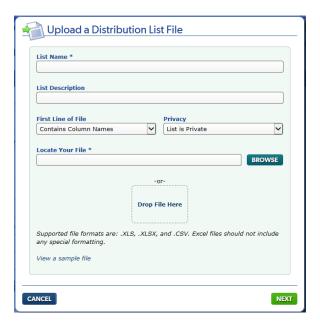
A distribution list is a set of names and shipping addresses for your intended recipients. When you provide us with a list we are able to ship the requested items and quantities on an order to each of these recipients. We prefer your list to be a Microsoft Excel™ spreadsheet (.xls, .xlsx or .csv file 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).



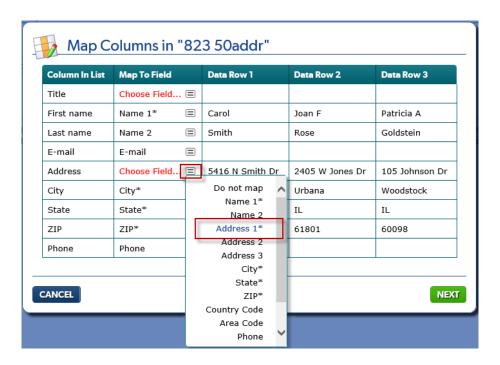
Step 3: Click the **Upload New List** button (bottom of the Choose a List section) and you are taken to the following page:



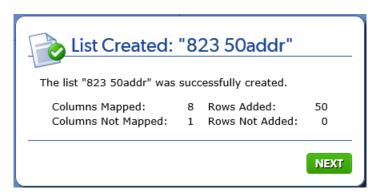
Step 4: Enter your **List Name**, optional List Description, select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) and the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.



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).

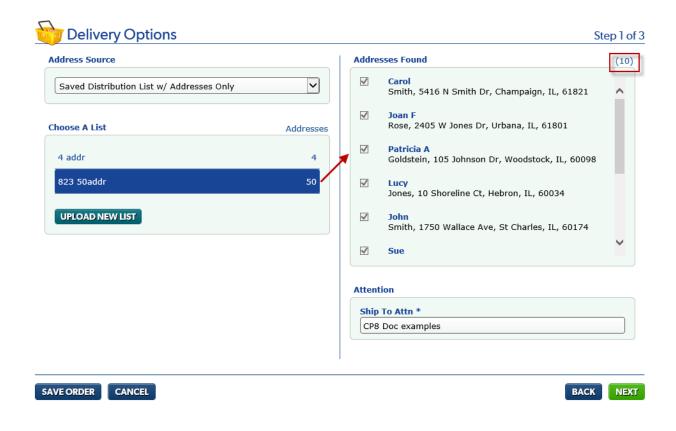


- Step 6: Click the icon to open the mapping options dropdown. When the Column in List and Map to Field columns match, they will be auto-mapped for you (as the example above shows). There is a 'Do not map' option that can be selected when needed. Click Next when all required fields are mapped properly.
- **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 section. You can scroll thru and view these addresses (just the first 10 will be shown). Click **Next** to complete the rest of checkout for this order request.



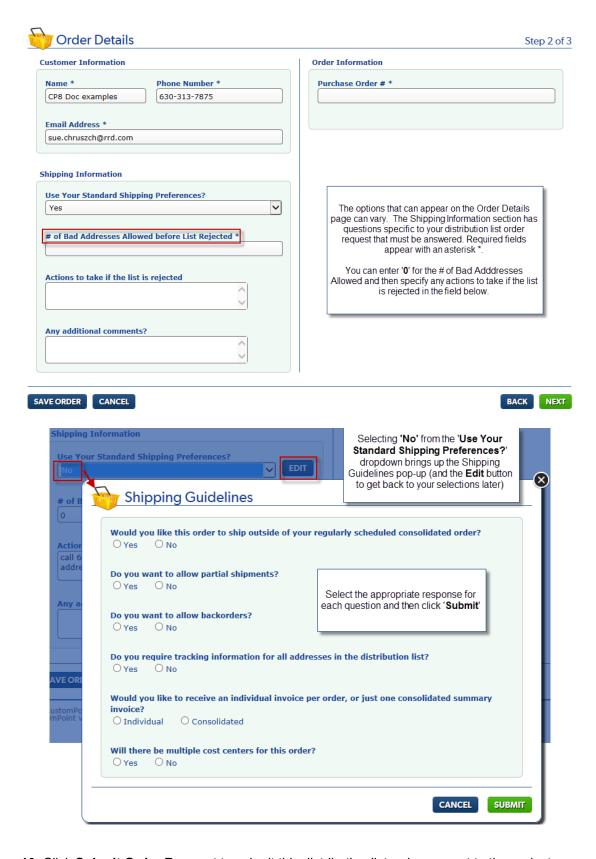


Step 9: Answer the Shipping Information section questions on the Order Details page that pertain to distribution list ordering.

