Web Services Order Center

User Guide

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1

Getting Started

The *Web Services Order Center User Guide* provides the information and instructions you need to set up and use Web Services Order Center at your site.

Web Services Order Center is an add-on product to FreeFlow Web Services. Whereas FreeFlow Web Services enables receiving and processing orders that enter the print service provider's system via the web, Web Services Order Center enables processing all off-line communication/business interactions received by the print service provider through such means as the fax, phone, email or from a "walk-in" customer.

Once the Print Service Provider has received a request for quotation, Web Services Order Center enables the Print Service Provider to create a quote, and it records all the interactions with the customer regarding this quote. After the Print Buyer has accepted the quote, the Print Service Provider can convert this quote into an order. When the order has been completed, the Print Service Provider can close the sales cycle by issuing an invoice and a receipt. The process is automated and efficient. The CSRs can view account and job statuses, handle all tasks, and issue reports, on a daily basis. And the built-in follow-up mechanism allows better customer service and helps the Print Service Provider's sales.

Web Services Order Center also provides a mechanism for the Print Service Provider to handle quick sales—sales that do not involve quotes or approvals—such as sales of stock from the shelves to walk-in customers.

In addition to the pricing calculation models provided by FreeFlow Web Services, Web Services Order Center provides production pricing calculation models. Instead of defining an overall cost for an intent joblet (for example, cutting), production pricing allows you to define the costs and prices for each part of the production process, such as setup time and labor charges, cutting charges, waste charges (for the cutting process, for example).

Web Services Order Center uses a single database for all quotes, orders and billing documents, and customer contact information.

Where To Go From Here

The *Web Services Order Center User Guide* is a procedural guide that guides you through the procedures and steps you perform to effectively use Web Services Order Center.

> Before using this guide, ensure that you have installed and configured the Web Services Order Center add-on product as described in the *FreeFlow Web Services Installation Guide.*

Once Web Services Order Center has been installed, proceed as follows:

1 Set up your system for Web Services Order Center use. For instructions, see Section 2 Setting Up The System.

2 To create quotes and orders, and perform quick sales, see Section 3 Handling Sales.

3 To handling billing and invoicing, see Section 4 Handling Invoicing and Billing.

4 To manage your business and production, Section 5 Managing Your Business And Production.

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Setting Up The System

Before using Web Services Order Center, you must appropriately set up your system. This chapter explains how to set up your system. Part of this set up applies to FreeFlow Web Services, and part of this setup is unique to Web Services Order Center. Before setting up your system, you should ensure that Web Services Order Center software is enabled.

This chapter provides instructions for performing the following tasks:

- Setting FreeFlow Web Services Definitions For Web Services Order Center Usage
- Performing Basic Web Services Order Center Setup
- Implementing Production Pricing

Setting FreeFlow Web Services Definitions For Web Services Order Center Usage

Ensure you establish the following FreeFlow Web Services settings and definitions to enable effective use of Web Services Order Center. These are regular FreeFlow Web Services tasks. For instructions on performing these tasks, see the *FreeFlow Web Services Print Provider Guide.*

- **Create and configure a dedicated Web Services Order Center email account**

  For instructions, see the *Installation Guide.*

- **Define a user for each customer service representative (and define Manager Advanced users)**

  You must define a user for each customer service representative (**System Setup > Users**). You can assign each CSR a System Admin, Manager, or Manager Advanced user type.

  The Manager Advanced user type is available only with Web Services Order Center. It provides the same privileges as Manager but also allows the user to create and edit credit notes, and cancel receipts (see Section 4). System Admin users can also create and edit credit notes and cancel receipts. but have more extensive privileges.

  You can assign the Manager Advanced user type to any appropriate user. It need not be a CSR.

  > Ensure that Office 2003 (or higher) is installed on each CSR's work station.

- **Configure CSR email forwarding to the Web Services Order Center email account**

  Each CSR must have an email account, and you must set up the accounts so that emails are forwarded to the Web Services Order Center email account. (You must also perform this any time you add a CSR user for Web Services Order Center.) For instructions, see the *Installation Guide.*

- **Set up the format of emailed documents**

  You can ensure that Word documents are converted to PDF format. For instructions, see the *Installation Guide.*

- **Define needed accounts and account group settings**.

  To set-up new accounts and manage existing ones, choose **Accounts > Account Setup**.

  - Define at least one user for each account (**Accounts > Account Setup > Users**).
  - You can also add **Account Manager** and **Sales Person** custom fields to account's details (make these fields visible in **System Setup > Advanced Customized Fields**; they will then be visible in **Accounts > Account Setup > General Info**).

  To manage account groups, choose **System Setup > Advanced > Account Groups**.

■ **Define Job Expiration**.

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

■ **Adjust Custom Fields in Offline Order Information (Optional)**

By default, the system uses the default fields for entering and displaying order information. If custom fields that were defined under System Setup (**System Setup > Advanced > Customized fields**) need to be changed for a specific account, do this in **Accounts > Account Setup > Customized Fields**.

Performing Basic Web Services Order Center Setup

After enabling the Web Services Order Center software, you must define the a number of settings, as described in the following topics:

■ Define Invoice Setting
■ Define Banks and Credit Card Lists
■ Define Quick Sale Settings
■ Modify Follow-up and Validity Periods for Quotes and Orders (Optional)
■ Customize Document Numbering (Optional)

Define Invoice Setting

1 Select **System Setup > Advanced > Billing**. The **Billing** tab is displayed.

2 To allow automatic creation of invoices and receipts for online orders with online payment select the **Create an Invoice and Receipt for Web created orders with online payment** check box. (To disable automatic Invoice and Receipt generation, clear the check box.)

3 To issue invoices to a parent account instead of the account that generated an order, select the **Allow issuing invoice for parent account** check box. (To enable the user to issue an invoice to the selected account only, clear the check box.)

4 Click **Save**.

Define Banks and Credit Card Lists

Use the **Billing** window in the System Setup, you can define the list of banks from which you accept checks and a list of credit cards which you accept. These lists are used to select the name of the bank or credit card in the registration of the payment.

1   Select **System Setup › Advanced › Billing**. The **Billing** tab is displayed.

2   To add a bank or credit card

    a   Click **Add** under the list. An empty row is added to the list.

    b   Type in the bank or credit card name.

3   To remove a bank or credit card, select the bank or credit card and click **Remove**.

4   When you are done, click **Save**.

Define Quick Sale Settings

Using the **Quick Sale** window in the System Setup, you can define numbering, pricing, printer, and cash drawer setting for the **Quick Sale** feature.

1   Select **System Setup > Advanced > Quick Sale**. The **Quick Sale** tab is displayed.

2   To combine the prefix and counter of quick-sale receipts with standard receipts, select the **Use Billing Receipt numbering** check box. The **POS Receipt prefix** and **Starting Number** fields are disabled.

3   To select the default discount line item for the quick sale, click **Select Item**, and in the opened **Select Item** dialog box, select the item and click **OK**.

4   In the **Receipt Printer Path** field, type the path for the receipt printer.

5   Define the cash drawer information.

    a   Type the path for the cash drawer in the **Cash Drawer Path** field.

    b   Type the code that will be used to open the cash drawer in the **Cash Drawer Code** field. (This value is provided by Professional Services.)

    c   Select **Parallel** or **Serial** from the **Cash Drawer Link** options. (This is part of the implementation between FreeFlow Web Services and the Cash Drawer. Contact the distributor for more details about implementation.)

6   Click **Save**.

Modify Follow-up and Validity Periods for Quotes and Orders (Optional)

Set the follow-up and validity time periods for quotes (and orders).

1   Select **System Setup › Advanced › CRM**.

2   In the **Default Follow up** field, type the default time period by which follow-up is expected. Default: 3 days.

3   In the **Default Valid until** field, type the time period after which the quote is no longer considered valid. Default: 30 days

4   Click **Save**.

> You can change the dates for any specific quote in the **General** page of the Quote detail. When the quote is converted to an order, the order dates are reset regardless of what was set in quote.

Customize Document Numbering (Optional)

All Quote, order and billing documents are numbered. These numbers are used to identify the objects in the system and the documents that are sent to the customers at different stages of the order processing.

Each document number has an alphabetic prefix that indicates the document type (for example, QUO for quotes); the system is supplied with appropriate prefixes. Different document types are numbered independently of each other.

You can customize the prefixes and the starting number of each counter. You can also decide to use the same counter for several objects, according to system limitations. such changes are optional. Table 1 on page 9 indicates the default numbering prefixes, and other numbering options.

To customize document numbering

1   Select **System Setup > Advanced > Numbering**. This displays the Numbering window.

Figure 1: Numbering window

2   Modify the prefixes in each of the prefix fields, if required.

3   Change the starting numbers for each of the objects in the **Starting Number** fields, if required.

4   To separate the prefix and numbering of web-submitted orders, select the **Use separate numbering definitions for online and offline orders** check box; the **Online Order Number** prefix and starting number fields are enabled.

5   To combine the prefix and counter of the receipts and deposits, select the **Use Receipt numbering definitions for Deposit** check box; the **Deposit Number** prefix and starting number fields are disabled.

6   To combine the prefix and counter of the receipts and refunds, select the **Use Receipt numbering for Refund** check box; the **Refund Number** prefix and starting number fields are disabled.

7   To combine the prefix and counter of the invoices and credit notes, select the **Use Invoice numbering for Credit Notes** check box; the **Credit Notes** prefix and starting number fields are disabled.

■   Numbering of existing quotes, orders and billing documents, is not influenced by changes in numbering.

■   Numbering should be set once, after a new installation.

Table 1: Default Numbering Prefixes

Object	Default Prefix	Other Options
Quotes	QUO	
Orders	OSR	
Online orders	OSR	Use a separate counter, with a default OWB prefix.
Invoices	INV	Use the same counter and prefix as receipts.
Receipts	RCT	
Deposits	DEP	
Refunds	REF	Use the same counter and prefix as receipts.
Credit notes	CDT	Use the same counter and prefix as invoices.

Implementing Production Pricing

To use production pricing for jobs and templates, you must first define production pricing settings. To do this, you should understand certain basic pricing concepts.

This chapter contains the following major topics:

■ Pricing Concepts
■ Setting Up Production Pricing

Pricing Concepts

FreeFlow Web Services provides several pricing calculation models for defining pricing settings, and these are described in the *Print Service Provider Guide*. Web Services Order Center, however, provides several additional pricing calculation models, based on production pricing, described in this section.

You determine which calculation models to use for defining pricing for a job type or template. Then, when you request a quote for a print job, the application returns price quotations depending on the selected/defined model.

This section covers the following concepts:

■ Regular FreeFlow Web Services Pricing Mechanism
    ■ Hierarchy FreeFlow Web Services Uses To Calculate The Price Of A Job
■ Expanded Pricing Capabilities Provided By Web Services Order Center
■ Choosing between Intent Pricing and Production Pricing

Regular FreeFlow Web Services Pricing Mechanism

When utilizing the regular FreeFlow Web Services pricing mechanism, you follow the following flow:

1 When defining the System Setup, you define the following sets of Pricing parameter:

- Business parameters—this set of parameters include currency and how to round off amounts
- Tax Packages—this set of parameters includes various taxing packages that can be added to the price of the job.
- Line Items Library—this set of parameters actually consists of individual items that you generally define elsewhere (for example, stock paper items, shipping items). Not all items in this library need to contain cost or pricing information, but many of the items do contain this information (for example, prices for specific paper types, prices for shipping). You can add additional items to this library directly, without defining them elsewhere.

2 When you define a job type, you define the job intent joblets that are included in the job. Then, when you define the job pricing settings, you define the following:

- Calculation model to be used in determining the job's pricing. This is the default pricing model and can be either of the following models:
  - Intent—this model allows you to define pricing based on the job intent definition. You can define base costs and prices for the job and particular intent options included. Though you can have in mind the time, labor, waste, and other costs, when you define the cost and price of an intent joblet, there are no fields that allow you to actually specify these amounts. Therefore, the job price is fixed according to the intent price regardless of the actual time, labor, waste, and so on, that the job requires.
  - Manual—This model allows the CSR defines the price manually while the job is in the shopping cart.
  - Excel pricing—This model allows the CSR to define pricing at the account level, using an Excel file.
- If you select Intent Pricing, the following sections allow you to define the Intent Pricing for the job:
  - Planner—this section of the Pricing tab allows you to specify output devices and related parameters according the quantities being printed.
  - Job Type Options—When you select Intent Pricing, this section allows you to define both basic pricing for the job, and pricing for all of the intent options that might be selected by the Print Buyer.
- If you select Manual Pricing, the Planner section allows the CSR to define pricing at the time the job is ordered.

3 When you define a template, the template inherits the characteristics of the job type, including the Calculation Model. In the Pricing tab of the Settings, you can accept the default Calculation Model of the parent (that is, the job type), or you can choose to use new settings. If you choose to use new settings, you can change the Calculation model (that is, make a different model the default model) and/or modify the pricing settings.

4 If different pricing plans are possible (for example, the job can be printed on different output devices, and pricing will be different depending on the device chosen), you can see the plans in Track jobs.

Hierarchy FreeFlow Web Services Uses To Calculate The Price Of A Job

When FreeFlow Web Services calculates the price of a job request, the pricing mechanism has a hierarchy that contains the following 4 levels. It begins with the most specific pricing, and if that level is not found, it moves to the next level:

1 Manual price for a pre-ordered job.

A pre-ordered job is a job where the template or job type pricing is defined as Manual. When the Print Buyer requests a quote, an error message indicates that a price cannot be calculated. The Print Buyer must then call the Print Service Provider to request a manually-supplied price.

2 Price setting per template.

3 Account pricing (Excel).

4 Price setting per job type.

Expanded Pricing Capabilities Provided By Web Services Order Center

In addition to the pricing calculation models available from FreeFlow Web Services, Web Services Order Center allows you to use various forms of Production Pricing to determine costs and prices. Instead of defining an overall cost for an intent joblet such as cutting, production pricing allows you to define the costs and prices for each part of the production process, such as setup time and labor charges, cutting charges, waste charges for the cutting process.

In general, production pricing is determined by a combination of stock pricing, output device pricing and process estimator pricing.

Using production pricing involves the following:

1 When defining System Setup

a Enable production pricing. (You do this by clicking an appropriate check box in the Business window.)

b Define Process Estimators. You use a pre-supplied set of Process Estimators to define the costs and prices of each production process (such as cutting, drilling, wide format printing). Costs and prices can factor in such things as number of times the process is performed, setup labor, run labor, and materials.

2 When defining Job Types and Templates in the wizard:

a In the Intent panel, you select joblets for the processes (such as drilling, laminating, etc.) that can be applied to the job. (Many process joblets correspond to the process estimators that you defined earlier.) In addition, you can select any generic joblets that you have defined.

b In the Pricing tab of the Settings panel, you select the Calculation model as you would in FreeFlow Web Services. However, Web Services Order Center provides you with several production pricing Calculation Models. Production pricing calculation models apply the pricing breakdowns you defined in the process estimators to the process joblets used by the job (which you selected in the Intent panel).

