XEROX®

FreeFlow™

Version 6.0, December 2007
701P47809

FreeFlow® Web Services Order Center User Guide

Powered by Press-sense

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Contents

Glossary

Commit - Activity in the software that confirms a quote/order/invoice. This activity can be applied to any quote/order/invoice in draft mode, in order to advance it to the next processing stage.

CSR (Customer Service Representative) - A member of the Print Provider organization who processes a specific quote, order or invoice and handles the relationships with the customers.

Invoice - An itemized bill for goods sold or services provided, containing individual prices, and the total charges. Invoices can be created for committed orders only. There is no dependency on the status of the job (printed or delivered). One invoice can include one or more orders.

Order - A quote that is approved by the customer is converted into an order by the Print Provider's CSR

Print Buyer / Customer - Any individual or organization that purchases printed material produced by a printing facility.

Print Provider / Print Service Provider - Individual or organization that produces printed material.

Product/Job - An item that the Print Provider can supply to the customer. A product does not necessarily have to be a printed item and can be supplied by the Print Provider itself or by another business (i.e. in the case of mugs and pens).

Quote - Price estimate for supplying a Print Provider product to the customer. A quote can refer to one or more products.

RFQ - Request for Quote. When a customer asks for a quote for a certain product or products.

Chapter 1: Introduction

General

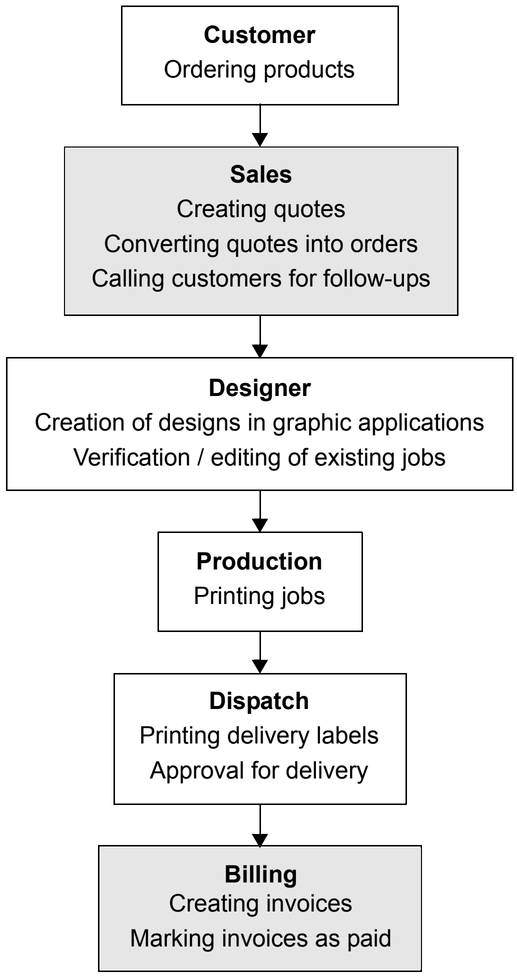
FreeFlow Web Services Order Center is a software solution designed for the use of the Print Provider and to extend the capabilities of *FreeFlow Web Services*. *Order Center* automates the offline order process through providing main Customer Relationship Management (CRM) and Management Information system (MIS) capabilities; whereas *FreeFlow Web Services* enables receiving and processing orders that enter the Print Provider's system via the web, *Order Center* enables processing all communication/business interactions received by the Print Provider through such means as the fax, phone, email or a "walk-in" customer.

Once the Print Provider has received an RFQ, *Order Center* enables carrying out and recording the process of determining a quote that is satisfactory to both the Print Buyer and the Print Provider. This process includes the creation and recording of all communication between the Print Provider and the Print Buyer. *Order Center* enables recording the process for future reference and analysis.

After the Print Buyer has accepted the quote, *Order Center* gives the Print Provider the ability to convert this quote into an order. When the order has been completed, *Order Center* provides the Print Provider billing capabilities that allow closing the sales cycle.

Business Management Automation

Order Center add-on for the *FreeFlow Web Services* software is a business management system for Print Providers. The diagram below illustrates the general workflow for processing a quote/order/invoice for any product.



The Sales and Billing steps in this diagram are the business flow steps. *Order Center* functionality provides the sales and billing personnel in the Print Provider organization the tools for pricing and tracking an order from the quote to the billing stage. This allows a more efficient use of the Print Provider's human asset time and enables the CSRs to focus on sales.

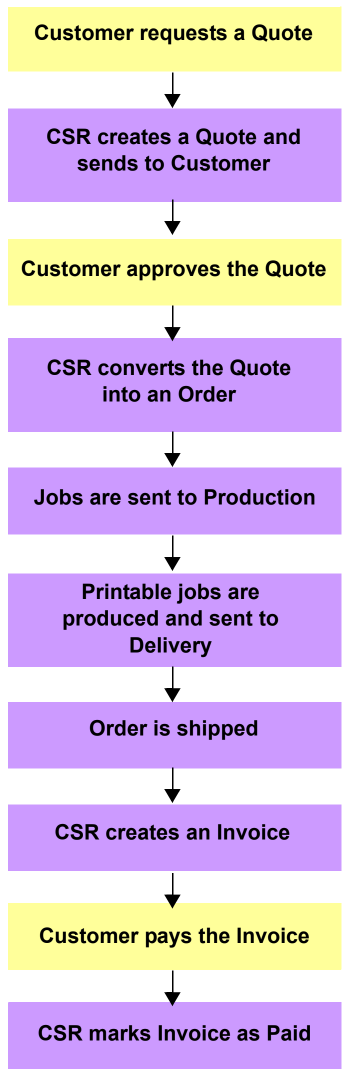
Order Center uses a single database for all quotes, orders and invoices. Collecting phone, fax, email and Web orders in one database allows unifying traditional offline and Web-based business flows.

Order Center captures all business activities and allows viewing the customer/job status. It allows storing and handling all the customer interactions, including quotes, phone calls, correspondence, customer-supplied files, etc. The built-in follow-up mechanism allows better customer service and helps the Print Provider's sales. The CSRs can also check and handle the status of all tasks on a daily basis, and can issue reports.

Order Workflow

A Quote/Order/Invoice cycle begins with a customer request for a quotation. This request can be received by phone, fax and email or by a "walk-in" customer. Based on the request, the Print Provider's CSR creates a quote that is sent to the customer.

The quote can be accepted as is, revised, or cancelled. When the quote is accepted, it is then converted into an official order to be produced and shipped to the customer. After an order is committed and produced, it can be invoiced (an invoice is then sent to the customer). When the customer pays the invoice, the invoice can be marked as "paid" by the CSR.



Note: *Order Center* isn't an accounting system; so, for general ledger purposes it is necessary to enter the data into an accounting system.

Chapter 2: Installation

General

The *Order Center* application is purchased as an extension to the *FreeFlow Web Services* software, and is installed "on top" of the *Web Services* application using a dedicated Installer. The Installer is supplied on a CD, together with the activation key.

For the installation procedure, see *Order Center Installation Guide*.

Once the *Order Center* application is successfully installed, it is possible to see the information about the installed version.

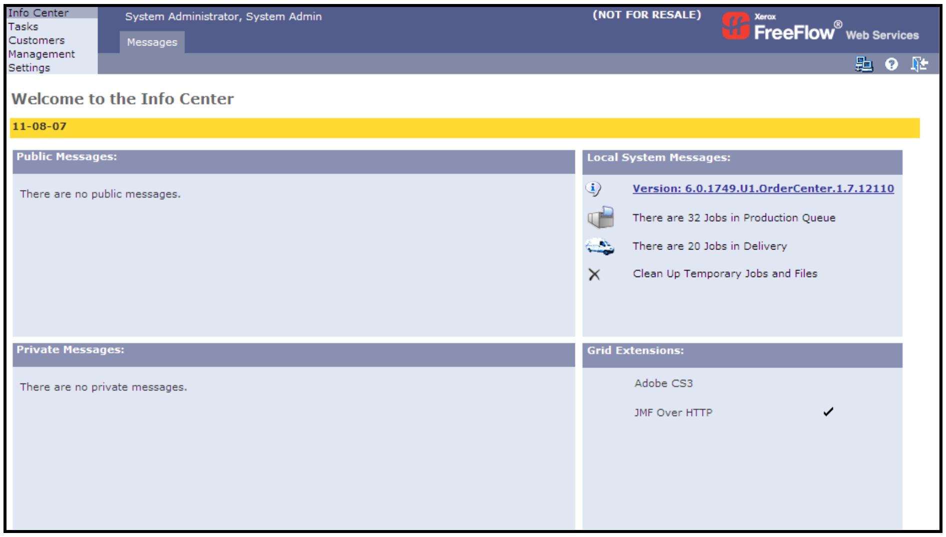
Version information

1 Run the *FreeFlow Web Services* software.

2 Log in to the system as a Print Provider user.

Note: If you don't know your user name and password, consult your System Administrator.

The ***Info Center*** page opens.



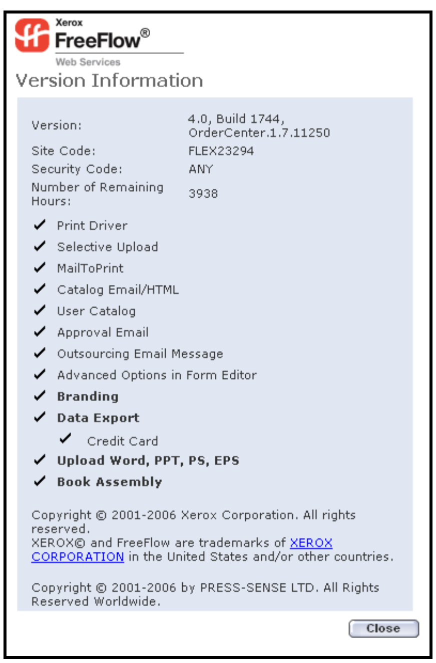
3 Under **Local System Messages**, you can see the link that contains information about the installed software.

On this example screen:

- **Version: 6.0.1749.U1** - the *FreeFlow Web Services* version information
- **OrderCenter.1.7.12110** - the *Order Center* version information that is added after the *Order Center* installation.

4 Click the link to see detailed information about the installed software.

The **Version Information** box opens showing all the installed software components.



5 Click **Close** to return to the main screen.

Chapter 3: Settings

General

After the *Order Center* software is installed, the following settings have to be verified:

- Print Provider's users
- Customers
- Numbering conventions (upon Print Provider organizational decision)
- Job expiration (upon Print Provider organizational decision)
- Format of the quote/order document (PDF or Word) that is sent to the customer by email
- Email retrieval feature - creation of dedicated email account.

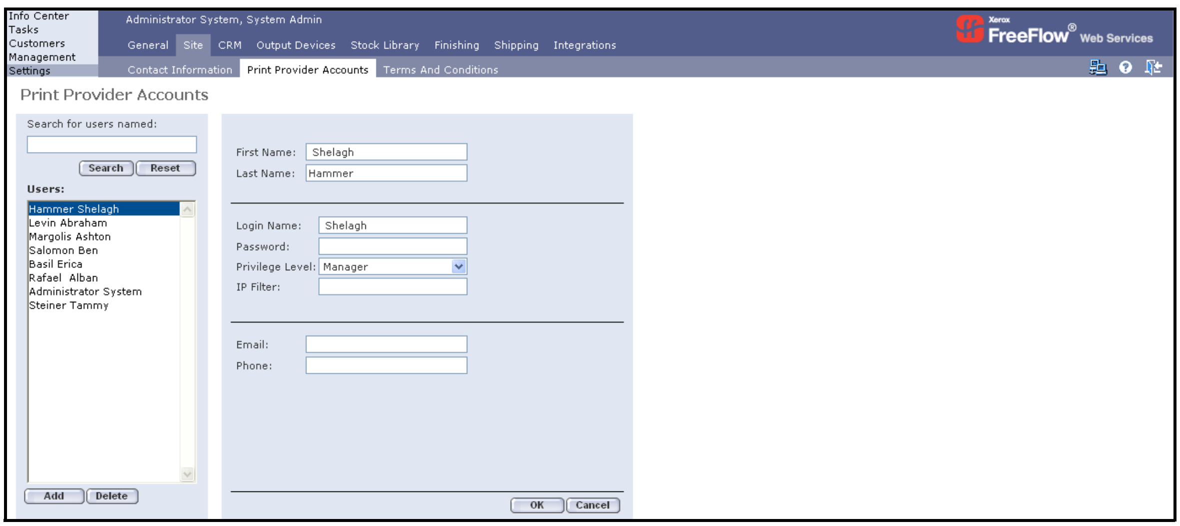
Users

To allow the usage of the *Order Center* features by the Print Provider business staff, a user has to be created for each CSR, Operator, Dispatch or Billing person who will work with the system.

To view and work with the list of Print Provider users:

1 Choose **Settings** from the top left corner menu.

2 Select the **Site** tab and then the **Print Provider Accounts** tab to open the appropriate window.



The ***Print Provider Accounts*** window contains the following components:

- **User list pane** - List of system users within the Print Provider organization
- **User details pane** - Parameters of the user selected in the list

This window allows the Print Provider to create user accounts for all the members of the Print Provider organization who work with the *FreeFlow Web Services* system. Each user is provided with a login name, a password, and is designated a user privilege. The list of users is open, enabling the Print Provider to add and remove users from the list.

Note: The user accounts creation procedure is described in detail in the *Print Provider Guide, Chapter 6: Settings, Print Provider Accounts* section.

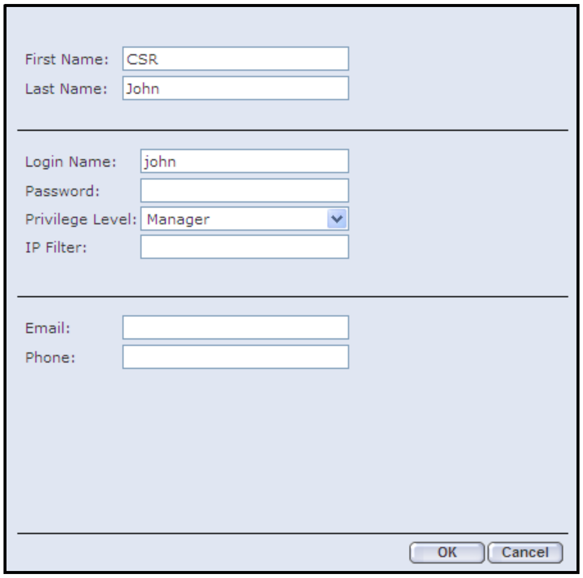
User list pane

In the user list pane, the Print Provider defines all of the staff members that are involved with the system. The user list pane has a search engine for finding a specific user or for narrowing the list.

The user list pane contains the following operation buttons:

- **Search** - Activates the search engine. The search results replace the entire list of users.
- **Reset** - Replaces the search results with the entire list of users.
- **Add** - Adds a new user to the list.
- **Delete** - Permanently deletes users from the list.

User details pane

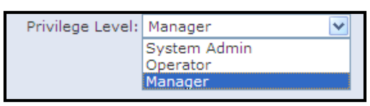


This pane shows the parameters of the user selected from the list, or empty fields for defining a new user. The Print Provider enters the appropriate information about each user.

- **OK** - Saves the settings entered to the user details pane.
- **Cancel** - Cancels all the changes made to the settings.

User privileges

User privileges are set from the **Privilege Level** drop-down menu. Users can be assigned System Administrator, Operator or Manager privileges.