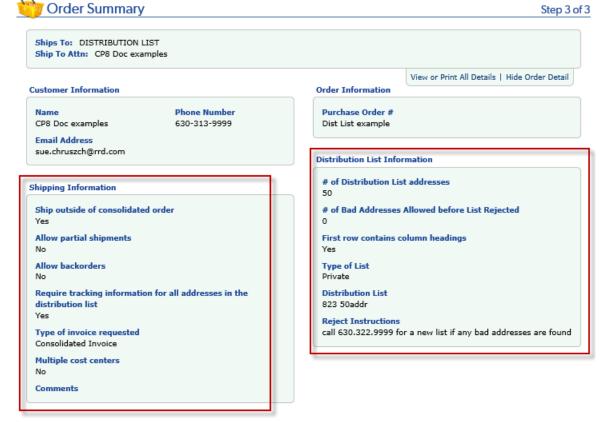
- Go with the default of 'Yes' for 'Use Your Standard Shipping Preferences?' (or click 'No'
 and select the appropriate responses on the Shipping Guidelines pop-up and click Submit,
 see example below)
- Enter the appropriate number (e.g. '0' in this example) in the '# of Bad Addresses Allowed before 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.





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



Items Ordered

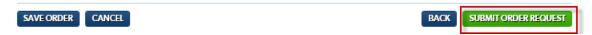


Notes

This is an order request, not an order. An order request is sent to a Project Manager for review. Your order request will not be sent until you click "Submit Order Request" and receive your Sales Reference Number. A Project Manager may contact you to confirm the details of your order request. The Project Manager will then submit your order for final processing.

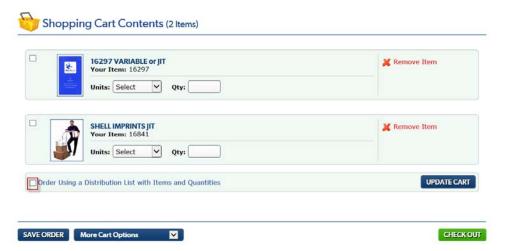
For First Class Mail distributions, we will mail to all addresses on the attached list. CASS Certification will be performed on the list only to append postnet barcodes.

For premium service delivery distributions of kits, we can search for non-deliverable addresses and pull them from your list to help you avoid unnecessary shipping costs.

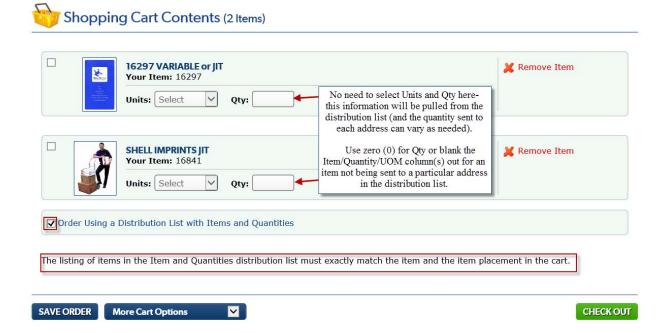


Using the cart checkbox 'Order Using a Distribution List with Items and Quantities'

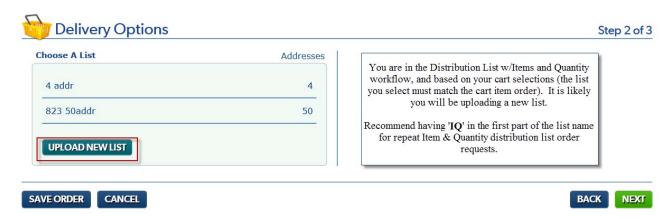
Step 1: Select your item(s) for the order and then click the checkbox 'Order Using a Distribution List with Items and Quantities' when you have the appropriate items in the cart. With the checkbox checked, compare the example below with the following printscreen. You will see the following changes: 1) the Units and Qty fields are disabled (grayed), 2) the Update Cart button is removed, and 3) an instruction message appears below the checkbox.