Web Services Order Center provides the following production pricing calculation modules:

- **Production Pricing**—regular production pricing. Printing pricing is based on press sheet counts, and total pricing is calculated based on the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering).

- **Wide Format Production**—production pricing for wide format printing such as posters and banners. Printing pricing is and is based on print area, and total pricing is calculated using the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering **+ wide format printing**).

- **Production with Generic Joblets**— production pricing where the job also uses generic joblets (such as joblets for design work, artwork, or other special inputs). Printing pricing is based on press sheet counts, and total pricing is calculated using the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering) + generic joblets. (Although generic joblets are technically intent pricing items, they are used for production pricing as well.)

The hierarchy used to calculate the price of a job (Hierarchy FreeFlow Web Services Uses To Calculate The Price Of A Job on page 11) remains unchanged with production pricing.

3   When you create quotes or orders, you can use the default calculation model to determine pricing or you can choose a different calculation model for the quote or the order. You can also make other adjustments that affect pricing and re-estimate the price of the job.

4   If different output devices can be used, providing different pricing plans, Web Services Order Center selects the lowest price; if several plans have the same lowest price, Web Services Order Center selects the most cost effective. However, you can view the plans while you creating quote pricing.

Choosing between Intent Pricing and Production Pricing

Intent pricing and production pricing provide different approaches according to situation and need.

- Intent pricing—this calculation model allows you to define pricing for job type and template intents, according to the number of copies, the total pages or the actual printed press-sheets. It is useful when you know how much you want to charge—for example, you know what the market charges for a particular intent—even if you do not know your actual costs or do not want to manage them through FreeFlow Web Services. You define intent pricing individually for each job type and template intent. You can specify costs if you know them, but these are for your information, and they are not central to the price calculation.

- Production pricing—this calculation model is useful when you know the cost of various production processes and materials. You define the costs of these processes and materials, and the percentage you want to mark up those costs to determine the price. Production process pricing (for example, the cost of cutting, drilling or lamination) is defined at the system level, not the job level. But you define, for each job type or template, whether production pricing will be available for that job type or template.

  Production pricing can also include generic joblet pricing (for example, to set the design or packaging costs and markups). Though technically intent pricing, they will be added to production pricing calculations.

  When production pricing is enabled, the job price calculation uses the same mechanism for Web Services Print Buyer's and for Customer Service Representatives who prepares quotations for off line orders. Several pricing plans can be presented to the CSR, who can then choose the best plan (generally according to prices/ machines).

Setting Up Production Pricing

You set up production pricing by performing the following high-level steps:

1   Enable Production Pricing

2   Define Output Device Pricing Parameters

3   Define Stock pricing

4   Define Process Estimator parameters

Once you have implemented Production Pricing, you can define Production Pricing as the calculation model for job types and templates, by performing the following procedure:

◼   Define Production Pricing As The Default Calculation Model For A Job Type or Template

Enable Production Pricing

1   Select **Print Settings > Pricing > Business**.

2   Enable production pricing by selecting the **Enable pricing based on production pricing** check box.

Figure 2: Enable Production Pricing

The Enable pricing based on production pricing check box is enabled only if Web Services Order Center is installed.

Define Output Device Pricing Parameters

> You can only define these Output Device production pricing parameters if production pricing is enabled. For instructions on enabling production pricing, see Enable Production Pricing on page 13.

Define output device pricing parameters as follows:

1   Select **Print Settings > Production >Output Devices**.

2   In the **Output Devices** window, select the output device.

3   Configure the **Press Set Up** parameters as follows:

    i   On the right side of the window, click the **Press Setup** tab.

    ii   In the **Setup Time** field, define the minutes needed for the initial output device setup.

    iii   In the **Pass Setup Time** field, define the minutes needed for setting up one pass through the device.

    iv   For offset devices, define the minutes needed to set up each print head per pass in the **Print Head Setup Time** box.

    v   Click **Save**.

4   Configure speed and waste definitions:

    a   On the right side of the window, click the **Speed and Waste** tab.

    b   Configure the definitions as follows, depending on output device type:

      ■   To set speed and waste parameters for offset devices:

      i   In the **Fixed Waste** field, define the number of run sheets that are wasted during a run.

      ii   In the **Run Length** field, define the number of copies that can be run.

      iii   In the **Speed** field, define the number of sheets that can be run per hour.

      iv   In the **Waste** field, define the approximate percentage of run sheet waste (derived from output device adjustments, run sheet examination, or other waste factors).

      v   Click **Add** for additional job runs; define the parameters in the resulting fields.

      vi   In the **Production Factors** area, define speed and waste factors in the **Process Color**, **Spot Color**, and **Paper Weight** fields.

      vii   (Optional) Click **Add** for additional weights to be added to the job; define the parameters in the resulting fields.

Figure 3: Digital Output Device Speed and Waste Parameters

- To define speed and waste parameters for digital devices or copiers (Figure 3):

  i In the **Paper Weight** fields, define the minimum and maximum weights (in grams per square meter) that are wasted by the device during a run.

  ii In the **Speed by Paper Size** fields, define the number of run sheets that the device can run per hour, depending on the paper size.

  iii Click **Add** to add more runs to the job and define the additional values.

  iv In the **Production Factors** area, define the **Process Color**, **Spot Color**, and **Duplex Mode** speed factors.

c Click **Save**.

5 Define labor and mark-up charges used to calculate the production cost of a job, as follows, depending on the device type:

a On the right side of the window, click the **Labor Charge** tab.

b Configure the definitions as follows, depending on output device type:

- To define a digital labor charge:

  i Define the **Mark-up** percentage.

  For both the Setup time and the Run time:

  ii Define the **Labor Cost** per hour.

  iii Define the **Minimum labor charge** per number of minutes.

■ To define an offset labor charge:

    i   Define the **Mark-up** percentage.

    ii   Define the **Plate fee**.

For both the Setup time and the Run time:

    iii   Define the **Labor Cost** per hour.

    iv   Define the **Minimum labor** charge per number of minutes.

    v   Define the **Process wash-up cost (in monetary terms)**.

    vi   Define the **Spot wash-up costs (in monetary terms)**.

c   Click **Save**.

6   Define Click charges.

You can use external devices for digital print jobs, and calculate the cost per click in the production costs, as follows:

a   In the **Output Devices** window, click the **Click Charge** tab.

    i   Define the **Mark-up percentage**.

    ii   Define the **Color page 'click' costs**.

    iii   Define the **Black and White page 'click' costs**.

b   Click **Save**.

Define Stock pricing

Define Stock pricing as follows:

a   Select **Print Settings > Production > Stock Library**. For each stock item for which you are defining pricing, do the following:

b   Select the stock item and click **Edit**.

c   Define the cost and the price at the bottom of the screen, per number of copies.

> You can only define these costs and prices if production pricing is enabled. For instructions on enabling production pricing, see Enable Production Pricing on page 13.

d   To add another line, click **New Range** and define the cost and price for that range.

e   Click **OK**.

Define Process Estimator parameters

You define process estimators one at a time by displaying the Process Estimators window (**Print Settings > Pricing > Process Estimators**), selecting the process, and filling in the appropriate estimator values. You can define estimators for the following processes:

> You can only define process estimators if production pricing is enabled. For instructions on enabling production pricing, see Enable Production Pricing on page 13.

- Cutting—cutting the printed sheets/copies at the end of the print process.
- Folding—folding the printed material for a brochure, calendar, etc.
- Drilling—drilling holes in the printed copies.
- Laminating—laminating the printed copies.
- Numbering—adding serial numbers to the printed copies.
- Wide Format Printing—printing large format jobs such as posters, advertisements for building, etc.

To define Cutting process estimators

1   In the **Plug Ins** area of the **Process Estimators** window, select **Cutting**.

2   At the top of the **Cutting** area, select whether the pricing should be calculated by the labor involved in the cuts (**Use Price by Labor Time**) or by the number of cuts (**Use Price by Cuts**). The tabs and fields that can be edited depend on the value you select.

3   If you selected **Use Price by Labor Time**, fill in the fields as follows:

   a   In the **General** tab, fill in the Maximum Stack Height.

   b   In the **Setup Time** tab (Figure 4 on page 18), define the following:

      i   In the **Job Preparation** field, specify the number of minutes it takes to prepare the job on the cutting device.

      ii   In the **Cut Configuration** field, specify the number of minutes it takes to configure the cutting device per cut.

      iii In the **Cutting Setup Labor Price** area, define the fixed and variable cutting setup labor costs per unit of time, per number of copies in a range, and do either of the following:

      - Fill in the fixed and variable cutting setup labor prices based on your own calculations.
      - Have the system calculate the fixed and variable cutting setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

Figure 4: Cutting Process Estimator—Setup Time tab

c In the **Run Time** tab, define the following:

i In the **Stack Reloading** field, specify the number of minutes it takes to takes to reload the stack of the printed job on the cutting device.

ii In the **Cut Run Time** field, specify the number of minutes it takes to cut the loaded job.

iii In the **Cutting Run Labor Price** area, define the fixed and variable runtime cutting labor costs per unit of time, per number of copies in a range, and do either of the following:

■ Fill in the fixed and variable cutting run labor prices based on your own calculations.

■ Have the system calculate the fixed and variable cutting run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

4 If you selected **Use Price by Cuts**, fill in the fields as follows:

a In the **General** tab, fill in the **Maximum Stack Height** in inches

b In the **Per Cut** tab, in the **Cutting Price** area, define the fixed and variable cutting costs per number of cuts, per number of copies in a range, and do either of the following:

■ Fill in the fixed and variable cut prices based on your own calculations.

■ Have the system calculate the fixed and variable cut prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5 Click **Save**.

To define Folding process estimators

1   Select **Print Settings > Pricing > Process Estimators**.

2   In the **Plug Ins** area of the **Process Estimators** window, select **Folding**.

3   In the **Setup Time** tab, define the following:

   a   In the **Job Preparation** field, specify the number of minutes it takes to setup the job on the folding device.

   b   In the **Fold Configuration** field, specify the number of minutes it takes to setup the folding parameters.

   c   In the **Setup Test Run** field, specify the number of minutes it takes to run a trial process.

   d   In the **Setup Waste** field, specify the number of press sheets that are wasted during setup and test run.

   e   In the **Folding Setup Labor Cost** area, define the fixed and variable folding set-up labor costs per unit of time, per number of copies in a range, and do either of the following:

      ■   Fill in the fixed and variable folding setup labor prices based on your own calculations.

      ■   Have the system calculate the fixed and variable folding setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

4   In the **Run Time** tab, define the following:

   a   In the **Machine Speed** field, specify the number of press sheets the machine can fold per hour.

   b   In the **Run Waste Factor** field, specify the percentage of waste during the trial run process.

   c   In the **Folding Run Labor Cost** area, define the fixed and variable folding run labor costs per unit of time, per number of copies in a range, and do either of the following:

      ■   Fill in the fixed and variable folding run labor prices based on your own calculations.

      ■   Have the system calculate the fixed and variable folding run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5   Click **Save**.

To define Drilling process estimators

1   Select **Print Settings > Pricing > Process Estimators**.

2   In the **Plug Ins** area of the **Process Estimators** window, select **Drilling**.

3   At the top of the **Drilling** area select whether the pricing should be calculated by the labor involved in the drilling (**Use Price by Labor Time**) or by the number of holes (**Use Price by Holes**). The tabs and fields that can be edited depend on the value you select.

4   If you selected **Use Price by Labor Time**, fill in the fields as follows:

   a   In the **General** tab, fill in the maximum stack height, and the maximum number of holes the machine can drill

b In the **Setup Time** tab, define the following:

    i In the **Job Preparation** field, specify the number of minutes it takes to prepare the job on the drilling device.

    ii In the **Drills Configuration** field, specify the number of minutes it takes to configure the drilling device per drill.

    iii In the **Setup Test Run** field, specify the number of minutes it takes to run a trial process.

    iv In the **Setup Waste** field, specify the number of press sheets that are wasted during setup and test run.

    v In the **Drilling Setup Labor Price** area, define the fixed and variable drilling setup labor costs per unit of time, per number of copies in a range, and do either of the following:

        ■ Fill in the fixed and variable drilling setup labor prices based on your own calculations.

        ■ Have the system calculate the fixed and variable drilling setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

c In the **Run Time** tab, define the following:

    i In the **Hole Run Time** field, specify the number of minutes it takes to drill the loaded job.

    ii In the **Drilling Run Labor Price** area, define the fixed and variable drilling run labor costs per unit of time, per number of copies in a range, and do either of the following:

        ■ Fill in the fixed and variable drilling run labor prices based on your own calculations.

        ■ Have the system calculate the fixed and variable drilling run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5 If you selected **Use Price by Holes**, fill in the fields as follows:

a In the **General** tab, fill in the maximum stack height, and the maximum number of holes the machine can drill.

b In the **By Holes** tab, in the **Drilling Price** area, define the fixed and variable drilling costs per number of holes, per number of copies in a range, and do either of the following:

    ■ Fill in the fixed and variable drill prices based on your own calculations.

    ■ Have the system calculate the fixed and variable drill prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

6 Click **Save**.

To define Laminating process estimators

1 Select **Print Settings > Pricing > Process Estimators**.

2 In the **Plug Ins** area of the **Process Estimators** window, select **Laminating**.

3 In the **Setup Time** tab, define the following:

a In the **Job Preparation** field, specify the number of minutes it takes to setup the job on the laminating device.

b In the **Setup Test Run** field, specify the number of minutes it takes to run a trial process.

c In the **Setup Waste** field, specify the number of press sheets that are wasted during setup and test run.

d In the **Laminating Setup Labor Cost** area, define the fixed and variable laminating setup labor costs per unit of time, per number of copies in a range, and do either of the following:

■ Fill in the fixed and variable laminating setup labor prices based on your own calculations.

■ Have the system calculate the fixed and variable laminating setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

4 In the **Run Time** tab, define the following:

a In the **Machine Speed** field, specify the number of meters the machine can laminate per hour (when laminating on one side).

b In the **Two Sides Slow Down** field, specify the percentage of time that the Machine Speed value decreases if the lamination is performed on two sides.

c In the **Run Waste** field, specify the number of press sheets that are wasted during the run.

d In the **Laminating Run Labor Cost** area, define the fixed and variable laminating run labor costs per unit of time, per number of copies in a range, and do either of the following:

■ Fill in the fixed and variable laminating run labor prices based on your own calculations.

■ Have the system calculate the fixed and variable laminating run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5 In the **Materials** tab, in the **Laminating Material Cost** area, define the fixed and variable costs of laminating material per unit of size, per number of copies in a range, and do either of the following:

■ Fill in the fixed and variable laminating material prices based on your own calculations.