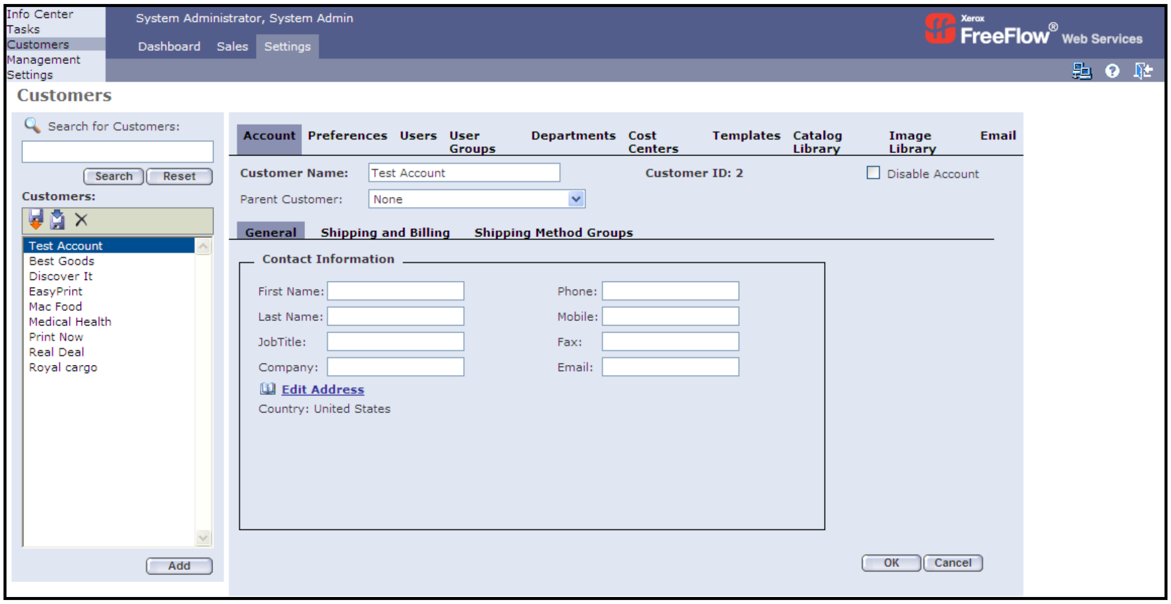
- A user assigned **System Administrator** privileges can access all the Print Provider interface windows.
- A user assigned **Operator** privileges can take responsibility for the design, production and dispatch operations. The Operator level also enables the user to work with the job-tracking feature under the **Management** of the main menu (top left corner menu).
- Users with **Manager** privileges can access the ***Info Center***, ***Tasks***, ***Customers*** and ***Management*** windows that are invoked from the main menu. The Manager level does not provide permission to work with the ***Settings*** window of the main menu.

Customers

To view and work with the list of customers:

1 Choose **Customers** from the top left corner menu, and select **Settings**.

The window opens showing the list of customers already defined in the system.



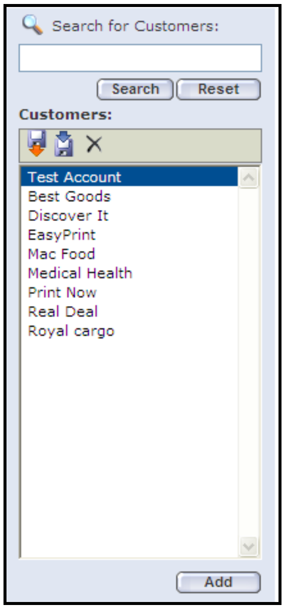
The window is composed of the following elements:

- **Customer list pane** - A list of all the Print Provider customers sorted alphabetically, together with a search engine.
- **Customer details pane** - Designed for entering all customer information including its users, under the different tabs.

Note: See *Print Provider Guide, Chapter 4: Customers* for a detailed description of the window components.

Important: When using *Order Center*, it is important to define at least one user for each customer. It is not sufficient to enter only the contact person details. This is done by selecting the ***Users*** page, and defining a user there.

Customer list pane



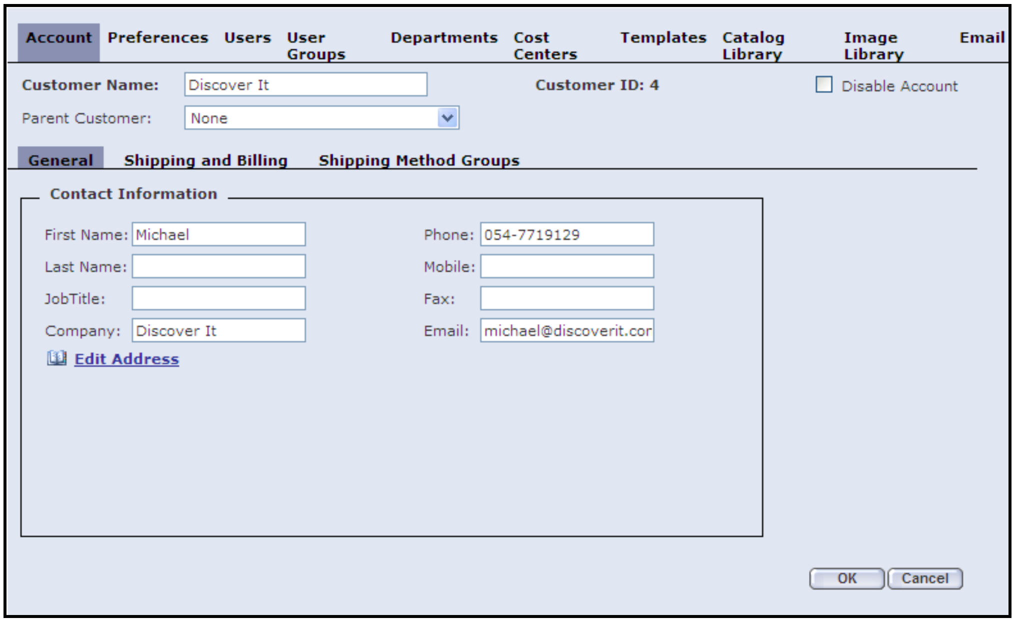
The list of customers is open, which allows new customers to be defined.

Note: The customer creation procedure is described in detail in the *Print Provider Guide, Chapter 4: Customers*.

The customer list pane contains the following operation buttons:

- **Search** - Activates the search engine. The search results replace the entire list of customers.
- **Reset** - Replaces the search results with the entire list of customers.
- **Add** - Adds new customers to the list.

Customers details pane



The pane contains several pages that incorporate all of the data that is relevant to each Print Buyer in the *FreeFlow Web Services* system.

Note: See the *Print Provider Guide, Chapter 4: Customers* for a detailed description of the window components.

- **OK** - Saves the settings that have been entered into the customer details pane.
- **Cancel** - Cancels all the changes made to the settings.

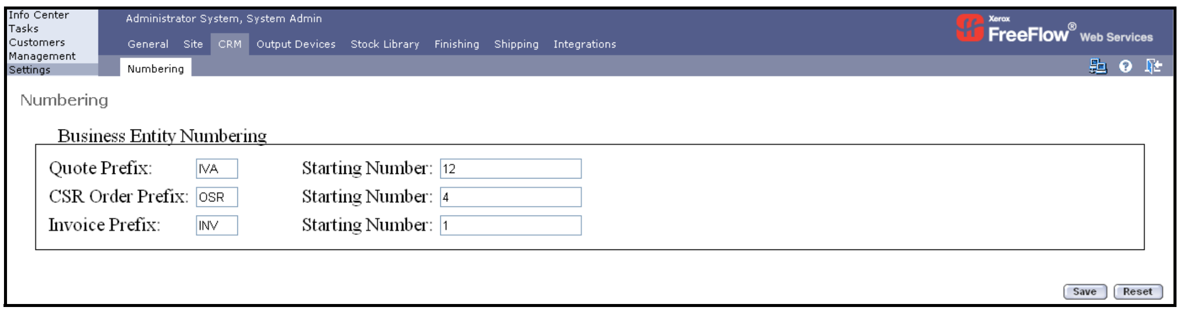
Quote, order and invoice numbering

Quotes, orders and invoices are numbered independently of each other. In order to distinguish between quotes, orders, and invoices, the user can set different prefixes to their numbers. In addition, the Print Provider can set starting numbers for quotes, orders, and invoices. The prefixes and numbers will appear on the documents that are sent to the customers at different stages of the order processing.

Note: Changing these settings is not mandatory; it is only according to the Print Provider preferences.

1 Choose **Settings** from the top left corner menu.

2 Click on the **CRM** tab. The ***Numbering*** window opens.



When the window opens, the default prefix and starting numbers for quotes, orders and invoices appear. For new installations the default numbering is 1. The default prefixes are: QUO, OSR, INV.

3 In the **Quote Prefix** field, enter a quote-number prefix, according to your preferences.

4 In the **CSR Order Prefix** field, enter an order-number prefix for the orders created in *Order Center*, according to your preferences.

5 In the **Invoice Prefix** field, enter an invoice-number prefix, according to your preferences.

6 In the **Starting Number** fields, change the starting numbers for quotes, orders and invoices according to your preferences.

Notes: 1. Web orders are not influenced by this setting and will continue to appear as before, as well as the already existing quotes, orders and invoices.

2. Numbering should be set only once after every new installation.

Job expiration

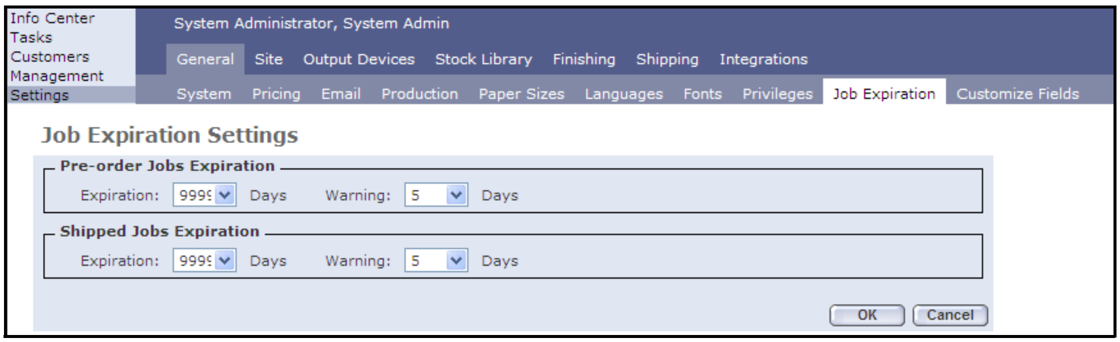
This setting enables determining the amount of time the jobs can reside in their respective queues before being automatically deleted.

To set the job expiration time:

1 Choose **Settings** from the top left corner menu.

2 Select the **General** tab and then the **Job Expiration** tab.

The ***Job Expiration Settings*** window opens.



The **Shipped Jobs Expiration** setting affects the jobs that are created in *Order Center*. Since it is important to maintain a history of jobs, it is strongly recommended to verify after installation that the number of days in the **Shipped Jobs Expiration** field is set to its maximum value (9999).

Format of sent documents

It is possible to convert the Word documents into PDF format when quotes/orders/invoices are sent by email to a customer. The documents will still be displayed to the CSR as Word documents that the CSR can modify, and the conversion to PDF will take place when the CSR sends the documents to the customer.

Note: Only the user that is assigned the Network Administrator privileges can enable this feature, since the access to the *FreeFlow Web Services* server is required for this action. The steps described below are for an IT person with administrative privileges.

In order to change the definition to PDF, carry out the following steps on the *FreeFlow Web Services* server:

1. Open Windows Explorer.
2. On the D: drive (or any other drive to which *FreeFlow Web Services* has been installed), and go to \NewEdition\mail2.
3. Open the mail.config file, for example in Notepad, for editing purposes.
4. Locate the following section:

   ```
   <!--Convert to PDF-->
     <add key="ConvertToPDF" value="False"/>
   ```
5. Change the value to True; the line should appear as:

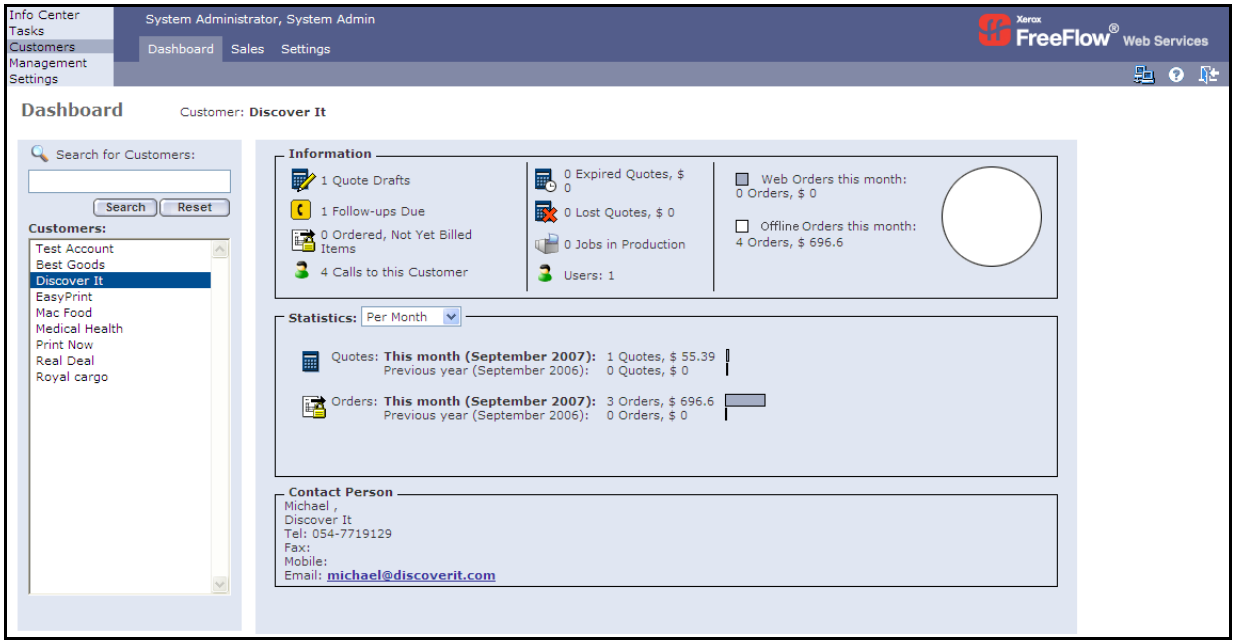
   ```
   <add key="ConvertToPDF" value="True"/>
   ```

Note: There is no need to stop or restart the application after this configuration has been completed.

Chapter 4: Working with quotes/orders/invoices

Customers window

Choose **Customers** from the top left corner menu.



The ***Customers*** window contains three tabs: the **Dashboard** and **Sales** tabs are added to the **Settings** tab after the *Order Center* is installed.

1 To view the status and statistics of customer quotes/orders, go to **Dashboard**.

2 To create and handle quotes and orders, go to **Sales**.

3 To make changes to the list of customers, go to **Settings**.

Note: For detailed information about customer creation, see the *Print Provider Guide, Chapter 4: Customers*.

Quote/Order status

The following icons indicate the status of the quotes and orders residing in the system:

Icon	Name	Description
	Quote-Draft	The quote is in draft form
	Quote-Released	The quote has been committed and sent to the customer
	Quote-Ordered	The quote has been ordered by the customer (this quote may be used again to generate a new order)
	Quote-Unread Message	A message has been received from the customer regarding the quote
	Quote-Follow-up Due	Contact should be made with the customer, concerning the quote
	Quote-Expired	The expiration date for the quote has been exceeded
	Quote-Lost	The quote was not accepted by the customer and was therefore cancelled by the CSR
	Order-Draft	The order is in draft form
	Order	The order was committed and the jobs are in production
	Order-Unread Message	A message has been received from the customer regarding the order
	Order-Follow-up Due	Contact should be made with customer, concerning the order
	Order-Canceled	The order was not accepted by the customer and was therefore cancelled by the CSR

Dashboard

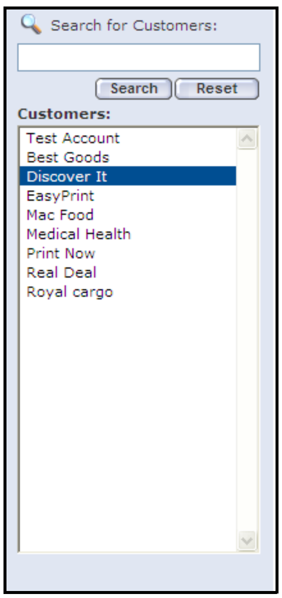
The ***Dashboard*** window shows the most important parameters of each customer's business with the Print Provider. The dashboard information is available for Print Provider users with privilege level of Manager and Administrator. The user can check the number and status of the current quotes/orders of a specific customer, and view the statistics of quotes/orders of this customer for a particular period of time. The number of Web orders vs. the number of *Order Center* (Offline) orders for the current month is also displayed.

This window is divided into the following two panes:

- **Customer list pane** - list of customers
- **Customer's business details pane** - summary of orders, statistics and general information for the customer selected in the list.

Customer list pane

The customer list pane contains the entire list of Print Buyers that are associated with the Print Provider.