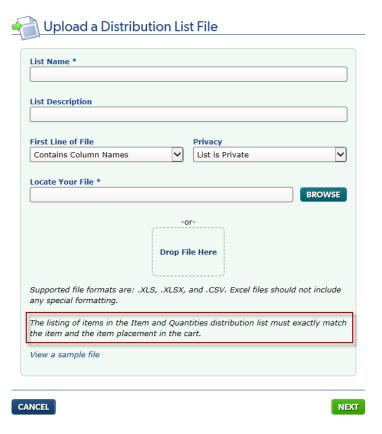
Step 2: Click Checkout when you are ready to select your list. Note: The instruction that appears reads: 'The listing of items in the Item and Quantities distribution list must exactly match the item/item placement in the cart'. The quantity ordered for the items (if that was entered prior to selecting 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:

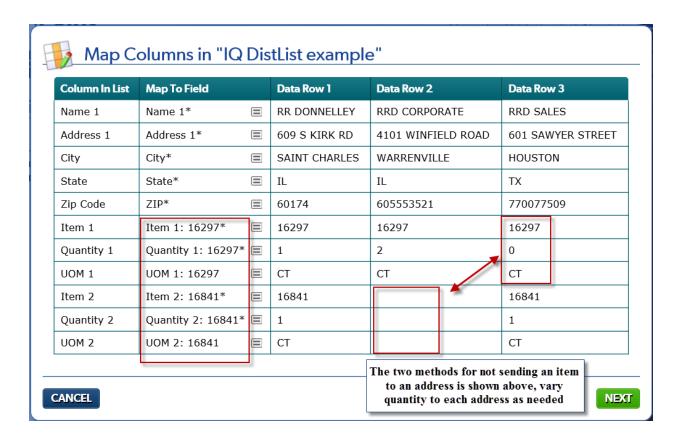


Step 5: Enter your **List Name**, optional List Description, select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) as well as the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.

Record Count

| You are uploading file: IQExample2018.xls Please correct the record count and click "Next" to Clicking "Cancel" will end the upload process. | proceed. |
|--|----------|
| Record Count * 3 | |
| ANCEL | NEXT |

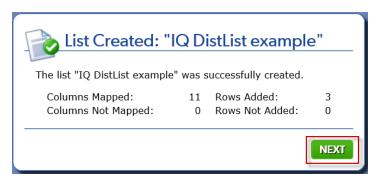
Step 6: **Confirm your Record Count is correct** (example shown above) then click **Next**. **Note**: If your spreadsheet has multiple worksheets, you will also be prompted to select the proper worksheet that contains the address information to map (click **Next** to proceed to the mapping step).



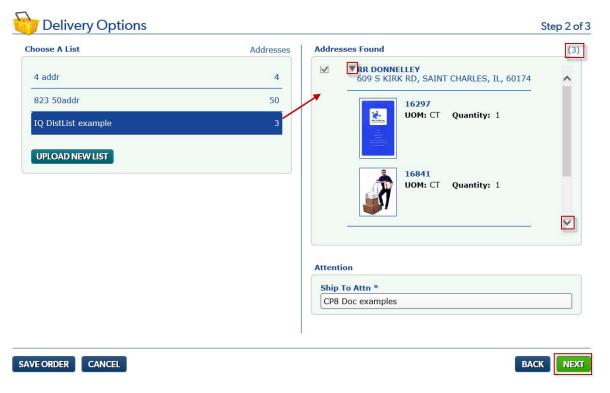
Step 7: The example above shows most of the required fields auto-mapping automatically (ZIP* was manually mapped to Zip Code). Any additional fields at the bottom that show 'Choose Field' in red can be reviewed and optionally mapped as needed. Click the ≡ icon to open the mapping options dropdown.

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.

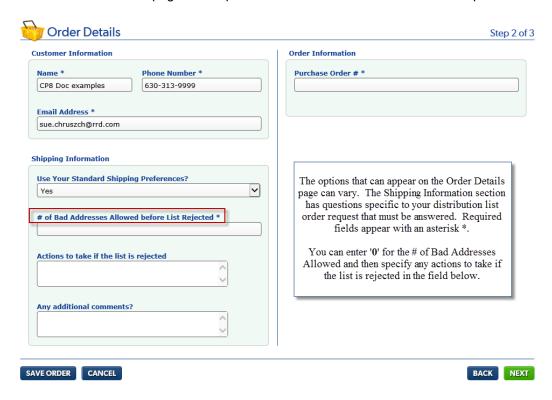




Step 10: Answer the **Shipping Information section questions on the Order Details page** that pertain to distribution list ordering.