■ Have the system calculate the fixed and variable laminating material prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

6 Click **Save**.

To define Numbering process estimators

1 Select **Print Settings > Pricing > Process Estimators**.

2 In the **Plug Ins** area of the **Process Estimators** window, select **Numbering**.

3 At the top of the **Numbering** area select whether the pricing should be calculated by the labor involved in the numbering (**Use Price by Labor Time**) or per number (**Use Price by Numbering**). The tabs and fields that can be edited depend on the value you select.

4 If you selected **Use Price by Labor Time**, fill in the fields as follows:

   a In the **Setup Time** tab, define the following:

      i In the **Job Preparation** field, specify the number of minutes it takes to setup the job on the numbering device.

      ii In the **Setup Test Run** field, specify the number of minutes it takes to run a trial process.

      iii In the **Setup Waste** field, specify the number of press sheets wasted during the trial run process.

      iv In the **Numbering Setup Labor Price** area, define the fixed and variable numbering setup labor costs per units of time, per number of copies in a range, and do either of the following:.

        ■ Fill in the fixed and variable numbering setup labor prices based on your own calculations.

        ■ Have the system calculate the fixed and variable numbering setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

   b In the **Run Time** tab, define the following:

      i In the **Machine Speed** field, specify the number of press sheets the machine can number per hour.

      ii In the **Run Waste Factor** field, specify the percentage of waste during the trial run process.

      iii In the **Numbering Run Labor Price** area, define the fixed and variable numbering run labor costs per units of time, per number of copies in a range, and do either of the following:

        ■ Fill in the fixed and variable numbering run labor prices based on your own calculations.

        ■ Have the system calculate the fixed and variable run labor numbering prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5 If you selected **Use Price by Numbering**, in the **Per Numbering** tab, in the **Numbering Price** area, define the fixed and variable numbering costs per number of units, per number of copies in a range, and do either of the following:

   ■ Fill in the fixed and variable numbering prices based on your own calculations.

   ■ Have the system calculate the fixed and variable numbering prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

6 Click **Save**.

To define Wide-Format Printing process estimators

1 Select **Print Settings > Pricing > Process Estimators**.

2 In the **Plug Ins** area of the **Process Estimators** window, select **Wide-Format Printing**.

3 In the **Setup Time** tab, define the following:

   a In the **Job Preparation** field, specify the number of minutes it takes to setup the job on the wide-format printing device.

   b In the **Setup Waste** field, specify the amount of paper that is wasted during setup.

c In the **Wide Format Printing Setup Labor** area, define the fixed and variable wide format printing setup labor costs per units of time, per number of copies in a range, and do either of the following:.

■ Fill in the fixed and variable wide format printing setup labor prices based on your own calculations.

■ Have the system calculate the fixed and variable wide format printing setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

4 In the **Run Time** tab, define the following:

a In the **Machine Speed** field, specify the area that the machine can print per hour.

b In the **Wide Format Printing Run Cost** area, define the fixed and variable wide format printing run labor costs per units of time, per number of copies in a range, and do either of the following:.

■ Fill in the fixed and variable wide format printing run labor prices based on your own calculations.

■ Have the system calculate the fixed and variable wide format printing run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

5 In the **Printing** tab, in the **Wide Printing Cost** area, define the wide printing run labor cost and price per number of copies in a range.

c In the **Wide Format Printing Run Cost** area, define the fixed and variable wide format printing costs per units of area, per number of copies in a range, and do either of the following:.

■ Fill in the fixed and variable wide format printing prices per units of area based on your own calculations.

■ Have the system calculate the fixed and variable wide format printing prices per units of area as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

6 Click **Save**.

Define Production Pricing As The Default Calculation Model For A Job Type or Template

If Production Pricing is enabled, to make Production Pricing the default Calculation Model for a job type or template, do the following:

1 Display the **Pricing** tab for the selected job type or template in the **Settings** panel of the Definition wizard. (Figure 5 on page 24 illustrates the Pricing tab for Job Types.)

2 In the **Calculation Model** field, select one of the type of production pricing calculation model:

■ **Production Pricing**.—select this model if the job type or template does not need generic joblets or wide formatting.printing. Print pricing will largely be determined by number of press sheets.

■ **Wide Format Production**—select this model if the job pricing should be largely calculated based on size of the printing area (such as posters/banners).

■ **Production with Generic Joblets**—select this model if the production is calculated according to production pricing (cost) but there is a need to use additional pricing elements (such as Design, packaging, etc.) which were added to the system using Generic Joblets.

> Selecting one of the above values disables Intent pricing for this job type, and pricing calculations will be based on the production pricing parameters.
>
> However, certain process joblets used by the job type (for example, cutting or drilling) are at the bottom of the window. These joblets contain a check box that allows you to override the system (production pricing) setting for that process, and to define pricing for those processes (for the job type).

Figure 5: Implementing Production Pricing for Job Types

3 If you are editing a template, and are choosing a different calculation model than is used by its job type, select the **Use New Settings** radio button, and select the calculation model.

4 Fill in the details of the Pricing tab as you would in FreeFlow Web Services. For details, see the *Print Service Provider Guide*:

■ If you chose **Production Pricing** or **Wide Format Production**, only the **Planner** section of the Pricing tab is displayed; stock and process estimator prices are taken depending on the definition of the production job.

■ If you chose **Production with Generic Joblets**, both the **Planner** section and the **JBF Options** section are displayed; the **JBF Options** section displays the base product and generic joblets.

3

Handling Sales

This chapter describes how you can use Web Services Order Center to handle sales. Most of the chapter covers the sales management life cycle from quote through orders. The last main section in the chapter covers the handling of quick sales.

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

When the Print Buyer accepts the quote, you can convert it into an official order to be produced and shipped to the Print Buyer. After an order is produced, it can be invoiced (an invoice is then sent to the Print Buyer). When the Print Buyer pays the invoice, you can mark the invoice as "paid."

1   Print Buyer – requests a quote.

2   Print Service Provider Customer Service Representative (CSR) – creates a quote and sends to the Print Buyer.

3   Print Buyer – approves the quote.

4   CSR – converts a quote into an order. If the order includes ready production files they are transferred directly to production. If the order does not have ready production files it is sent to artwork.

5   Designer (artwork) – creates the job production files, verifies and corrects supplied Print Buyer files, and handles proofing cycles.

6   Production operators – print and finish the jobs.

7   Dispatch operator – packs jobs for delivery, prints delivery labels, and approves the delivery.

8   Administrator – creates an invoice.

9   Print Buyer – pays the invoice.

10   Administrator – issues a receipt.

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

All the documents managed offline (quotes, orders, invoices, receipts, deposits and credit notes) have two main statuses – draft and committed. As long as a document is in draft mode, you can change and edit it as required. When the document is finalized and has to be transferred to the Print Buyer, it must be 'committed'. The 'commit' action makes the document official; a committed document can no longer be edited.

This chapter contains the following major topics.

> To view the list of the orders and quotes per account, use the **Dashboard** window (which is displayed when you select **Accounts** in the main menu). For details, see Viewing Account Data At A Glance—The Dashboard on page 72.

Creating a Simple Quote

You create a quote by performing the following three actions in sequence:

1   Create the Quote

2   Define the General Details

3   Add and Define the Products

Create the Quote

1   Select the customer account as follows:

   a   In the main menu, select **Accounts**. The **Dashboard** window is displayed.

Figure 6: Dashboard Window
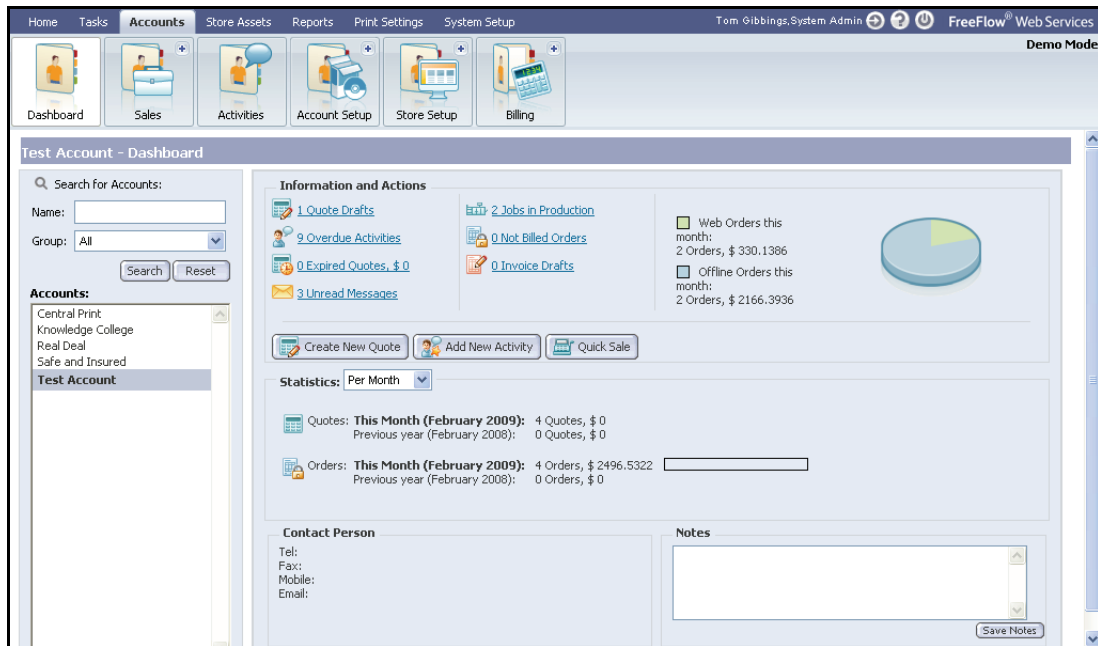
   b   In the customers list in the **Dashboard** window, select the account. (If the list is long, you can filter the list by specifying an account name or prefix, and selecting an account group, and then clicking **Search**.)

2   Select **Accounts > Sales**. This displays the **Sales - Quotes** window (Figure 7 on page 28).

Figure 7: Sales-Quotes Window

- The left pane displays the list of existing Open quotes for the account (that is, quote that require your attention).

- The right pane displays the details of the selected quote.

You can create a new quote from scratch or select and duplicate an existing quote. To simplify the quote selection process, you can do the following things to limit the list of displayed quotes:

- filter the list of displayed quotes according to quote status and/or responsible CSR. For an explanation of statuses, see Understanding Quote/Order Statuses And Icons on page 38.

- search for a specific quote or job if you know the quote number or job number.

3 Create a new quote (or duplicate an existing quote), as follows:

- To create a new quote, click **Create New**.
- To duplicate an existing quote, select the quote and click **Duplicate**.

> You can also create a quote by duplicating an existing order in the **Sales - Order** window.

The quote is added to the quote list. The quote is assigned a unique ID having a prefix of **QU** (for quote) followed by a numeric increment; the status of the quote is set to **Draft**.

Define the General Details

Fill in or edit the **General** details of the quote, as follows:

1   Type an identifying name for the quote **Name** field.

2   To select a different contact person

    a   Click the **Contact Person** link.

    b   In the dialog box that opens, select the contact in the list and click **Save**

3   If the print buyer supplies a Customer Reference Number, type the print buyer's reference number in the **Customer Reference** field.

4   In the **Received as** list, choose the way the RFQ reached you.

5   To assign a different CSR to the quote (by default, a new quote is assigned to the user creating the quote):

    a   Click the **Assigned to CSR** link.

    b   In the dialog box that opens, select the user and click **Save**.

6   To assign an account manager to this quote (available only if the Customize Fields feature is enabled):

    a   Click the **Account Manager** link.

    b   In the dialog box that opens, select the user and click **Save**.

7   To assign a sales person to this quote (available only if the Customize Fields feature is enabled:)

    a   Click the **Sales Person** link.

    b   In the dialog box that opens, select the user and click **Save**.

8   Type your internal reference number, if one exists, in the **Internal Reference** field.

9   Optionally change the default quote expiration and follow-up dates using the **Valid Until** and **Next Follow-up** calendars. For information on follow-up actions, see Handling Follow-up Activities for Quotes and Orders on page 43.

> A number of different quote/order custom fields can be added to quotes and orders. For information on customizing fields, see the System Setup chapter in the *Print Service Provider Guide*.

10   Optionally add notes as follows:

    ■   In the **Internal Note** text box, add notes that you want to appear on internal print service provider documents (for example, on the job ticket).

    ■   In the **Note for Customer** text box, add additional information that should appear on the Quote document that you send to the print buyer (information the print buyer should be aware of).

11   Click **Save**.

Add and Define the Products

Add the products (jobs and or templates) to the quote, as follows:

1 Select the **Products** tab.

2 Click one of the following buttons, depending on the product being added:

- To add a printable job from a job type, click the **Add New Job** button.
- To add a non-paper job (for example, a mouse pad), click the **Add Non-printable Job** button.
- To add a job from the account's templates, click the **Add Job from Template** button.

The **Choose Job Type** (or for a template, the **Choose Template**) dialog box opens.

3 Select the job type or template and click **Continue**.

The **Create a New Job** dialog box opens and displays the tabs (**Job details**, **Intent**, **Pricing**), and if needed, **Variable Information**) that you use to define the job or template.

- The sequence in which the tabs are displayed depends a number of factors. Perform the following steps in the order in which the tabs are displayed.
- This guide tries to avoid repeating instructions found in the *Print Provider Guide*. When filling in the details for the job type or template, see the *Print Provider Guide* for such instructions as:
  - Adding Joblets and Joblet option to Intents
  - Defining Tax Groups and Tax Packages
  - Adding Line Items to the Line Item Library
  - Defining Shipping

4 Select the **Job Details** tab, fill in the details as you would in FreeFlow Web Services, and click **Continue**. For information on attaching and uploading files, see Uploading, Attaching, and Mapping Files on page 34.

5 Select the **Intent** tab, fill in the details as you would in FreeFlow Web Services, and click **Continue**.

6 If there is a **Variable Information** tab, select the tab and fill in the details as you would in FreeFlow Web Services.

7 Select the **Pricing** tab. (Figure 8 on page 31 illustrates the Pricing Tab.)

- To use the default pricing calculation method defined for the job or template, fill in the quantity in the **Copies** field, and click **Calculate**.
  - If the default calculation method is Manual, the results matrix returns a line (Type: **Manual**; Item: **CSR Manual Price**) where you can type in the price in manually. Fill in the price.
  - For all default calculation methods except Manual, an itemized results matrix indicates the prices.
- To use a different pricing calculation method or perform other pricing changes for the quote, see Editing Pricing Details on page 35.

Figure 8: Pricing Tab

8 After filling in the last tab in the **Create a New Job** dialog box, click **Finish**.

The new job appears on the **Products** page. (Figure 9 illustrates Product Tab details.)