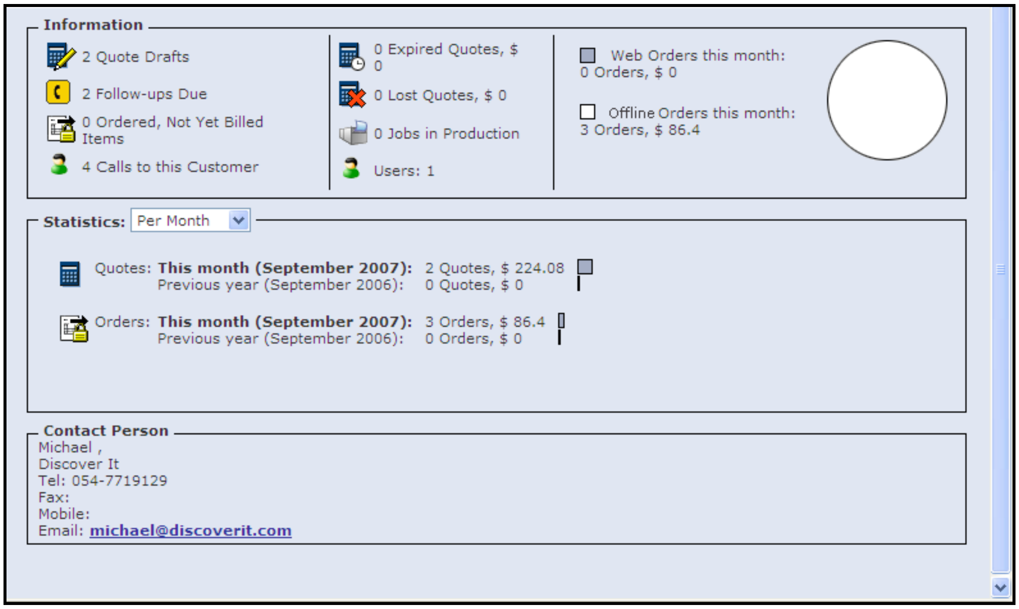
The customer list pane displays as default the complete list of customers; the list can be narrowed to an individual customer or to a small number of customers, using the search engine.

Searching for a customer

The customer search engine helps the Print Provider to quickly access a specific customer or group of customers. To work with the customer search engine, carry out the following steps:

1. In the **Search for Customers:** text box, enter a customer name (partial or complete).
2. Click **Search**; the relevant name(s) appear(s) in the **Customers** field.
3. Click **Reset** to restore the complete list of customers.

Customer's business details



The customer's business details pane is divided into the following three sections: **Information**, **Statistics** and **Contact Person**.

Information

This section displays the following summary for the specific customer selected in the list:

- Number of quote drafts
- Number of follow-ups due and calls to the customer
- Number of expired and lost quotes
- Number of items ordered, but not yet billed
- Number of jobs in the production queue
- Number of users that belong to the customer
- Number of Web orders this month, which is graphically displayed as the blue "pie" section
- Number of Offline orders this month - the number of orders created manually, in *Order Center*, which is graphically displayed as the white "pie" section.

Statistics

This sub-section allows Print Providers to view the number of quotes/orders and total prices of all the quotes/orders for the specific customer selected in the list on the left pane, according to the following time periods:

- Per Month
- Per Quarter
- Per Year

Quotes

Displays the number of quotes residing in the system in the selected time period (current month, current quarter, and current year), displays the total price of the quotes, and compares the quotes of the current time period with the quotes of the same time period, last year.

Orders

Displays the number of orders residing in the system in the selected time period (current month, current quarter, and current year), displays the total price of the orders, and compares the orders of the current time period with the orders of the same time period, last year.

Contact Person

Displays all the contact details of the liaison person in the Print Buyer organization.

Sales

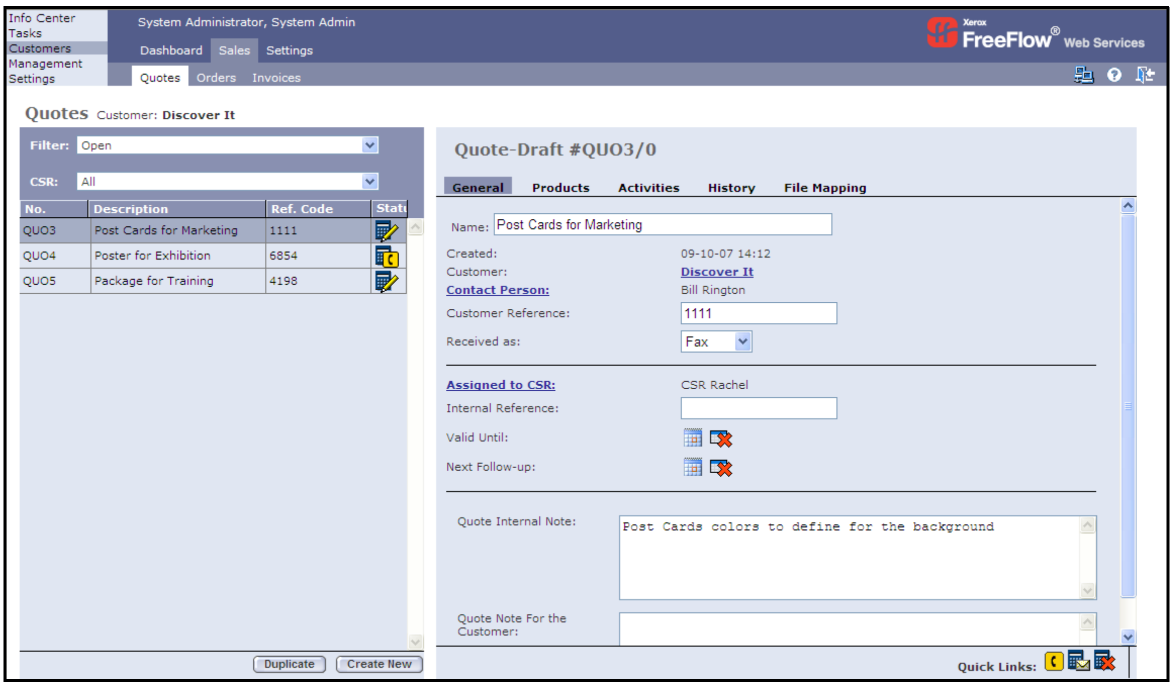
The tools of the **Sales** tab enable the CSR to initiate a quote draft and to manage and process it through the quote, order and invoice stages. The quotes, orders and invoices are displayed in separate windows, for viewing, editing and processing purposes.

Quotes

1 Choose **Customers** from the top left corner menu.

2 Select a customer in the ***Dashboard*** window and then click on the **Quotes** tab.

The ***Quotes*** window opens.



The ***Quotes*** window enables creating new quotes and provides a view of the quotes already in the system.

The Print Provider user can then specify the quote name, the customer contact person, expiration and follow-up dates, and then assign the responsible CSR. Finally, the Print Provider user sets the quote contents: the products, optional quantities and quoted prices.

The window is divided into two panes: the left pane displays the list of quotes; the right pane displays the details of the selected quote for viewing, editing and processing purposes.

List of quotes pane

The left pane contains the following fields and controls:

- **List of quotes** - Shows all or filtered quotes with the description and status for each one.

  Note: When the window opens, all "Open" quotes that require CSR's attention are shown by default in the list. If there aren't quotes in such status, the list can be empty. See *Filtering the list* below for explanation.

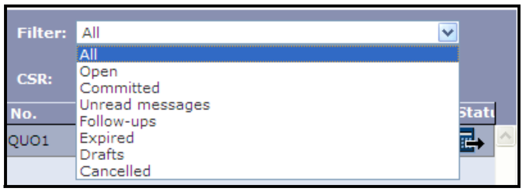
- **Duplicate** - This button allows duplication of a selected quote.

- **Create New** - This button allows creation of a new quote.
- **Filtering engine** - Allows the list of existing quotes to be filtered.

Filtering the list

Existing quotes in the list can be filtered in order to facilitate the work of CSRs. Quotes residing in the system can be filtered according to various criteria:

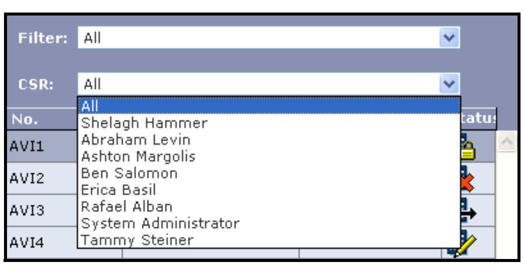
- By their status



The criteria for filtering by status are described in the following table:

Criteria	Description
All	All quotes in the system for the specific customer.
Open	Quotes in any status that require CSR's attention (quotes in the draft mode, quotes with follow-ups, with attached unread messages and expired)
Committed	Committed quotes
Unread messages	Only quotes with unread messages
Follow-ups	Only quotes requiring follow-ups
Expired	Only quotes with expired date of validity
Drafts	Only quotes in the draft mode.
Cancelled	Cancelled quotes

- By the CSR name



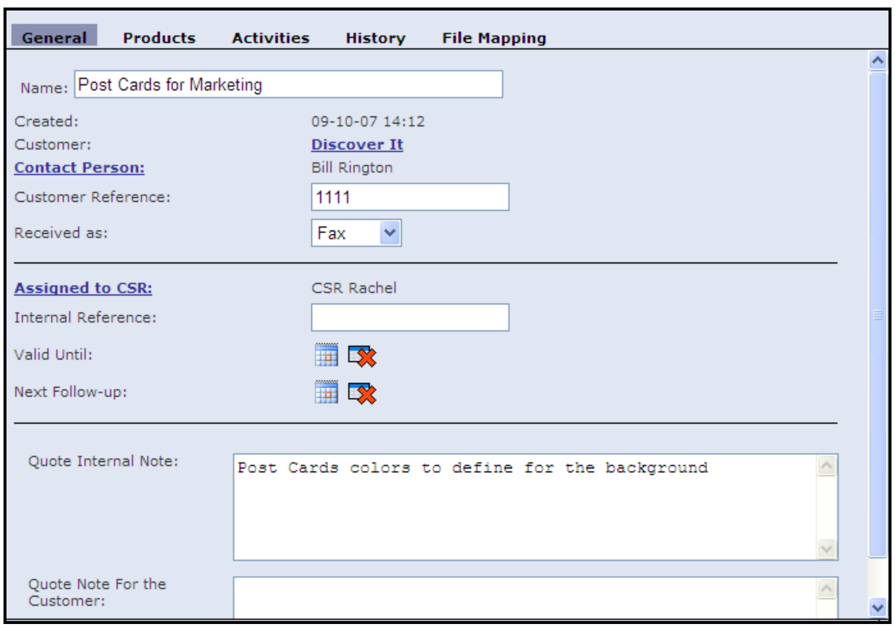
Quote details pane

On the right pane, the user works with five pages:

- ***General*** - Allows the user to set the general quote parameters.
- ***Products*** - Enables the user to add all the necessary products to a quote and to calculate the quote price.
- ***Activities*** - Enables the execution of actions required for processing the quote/order.
- ***History*** - Shows a record of the quote processing steps.
- ***File Mapping*** - Allows the Print Provider to assign to a product the files received from a customer.

Note: The same pages appear also in ***Orders*** and ***Invoices*** windows, and provide similar functionality. The differences are described in the *Orders* and *Invoices* sections in this guide.

General



This page allows the CSR to set the general quote parameters:

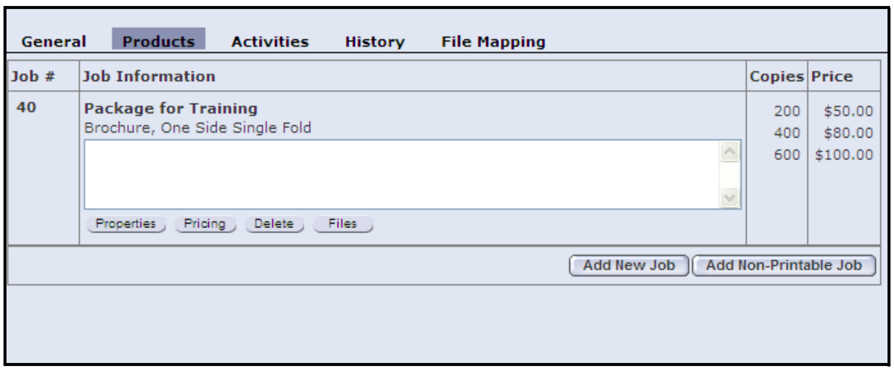
1. Enter the quote description in the **Name** field.
2. Choose a customer contact person using the **Contact Person** link, if the default person selected by the system is not suitable.
3. Enter the reference numbers for the Print Buyer side and for the Print Provider side in the **Customer Reference** and **Internal Reference** fields, respectively.
4. From the options of the **Received as** drop-down menu, choose the way the RFQ reached the CSR.
5. The default CSR is the one who logged in to the system. Other CSR personnel can be selected by using the **Assigned to CSR** link.
6. Quote expiration and follow-up dates - the system sets default dates: today + 30 days for the **Valid Until**, today + 3 days for the **Next Follow-up**. Change them if necessary using the **Valid Until** and **Next Follow-up** calendars.

7 Write down the notes in the **Quote Internal Note** and **Quote Note for the Customer** text boxes.

> ***Note:*** Text the user writes in the **Quote Internal Note** field appears only on internal documents such as Job Ticket, while the text entered into **Quote Note for the Customer** field appears on the Quote document sent to the customer. Thus, the information that the user wishes the customer to be aware of should be entered into the **Quote Note for the Customer** field.

8 View the summary of the quotes/orders and the statistics for the customer by clicking the link with a customer name in the **Customer** field (*see “Customer’s business details” on page 28*).

Products



This page enables the user to add all the necessary products to a quote, to view and edit properties of included jobs, to set the number of copies and to calculate the price for each quantity in each product in the quote. The page displays the job number, basic job information, number of copies and price for each included job.

Note: Job # is the system-generated number of each specific job in a quote.

Control buttons of the ***Products*** page for quotes:

- **Properties** - Opens the ***Edit Properties*** window for making changes to the job's properties. See the *Print Provider Guide, Chapter 4: Customers, Edit Properties Dialog Box* for information on how to edit job properties.
- **Pricing** - Opens the ***Pricing*** window for defining the number of copies and calculating the price for the specific job.

  Note: The **Pricing** button appears only if a quote is not committed yet.

- **Delete** - Deletes the selected job from the current quote.
- **Files** - Allows access to the folder of files attached to the job.

  Note: See **Open Folder** in *Approval for printing* below.

- **Add New Job** - Allows adding printable jobs to the quote.
- **Add Non-Printable Job** - Allows adding non-printable jobs to the quote.

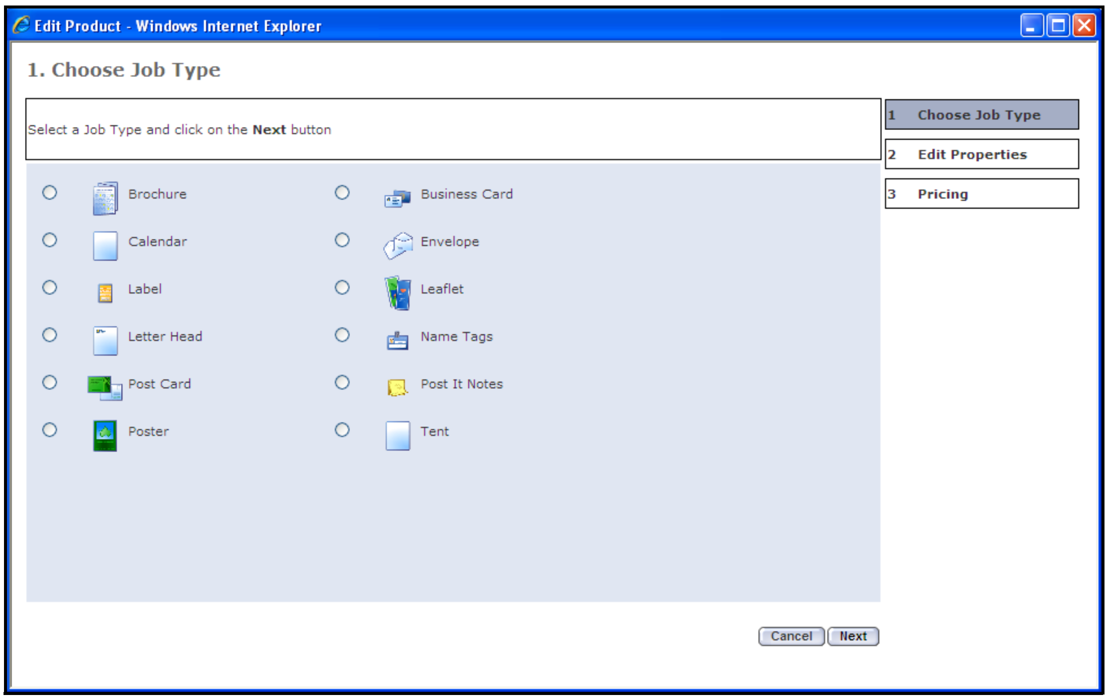
Adding printable jobs to a quote

To add a printable job to a quote, a three-step wizard is used.