- 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.

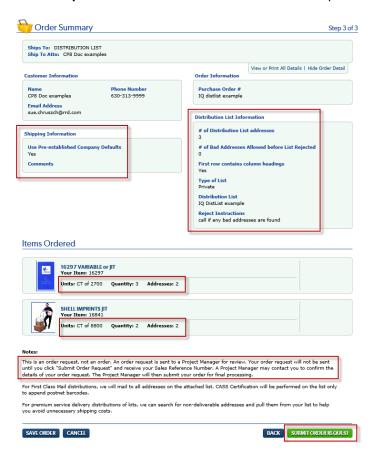
Click **Next** on the Order Details page to complete the rest of checkout for this order request.







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.

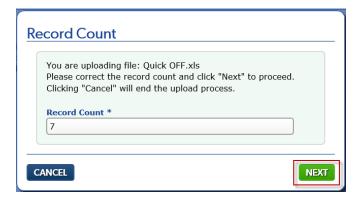
- **Step 2**: Select the '**Upload New List**' button option on the Delivery Options page (in the Address Source dropdown) OR you can select an *existing* saved OFF list by clicking the list name in the Choose a List column.
- **Step 3**: Both options from Step 2 (Upload New List or selecting an existing 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:



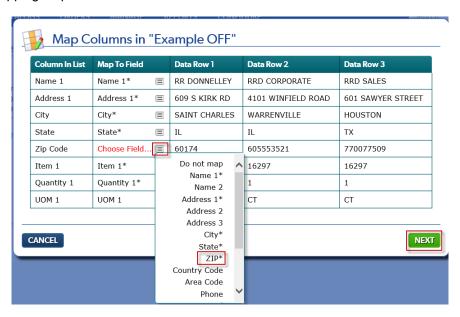
Step 4: Enter your **List Name**, optional List Description, select the appropriate **First Line of File** dropdown option (Contains Column Names or Contains Data) as well as the appropriate **Privacy** option (List is Private or List is Shared), click **Browse** to locate your file; and then click **Next**.



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



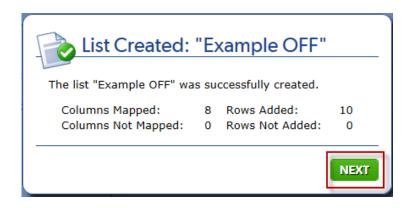
Step 6: **Confirm your Record Count is correct** (example shown above) then click **Next** to proceed to the mapping step.



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.



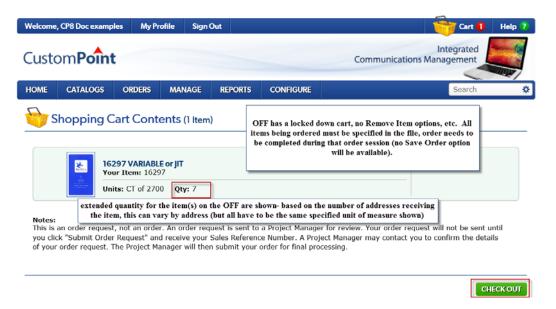
When the *Column in List* and *Map to Field* column data match, they are auto-mapped for you. The OFF template file **displays columns for up to 10 items (with the related Quantity and UOM columns)** and all the Customer Reference 1-25 fields. Any unwanted columns can be removed or just ignored during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



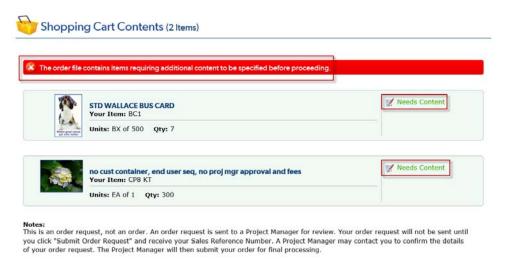
Step 8: Confirmation of the mapping you just saved displays next on the **List Created page**. It displays the number of columns mapped and the number of rows added (which equates to the number of addresses the order will be sent to). Click **Next**.



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.