Figure 9: Products Tab Details

Repeat this process for each job or template to be added. To add an item from the Items List Library to table, see Adding An Item from the Line Item Library on page 33.

The details in the Products tab (Figure 9 on page 31) of a quote or order are organized as follows:

- Jobs by Tax Group tables—Jobs are displayed in tables organized by the tax group that apply to the jobs.
    - If all jobs belong to the same tax group, all jobs are listed in the same tax group table.
    - If jobs belong to different tax groups, a table for each tax group lists the jobs that belong to that tax group.

    These tables will also contain urgency surcharge line items for the jobs in the table, and a discount line item, if these items are defined.

- Shipping details (and shipping taxes, if any) are provided in a separate table.

Performing Additional Edits in the Quote or Order

The previous section described how to create simple quotes and fill in the fields in the General tab. It deliberately avoided more detailed edits that are performed in the Products tab of the quote (or order) details. This section describes many of those other edits.

> The procedures in this section describe how to modify quotes. You can modify orders the same way by performing these procedures in the **Sales - Orders** window (**Accounts > Sales > Orders**). The **Sales - Orders** and **Sales - Quotes** windows are almost identical.

This section contains the topics:

- Selecting A Quote And Displaying Its Product Tab
- Adding/Deleting Jobs and Items
- Editing Pricing Details
- Uploading, Attaching, and Mapping Files

Selecting A Quote And Displaying Its Product Tab

If the quote is not selected and its product tab is not displayed, you can select the quote and display its Products tab, as follows:

1 In the main menu, select **Accounts**. The **Dashboard** window is displayed.

2 In the customer list in the **Dashboard** window, select the account. (If the list is long, you can filter the list by specifying an account name or prefix, and selecting an account group, and then clicking **Search**.)

3 Select **Accounts > Sales**. This displays the **Sales - Quotes** window (Figure 7 on page 28).

4 In the list of quotes on the left side of the window, select the quote.

(If the list of quotes is long, you can search for a specific quote or job if you know the quote number or job number. You can also filter the list of displayed quotes according to quote status and/or responsible CSR.)

5   In the **Quote Details** pane on the right side of the window, select the **Products** tab. (To edit the General details of the quote, select the **General** tab, and see Define the General Details on page 29 for information on editing the field of the **General** tab.)

Adding/Deleting Jobs and Items

This section includes the following procedures:

- ■ Adding Another Job or Template
- ■ Duplicating A Job
- ■ Deleting A Job
- ■ Adding An Item from the Line Item Library

Adding Another Job or Template

Follow the instructions in Add and Define the Products on page 30

Duplicating A Job

1   In the **Products** tab, hold the cursor above the job without clicking. The pop-up tool bar appears.

2   Click [icon] (Duplicate Job) in the pop-up tool bar.

3   To edit the job, click [icon] (Job Properties).

Deleting A Job

1   In the **Products** tab, hold the cursor above the job without clicking. The pop-up tool bar appears.

2   Click [icon] (Delete Job) in the pop-up tool bar.

Adding An Item from the Line Item Library

1   In the **Products** tab in the **Quote Details** pane, in the Tax Group in which you want to add the item, click **Add Item**.

2   Select the item and click **Add**.

3   (To remove an item from the quote, select the item in the tax group and click **Remove**.)

4   To recalculate the price after adding or deleting items, click

Uploading, Attaching, and Mapping Files

FreeFlow Web Services with Web Services Order Center provides two mechanisms for uploading and attaching files. Although these mechanisms are very similar, and you can use either at any time, each mechanism is intended for a specific situation, and are described accordingly in this section:

■ If you created the files in-house, or received the files by digital media, you must upload them and assign them to the appropriate jobs.

■ If you sent the Print Buyer a quote by email from the system, and the Print Buyer attached the files to the reply email, they will be automatically uploaded to the order (so you can skip the uploading stage); but you must still map the files to the appropriate job in the quote /order.

Attaching A File Where Upload Is Required

1   Do either of the following:

■ If you are in the process of creating a quote, in the **Job Details** tab of the **Edit Products** dialog box, click the **Attachments** link. The **Attachments** dialog box opens.

■ If you previously saved the quote, open the Attachments dialog box, as follows:

   i   In the **Products** tab in the Quote details pane, hold the cursor above the job or template without clicking. The pop-up tool bar appears.

   ii   Click [💾] (Files) button. The **Attachments** dialog box opens.

2   In the **Attachments** dialog box, click the **Upload Files**. The **Upload File** dialog box opens.

3   Ensure **Upload a Single file** is selected, and click **Browse**. The **Choose File** dialog box opens.

> There is an option to upload multiple files, using Multi-file upload. For instructions, see the *Print Provider Guide* for instructions.

4   Select the file for upload and click **Open**.

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

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

7   If the file requires no prepress work and is ready to print, to activate the preflight process, select the file and click **Mark for Production**. The file is processed and marked as ready for production; and the job will automatically be sent to the Production queue after the quote is converted into an order.

8   If the file is an imposition file (that is, if you used an external system for imposition and now uploaded the file), click **External Imposition**.

Perform the same steps for each file to be added.

Attaching Files From A Reply Email

If you sent the Print Buyer a quote by email, and the Print Buyer attached the files to the reply email, they will be automatically uploaded to the order, but you must still assign the files to the correct job. You do this using the **File Mapping** tab in the Quote or Order details pane.

1 Select the quote or order in the **Sales-Quote** or **Sales-Order** window.

2 In the details pane, select the **File Mapping** tab.

The files that were included in the reply are listed in the File Mapping tab. The File Mapping Page also lists all files that you manually uploaded and attached to jobs in the quote or order. If the file was submitted by email, an icon appears in the Email column. Double-clicking this icon displays the email message content.

> You can use the File Mapping tab for uploading and attaching any files.
>
> To upload additional files, click the **Upload Files** button and upload files as described in Attaching A File Where Upload Is Required on page 34.

3 For each unassigned uploaded file, select the file, and then select the job to which it should be assigned in the **Job Name** list box.

4 If the file requires no prepress work and is ready to print, to activate the preflight process, select the file and click **Mark for Production**. The file is processed and marked as ready for production; the job will automatically be sent to the Production queue after the quote is converted into an order.

The following icons indicates the results of the preflight operation:

■ — Preflight processing was successful.

■ — Preflight processing encountered errors.

Editing Pricing Details

This section describes how to view, define and modify pricing at the sales-quote or sales-order level.

> ■ This section does not repeat the pricing instructions that apply to FreeFlow Web Services. For information on defining pricing in FreeFlow Web Services, see the *Print Provider Guide*.
>
> ■ This section does not describe how to set up Production Pricing using Web Services Order Center. For instructions on Production Pricing setup, see Setting Up Production Pricing on page 13.

This section describes how to perform the following types of pricing adjustment.

■ Generating Prices for Different Quantities

■ Changing The Pricing Calculation For a Job Type or Template

■ Requesting a Quote from Another Print Provider

Generating Prices for Different Quantities

Print Buyers might want to know the prices for different quantities (number of copies) of the same job. You can generate different prices according to the number of copies.

1 If the **Pricing** tab in the **Edit Product** dialog box is not displayed, display it as follows:

  a In the **Products** tab in the Quote details pane, hold the cursor above the job or template without clicking. The pop-up tool bar appears.

  b Click ![Job Pricing icon] (Job Pricing) (or click ![Job Properties icon] (Job Properties) and select the **Pricing** tab).

2 On the left side of the Pricing tab, click **Add**. A blank field is opened to allow you to specify a number of copies.

3 Fill in the number of copies and click **Calculate**. The price is calculated for the newly defined quantity.

4 To use a particular quantity in the total costs calculation at the bottom of the right side of the tab, select the appropriate number of copies line. The totals are automatically recalculate accordingly.

5 Click **Save**, or if you are done with all pricing changes, click **Finish**.

Changing The Pricing Calculation For a Job Type or Template

There are several calculation models that you can use to calculate the price of a job. Each job type and template has a default calculation mode. When you create a quote or order, the default calculation model is used, and you cannot adjust the criteria used in this model.

By following the steps in this procedure, you can either change the calculation model, or use the same model but adjust the calculation criteria.

1 If the **Pricing** tab in the **Edit Product** dialog box is not displayed, display it as follows:

  a In the **Products** tab in the Quote details pane, hold the cursor above the job or template without clicking. The pop-up tool bar appears.

  b Click ![Job Pricing icon] (Job Pricing) (or click ![Job Properties icon] (Job Properties) and select the **Pricing** tab).

2 Click the **Change Planning and Pricing Setup** link. The **Planning** dialog box opens and displays the **Pricing** tab (it also contains a Tax and Urgency tab).

3 Select the **Use New Settings** option, which turns the **Calculation Model** field into a drop-down list.

4 Select the new Calculation Model, or select the same calculation model if you want to make changes to the default calculation model. The fields in the **Planning** dialog box might change, depending on the selection.

5 Depending on your selection, fill in the fields in the **Pricing** tab of the **Planning** dialog box:

  ◼ If you chose one of the Production pricing models as the calculation model, see Define Production Pricing As The Default Calculation Model For A Job Type or Template on page 23.

  ◼ If you chose Intent or Excel as the calculation model, refer to the instructions for those calculation models in the *Print Service Provider Guide*.

■ If you chose Manual as the calculation model, another line (Type: **Manual**; Item: **CSR Manual Price**) will be added to the result matrix. Fill in the price in manually.

6 Click **Save**. The **Planning** dialog box closes.

7 Select the quantity and click **Calculate**, to update the **Total Price** according to the new price settings.

8 Click **Save**, or if you are done with all pricing changes, click **Finish**.

Requesting a Quote from Another Print Provider

Use this feature send a request for quotation to another print provider, if you expect to outsource this job and don't know the outsourcing cost.

1 If the **Pricing** tab in the **Edit Product** dialog box is not displayed, display it as follows:

a In the **Products** tab in the Quote details pane, hold the cursor above the job or template without clicking. The pop-up tool bar appears.

b Click [icon] (Job Pricing) (or click [icon] (Job Properties) and select the **Pricing** tab).

2 Click **Request for Third Party Quote** button, The **Request for Quote** dialog box is displayed.

> The **Request for third party quote** button is enabled for quotes/orders in the Draft status.

3 Select a partner print provider already defined in the system from the **Print Provider Name** list.

> ■ To add new partner print providers, use the **New Print Provider** button.
> ■ Details of any partner in the list can be changed using **Edit Details** button.
> ■ Any partner can be removed from the list using the **Remove Print Provider** button.

4 Click the **Job Ticket** link in **Edit Job Ticket** section, if editing is required. For information about editing the job ticket, see the section about Production, in the Print Service Provider Guide.

5 Write your comments in the text box, in the **Add Comment** section.

6 To attach the job PDF to the email that will be sent, select the **Add Job PDF to Email Content** check box.

7 Click the **Send Email** button to send the request for quotation to the selected partner print provider.

> Once an answer on the request for quote (RFQ) has been received via email or by any other way, the CSR must manually enter the price in the **Pricing** screen for the job.

Progressing From Quotes Through Orders

After you have defined a quote, you must progress through the rest of the quote–order life cycle. This means sending the quote to the customer, and then handling the customer's response, which is usually either an acceptance or rejection, or a request for a change to the quote.

However, to be able to progress through the quote–order life cycle, you must perform two separated, but related, tasks in parallel:

■ Checking the quote/order statuses—this is just a matter of looking at the status icon in the **Sales - Quote** window or the **Sales - Order** window, and knowing what the status icon means.

■ Performing follow-up activities—for example, after providing the customer a quote, if you do not hear from the customer within a specified period of time, you will need to contact the customer.

With this in mind, this section covers the following topics.

■ Understanding Quote/Order Statuses And Icons
■ Moving Through The Stages In The Quote–Order Life Cycle
■ Handling Follow-up Activities for Quotes and Orders
■ Viewing Quote and Order History

Understanding Quote/Order Statuses And Icons

All quotes appearing in the **Sales - Quotes** window, and all orders appearing in the **Sales-Orders** window, have icons that indicate their status. As you work with quotes and orders, and progress through the quote–order life cycle, you will need to recognize these icons, and their meanings. Figure 10 on page 38 describes the quote statuses and icons; Figure 11 on page 38 describes the order statuses and icons.

Figure 10: Quote Statuses

Icon	Name	Description
	Quote-Draft	The quote is in draft form.
	Quote-Commited	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.
	Quote-Activities Overdue	Activities scheduled for the quote were not completed.

Figure 11: Order Statuses

Icon	Name	Description
	Order-Draft	The order is in draft form.
	Order-Commited	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-Activities Overdue	Activities scheduled for the order were not completed.
	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.

- When you open a window that displays lists of quote or orders (for example, the **Sales - Quotes** or **Sales - Order** window), by default all Open quotes or orders are displayed. There are quotes or orders that require your attention (quotes or orders in the draft or expired mode, or with overdue activities, or with attached unread messages).

- Quote or order expiration, overdue activities, and unread messages are technically not statuses but rather they are flags marking additional information about a quote or order status. The available work steps depend on the actual quote or order status, and not on these flags.

Moving Through The Stages In The Quote–Order Life Cycle

This section cover the following topics:

- Providing the Quote to the Customer (Committing)
- Handling the Customer Response
    - Placing the Order
    - Revising the Quote or Order
    - Cancelling the Quote or Order

Providing the Quote to the Customer (Committing)

When you finished preparing a draft quote and you are ready to send it to the print buyer, you must commit the quote, that is, you must convert the quote from a draft to an official document.

> At this stage, for orders that don't require sending a quote to the customer, you can activate the quick conversion of the draft quote to a committed order by clicking on the **Convert to Committed Order** button. In this case, all following steps are not relevant.

1 If the **Sales - Quotes** window is not displayed, or if the quote is not selected, do the following:

  a In the main menu, select **Accounts**.

  b In the Customers list in the **Dashboard** window, select the account.

  c Select **Sales > Quotes**. The **Sales - Quotes** window opens and displays all Open quotes. For an explanation of statuses, see Understanding Quote/Order Statuses And Icons on page 38.

  d To filter the **Sales - Quotes** list to display only draft quotes, select **Draft** in the **Status** drop down list.

  e Select the quote in the **Sales - Quotes** list.

2 Click ▦ Commit and Send to Customer). The Quote detail pane is replaced by the **Commit the Quote and convert it into an official Quote** pane.

3 Optionally, edit the **Valid Until** and **Next Follow-up** dates.

4 Select one of the following methods to commit and convert the quote.

  ■ To send the contact the quote in an email, select **Commit and Send an Email**.

  i In the **Action** drop down list, select **Commit and Send an Email**, and then click **Go**. The **Send Document** preview dialog box opens. You can preview and edit the document.

  ii To send the document, click **Send Email**. Depending on the basic settings defined during installation, the quote document is either attached to the email as a Word document or converted to a PDF and attached, and sent to the contact person and the CSR.