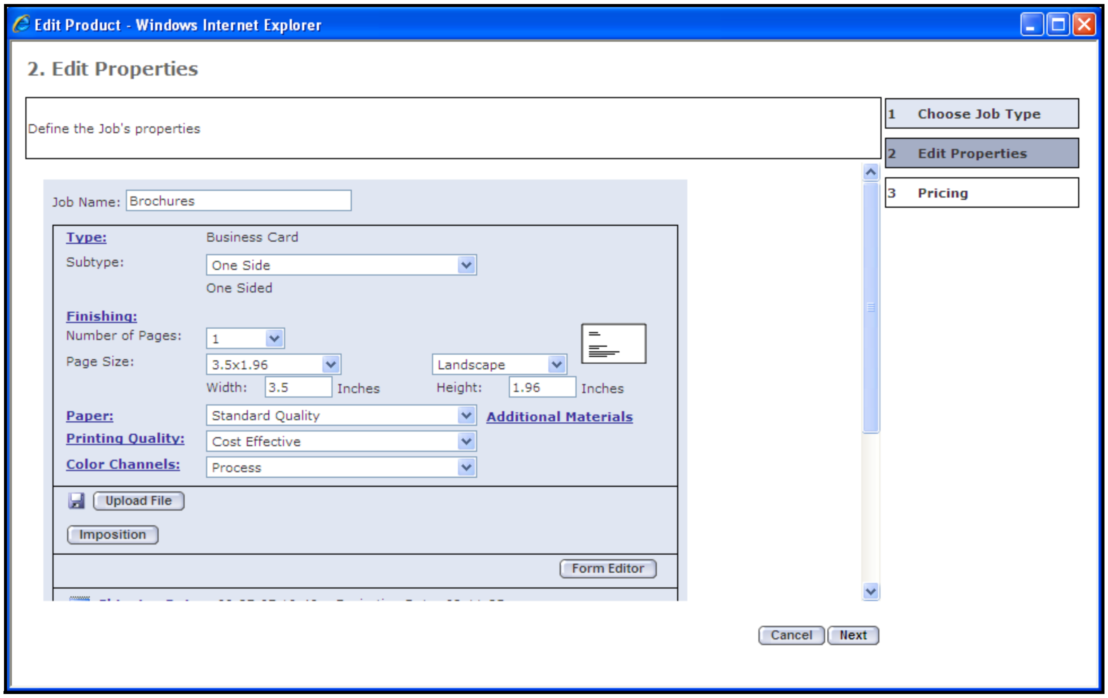
The wizard steps are:

- Choosing the type of the job to be added
- Editing the properties of the job
- Pricing the job

1 Click the **Add New Job** button.



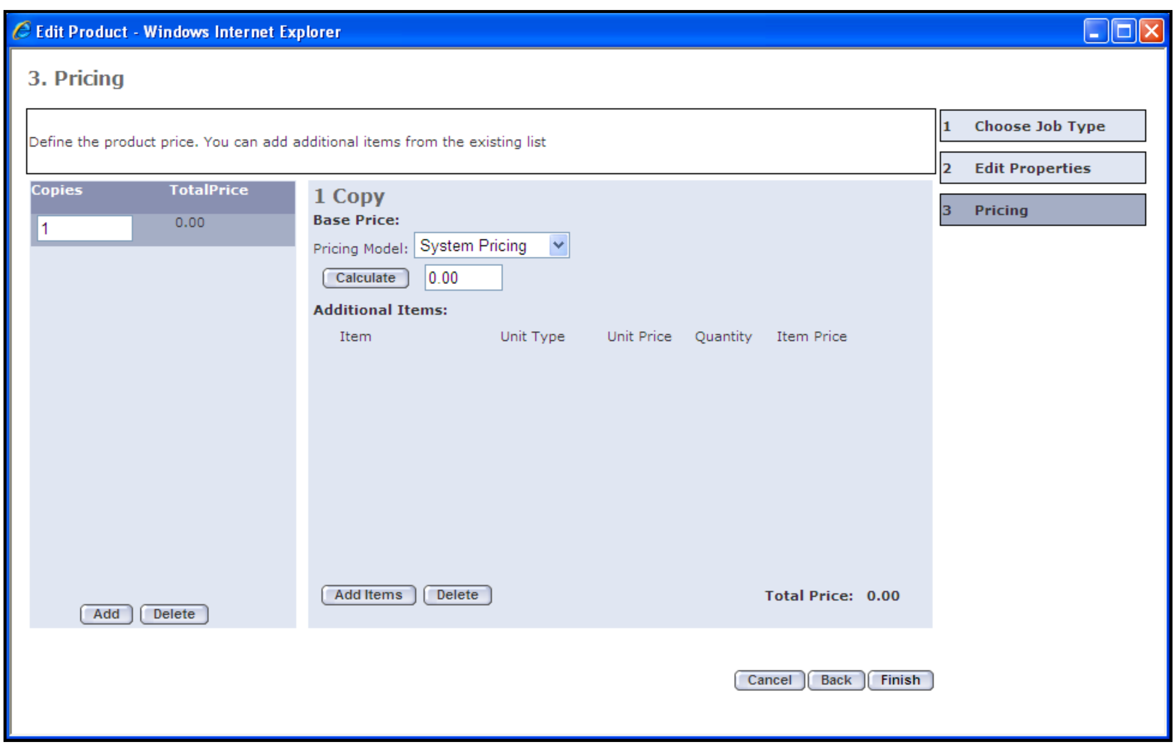
2 Select a job type and click **Next**.



Note: Scroll down to see the lower part of the window.

3 Edit the job properties and click **Next**.

Note: To edit the job properties see the *Print Provider Guide, Chapter 5: Management, Edit Properties* section.



Now you can calculate the price for the job to be added.

Note: For the price calculation procedure see the *Pricing* section below.

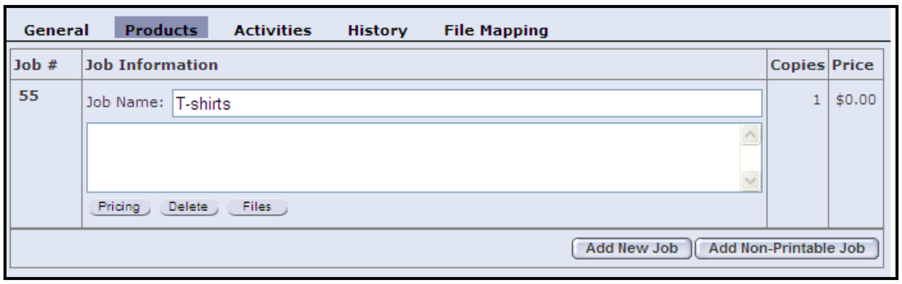
4 Click **Finish**. The new job appears on the ***Products*** page.

5 Click the **Properties** or **Pricing** buttons under the new job, if you need to view and change the properties and calculate the price.

Adding non-printable jobs to a quote

1 To add a non-printable job to a quote, click the **Add Non-Printable Job** button.

The new job appears on the ***Products*** page.



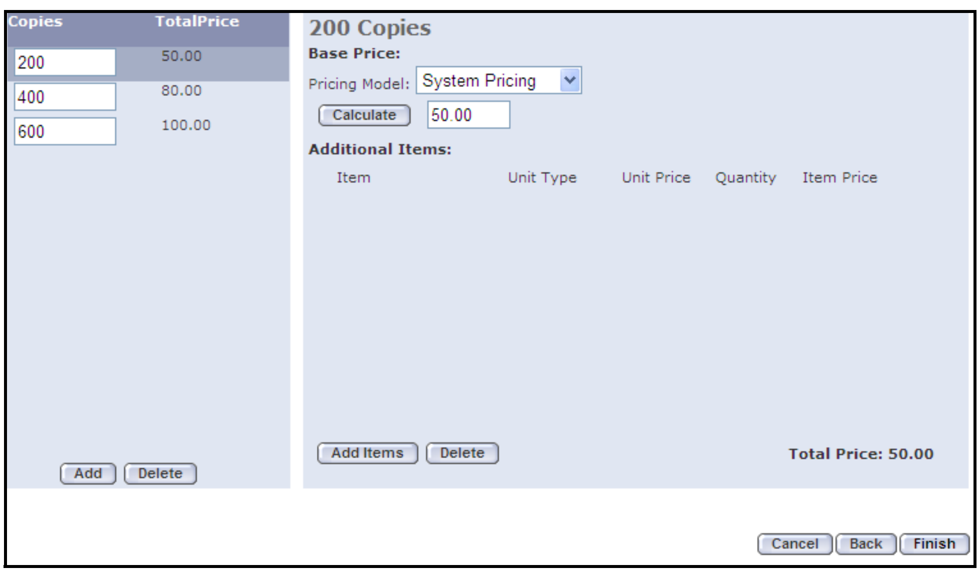
2 Click the **Pricing** button under the new job in order to enter its price. Non-printable jobs can be priced only manually.

Note: To price non-printable jobs see *Entering the price manually* in the *Pricing* section below.

Pricing

- Click the **Pricing** button under the specific job on the ***Products*** page.

The ***Pricing*** window opens.



This window enables the calculation of the total price of various amounts of copies of a specific product. The following pricing methods are available:

- Manual pricing
- Price calculation using the default model of system pricing
- Price calculation using the Excel Pricing model

Note: For a detailed description of the pricing models see the *Print Provider Guide, Generic Pricing Mechanism in Chapter 7, Excel Pricing in Chapter 4, and Pricing Window in Chapter 6*.

Entering the price manually

1 In the **Copies** text box, enter the number of job copies to be delivered to the customer.

2 Enter the price in the field next to the **Calculate** button.

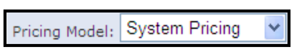
3 Click somewhere in the window area.

The entered value appears under **TotalPrice**.

Note: The user can create a list of varying prices for different numbers of copies by clicking the **Add** button and then entering the price. The **Delete** button deletes selected line from the list.

Calculating the price using the default System Pricing model

When the ***Pricing*** window opens, the System Pricing method is selected by default in the **Pricing Model** drop-down menu:



1 In the **Copies** text box, enter the number of job copies to be delivered to the customer.

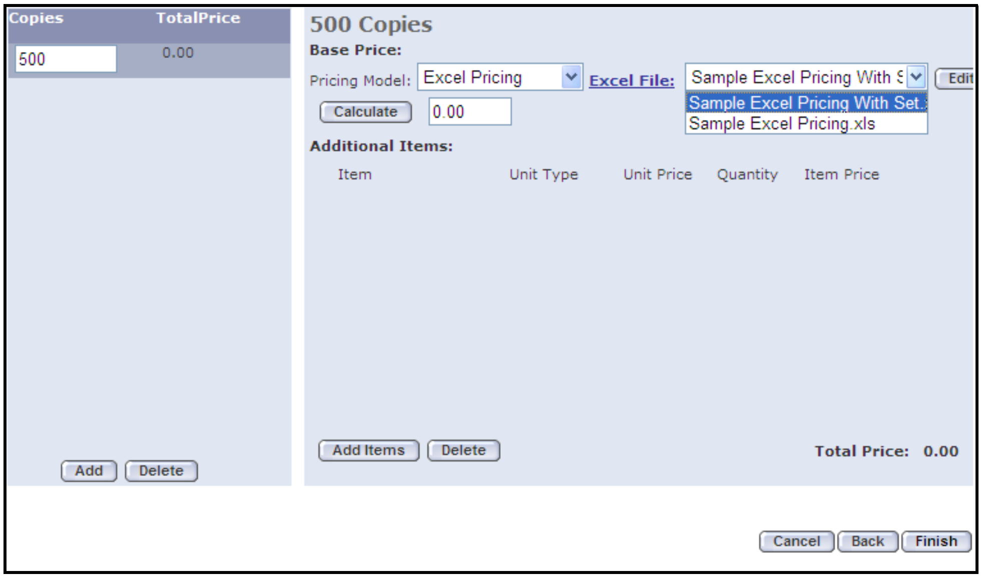
2 Click the **Calculate** button.

The number entered by the user appears on the left pane. The price appears in the field next to the **Calculate** button, and under **TotalPrice** on the left pane.

Calculating the price using an Excel Pricing model

1 In the **Copies** text box, enter the number of job copies to be delivered to the customer

2 Choose the **Excel Pricing** option from the **Pricing Model** drop-down menu. The **Excel File** link appears, together with the drop-down list, which enables the selection of the pricing file to be used by the system.



Notes:

1. All the files in the drop-down list can be edited. Use the **Edit** button to open and edit the Excel Pricing file selected in the list. The Edit operation creates a copy of the Excel Pricing file that is assigned to the specific job only.
2. Use the **Excel File** link for adding a new Excel Pricing file to the list.

3 Click the **Calculate** button.

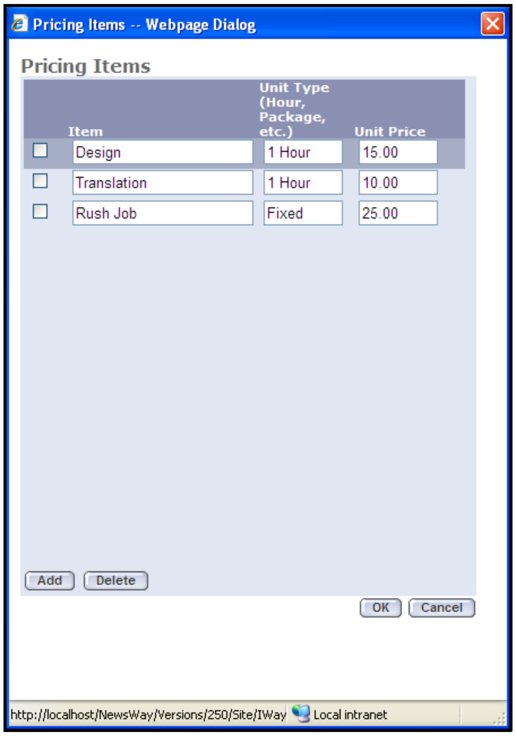
The calculated price appears in the field next to the button and under **TotalPrice**.

Additional price components

The *Additional Items* feature enables adding variables that are to be considered in the product pricing (such as pre-press time, graphic design time, special materials etc.)

1 In the ***Pricing*** window, select the required number of copies.

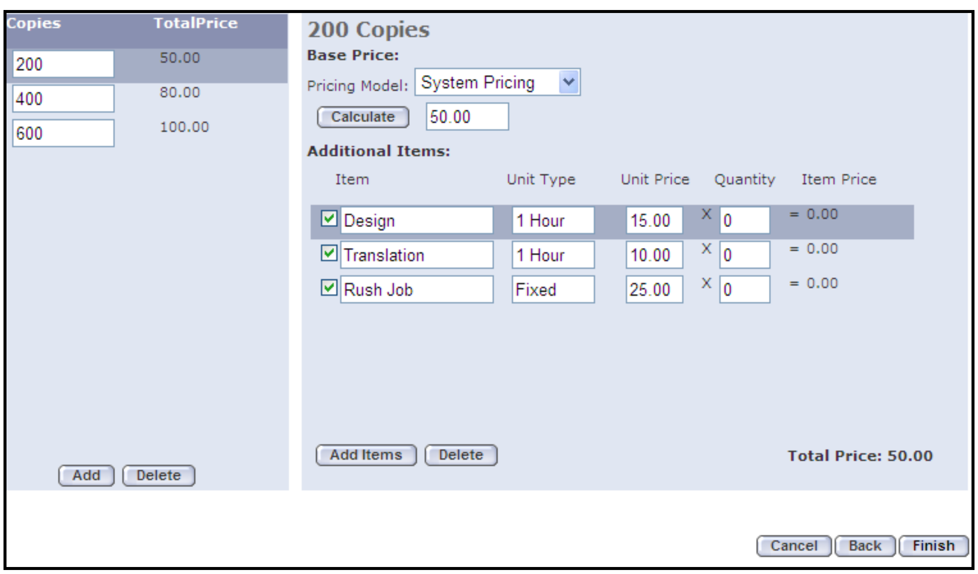
2 Click on **Add Items**; the ***Pricing Items*** dialog box appears.



3 To add a new pricing item to the list, click the **Add** button.

4 Enter the appropriate item name, type of unit and unit price.

5 Mark the check boxes of pricing items to be included in the total price for the selected number of copies and then click **OK**; the selected pricing items appear under **Additional Items**.

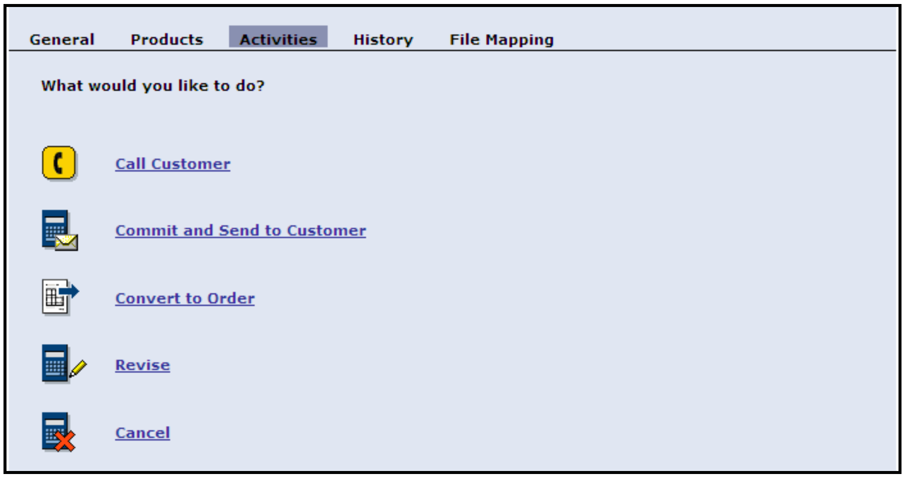


6 Enter the quantities for the additional price components and click somewhere in the window area.

The prices per quantities are calculated and appear in the **Item Price** column, and are included in the **Total Price** according to the specific number of copies they were defined for, at the lower right corner of the window.

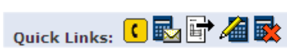
7 Click **Finish** to end the price calculation procedure and close the ***Pricing*** window.

Activities



The ***Activities*** page allows the user to call the customer, to commit a current quote, order or invoice, and to advance it to the next stage of processing, to revise a quote, order or invoice, to cancel a quote, order or invoice, and to mark an invoice as paid.

The **Quick Links** icons in the lower right corner of the screen are shortcuts to the enabled user activities:



Icon	Legend
	Call Customer
	Commit and Send to Customer
	Convert to Order
	Revise
	Cancel
	Mark as Paid

Note: The list of activities (and, accordingly, the number of icons) is different for different stages of the quote/order/invoice processing. For example, the **Revise** activity appears only after the quote/order/invoice is committed; the **Convert to Order** activity appears after a quote draft is converted into a quote, while the **Mark as Paid** activity appears only at the invoice stage.

Call Customer

Clicking the **Call Customer** link invokes the customer details needed in order to contact the customer.

The essence of the follow-up discussion with the customer can be documented in the **Quote Internal Note** text box.

In addition, the following functionality is provided:

- Changing the contact person or editing the contact person's details, using the **Contact Person** link.
- Setting up the **Next Follow-up** date, using the calendar icon.
- Saving the changes to the customer and quote details, using the **Save** button.

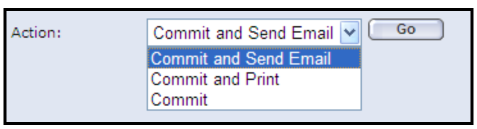
Commit and Send to Customer

This activity enables the user to commit quotes and proceed to the next stage in the processing cycle.

1 Click the **Commit and Send to Customer** link. The following dialog box opens.

This dialog box provides the following functionality:

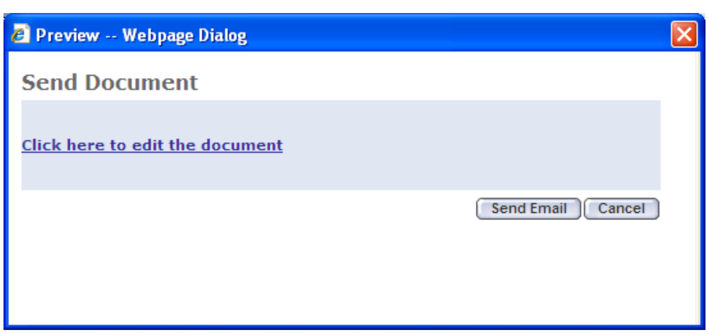
- Changing the contact person or editing the contact person's details
- Determining until which date the quote is valid
- Setting the next follow-up date
- Setting one of the following commit options:



2 Choose one of the commit actions and activate it by clicking the **Go** button.

Commit and Send Email

This action confirms the current document and advances it to the next processing stage. After choosing this action and clicking **Go**, the ***Send Document*** dialog box appears.



- **Send Email** - Sends the document in Word or PDF format, according to the settings.
- **Cancel** - Returns the current quote to draft without committing.

1 Click on the link in order to view the quote in the Word format.

A Word document opens.

2 Edit the Word document and **Save** the changes.

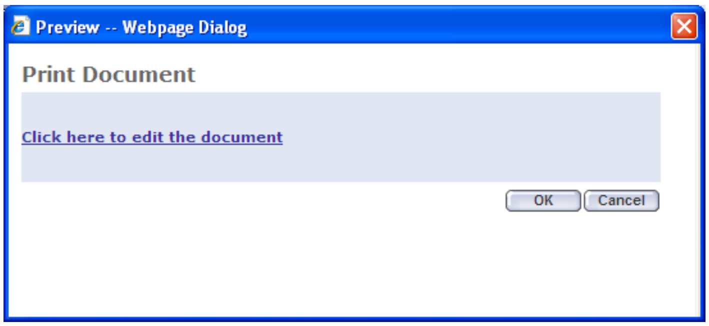
3 Close the document and click the **Send Email** button.

The quote is sent to the customer by email in Word format or is converted to PDF format and then sent. See *Format of sent documents* in the *Settings* section.

The customer can reply to the email message; the reply message will appear on the ***History*** page as an unread message. If the customer attaches files to the reply mail, they will be automatically attached to the quote. See *"File Mapping" on page 45* for information on how to map the attached files to a specific job.

Commit and Print

This action confirms the current document and advances it to the next processing stage. After choosing this action and clicking **Go**, the ***Print Document*** dialog box appears.



- **OK** - commits the quote.
- **Cancel** - returns the quote to the draft status without committing.

1 Click on the link in order to view the quote in the Word format.

The Word document opens.

2 Edit the Word document and **Save** the changes.

3 Print the document from Word.

4 Close the document and click the **OK** button.

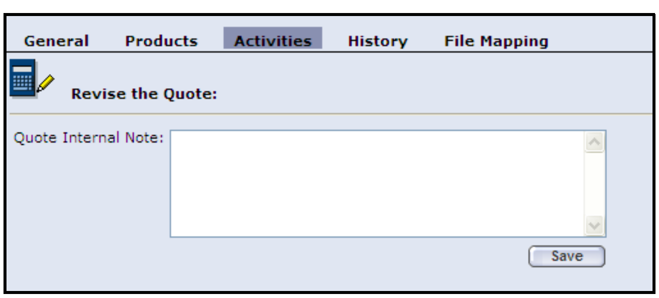
Commit

This action confirms the current document. After choosing this action and clicking **Go**, the quote advances it to the next processing stage. This is useful when there is no need to send a quote document to the customer.

Revise

This activity allows revising a committed quote that was not converted into an order yet.

1 Click on the **Revise** link. The following dialog box opens:



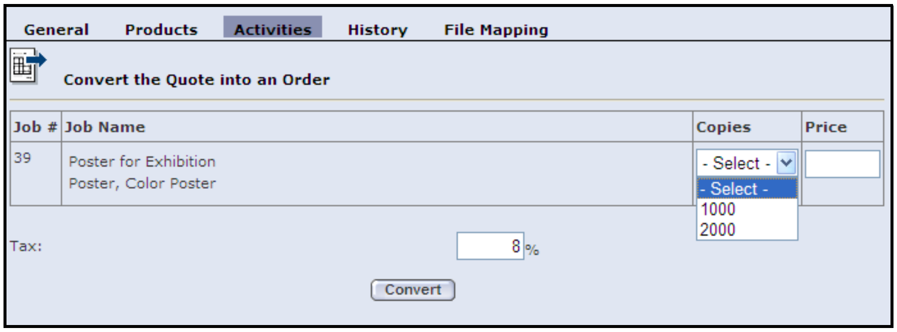
2 Type a note text in the **Quote Internal Note** field and click **Save**.

The revised quote returns one processing stage back to the draft mode.

Convert to order

This activity enables converting quotes into orders.

1 Click the **Convert to Order** link. The dialog box opens.



This dialog box displays the job details with a table composed of the following columns:

- **Job #** - The number of the job automatically assigned by the system.
- **Job Name** - The description of the job.
- **Copies** - Contains a dropdown box for the convenient adjustment of the number of copies.
- **Price** - Appears automatically after the number of copies is selected.

In addition, the **Tax** box is displayed for editing the tax rate for the entire order.

2 Choose the number of copies.

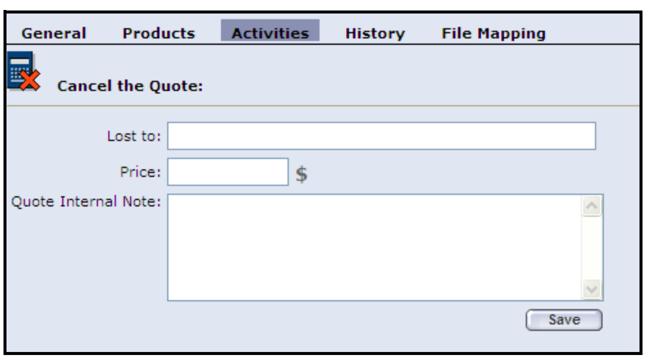
3 Click on the **Convert** button to activate the process of converting the quote into an order.

Note: A quote can ben converted into an order, innumerable times. This is useful if you need to create a new order from a quote that already exists in the system and was previously committed.

Cancel

This activity enables canceling and closing a quote/order that was not accepted by a customer.

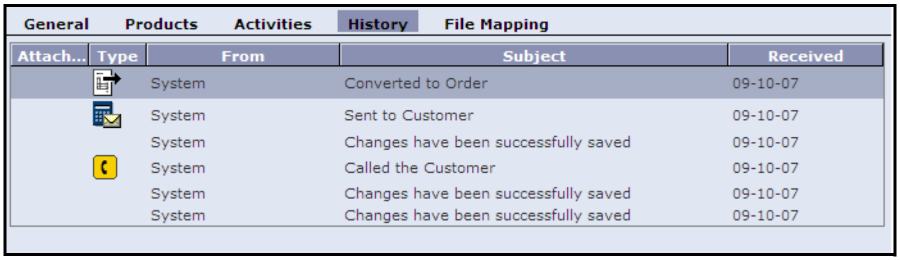
1 Click on the **Cancel** link. The dialog box opens.



The **Lost to** and **Price** text boxes allow the user to record the name of the competitor that won the job, and at what price. In addition, the user can write down, in the **Quote Internal Note** text box, any other remarks regarding the job.

2 Click **Save** to save the entered information.

History

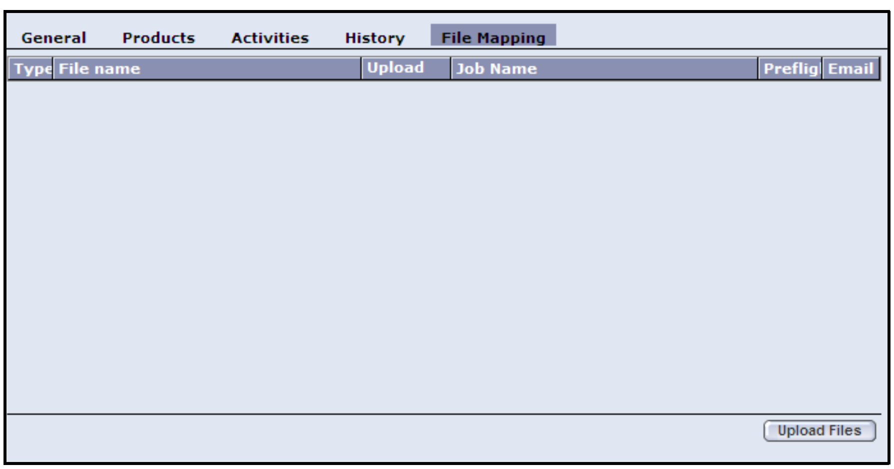


This page provides the user a record of the progressive stages of the quote/order selected in the list on the left pane, from quote to the current status.

The displayed information is arranged into the following columns:

- **Attachments** - Enables viewing the files attached to an event.
  - In the case a quote/order is committed and the document is printed or sent to the customer, the corresponding event is created and the document is attached to the event and can be opened for viewing.
  - In the case a file is attached to an email message, the file can be opened for viewing.
- **Type** - Type of event: it can be a user or system activity, displayed by the relevant icon where applicable.
- **From** - From where the event originated: it can be a system user or a customer
- **Subject** - The description of the event
- **Received** - Date of the event

File Mapping



This page allows the user to assign files received by email or uploaded, to specific jobs.

The **File Mapping** page displays the following information:

- **Type** - The type of file that was submitted by a customer or uploaded
- **File Name** - The name of the file
- **Upload** - The date that the file was uploaded to the system
- **Job Name** - The name of the job to which the file is assigned, or the status of the assignment

- **Preflight** - Indicates the status of the file after the Preflight operation:

 The file requires manual processing.

 The file will be automatically processed by the system.

 The system has encountered a Preflight error

- **Email** - If the file was submitted by email, an icon appears in this field. Double-clicking on this icon displays the email message content.

Mapping a file to a job

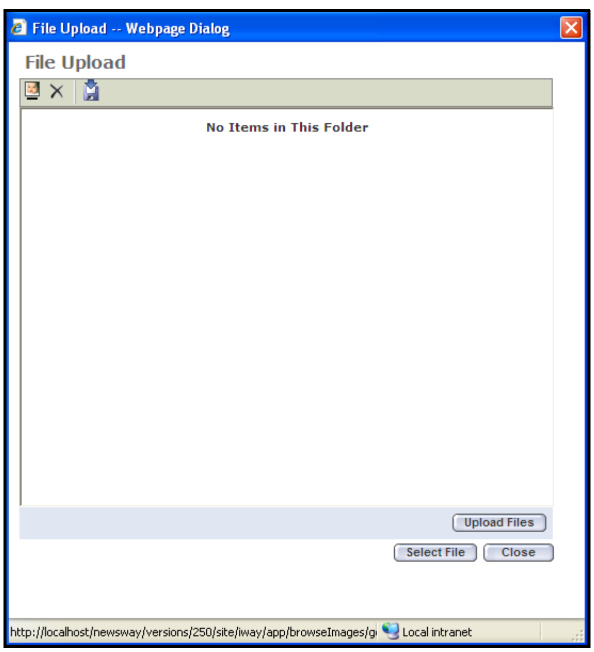
Files related to a job can be received from the customer by email or uploaded manually.

Files received by email from the customer are automatically uploaded to the list of files on the ***File Mapping*** page, if the customer replied to a quote email sent by the CSR.

Manual uploading

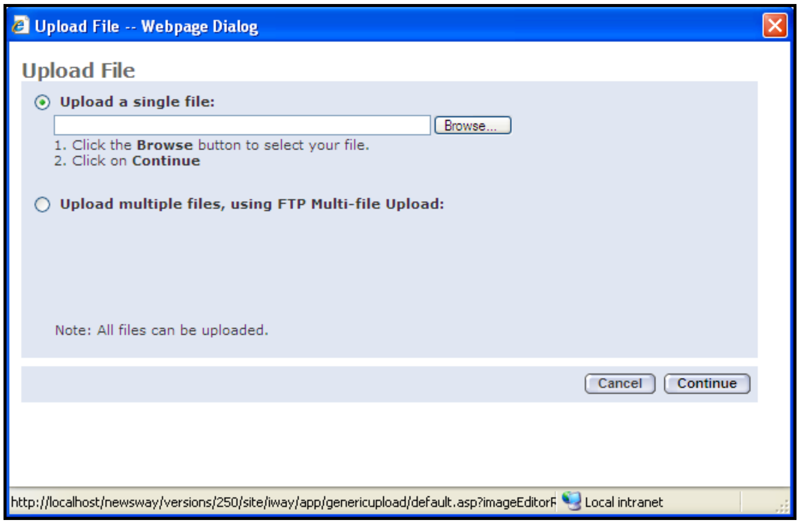
If there are files to be uploaded manually, proceed according to the following steps:

1 On the ***File Mapping*** page, click the **Upload Files** button in order to attach files to the job. The ***File Upload*** dialog box opens.