  ■ To print the quote (for example, for a walk-in customer or to fax the quote)

  i In the **Action** drop down list, select **Commit and Print**, and then click **Go**. The **Print Document** preview dialog box opens. You can preview and edit the document.

  ii To print the document, click **OK**.

  ■ To commit the quote without printing or sending, in the **Action** drop down list, select **Commit**, and then click **Go**.

The **Commit the Quote and convert it into an official Quote** pane is replaced by the details pane for the quote.

Handling the Customer Response

This section describes how to handle the Print Buyer's response to the quotes. Generally, any of the following actions will be performed, depending on the Print Buyer response:

■ Placing the Order
■ Revising the Quote or Order
■ Cancelling the Quote or Order

Placing the Order

After the print buyer has accepted the quote and decides on the quantities to print for each quoted job, you should convert the quote to an order. You can convert both committed quotes and draft quotes to orders.

You can convert quotes to either of two types of orders:

■ Committed Order—Convert to this status of order when all order details are finalized.
■ Draft order—convert to this type of order where the order information is not complete and finalized (for example, you are still gathering information, files still need to be supplied, quantities are undecided).

A quote can be repeatedly converted into an order, generating an unlimited number of orders. This is useful if you need to create repeated orders from the same quote.

1 If the **Sales - Quotes** window is not displayed, or if the quote is not selected, do the following:

   a In the main menu, select **Accounts**.

   b In the Customers list in the **Dashboard** window, select the account.

   c Select **Sales > Quotes**. The **Sales - Quotes** window opens and displays all Open quotes. For an explanation of statuses, see Understanding Quote/Order Statuses And Icons on page 38.

   d To filter the **Sales - Quotes** list to display only committed quotes, select **Committed** in the **Status** list.

   e Select the quote in the **Sales - Quotes** list.

2 Click either of the following buttons:

■   —click this button to convert the quote to a committed order.

■   —click this button to convert the quote to a draft order.

3 The **Convert the Quote into an Order** screen appears.

4 Adjust the number of copies, if required.

5 Click **Convert**.

The quote is converted to an order and now appears in the following windows:

■ The quote still appears in the **Sales - Quote** window with its quote ID. Its status is set to **Quote-Ordered**. The details pane in the window indicates that the quote has been ordered.

> If you converted the quote to a draft order, you can still convert the quote in this window to a committed quote by clicking [icon].

■ The quote is added as an Order to the **Sales - Order** window (**Accounts > Sales > Orders**). The prefix for this order is changed to OSR and it is assigned a new numeric increment. The status of the order in the Sales - Order window is as follows:

   ■ If you converted the quote to a draft order, the status of the order is Draft.
   ■ If you converted the quote to a committed order, the status of the order is Committed.

If you convert a quote to a committed order, the attached jobs are automatically sent to the appropriate queue:

■ Jobs without attached files, jobs with attached files that are not marked for production, and upload jobs from the Print Buyer where **Send file separately** was selected, go to the Artwork queue.

■ Jobs with attached files that are marked for production go to the Production queue.

Revising the Quote or Order

You can:

■ modify uncommitted quotes after you saved them as a draft.

■ revise quotes after you committed them and sent them to the customer (for example, the print buyer will not accept the quote unless you make certain changes).

■ make changes to a committed order.

1 Select the quote or order in the **Sales - Quotes** or **Sales - Orders** window. To simplify selection, you can do the following:

   ■ To display the list of draft quotes, select **Draft** in the **Status** drop down list.
   ■ To display the list of committed quotes, select **Committed** in the **Status** drop down list.

2 To revise a committed quote or order, do the following:

   a Click the **Revise** button. The **Revise the Quote** (or **Revise the Order**) screen pane is displayed. This screen allows you to add a note explaining why you are revising the quote.

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

   The Quote (or Order) is set back to **Draft** status, and the number is changed to include a revision number (for example, QU07 becomes QU07/1; OSR15 becomes OSR157/1.)

3 Perform the necessary edits and changes to the quote and job, as described throughout this chapter.

4 When you are done updating or revising the quote or order, you can commit it. To send a revised quote to the customer, see Providing the Quote to the Customer (Committing) on page 40.

Cancelling the Quote or Order

If the print buyer decides against placing an order, or if the user placed the order but is now canceling it, you can close the quote or order as follows:

1 Select **Accounts > Sales** to cancel a quote, or select **Accounts > Sales >Orders** to cancel an order.

2 Select the quote or order.

3 Click **Cancel**. The **Cancel the Quote** (or **Cancel the Order**) pane appears.

4 Fill in the following relevant information if available (which might be useful to you for future decisions):

- Name of the print provider to whom you have lost the business
- Price at which the other print provider won the order

5 Type any additional relevant information in the **Quote Internal Note** box.

6 Click **Save**.

> You can view the competitor name, price and internal note in the **History** tab of the **Sales - Quote** or **Sales - Order** window. For details, see Viewing Quote and Order History on page 45.

Handling Follow-up Activities for Quotes and Orders

Concepts

Many, if not most, business transactions cannot be completed in a single action from start to finish. Often, follow-up activities are required. Examples:

- If you provide a print buyer a quote, and after a predetermined amount of time the buyer has still not responded to your quote, you should check with the print buyer whether to proceed with the order. To remind you to follow-up with the Print Buyer, the Activities feature automatically creates a follow-up activity when you provide a quote.
- If a designer makes a change in a job's design, you might need to modify the job's pricing or scheduling. The Activities feature automatically alerts you to design changes so that you can check if pricing or scheduling changes are needed.
- If you need to contact, or a schedule a meeting with, a Print Buyer, you can use the Activities feature to remind you to make the contact or set up the meeting.

As the above examples illustrate, there are two types of activities:

- Manually created (ad-hoc) activities that you create according to need.
- Automatically generated and scheduled activities.
  - Change in order – an activity that is generated when a designer marks a change in job or order in the artwork queue. For more information, see Handling Jobs That Are Not Ready For Production—The Artwork Queue on page 76.

■ Follow-up phone call - an activity that is generated when a Follow-up date is defined in a quote or an order. **Note:** In new quotes, the system automatically assigns a follow-up date. You can change this date, which will affect the activity.

When an activity is automatically generated, all of its parameters are set automatically as well.

Viewing and Handling Quote and Order Activities

The steps in this procedure describe how to view and handle quote activities. To view and handle Order activities, perform these steps in the **Sales - Orders** window (**Accounts > Sales > Orders**). The **Sales - Orders** and **Sales - Quotes** windows are almost identical.

1 If the **Sales - Quotes** window is not displayed, or if the quote is not selected, do the following:

a In the main menu, select **Accounts**.

b In the Customers list in the **Dashboard** window, select the account.

c Select **Sales > Quotes**. The **Sales - Quotes** window opens and displays all Open quotes. For an explanation of statuses, see Understanding Quote/Order Statuses And Icons on page 38.

d If helpful, filter the display.

e Select the quote in the **Sales - Quotes** list.

2 In the details pane, click (Activities). The Activities window opens. By default, the window lists Active activities for the quote.

3 Filter the displayed activities as needed, as follows:

a Specify filtering criteria based on status, date type (Start, Due) and period, and person assigned to the activity.

b To display activities for the entire account (not just the quote), select the **Display Account Level Activities** check box.

c Slick **Search**.

The filtered list of activities is displayed in the window.

4 Do any of the following in the Activities window:

■ **To create a new activity from scratch**, click **New**. The **New Activity** dialog box opens. The activity parameters are set to the default values, where appropriate.

■ **To duplicate an existing activity**, select the activity and click **Duplicate**. The **Duplicate Activity** dialog box displays the duplicated details of the activity (these are basically the same details that are displayed for the selected activity record in the Activity window).

■ **To edit an existing activity**, select the activity and click **Edit**. The **Edit Activity** dialog box displays the details of the activity (these are basically the same details that are displayed for the selected activity record in the Activity window).

5   Fill in or modify the details of the activity as needed. Note the following important points and hints:

- You can edit the list of available activity types (for instructions, see Step 6).
- By adjusting the priority value and then sorting on priority, you can view the most important activities first.
- You can adjust the **% complete** values and the due date according to need, to make the information more accurate and valuable.
- You can adjust the status according to subsequent follow-up results (for instructions see Step 7).

6   To edit the activity types list:

a   Click **Edit List**. The **Account Activity Type** dialog box opens.

b   Add, edit, or remove the items in the list.

c   Click **Save**. The dialog box is closed and the list updated.

7   To adjust the status of the activity

a   Click **Change Status**.

b   In the Change Status dialog box:

i   Select the appropriate status (Active, On Hold, Complete, or Cancelled).

ii   Specify a reason (or other relevant information) for making the change.

iii   Click **OK**.

8   When you are done editing the activity, click **OK** in the **Edit Activity** dialog box.

Viewing Quote and Order History

You can view a list of the stages, to date, in the life cycle of a quote or order.

> The steps in this procedure describe how to view the history of a quote. To view the history of an order activities, perform these steps in the **Sales - Orders** window (**Accounts > Sales > Orders**). The **Sales - Orders** and **Sales - Quotes** windows are almost identical.

1   If the **Sales - Quotes** window is not displayed, or if the quote is not selected, do the following:

a   In the main menu, select **Accounts**.

b   In the Customers list in the **Dashboard** window, select the account.

c   Select **Sales > Quotes**. The **Sales - Quotes** window opens and displays all Open quotes. For an explanation of statuses, see Understanding Quote/Order Statuses And Icons on page 38.

d   If helpful, filter the display.

e   Select the quote in the **Sales - Quotes** list.

2   In the details pane, select the **History** tab. The details area displays the list of the stages in the quote's life cycle.

3   To view the Activity details of a particular stage, click the 🔍 button in the **Details** column for that stage. The Activity Details dialog box opens and displays the Activity description. When done viewing the Activity Detail, click close in the **Activity Details** dialog box.

Handling Quick Sales

The Quick Sale feature is intended for simple transactions that do not require a job ticket for the production floor. For example, this feature enables you to sell products or services to walk-in or known clients, who enter the store and ask for products such as photocopies or a box of paper, or for services such as binding or lamination, get payments and issue receipts, providing a "cash register" type of functionality.

Quick sales are handled from the Quick Sale window. The window displays the list of items and/or services for a sale, and payment details. You can issue a standard receipt to a client.

The list of items and services available are taken from the pricing definitions already defined for stock and services in the Line Items library.

The Design and structure of the Quick Sale receipts are defined by a default Word template provided in the system. Quick Sale receipts contain the following information: print house details, sale details, CSR details, etc. The receipts are printed on a printer that was pre-defined through the Quick Sale settings, described in Define Quick Sale Settings on page 6.)

> It is recommended to create a general account (with at least one user) to use for occasional walk-in clients.

This section contains the following topics:

- Performing a Quick Sale
- Making New Items Available for Quick Sale

Performing a Quick Sale

1   In the main menu on the Print Service Provide side, select **Accounts › Sales › Quick Sale**. The **Quick Sale** window (Figure 12)is displayed.

> You can also reach this window by clicking **Quick Sale** on the **Dashboard**.

Figure 12: Quick Sale Window

- The right side of the window displays the list of products and services that are available for in the Line Item library.
- The left side of the window displays the items that have been selected for the current quick sale.

2   Select an account from the **Accounts** drop-down list (for example, an account called Walk-ins).

3   For each item the buyer wants to purchase, locate the item list on the right side of the window and click **Add to Sale**. The item is added to the itemized list on the left side of the window. Note the following points:

- If a required item does not exist in the pre-defined items list, you can add it using the **New Item** button. For more information, see Making New Items Available for Quick Sale on page 49.
- To filter the items displayed on the right side of the window, you can use the **Search** box to perform a search, and/or click the **All** value in the **Type** field and then limit the types of items displayed.

4 In the item entry on the left side of the window, fill in the **Quantity** being ordered. The cost and price are updated.

> You can edit the **Cost** and **Price** values. Any change in these fields or in a number of item lines will recalculate line subtotal, balance due, tax and change values for current sale.

5 To remove an item from the current sale, select the item and click **Remove Item**.

6 When the list of items being ordered is complete, to set a discount on the order:

> You can only set a discount if a discount item was selected during Quick Sale setup (**System Setup > Advanced > Quick Sale**; for instructions, see Define Quick Sale Settings on page 6).

    a Click the **Set Discount** button. A new line appears in the items list of the sale. A subtotal amount is displayed in red with a negative value.

    b Set the discount amount appropriately.

7 When the buyer pays for the order, add in the payment information, as follows:

    a Click **Add Payment**. The **Payments** dialog box opens.

    b Select the form of payment and provide additional information as required, according to the form of payment.

    c Type the payment amount.

    d Click **OK**. The dialog box closes; the order draft is updated according to the payment information.

    e If the buyer is making multiple payments (for example, multiple checks), repeat this step for each payment.

8 Click the **Open Cash Drawer** button to handle the payment.

> This feature is enabled only if was implemented by Professional Services, and a connection to the cash drawer was defined in the Quick Sale settings. For more information, see Define Quick Sale Settings on page 6.

9 Commit the sale (save the sale in the system) by doing either of the following.

    a If payment was provided, click **Commit and Print Receipt**. A confirmed receipt is assigned a number and printed. The receipt is linked to the created invoice and sent to the pre-defined printer.

    b If no payment was provided, click **Commit**. A paid invoice is created in the system and linked to the created order.

- If the buyer decided not to proceed with the purchase, click **Clear Sale** before and instead of committing the sale. Confirm the deletion of the sale.

- The receipt numbering can be based on a unique counter for the Quick Sale receipts or use the same numbering as the Billing Receipts, according to the Quick Sale settings. For more information on Quick Sale receipt numbering, see Define Quick Sale Settings on page 6. For more information on numbering in general, see Customize Document Numbering (Optional) on page 7.

Making New Items Available for Quick Sale

During the course of normal FreeFlow Web Services setup and maintenance, you define available line items, including items that are available for quick sales. However, if during processing of a quick sale, you find that an item is not listed in the Line Item library, you and use this procedure to add the item to the library from the **Quick Sale** window.

1   In the main menu on the Print Service Provide side, select **Accounts › Sales › Quick Sale**.

1   In the right side of the **Quick Sale** window, click **New Item**. The **Line Item** dialog box is displayed.

2   Choose required item type from the **Type** drop-down list.

3   Type a description for the new line item.

4   Choose the type of units from the **Units** drop-down list.

5   Define the pricing information. For more information about creating line items, see the chapter on pricing in the Print Service Provider User Guide.

    a   Add price ranges, if required.

    b   Enter the cost and price data.