2 Click the **Upload Files** button again.

The ***Upload File*** dialog box appears.



3 To upload a single file, click the **Browse** button, and go to the required folder.

4 Select a file for upload and click **Open**. The ***Upload File*** dialog box opens again, with the path to the selected file.

5 Click **Continue**.

The **Upload Report** appears informing the user that the file has been uploaded.

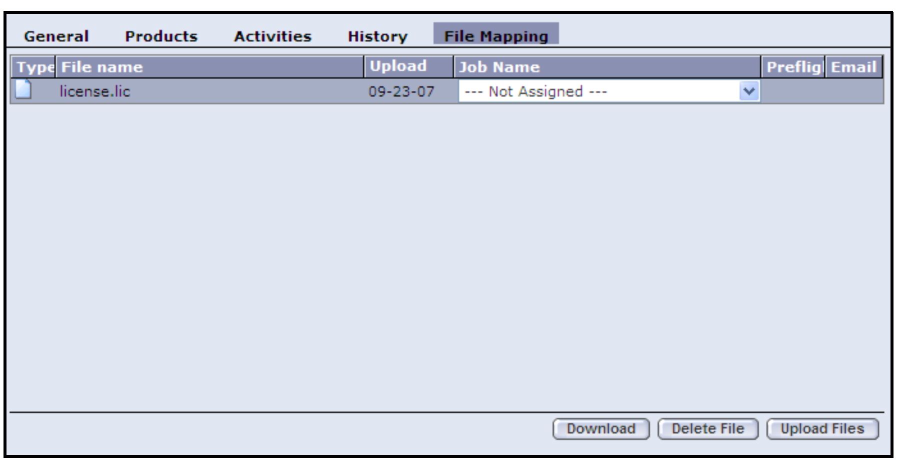
6 Click **Close**.

The uploaded file appears in the ***File Upload*** dialog box. Perform the same steps for each file to be added.

Note: There is an option to upload multiple files, using Multi-file upload. See *Print Provider Guide* for instructions

7 Click the **Close** button.

The files are added to the list of uploaded files in the ***File Mapping*** page, but not assigned yet to any specific job.



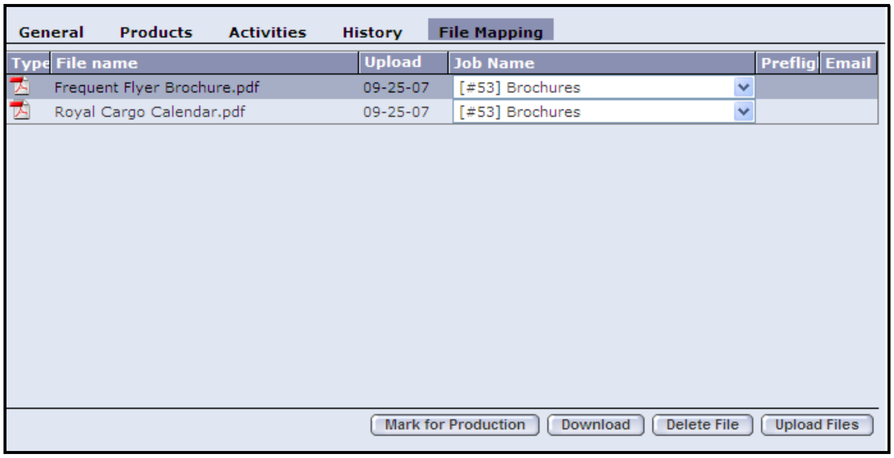
Additional control buttons appear on the page after uploading files:

- **Download** - Enables the download of files to any location.
- **Delete File** - Enables the deletion of files that have been uploaded.

Assigning files to a job

Every file displayed in the list, regardless the way it was uploaded, should be assigned to a specific job:

- Open the drop-down menu in the **Job Name** column and choose the job to which you need to assign the uploaded file.



The uploaded file is assigned to a specific job of the current quote/order.

An additional control button appears on the page after assigning a file to a job:

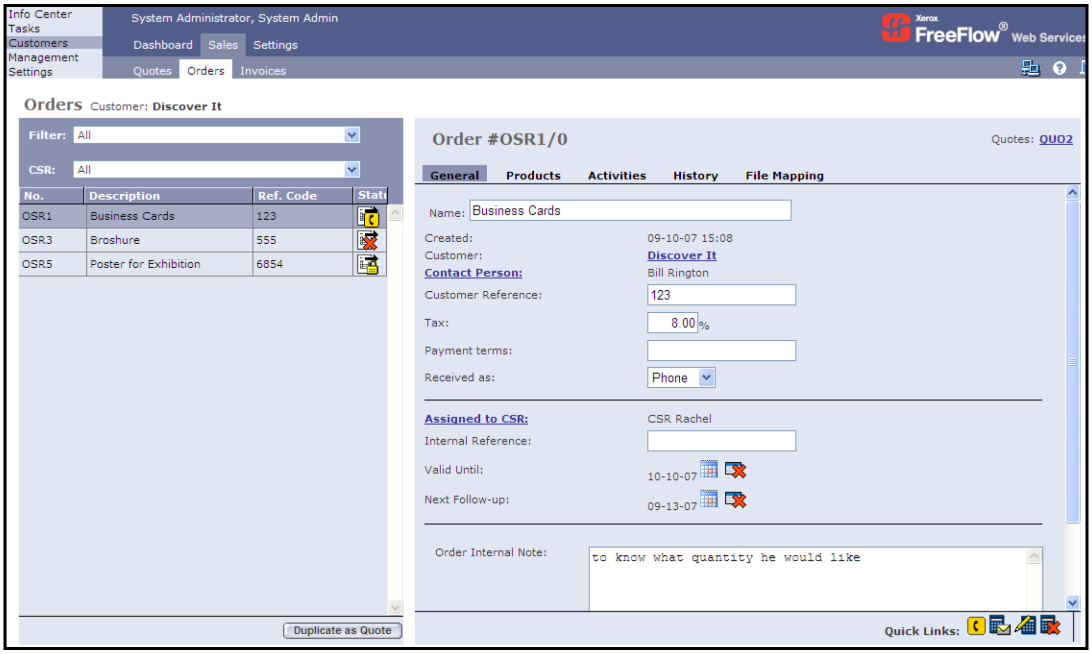
- **Mark for Production** - Activates the Preflight operation. The file is processed and marked as ready for production, which enables automatic printing after the conversion of the quote into an order.

Orders

An order is created by a CSR from a quote after the customer has viewed and accepted the quote and has decided which quantity to print for each quoted job. New orders cannot be created independently of a quote. Any order contains the same number of products that appeared in the quote from which it was originated. Each product in an order, however, has only one priced quantity. Any order can be edited until it is not committed.

1 Choose **Customers** from the top left corner menu.

2 Click the **Sales** tab and then the **Orders** tab. The ***Orders*** window opens.



This window provides a view of the orders in the system. The ***Orders*** window is designed exactly as the ***Quotes*** window. Refer to the *"Quotes" on page 29* for information about the window components.

The window is divided into two panes: the left pane displays a list of orders, the right pane displays the details of a selected order for viewing, editing and processing purposes.

List of orders pane

The left pane contains the following fields and controls:

- **Filtering** - Enables filtering the list of existing orders by status and by CSR. See *"Filtering the list" on page 31* for explanation.
- **List of orders** - Shows all or filtered orders with the description and status for each one. *See "Quote/ Order status" on page 26.*

Note: When the window opens, all "Open" orders that require CSR's attention are shown by default in the list. If there aren't orders in such status, the list can be empty.

- **Duplicate as Quote** - This button enables the creation of a new quote with the same parameters as the selected order.

Order details pane

On the right pane, the user works with the five pages:

- ***General*** - Allows the user to view and edit the general order parameters.
- ***Products*** - Enables the user to add necessary products to an order, to calculate the price, and to send jobs to the Production queue.
- ***Activities*** - Enables performance of the actions required to process the order.
- ***History*** - Displays the list of user operations for the specific order through all its stages, from quote until the current status.
- ***File Mapping*** - Allows the Print Provider to assign to a job the files received from a customer.

The quote from which the order was created is indicated in the top right corner of the pane.

The order details pane displays the details of the selected order for viewing, editing and processing purposes. When a quote is converted into an order, the order information comes by default from the quote. However, the user can edit any order parameter displayed on the ***General***, ***Products*** and ***File Mapping*** pages.

The ***General*** and ***Products*** pages of the ***Orders*** window contain additional functionality that does not appear on the same pages of the ***Quotes*** window.

General

There are two additional text boxes on the ***General*** page of the ***Orders*** window:

- **Tax** - Displays the tax on the order and allows the user to edit the value.
- **Payment Terms** - Allows entering short information on the terms of payment.

Notes:

1. The rest of fields and controls are described in the section *General* for Quotes on *page 32*.
2. Job # is the system-generated number of each specific job in an order. This number is different from the job numbers appear in the quote.

Products

The ***Products*** page of the ***Orders*** window for committed orders contains additional control buttons:

- **Send to Production** - Sends items to the production queue.
- **Send to Delivery** - Sends items to the delivery queue.

Note: In the latest software version the jobs are passed automatically to the production queue, so these buttons are not in use.

- **Job Ticket** - Opens the Job Ticket for viewing, editing and printing.

Note: The remaining fields and controls are described in the section *Products* for Quotes on *page 33*.

Activities

After committing an order, in addition to the change from draft status, the jobs are moved on to the next stage. All jobs are sent to the Production queue.

How to create a new quote and convert it to order

This section provides a brief description of the sales procedure beginning from the creation of a new quote and until converting it to an order and sending ordered jobs to production. This quick reference guide can help new CSR users to learn the *Order Center* features and capabilities and to understand the order processing workflow.

A new quote is created by the CSR, following a customer request for quotation. This request can be made by telephone, fax, email, etc.

1 In the left pane of the ***Quotes*** window click the **Create New** button. See the *Quotes* section on *page 29*.

A new Quote Draft opens in the right pane.

2 Enter all the necessary information on the ***General*** page. See the *General* section on *page 32*.

Note: When a new quote is created, the *Order Center* application automatically registers the time and date that the quote was created, and the logged-in Print Provider user is automatically designated as the assigned CSR.

3 Open the ***Products*** page and enter all the necessary information. See the *Products* section on *page 33*.

The new Quote Draft is completed.

4 Open the ***Activities*** page and choose an action to be taken. At this stage, you can call the customer, commit the quote draft or cancel it. See the *Activities* section on *page 40*.

5 Click on the **Commit and Send To Customer** link. See the *Commit and Send to Customer* section on *page 42*.

6 Choose an option from the **Action** drop-down menu and click the **Go** button.

The Quote Draft is committed and converted into a Quote.

7 Open again the ***Activities*** page.

At this stage you can call the customer, convert the quote into an order, or revise the quote, commit the changed quote and then convert it into an order.

8 Click on the **Convert to Order** link.

9 On the next screen, choose the number of copies and click on the **Convert** button.

Note: The options of the **Copies** drop-down menu are defined by the CSR on the ***Products*** page when the quote draft is created. The price is calculated automatically according to the selected number of copies.

The Quote is converted to an Order Draft.

10 In the ***Products*** page verify that the jobs, their quantity and prices are correct. Modify them if necessary.

11 In the ***Activities*** page click the **Commit and Send To Customer** link.

12 Choose an option from the **Action** drop-down menu and click the **Go** button.

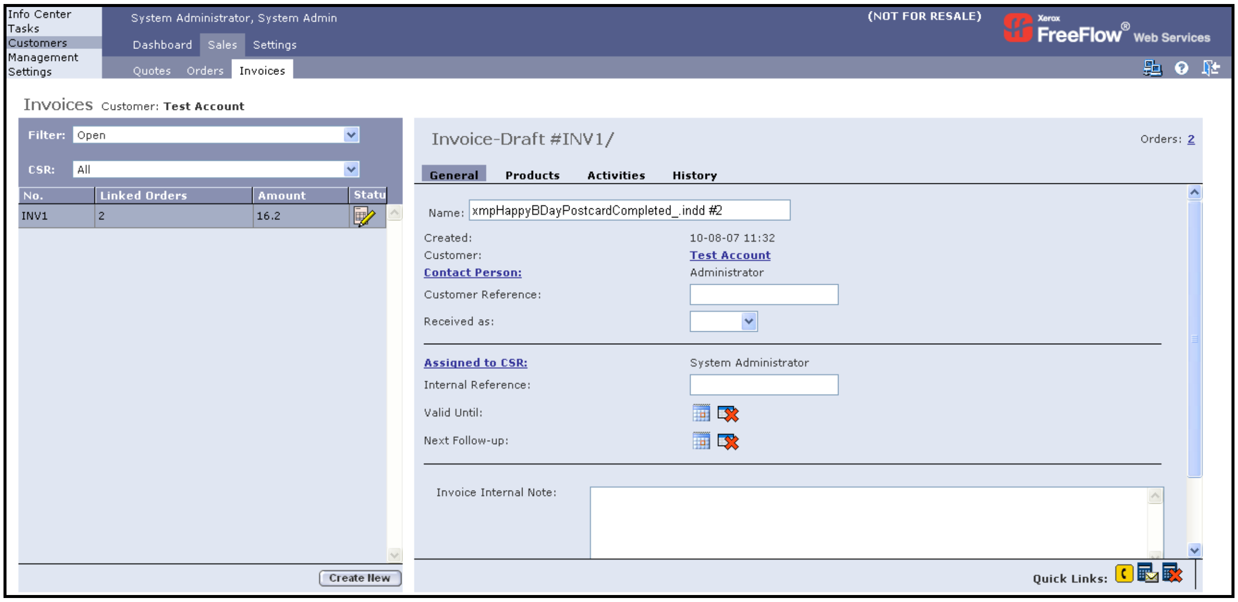
The Order Draft is committed and converted into an Order.

The jobs are passed automatically to the Production queue.

Invoices

1 Choose **Customers** from the top left corner menu.

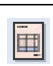
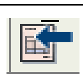
2 Click **Sales**, and then click **Invoices**.



This window provides a view of invoices for a specific customer in the system. The ***Invoices*** window is designed exactly as the ***Quotes*** window. Refer to the *"Quotes" on page 29* for information about the window components.

The window contains the following elements:

- **Invoice list pane** - Displays all or filtered invoices. The following icons indicate the status of the invoices in the list:

Icon	Name	Description
	Invoice-Released	The invoice has been submitted to the customer
	Invoice-Paid	Payment against the invoice has been submitted

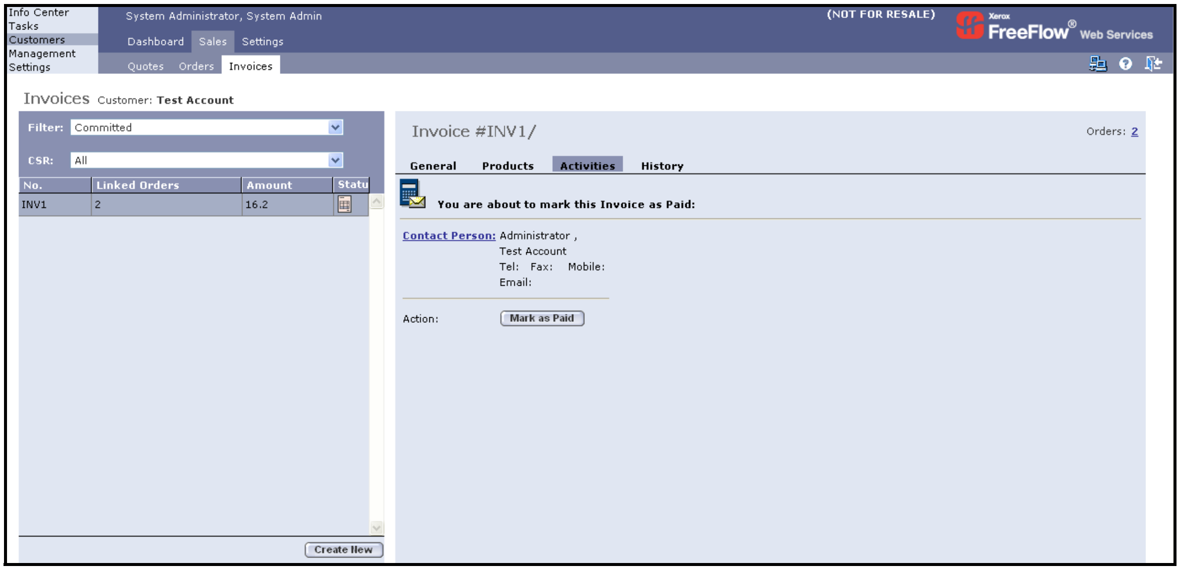
- **Details pane** - Displays the details of the selected invoice for viewing, editing and processing purposes. The orders included in the current invoice are indicated in the top right corner of the pane.
- **Create New button** - Enables creating a new invoice.