6   Click **Save**.

4

Handling Invoicing and Billing

The Billing module of Web Services Order Center enables you to generate and manage the billing documents. This module provides:

- Separate windows, under **Accounts > Billing**, for generating and handling invoices, receipts, credit notes, and deposits, at the account level.

> When Web Services Order Center is installed, the **Account Links** option is not available. (**Account Links** is the only option available from **Accounts > Billing** when Web Services Order Center is not installed.)

- The **Billing Manager** window (**Tasks > Billing**) that provides a single, shortcut window for monitoring and intervening in billing issues for any account. This window and its usage is described in Section 5 Managing Your Business And Production.

This chapter provides instructions for performing the following tasks:

- Handling Invoices
- Handling Receipts
- Handling Credit Notes
- Handling Deposits

Handling Invoices

An invoice is a request for payment for orders produced in the system. You issue and handle invoices for an account in the Invoices window (Figure 13).

Figure 13: Billing Invoices Window

The window contains two sections:

- The left side lists the invoices for the account. By default, only the Open invoices are listed.
- The right side lists information about the selected invoices. It contains two tabs:
    - General tab—lists general information such as contact person and billing address.
    - Details tab—lists details specific to the particular invoice.

The key details specific to the invoice are displayed in the Details tab (Figure 14 on page 53). The Detail tab includes the following:

- list of the orders to be paid—order lines are links. Clicking an order number link to open the dialog box with the order details.
- any manually added lines (components that are not linked to an order but have a value that will influence the invoice total). The manual lines do not have an order number.
- breakdown that includes:
    - **Total Credit Notes** amount line—if credit notes exist for the invoice, the **Total Credit Notes** amount becomes an active link. If you click on it, it opens the **Credit Notes** window in a dialog box, where you can view credit note information.
    - **Total Deposits** amount line—this line is always a link, even if no deposits exist for the connected orders. Clicking this link opens the **Deposits** window in a dialog box, where you can view deposit information or manage deposits.

Figure 14: Invoice Details

This section contains the following procedures:

- To open the Invoice window and display invoices
- To create or edit an invoice
- To confirm a draft invoice
- To cancel an invoice
- To issue a Credit Note
- To view the details of an order in the invoice
- To display the credit notes for the invoice
- To display the deposits for the invoice
- To print an invoice

To open the Invoice window and display invoices

1 Open the window as follows:

   a In the main menu, select **Accounts**.

   b In the **Dashboard** window, select the account.

   c In the menu ribbon, select the **Billing** tab. The Invoices window (Figure 13 on page 52) is displayed.

2 To filter the list by any combination of status, name of CSR who created the invoice, issue dates, or value dates

   a Select values for any combination of the following:

     - From the **Status** drop-down list, select the status of the invoices.
     - From the **Created by** drop-down list, select the name of CSR.

- From the **Date** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.
- From the **Select Date** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).

b Click **Search**.

3 To search a specific invoice with a known number, specify the invoice number and click **Search**

4 (To clear the search results and display the entire list of Open invoices, click **Reset**.)

To create or edit an invoice

1 In the Invoice window, do one of the following:

a To create a new invoice, click **Create New** under the list of invoices. The **New Invoice** dialog box opens.

b To edit a draft invoice, select the draft invoice, and click **Edit** under the invoice details. The **Edit Invoice** dialog box opens. (You cannot edit a confirmed invoice; if a confirmed invoice is incorrect, you can cancel it, and then define a new, correct invoice.)

2 In the **General** page of the **New Invoice** (or **Edit Invoice**) dialog box, enter information in the editable fields.

a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account. Selecting a different user automatically updates the user details and billing address.

b If required, enter the text of the internal note and/or the text of the note for the customer.

> The note for the customer will appear on the invoice printout.

3 In the **New Invoice** (or **Edit Invoice**) dialog box, select the **Details** tab, where you can add invoice components to the invoice (Figure 15 on page 54).

Figure 15: New Invoice Dialog Box–Details Tab

4 To add order(s) to the invoice:

    a Click the **Select Orders** button. The **Select Orders** dialog box appears, listing all the committed orders for the account.

Figure 16: Select Orders Dialog Box

    b If required, search for the orders using the search feature.

    c Select the check boxes next to the orders to be included and click **OK**. The **Select Orders** dialog box closes, and the selected orders appear in the **New Invoice** dialog box. The invoice total is recalculated.

5 To add a new price component to the total amount of the selected invoice draft (if required):

    a Click the **Add Manual Line** button.

    b Enter the information in the editable fields of the **Set Manual Line** dialog box. This can include a description, amount excluding tax, discount amount or percentage, and tax amount.

    c Click **OK**. The new line appears in the **New Invoice** dialog box, and the invoice total is recalculated.

6 (To remove orders or manual lines from the invoice draft, select the item and click the **Remove** button. Then click **Yes** to confirm. The selected line is removed from the invoice, and the invoice total is recalculated.)

7 To set a discount for an order/manual component in the invoice draft:

    a Select the line in the invoice component list and click the **Set Discount** button. An appropriate dialog box opens allowing the user to enter the discount for the selected line.

    b Type the discount description.

    c Enter the discount value or percentage.

d Click **OK**. The dialog box is closed, the corresponding data in the selected line is changed, and the invoice total is recalculated.

8 If you need to manage the deposits for this invoice, click the **Total Deposits** link near the bottom of the dialog box to open the **Deposits** window. For information on creating and editing deposits, see To create or modify a deposit on page 68.

9 To save the invoice as a draft, click **OK**; to save the invoice as a confirmed invoice, click **Confirm**.

To confirm a draft invoice

1 In the **Invoice** window, select a draft invoice, and click **Confirm**.

2 In the confirmation prompt warning that the invoice will not be editable, click **Yes**.

The message dialog box is closed and the status of the invoice is changed to **Confirmed**. Confirmed invoices cannot be edited. If you find a mistake in a confirmed invoice, cancel the invoice and create a new invoice in its place.

To cancel an invoice

Only invoices in **Draft** or **Confirmed** (but not paid) status, can be cancelled. For invoices in any other status the **Cancel Invoice** button is disabled.

1 In the Invoice window, select the invoice. and click **Cancel Invoice**.

2 In the confirmation prompt, click **Yes**.

3 In the dialog box that opens requesting the reason for the cancellation, enter the information in the **Reason** field and click **OK**.

The invoice is cancelled.

> ■ The cancellation of an invoice cancels also all the credit notes issued for that invoice.
> ■ If the canceled invoice was a confirmed invoice, a new credit note is created with an amount equal to the amount of the cancelled invoice, and it is linked to the cancelled invoice. This is done for balancing the books.

To issue a Credit Note

Credit notes are linked to specific invoices. You can only issue a credit note for an invoice with a **Confirmed** or **Partially paid** status. For detailed information on credit notes, see Handling Credit Notes on page 63.

> If the Billing module is not activated in the license, the **Issue Credit Note** button is disabled, and the **Mark as Paid** button appears, enabling the user to change the status of invoices from Confirmed to Paid.

1 In the **Invoice** window, select the invoice, and click **Issue Credit Note**. The **New Credit Note** dialog box opens. The number of selected invoice is displayed in the **Issued for Invoice #** field of the **Details** page, on the right pane of the window.

2 Fill in the necessary information.

3 Click **OK** to save the draft credit note for the selected invoice; or click **Confirm** to save the draft and convert it to a confirmed credit note.

To view the details of an order in the invoice

1 In the **Invoice** window, select the invoice.

2 In the information pane, select the **Details** tab.

3 Click the **Order** link. A dialog box displays the Order details.

To display the credit notes for the invoice

This procedure is valid only if there are credit notes associated with the invoice.

1 In the **Invoice** window, select the invoice.

2 In the information pane, select the **Details** tab.

3 Click the **Total Credit Notes** link. The **Credit Notes** window opens in a dialog box. For information on using the **Credit Notes** window, see Handling Credit Notes on page 63.

To display the deposits for the invoice

1 In the **Invoice** window, select the invoice.

2 In the information pane, select the **Details** tab.

3 Click the **Total Deposits** link. The **Deposits** window opens in a dialog box. For information on using the **Deposits** window, see Handling Deposits on page 66.

To print an invoice

1 In the **Invoice** window, select the invoice.

2 Click **Print**.

Handling Receipts

Receipts are issued in response to payments made. You issue and handle receipts for an account in the Receipts window. The window contains two sections:

- The left side lists the receipts for the account. By default, only the draft receipts are listed.
- The right side lists information about the selected receipts. It contains two tabs:
    - General tab—lists general information such as contact person and billing address.
    - Details tab—lists details specific to the particular receipt.

The key details specific to the receipt are displayed in the Details tab (Figure 17 on page 58). This tab displays:

- invoices included in the receipt—these are links and clicking the invoice number link opens a dialog box with the invoice details.
- confirmed credit note total for an invoice—this amount is shown in the **Invoices** table. If credit notes exist for the invoice, this amount becomes an active link. If you click on it, it opens the **Credit Notes** window in a dialog box, where you can view credit note information. For detailed information on credit notes, see Handling Credit Notes on page 63.
- total amount of the receipt
- total refunds
- amount and type of each payment
- total payments.

Figure 17: Receipts Detailed Information

Receipts:

- can be issued for one or multiple invoices.
- can be issued for a payment covering the full balance of the invoices or a partial payment.
- can contain one or multiple payments with different payment forms.
- can be paid using various payment methods. In case of credit card, it can be divided into several installments.

Examples

The following examples present the most simple receipt scenario and a complex one.

■ Simple Receipt—A receipt is issued for one invoice; one payment is made for the full amount.

■ Multiple invoices and multiple payments receipt—A receipt is issued for two invoices; two payments are made, in cash and with a credit card; the payments are for a partial amount.

When payments are made for a partial amount and there is more than one invoice, you can decide how to divide the payment between the invoices. In this example, the first invoice was accredited full payment, and the left-over payment was accredited to the second invoice.

This section contains the following procedures:

■ To open the Receipts window and display receipts

■ To create or modify a receipt

■ To confirm a draft receipt

■ To cancel a receipt

■ To view the details of an invoice included in the receipts

■ To display the credit notes for the invoice in the receipt

■ To print a receipt

To open the Receipts window and display receipts

1 Open the window as follows:

   a In the main menu, select **Accounts**.

   b In the **Dashboard** window, select the account.

   c In the menu ribbon, select the **Billing > Receipts**. The **Receipts** window is displayed.

2 To filter the list by any combination of status, name of CSR who created the receipt, issue dates, or value dates

   a Select values for any combination of the following:

      ■ From the **Status** drop-down list, select the status of the receipt.

      ■ From the **Created by** drop-down list, select the name of CSR.

      ■ From the **Date** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.

      ■ From the **Select Date** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).

   b Click **Search**.

3 To search a specific receipt with a known number, specify the receipt number and click **Search**

4 (To clear the search results and display the entire list of draft receipts, click **Reset**.)

To create or modify a receipt

You can create new receipts and modify draft receipts.

1   In the Receipts window, do either of the following:

- To create a new receipt, click **Create New** under the list of receipts. The **Insert Receipt** dialog box opens.
- To edit an existing draft receipt, select the receipt and click **Edit** under the receipt details pane. The **Edit Receipt** dialog box opens. (You cannot edit a confirmed receipt; if a confirmed receipt is incorrect, you can cancel it, and then define a new, correct receipt.)

2   In the **General** page of the **Insert Receipt** (or **Edit Receipt**) dialog box, enter information in the editable fields.

- **a**   If required, change the account billing address.

- **b**   If required, enter the text of the internal note and the text of the note for customer.

The note for the customer will appear on the receipt printout.

3   In the **Insert Receipt** (or **Edit Receipt**) dialog box, select the **Details** tab.

Figure 18: Edit Receipt Dialog Box

4 To select invoices for which the receipt is being given

   a Click the **Select Invoices**. The **Select Invoices** dialog box appears.

   b If required, use the search feature to find the invoices.

   c Select the check boxes next to the invoices to be included.

   d Click **OK**. The **Select Invoices** dialog box closes; the invoices appear in the **Insert** (or **Edit**) **Receipt** dialog box.

> Each invoice line contains on the far right side a **Left to Pay** field and a **Paid Amount** text box. The **Left to Pay** field shows the current amount for payment on the invoice - the invoice amount, less credit notes, deposits and previous receipts. The **Paid Amount** by default contains the same number as the **Left to Pay**.

(To remove an invoice, select it and click **Remove line**).

5 To add or edit payments

   a Click **Add Payment**, or select the payment and click **Edit Payment**. The **Payments** dialog box opens.

   b Select the form of payment. The dialog box contents change for each specific method of payment.

   c Fill in the details and amounts, as required. If the payment type is Credit Card or Debit Card, and payment is being made in more than one installment, use the **Installment** button to open a dialog box where you can enter the required information.

   d Click **OK**. The dialog box closes and the payment is added to the list.

6 If the payment amount does not cover the full amount in the invoice (or invoices), type the paid amount per invoice in the **Paid Amount** text box.

> - The payment screens have no interface to online payment gateways.
> - If you cannot see the **Paid Amount** text box on the right hand side of the invoices, use the horizontal scroll bar to display it.

7 Save the receipt as follows

- To save as a draft receipt, click **OK**. The dialog box closes. The status of all the invoices included in the draft receipt and of all the credit notes linked to the draft receipt is changed to **Linked to draft receipt**.
- To save the receipt with a confirmed status, click **Confirm**. The dialog box closes. The status of all the invoices included in the selected receipt is changed to **Paid** or **Partially paid**, depending on the amount paid.

To confirm a draft receipt

1 In the Receipt window, select the draft receipt and click **Confirm**.

2 In the confirmation prompt warning that the receipt will not be editable, click **Yes**.

The message dialog box is closed. The status of the receipt is changed to **Confirmed**.

To cancel a receipt

Only for authorized users (users with System Administrator or Manager Advanced user type) can cancel a receipt.

1   In the Receipt window, select the receipt and click **Cancel Receipt**.

2   In the confirmation prompt, click **Yes**.

3   In the dialog box that opens requesting the reason for the cancellation, enter the information in the **Reason** field and click **OK**.

The receipt is cancelled. The status of all the invoices included in the receipt, and the status all the credit notes linked at account level, is changed to **Confirmed**.

To view the details of an invoice included in the receipts

1   In the **Receipt** window, select the receipt.

2   In the information pane, select the **Details** tab.

3   Click the **Invoice** link. A dialog box displays the Invoice details.

To display the credit notes for the invoice in the receipt

This procedure is valid only if there are credit notes associated with the invoice in the receipt.

1   In the **Receipt** window, select the receipt.

2   In the information pane, select the **Details** tab.

3   Click the **Credit Notes** link for the invoice. The **Credit Notes** window opens in a dialog box. For information on using the **Credit Notes** window, see Handling Credit Notes on page 63.