Notes:

1. For information about creating new invoices, see the *Creating a new invoice* section on *page 69* in this guide.
2. Invoices can be created for produced jobs, either before or after shipment. An invoice can contain several orders.

Mark an invoice as paid

1 Choose **Customers** from the top left corner menu and select a customer on the ***Dashboard***.
2 Go to the **Sales** tab in the ***Invoices*** window.
3 Filter the invoice list using the "Committed" criterion and locate the paid invoice.
4 Go to the ***Activities*** page and click on the **Mark as Paid** link.



5 Click the **Mark as Paid** button.
The details pane is displayed again. The Invoice is converted into a Paid Invoice.

Note: *Order Center* isn't an accounting system; so, for general ledger purposes it is necessary to enter the data into an accounting system.

Chapter 5: CSR Tasks

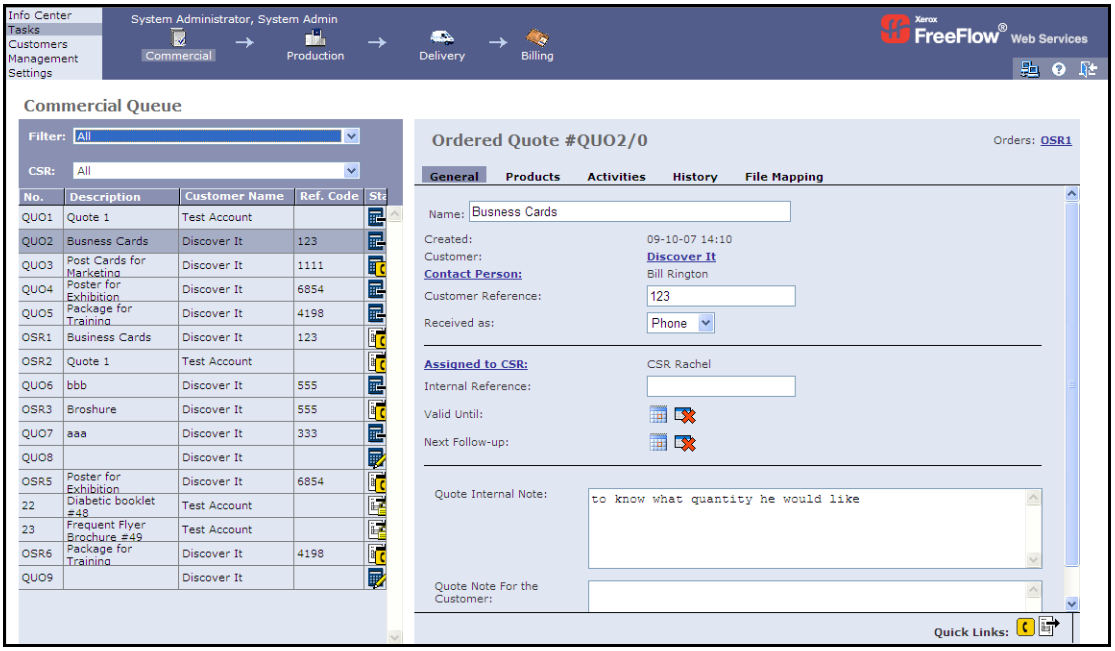
Tasks window

In addition to the **Production** and **Delivery** tabs, which are displayed in the Print Provider's interface and described in the corresponding sections of the *Print Provider Guide*, the following two tabs are added to the ***Tasks*** window after the *Order Center* installation:

- Commercial
- Billing

Commercial

- Choose **Tasks** from the top left corner menu and then click **Commercial**.



The ***Commercial*** window provides the CSR access to all the quotes and orders in the system and the ability to handle the tasks with "Open" status, with a due date of today or earlier. All open tasks for all customers and all CSRs are displayed automatically when you open the window.

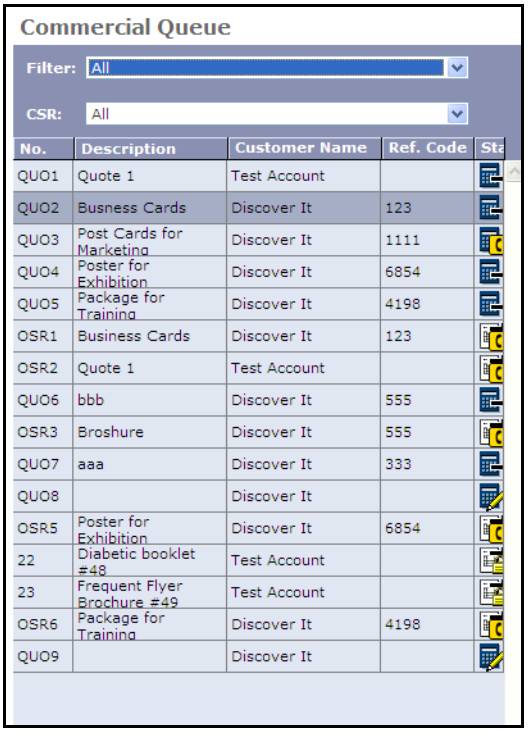
The window provides a filtering system that enables the display of the quotes and orders according to specified criteria or according to the responsible CSR.

The ***Commercial*** window displays by default all quotes and orders in "Open" status. "Open" status covers the "Follow-up", "Expired", "Drafts" or "Unread" statuses. The user can filter displayed items by each one of the mentioned statuses.

The ***Commercial*** window comprises the ***Commercial Queue*** and the details pane.

Commercial Queue

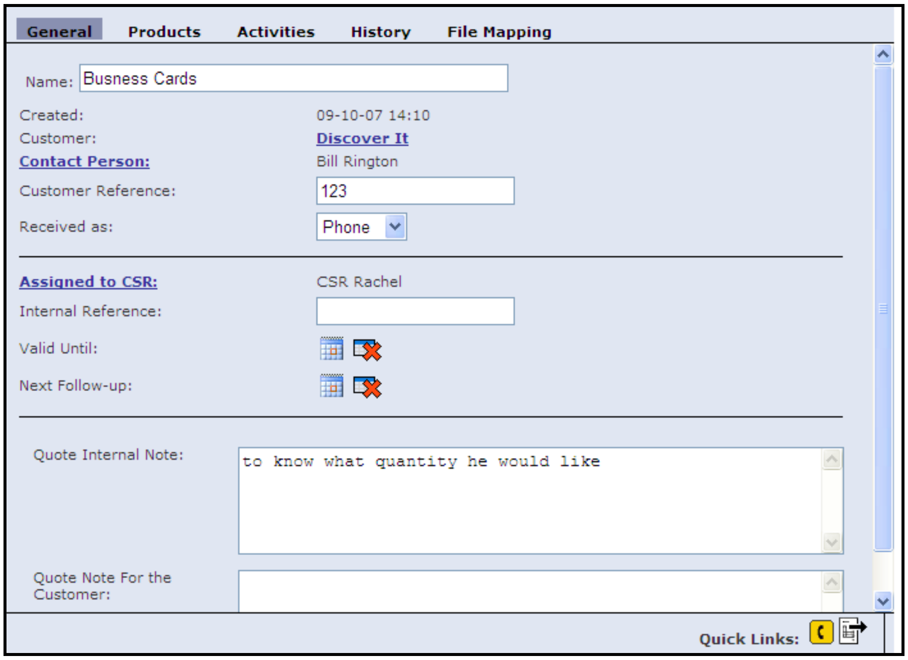
When a quote or order is selected in the ***Commercial Queue***, all relevant details and parameters are displayed in the adjacent details pane.



The information in the list is presented in the following columns:

- **No.** - System-generated identifier for the easy identification and reference of the quote/order
- **Description** - Description of the quote or order
- **Customer Name** - Name of the customer associated with the quote or order
- **Reference Code** - Customer-generated, used for locating the quotes and orders
- **Status** - The current status of the quotes and orders
- **Filtering engine** - The filtering criteria are described in the *Filtering the list* section on *page 31*.

Details pane



The details pane displays all the details and parameters of the quote or order selected in the ***Commercial Queue*** and enables processing the quotes and orders.

The details pane contains the following pages:

- ***General*** - Allows the user to view and edit the general quote/order parameters.
- ***Products*** - Enables the user to add necessary products to an order, calculate the price, and send jobs to the Production queue.
- ***Activities*** - Enables performing the actions required for processing the order.
- ***History*** - Displays the list of user operations for the specific order through all the stages from quote until the current status.
- ***File Mapping*** - Allows the Print Provider to assign to a job the files received from a customer.

Note: The functionality of these pages is the same as in the ***Quotes*** and ***Orders*** window, depending on the quote/order status. Refer to the *Quotes* section on *page 29* and to the *Orders* section on *page 49* for information about the corresponding window components.

Production and Delivery

When an order has been committed, its jobs are forwarded to the **Production** queue. If a job is a printable job, it is printed or outsourced and forwarded to the **Delivery** queue. If a job is a non-printable job, it can be outsourced or forwarded to the **Delivery** queue.

Notes:

1. For a detailed description of the ***Production*** and ***Delivery*** windows, see the *Print Provider Guide, Chapter 4: Tasks*.
2. Production and Delivery can be handled by users assigned any of the privilege levels.

Production

- Choose **Tasks** from the top left corner menu and then click **Production**.

The ***Production*** window allows the Design/Production personnel to see all jobs waiting for design/ production.

When the user commits an order, the order jobs automatically enter the ***Approval Queue***. In the queue, the jobs are displayed chronologically, by order of arrival. The details of the job selected in the ***Approval Queue*** are displayed in the ***Job Info*** pane.

The following controls are available at this stage of order processing:

- **Job Ticket** - Accesses the ***Job Ticket*** window, where the Job Ticket can be viewed, edited and printed.
- **Edit Imposition** - Allows the user to alter the various job imposition parameters.
- **Outsource** - A feature that enables the user to outsource specific jobs to partner Print Providers.
- **Layout Maker** - Enables the user to impose more than one job on a press sheet, in order to reduce production costs.
- **Approve** - Transfers the job to the assigned output device according to the job type. Moves the job from the approval queue to the Printing queue and to the Delivery queue.

- **Approve Order** checkbox - A feature that allows the user to approve an order containing several jobs. When the user selects a job, selects this checkbox and then clicks **Approve**, the approval is applied to all the jobs that are in the same order.
- **Imposition** - Enables the user to preview the imposed job.
- **Note** - Accesses the ***Edit Note*** dialog box for editing internal notes as well as notes for the customer.
- **Info Message** - Accesses the ***Job Report*** dialog box, which displays the font types in use in the PDF Preview and in the Imposition Proof.
- **Preflight** - Accesses the ***File Upload Report***, which provides the user the ability to examine the PDF file parameters before processing the job.
- **Attachments** - Reports the number of attached files and accesses the ***Attachments*** dialog box, which enables uploading and downloading files. See the explanation in the *Approval for printing* section below.

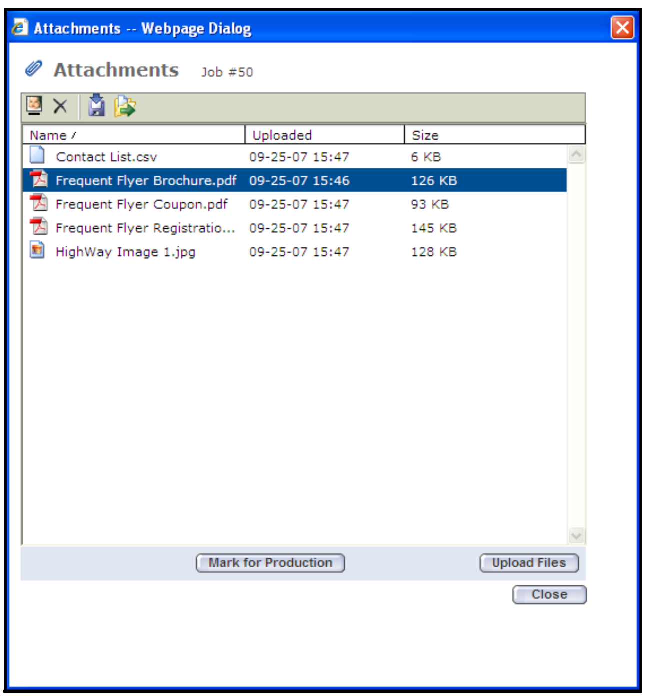
Note: Where there is any problem, the **Problem** link appears. Clicking on this link opens the ***Job Report*** dialog box that provides a platform for displaying messages that can explain system warnings.

Approval for printing

Prior to the approval of a job for printing, all the necessary files have to be attached to the job and all the necessary design changes have to be performed to the attached files.

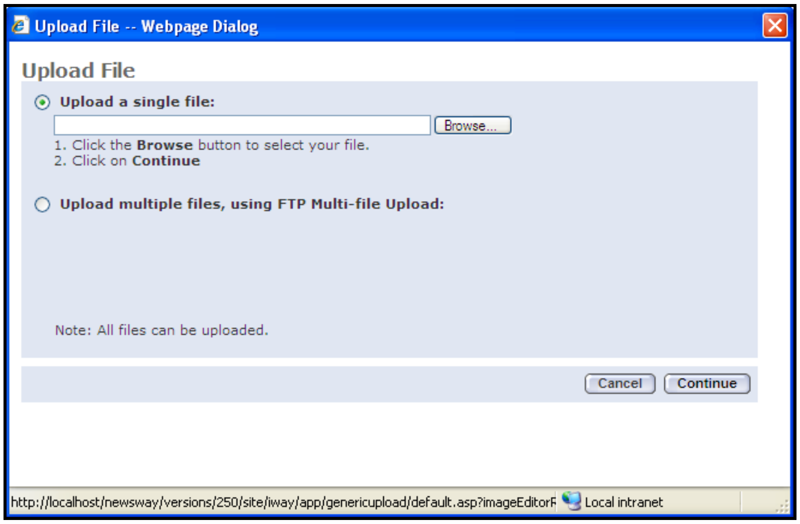
1 Select a job in the ***Approval Queue*** and click on the **Attachments** link on the ***Job Info*** pane.

The ***Attachments*** dialog box opens.



2 Click the **Upload files** button in order to attach the required files to the selected job.

The ***Upload File*** dialog box appears.



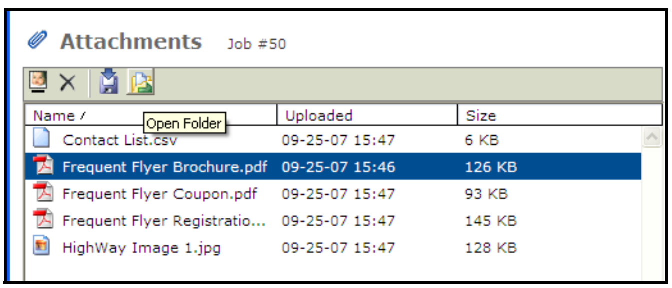
3 To upload a single file, click the **Browse** button, and go to the required location.

4 Select a file for upload and click **Open**. The ***Upload File*** dialog box opens again, with the path to the selected file.

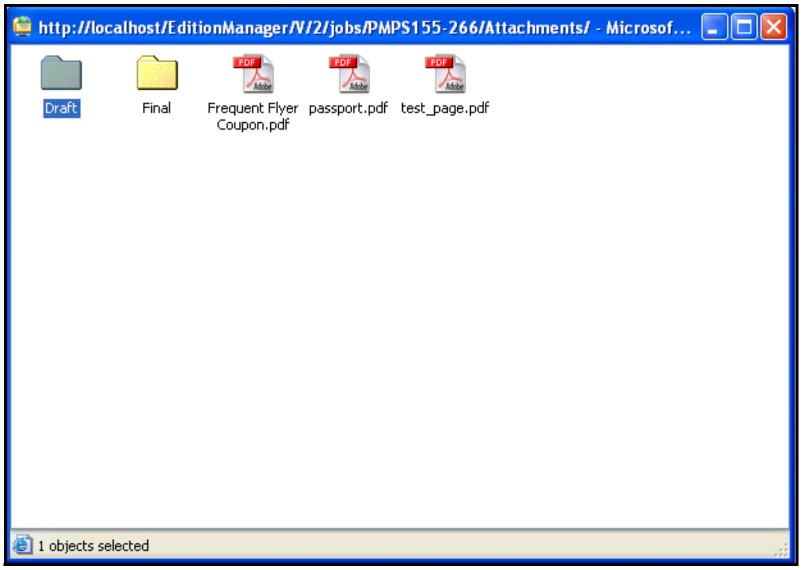
5 Click **Continue**. The **Upload Report** appears informing the user that the file has been uploaded.