To print a receipt

1   In the **Receipt** window, select the receipt.

2   Click **Print**.

Handling Credit Notes

A credit note is a billing document that you issue to a print buyer to record the reduction of an invoice because of a discount, product return or cancellation. You will find it especially useful when you want to give a discount to a print buyer after issuing an invoice.

A credit note is only issued against a specific invoice:

■ Credit notes are linked to an invoice, influencing the invoice balance to be paid. The invoice is linked to a receipt. The credit note amounts are displayed in the receipt.

■ Multiple credit notes can exist for an invoice. When creating a receipt for an invoice with a linked credit note, the total amount to pay will be:

```
Total to Pay = Invoice Total - Credit Notes
```

You handle credit notes for an account in the Credit Notes window. The window contains two sections:

■ The left side lists the credit notes for the account. By default, only the draft credit notes are listed. The list is sorted by issue date, in ascending order. You can sort the list by each data type by clicking the corresponding column header.

■ The right side lists information about the selected credit notes. It contains two tabs:

   ■ General tab—lists general information such as contact person and billing address.

   ■ Details tab—lists key details specific to the credit note. The credit note details contain information of the connected invoice, the credit note amount and tax (Figure 19 on page 65).

This section contains the following procedures:

■ To open the Credit Notes window and display credit notes
■ To create or modify a credit note
■ To confirm a draft credit note
■ To cancel a credit note
■ To print a credit note

To open the Credit Notes window and display credit notes

1 Open the window as follows:

   a In the main menu, select **Accounts**.

   b In the **Dashboard** window, select the account.

   c In the menu ribbon, select **Billing > Credit Notes**. The **Credit Notes** window is displayed.

2 To filter the list by any combination of status, name of CSR who created the credit note, issue dates, or value dates

   a Select values for any combination of the following:

     ■ From the **Status** drop-down list, select the status of the credit notes.

     ■ From the **Created by** drop-down list, select the name of CSR.

     ■ From the **Date** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.

- From the **Select Date** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).

b Click **Search**.

3 To search a specific credit note with a known number, specify the credit note number and click **Search**

4 (To clear the search results and display the entire list of draft credit notes, click **Reset**.)

To create or modify a credit note

Open users with System Administrator or Manager Advanced user type privileges can create or modify credit notes.

1 In the **Credit Notes** window, do either of the following:

- To create a new credit note, click **Create New** under the list of credit notes. The **New Credit Note** dialog box opens.
- To edit a draft credit note, select the credit note and click **Edit** under the credit note details pane. The **Edit Credit Note** dialog box opens. Only draft credit notes that are connected to a confirmed but not yet paid invoice can be edited. (You cannot edit a confirmed credit note; if a confirmed credit note is incorrect, you can cancel it, and then define a new, correct credit note.)

2 In the **General** page of the **New Credit Note** (or **Edit Credit Note**) dialog box, enter information in the editable fields.

a Change the default account billing address and contact person information, if required.

b Type the text of the internal note and the text of the note for customer.

> The note for the customer will appear on the credit note printout.

3 In the **New Credit Note** (or **Edit Credit Note**) dialog box, select the **Details** tab.

Figure 19: Credit Note Details

4 Click the **Select Invoice** button. The **Select Invoice** dialog box opens.

    a Select the invoice.

    b Click **OK**. The dialog box closes; the invoice number appears in the credit note details.

5 Enter the amount/percentage of the credit note and set the tax.

6 Save the credit note as follows:

    ■ To save as a draft credit note, click **OK**.

    ■ To save as a confirmed credit note, click **Confirm**.

To confirm a draft credit note

Only authorized users (users with System Administrator or Manager Advanced user type) can confirm a draft credit note.

1 In the Credit Note window, select the draft credit note, and click **Confirm**.

2 In the confirmation prompt warning that the credit note will not be editable, click **Yes**.

The message dialog box is closed. The status of the credit note is changed to **Confirmed**.

To cancel a credit note

Only for authorized users (users with System Administrator or Manager Advanced user type) can cancel a credit note.

1 In the Credit Note window, select the credit note, and click **Cancel Credit Note**.

2 In the confirmation prompt, click **Yes**.

3 In the dialog box that opens requesting the reason for the cancellation, enter the information in the **Reason** field and click **OK**.

The credit note is cancelled.

To print a credit note

1 In the **Credit Note** window, select the credit note.

2 Click **Print**.

Handling Deposits

A deposit is a partial payment for an order, made by the print buyer in advance, before commencing work on a job. This is customary when some artwork should be performed before it is known whether the job will be ordered.

A deposit is linked to a specific order. Because it is possible to make several advance payments, multiple deposits can be connected to an order.

You handle deposits for an account in the **Deposits** window. The window contains two sections:

■ The left side lists the deposits for the account. By default, only the draft deposits are listed.
■ The right side lists information about the selected deposit. It contains two tabs:
  ■ General tab—lists general information such as contact person and billing address.
  ■ Details tab—displays key details specific to the particular deposit (Figure 17 on page 58). This includes order number, total order amount, and the existing confirmed deposit amount.

Figure 20: Deposit Details


```
Deposit #RCT2

[ General ]  Details

Deposit For Order No:OSR3
Order Total:      1866.4506
Existing Deposits:   0

  #      Value Date        Amount        Payment Type       Details
  1       03-17-09         186.65            Cash

     Total Payments:      186.65


Total Inc. Tax:   186.65
```

This section contains the following procedures:

■ To open the Deposits window and display deposits
■ To create or modify a deposit
■ To confirm a draft deposit
■ To cancel a deposit
■ To print a deposit

To open the Deposits window and display deposits

1 Open the window as follows:

   a In the main menu, select **Accounts**.

   b In the **Dashboard** window, select the account.

   c In the menu ribbon, select the **Billing > Deposits**. The **Deposits** window is displayed.

2 To filter the list by any combination of status, name of CSR who created the deposit, issue dates, or value dates.

   a Select values for any combination of the following:

      ■ From the **Status** drop-down list, select the status of the deposit.
      ■ From the **Created by** drop-down list, select the name of CSR.
      ■ From the **Date** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.
      ■ From the **Select Date** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).

   b Click **Search**.

3 To search a specific deposit with a known number, specify the deposit number and click **Search**

Clicking **Reset** performs the search again with specified text criteria removed; it does not reset the drop down list values. To reset the drop down list criteria, select the desired criteria again and click search.

To create or modify a deposit

You can create new deposits and modify draft deposits for committed orders only.

1 In the **Deposits** window, do either of the following:

- To create a new deposit, click **Create New** under the list of deposits. The **Insert Deposit** dialog box opens.
- To edit an existing draft deposit, select the deposit and click **Edit** under the deposit details pane. The **Edit Deposit** dialog box opens.(You cannot edit a confirmed deposit; if a confirmed deposit is incorrect, you can cancel it, and then define a new, correct deposit.)

2 In the **General** page of the **Insert Deposit** (or **Edit Deposit**) dialog box, enter information in the editable fields.

a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account. Selecting a different user automatically updates the user details and billing address.

b If required, enter the text of the internal note and the text of the note for the customer.

The note for the customer will appear on the deposit printout.

3 In the **Insert Deposit** (or **Edit Deposit**) dialog box, select the **Details** tab.

4 For a new deposit (or to correct the order), click **Select Order**. The **Select Orders** dialog box appears.

a Find and select the order.

You can click the order number link to check the order details.

b Click **OK**. The dialog box closes and the order information appears in the **Insert Deposit** dialog box.

5 To add a payment, click **Add Payment**. The **Payments** dialog box opens.

a Fill in the payment information as you would for a receipt (see Step 5 on page 61).

b Click **OK**, the **Payments** dialog box closes and the payment information is updated.

6 Type the total payments amount in the **Total Amount** text box.

7 If required, edit the selected payment line information using the **Edit Payment** button.

8 If required, remove the selected payment(s) from the table using the **Delete Payment** button.

9 Save the deposit as follows:

- To save as a draft deposit, click **OK**.
- To save as a confirmed deposit, click **Confirm**.

To confirm a draft deposit

1 In the **Deposit** window, select the draft deposit, and click **Confirm**.

2 In the confirmation prompt warning that the deposit will not be editable, click **Yes**.

The message dialog box is closed. The status of the deposit is changed to **Confirmed**.

To cancel a deposit

1 In the **Deposit** window, select the deposit and click **Cancel Deposit**.

2 In the confirmation prompt, click **Yes**.

3 In the dialog box that opens requesting the reason for the cancellation, enter the information in the **Reason** field and click **OK**.

The deposit is cancelled.

To print a deposit

1 In the **Deposit** window, select the deposit.

2 Click **Print**.

5
Managing Your Business And Production

This chapter describes many of the tasks that you will perform, using Web Services Order Center, to help you manage your business.

Many of these tasks utilize the functionality described in the earlier chapters of this guide. But Web Services Order Center also provides several more windows to help simplify the performance of a number of these management tasks.

A number of these windows are queue windows accessed from the **Task** option in the main menu, where Web Services Order Center offers a number of improvements in the Business-to-Production flow, including the following:

- Jobs are automatically sent to the Production queue after the order has been "committed"
- When a Job is being revised, following user confirmation of the request to revise, the Job is withdrawn from the Production or Delivery queues (if it had already been placed there).
- Jobs can now be approved for production without attached PDF (or other) files for production.
- Users can now select the target file that is to be printed from among existing files located in the Attachments window.

This chapter covers the following topics:

- Viewing Account Data At A Glance—The Dashboard—generally performed by the CSR.
- Monitoring Open Quotes and Orders—The Commercial Queue—generally performed by the CSR.
- Handling Jobs That Are Not Ready For Production—The Artwork Queue—generally performed by the designer.
- Managing An Account's Activities—The Activities Window—generally performed by the CSR.
- Managing Billing—The Billing Manager—generally performed by administrative personnel.

Viewing Account Data At A Glance—The Dashboard

There are several important reasons for reviewing account business data:

- To ensure that everything is fine with an account. For example:
    - to ensure that orders and jobs are handled quickly
    - to determine if any follow-up activities are required, and ensure that they get performed.
    - to identify any outstanding issues or problems, and ensure that they do not "fall between the cracks."

   Reviewing account data on a frequent basis can make it much easier to keep the customer satisfied.

- To help in pre-sales preparation. For example, before providing a quote to a customer, it might be useful to check the customer's account history. Checking the history might help you decide:
    - how fast you should respond to the request for quotation.
    - what kind of payment terms and price to quote.
    - how fast you would agree to deliver it.

CSRs and other relevant users can view account data at a glance in the **Dashboard** window.

To review account data in the Dashboard

1 In the main menu, select **Accounts**. The Dashboard window is displayed (Figure 21).

Figure 21: Dashboard Window
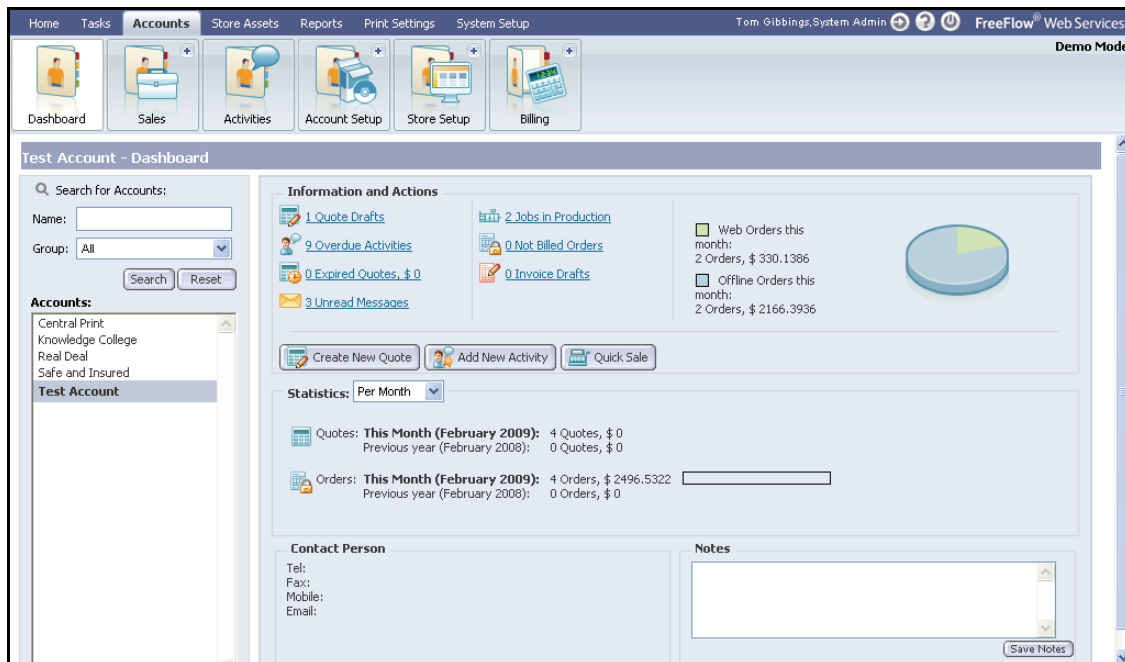
- The Dashboard also provides shortcut access to other windows.
- Print Service Provider users must have Manager or Administrator privileges to view account business data in the **Dashboard** window.

The **Dashboard** window contains the following panes:

■ Account list pane —from which you select the account to whose data you want to view.

■ Account Business Details pane—displays details and links to other details, for the account you selected.

2 To filter the account list or search for an account, do the following"

   a In the **Search for Accounts** text box, enter an account name (partial or complete).

   b In the **Group** list, select which groups to search.

   c Click **Search**; the relevant name(s) appear(s) in the list.

(You can click **Reset** to restore the complete list of accounts.)

3 Select the account.

The details of the account are displayed in the Business Details pane.This pane contains the following sections that provide key information about the account at a glance:

■ **Information and Actions**—this section contains:
   ■ totals for commonly requested data, and links to access the windows where that data is normally displayed. For example, the **Quote Drafts** link displays the number of Quote Drafts (for the account), and provides direct access to those quote drafts in the **Sales - Quotes** window (as if you selected **Accounts > Sales > Quotes** and then selected **Drafts** as the **Type** filter).
   ■ buttons to perform common actions (create new quotes, add new activities, and perform quick sales).
   ■ summary and pie chart indicating the Web orders and Offline orders for the month.

■ **Statistics**—displays (for the account) the number of quotes and orders and their total prices, for a time period you select (month, quarter, year), and compares these figures to quotes and orders for the same time period last year.

■ **Contact Person**—displays the contact details of the contact in the Print Buyer's organization.

■ **Notes**—allows you to enter, save, and view at a glance, important notes regarding the account.

4 For shortcut access to a type of item that requires intervention in the appropriate window (for example, to access Quote Drafts in the **Sales - Quotes** window), click the appropriate link in the **Information and Action** section.

lists the shortcut links, the windows those links open, and the lists displayed in the opened windows.