6 Click **Close**. The uploaded file appears in the ***Attachments*** dialog box.

7 Perform the same steps for each file to be added, or use the *Open Folder* feature to add multiple files.



8 Click the **Open Folder** icon on the toolbar of the ***Attachments*** dialog box in order to open the folder containing the files that are attached to the selected job.



The files in this folder are attached to the job and can be viewed and changed at any time. The files can be copied to any other location or placed in any folder, using standard Windows Explorer procedures. This is useful if any design changes have to be made to the attached files.

9 Close the folder in order to return to the ***Attachments*** dialog box.

10 Click **Close**. Click on the **Attachments** link in the ***Job Info*** pane to open the dialog box again. Now all the changes you made reflect in the ***Attachments*** dialog box.

11 Select a file and click **Mark for Production**. The Preflight operation is activated. The file is processed and marked as ready for production, which enables the automatic printing of the file.

12 Re-impose the job if necessary (see *Edit Imposition* in the *Print Provider Guide*).

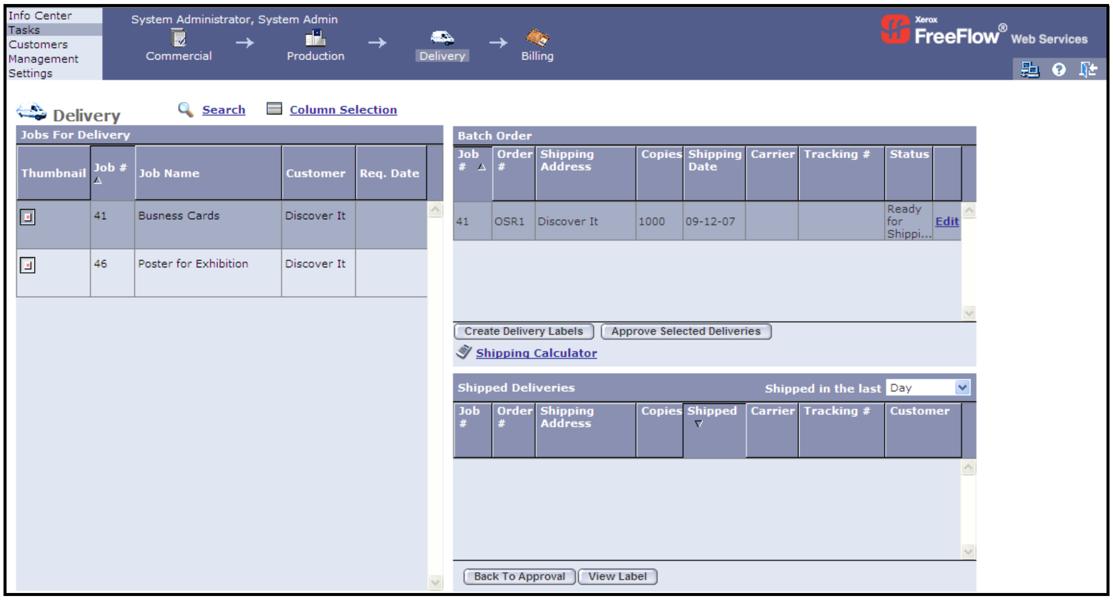
13 Approve the job for printing by clicking the **Approve** button.

The job is printed and ready for delivery.

Note: Attaching files to the job is not mandatory, however it is recommended in order to keep all job's info and digital media in one location.

Delivery

- Choose **Tasks** from the top left corner menu and then click **Delivery**.



The ***Delivery*** window allows the Dispatch personnel to see all jobs waiting for delivery.

The ***Delivery*** window options enable handling the Print Provider's delivery desk. From this window, the user prints shipping labels and then approves the printed jobs for shipping.

The window is composed of the following components:

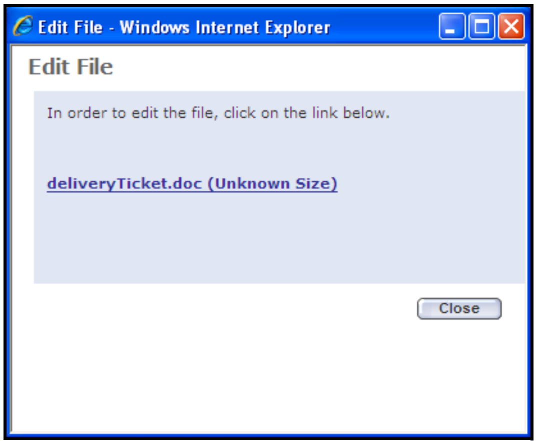
- **Jobs for Delivery** - Displays the jobs that have been transferred to the output device, printed and are waiting to be delivered.
- **Batch Order** - Shows all the jobs in the same order.
- **Shipped Deliveries** - Displays the jobs that have been shipped to the customers.
- **Search** - Enables a narrowed search scope by simultaneously running up to three search criteria.
- **Column Selection** - Enables the user to add or remove the viewable columns in the **Jobs for Delivery** pane.

Delivery approval

In order to label an ordered package, carry out the following steps:

1. Make sure that the relevant jobs are selected in the **Batch Order** list.
2. Click the **Create Delivery Labels** button.

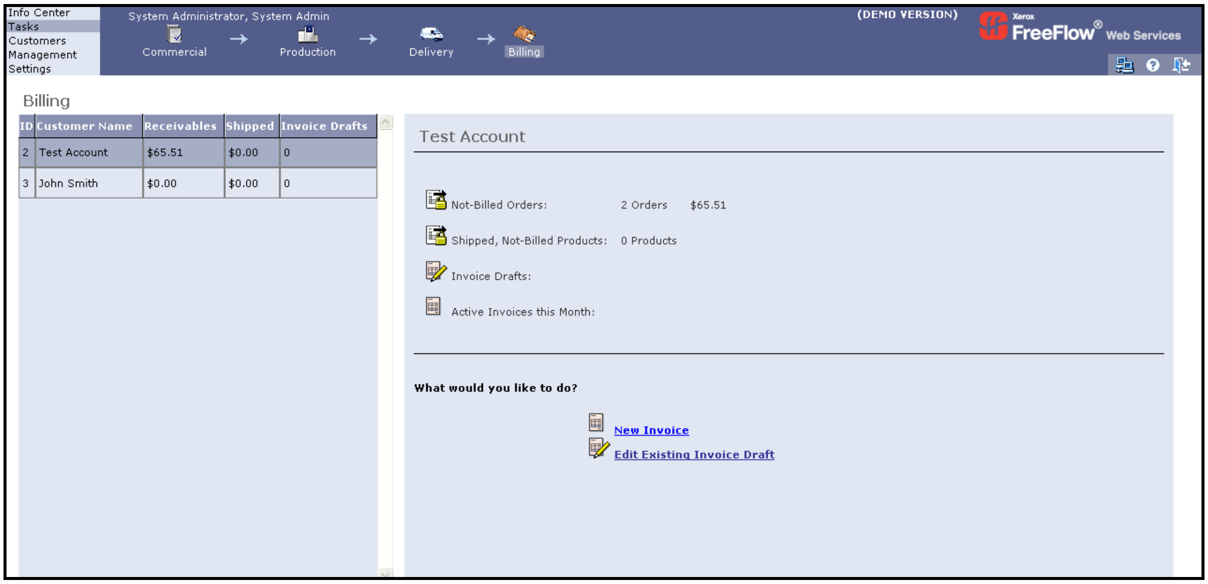
   The ***Edit File*** dialog box opens.



3. Click on the link and verify that the label information is correct, and then click **Print**.
4. Click **Approve Selected Deliveries**. The job is removed from the **Jobs for Delivery** panel and appears in the **Shipped Deliveries** pane.

Billing

Choose **Tasks** from the top left corner menu and then click **Billing**.

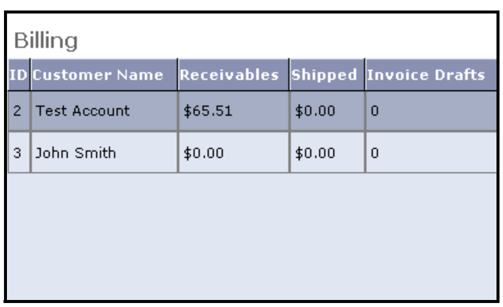


The ***Billing*** window provides the user an on-going summary of the billing for the customers.

The window is divided into the following two elements:

- **Customer list pane** - Contains a list of all billed customers.
- **Customer accounting** - Displays accounting statistics and allows creation of new invoices.

Customer list pane



The customer list pane displays the list of customers with an outstanding balance (orders that are not billed yet).

The pane is divided into the following columns:

- **ID** - System-generated customer identifier
- **Customer Name** - The name of the customer
- **Receivables** - The pending amount of unsettled transaction owed to the Print Provider
- **Shipped** - The pending amount of unsettled shipped jobs only, from among the receivables
- **Invoice Drafts** - Number of invoices still in draft mode

Customer accounting

The account details pane displays the following summaries for the selected customer:

- **Not-Billed Orders** - Orders not yet billed, quantity and amount
- **Shipped, Not-Billed Products** - Products shipped but not yet billed, quantity and amount.
- **Invoice Drafts** - Invoices still in draft mode
- **Active Invoices this Month** - Invoices submitted this month that have not yet been paid

In addition, the account details pane enables the following activities:

- Creating a new invoice
- Editing an existing invoice draft

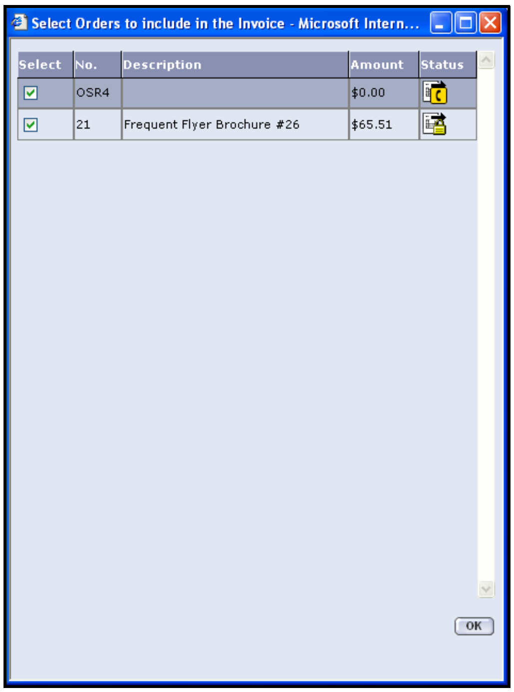
Creating a new invoice

1 Select a customer in the customer list pane.

2 Click on the **New Invoice** link.

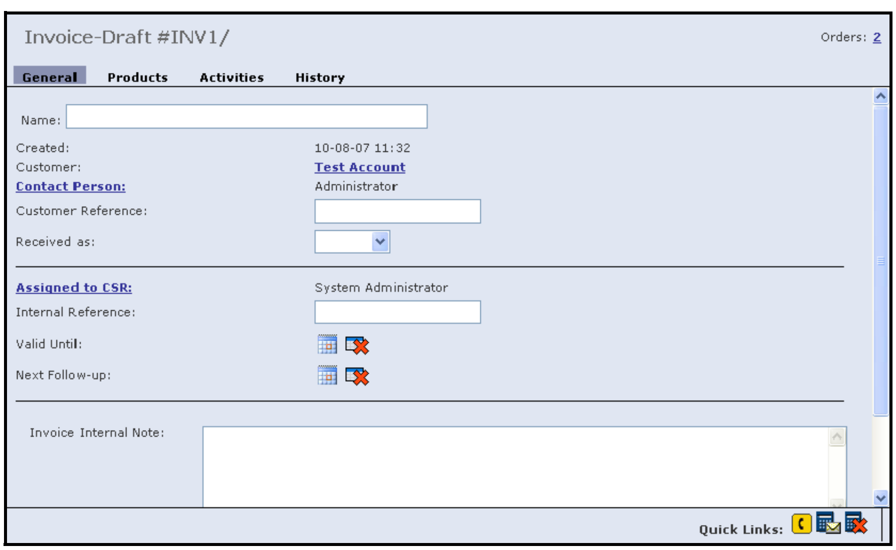
> ***Note:*** Invoices can be created for produced jobs, either prior or following shipment. An invoice can contain several orders.

The following dialog box appears that allows the user to select the orders to be included in the new invoice:



3 Mark the check boxes of the orders to be included in the new invoice.

4 Click **OK**; the new Invoice Draft appears, in the details pane on the right.



Note: See the *"Quote details pane" on page 32* for a detailed description of the details pane.

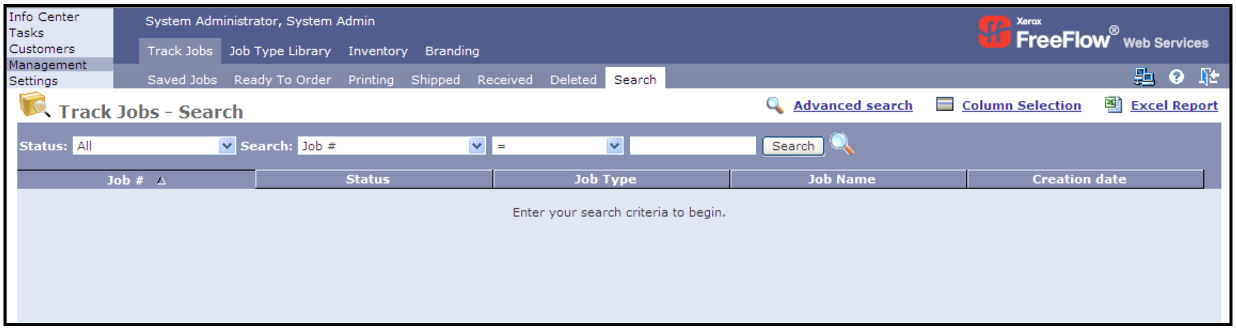
The account details pane contains four pages:

- ***General*** - Allows the user to set the general invoice parameters (see illustration above).
- ***Products*** - Enables the user to view all the jobs included in the specific invoice.
- ***Activities*** - Enables performing the actions required for processing the invoice.

  Use the **Commit and Send to Customer** activity to approve the invoice draft and advance it to the next step of processing. After committing, the details pane is replaced with the customer accounting view.
- ***History*** - Provides the user a record of the invoice processing stages.

Chapter 6: Track Jobs

Choose **Management** from the top left corner menu; click the **Track Jobs** tab and then the **Search** tab.



This window provides the *Order Center* users the ability to search for ordered jobs according to various criteria.

The ***Track Jobs - Search*** window is composed of the following elements:

- **Status dropdown menu** - A menu of status options
- **Search dropdown menu** - A menu of "search by" options
- **Command dropdown menu** - A menu of search commands that enable comparison options for numbers and text searches.
- **Search For text box** - Used for manually entering a search criterion (a number, letter or word)
- **Search button** - Carries out the search procedure according to the search criteria

  See the *Print Provider Guide, Chapter: 5, Management* for a detailed description of the search options.
- **Advanced Search link** - Enables additional search options.
- **Column Selection link** - Allows the selection of the information to be displayed in the search results table.

  When the *Order Center* software is installed, a number of additional columns are available for selection, and a number of additional criteria are available for search:
  - Assigned CSR First Name
  - Assigned CSR Last Name
  - Order Customer Reference
  - Order Internal Reference
  - Order Received As

  To search for *Order Center* orders/jobs:
  1. Choose **All** from the **Status** dropdown menu.
  2. Choose **Assigned CSR First Name** or **Assigned CSR Last Name** from the **Search** dropdown menu.
  3. Choose <> from the **Command** dropdown menu.
  4. Verify that the **Search For** text box is empty.
  5. Click the **Search** button.
- **Excel Report link** - Allows the user to export the search results to an Excel file. This feature is useful for reporting and statistics purposes.

  To create an Excel report:
  1. Click on the **Excel Report** link.
  2. Mark the corresponding check boxes for data to be included in the report.
  3. Click the **Create Excel Report** button.

  See *Print Provider Guide, Chapter 5, Excel Report* section for further information about this procedure.

If the **Production Parameters** check box was selected, the data related to the consumables of each job is included in the report. This is useful for forecasting the consumption of material for the time period previously selected in the search criteria.

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