Table 2: Shortcut Links in the Dashboard

Link	Window Opened	List displayed
Quote Drafts	Sales- Quotes	Filtered list of draft quotes
Overdue Activities	Activities	Filtered list of overdue activities
Expired Quotes	Sales - Quotes	Filtered list of expired quotes
Unread Messages	Commercial queue	Unread messages on quotes from the selected account
Jobs in Production	Production queue	Jobs in the Production queue
Not Billed Orders	Sales - Orders	Filtered list of committed orders
Invoice Drafts	Billing - Invoices	Filtered list of draft invoices

5   To perform one of the following actions for the account, click the appropriate button:

- To create a new quote, click **Create New Quote**. (Alternatively, you can perform this action in the Sales - Quotes window). For instruction on filling in quote details, see Creating a Simple Quote on page 27.

- To add a new activity, click **Add New Activity**. (Alternatively, you can perform this action in the Activities window). For instructions on filling in activity details, see Handling Follow-up Activities for Quotes and Orders on page 43.

- To create and register a quick sale transaction, click **Quick Sale**. (Alternatively, you can perform this action in the Quick Sale window). For instructions on filling in quick sale details, see Performing a Quick Sale on page 47.

6   To view quote and order statistics for a particular time period, select the time period in the drop down list in the **Statistics** section.

7   To add a note concerning the account, type the note in the **Notes** text box and click **Save**.

Monitoring Open Quotes and Orders—The Commercial Queue

Although you can view and handle quotes in the **Sales - Quotes** window, and orders in the **Sales - Orders** window, the **Commercial** window provides a single location for handling quotes and orders for all accounts. The **Commercial** window provides you:

- Access to all the quotes and orders in the system.
- The ability to perform tasks on quotes and orders.
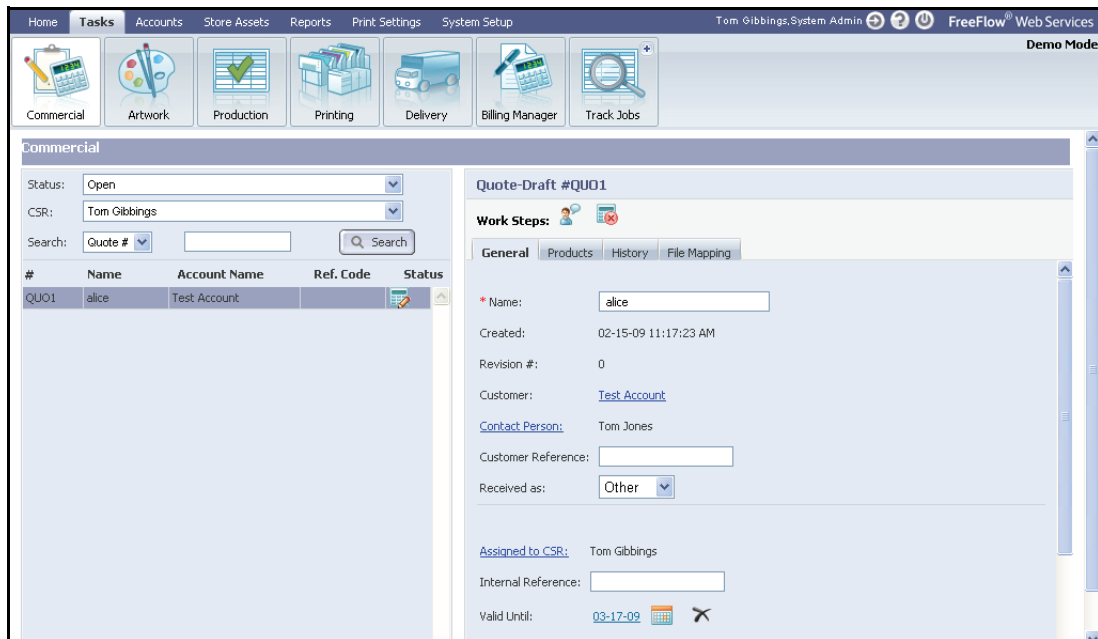- Access to overdue account level activities.

As with the **Sales - Quote** and **Sales - Order** windows:

- the **Commercial** window it contains two panes. The left pane lists the open quotes and orders, and the right pane displays the details of the selected quote or order, and allows you to handle that quote or order.
- the Commercial window allows you to filter and specify selection criteria for listed quotes and orders
- the details pane displays the same information and allows you to perform the same actions.

To Handle Open Quotes and Orders in the Commercial window

1   In the main menu, choose Tasks. The **Commercial** window is displayed.

Figure 22: The Commercial Window

By default, the **Commercial** list displays all quotes and orders having one of the various Open statuses, and overdue account level activities. Open statuses include the **Follow-up**, **Expired**, **Drafts**, and **Unread Messages** statuses.

You can filter displayed items by each one of the mentioned statuses and by responsible CSR.

2   Optionally filter the list or provide selection criteria.

3   Select the quote or order to be handled. All relevant details and parameters are displayed in the adjacent details pane.

4   Handle the quote or order as you would in the **Sales - Quote** window or the **Sales - Order** window. (The functionality of these pages is the same as in the **Quotes** and **Orders** in the **Sales** window, depending on the quote/order status. For details regarding the functionality of these windows, see Section 3 Handling Sales.)

Handling Jobs That Are Not Ready For Production—The Artwork Queue

Concepts

Jobs that are not ready for production, arrive to the **Artwork** queue window (Figure 23). This generally occurs in the following cases.

- A job in a committed order has no production file.
- A Print Buyer orders a job online without uploading a print file.

Such jobs can generally be made ready for production in either of the following ways.

- At the Print Buyer request, your team can create or design the production file. If your team prepares the production file, you must, of course, get it approved by the Print Buyer.
- The Print Buyer can supply you the production file (as might normally be done before the order has been committed).

Use the **Artwork** queue window to manage the jobs that require some work to be done before they can be sent to production.

Figure 23: Artwork Queue Window
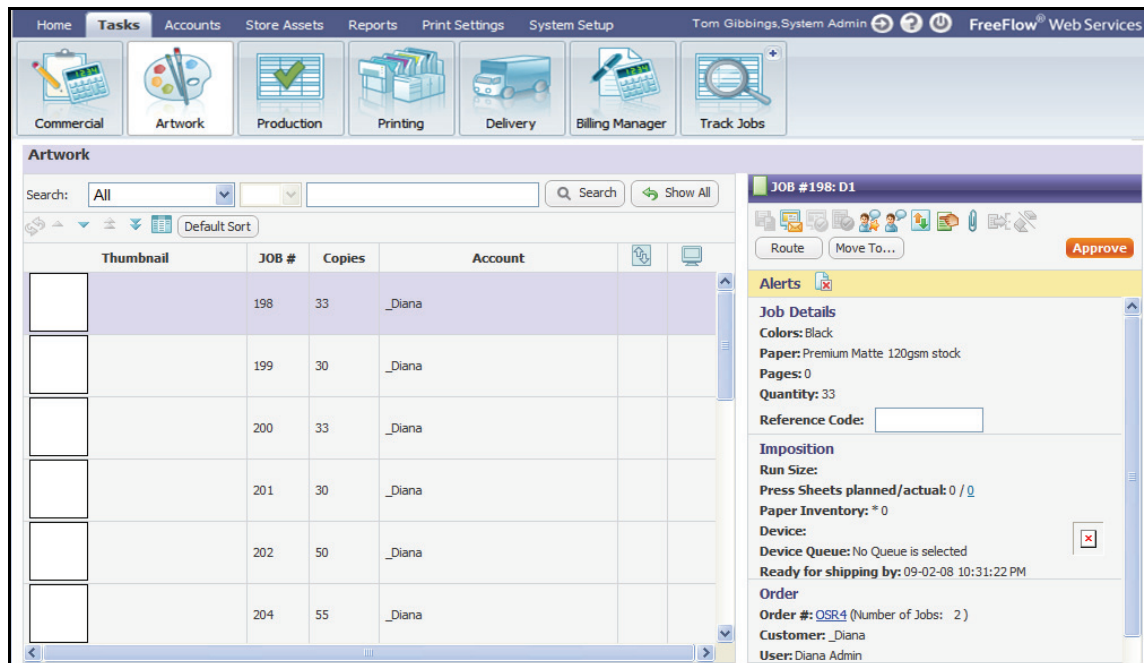
The **Artwork** window contains two panes:

- List – includes all the jobs that require handling before they can be sent to production.
- Job details – displays the detailed information for the selected job and a tool bar with options for handling the job.

List pane

Jobs in the Artwork list sorted according to the sequence of job arrival, with new jobs added to the bottom of the list.The following information appears for every job in the queue: job thumbnail (if exists), job number and name, number of ordered copies, shipping date, account name, order change status, and soft proof status.

> Usually, the thumbnail will be empty, since there is no production file.

Functional icons and buttons of the **Artwork** queue allow you to search for any job in the artwork phase, to upload and download print files, to send a job to production when the artwork is ready, to send a job to a soft proof, and, in case a job was printed externally, to move the job from the **Artwork** queue directly to **Delivery**, skipping the production.

Job details pane

When a job is selected in the list, the job information appears in the right pane:

■ Job alerts – initially will display 'No production file' for offline orders, and 'Note from the customer', if exists, for online orders. After a file has been added, may display additional alerts regarding preflight problems, font problems, etc. For more information about alerts, see the chapter discussing production, in the Print Service Provider Guide.

■ Details of selected job.

■ Imposition information – which at this stage is usually empty.

■ Details for the order that contains selected job: the order number (linked to the order), number of jobs in order, account name, price, order and shipping date.

Tasks Handled in the Artwork queue

You can perform the following tasks in the Artwork queue:

■ Managing Production Files
■ Managing Follow-up Activities for Order And Job Changes
■ Moving Jobs from the Artwork Queue to Other Queues

Managing Production Files

This section contains covers the following topics:

■ Handling File Attachments
■ Sending And Confirming Soft Proofs

Handling File Attachments

You can upload, download and attach files to a job, and view, modify or replace the files that are attached to a job. The files can be copied to any other location or placed in any folder, using standard Windows Explorer procedures.

In some cases, a designer might want to download files to a local computer to do the design work, and then upload the files back to the system when the design work is done.

The steps in this procedure describe how use the **Attachments** dialog box to upload, download, and attach files. It also describes how to mark files for production, and how to indicate external impositions:

■ External imposition functionality enables you to impose a job on external system, upload the imposed file to the system, and mark it as imposed.

■ Mark for Production functionality performs a preflight, creates a preview and thumbnail, and when you close the dialog box, updates the thumbnail in the list.

In the **Attachments** dialog box, a file's status is indicated either or both of the following icons:

■   icon—the file is ready for production

■   icon—the file is imposed.

To handle file attachments

1   Select **Tasks > Artwork**. The **Artwork** window is displayed. You can filter the display.

2   Select the job.

3   In the details pane, click   (**Attachments**). The **Attachments** dialog box opens and displays currently uploaded files.

4   To upload additional files to the list of files

     a   Click the **Upload Files**. The **Upload File** dialog box opens.

     b   Ensure **Upload a Single file** is selected, and click **Browse**. The **Choose File** dialog box opens.

> There is an option to upload multiple files, using Multi-file upload. For instructions, see the *Print Provider Guide* for instructions.

     c   Select the file for upload and click **Open**.

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

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

     f   Repeat this step for each file to be added.

5   To download files (for example, to your local computer):

    a   Select the file(s).

    b   Click ![icon] (**Download**).The **Download File** dialog box opens and displays one or two file download links.

> If you are downloading one file, the dialog box will contain two links: for the single file and a zip file containing the file to be downloaded.
>
> If you are downloading several files, the dialog box will contain a link for a zip file containing all the files to be downloaded.

    c   Click the link. The **File Download** dialog box opens.

    d   Save the file to the desired location as you would any file in the web browser.

    e   Close the **Download File** dialog box.

6   To delete a file, select the file and click ![icon]. This can be useful, for example, if the Print Buyer rejects a proof that you uploaded and sent as a soft proof for approval.

7   To activate the preflight process on a file, select the file and click **Mark for Production**. The preflight is performed, a preview and thumbnail created, the dialog box is closed and the thumbnail is updated in the list. A Marked for Production icon ![icon] appears by the file.

8   To apply an external imposition to a PDF file, select the file and click **External Imposition**. An External Imposition icon ![icon] appears by the file.

> Only PDF files can be imposed.

9   When done, click **Close**.

Sending And Confirming Soft Proofs

If your design team is designing or creating the production file, you will need to send a soft proof to the Print Buyer for approval. When you send soft proof, a flag is added to the job in the Artwork queue.

When the Print Buyer approves the soft proof, you must update the job in the Artwork queue to indicate the approval. These update actions are recorded in the order history.

In many cases, the status icons that is used to indicate that an activity was performed matches the icon of the button that was used to perform the action (for example, the icon indicating that a soft proof was sent is identical to the button used for sending a soft proof).

To send a soft proof

1   Select **Tasks > Artwork**. The **Artwork** window is displayed.

2   Select the job for which you are sending the soft proof.

3   Click ![icon] (Send Soft Proof). The **Send Soft Proof** dialog box opens. The dialog box displays the list of files already attached to the job (if any exist).

4   In the dialog box, specify who will receive the soft proof. You can select a different user, or select the **Other Mail Address** check box and type an email address of a person, who is not a user.

5   Type a subject and message for the email.

6   To upload additional files to be sent, click **Upload Additional Files**. The Attachments dialog box opens. Attach the files as described in Step 4 on page 78 (in the Handling File Attachments procedure).

7   Select the check boxes of the files for soft proofing.

8   Click **OK**. An email with the soft proof PDFs is sent. A message confirming that the email was sent appears.

9   Click **OK** to close the confirmation message. The ![icon] icon appears in the list, indicating that a soft proof has been sent.

To indicate that a Print Buyer approved the a soft proof

If the Print Buyer approves the soft proof, do the following:

1   Select **Tasks > Artwork**. The **Artwork** window is displayed.

2   Select the job whose soft proof has been approved by the Print Buyer.

3   Click ![icon] (Confirm Soft Proof). The **Confirm Soft Proof** dialog box opens.

4   If necessary, change the name of the confirming person. You can select a name of a different user, or select the **Other User Name** check box and type a name of a person, who is not a user.

5   Set the confirmation date.

6   Add a note, if needed.

7   Click **OK**. The ![icon] icon appears in the list, indicating that the change was confirmed.

Managing Follow-up Activities for Order And Job Changes

Certain changes that the designer performs might require follow-up activities. For example, the designer might change a job in a way that can affect the job's pricing or production time. In such a case the CSR should be notified.

The designer manually indicates the required follow-up, using the 🔼 (Define Change in Order/Job Activity) button. This results in the following:

■ The order appears in the **Commercial** queue with an Overdue Activity status and icon. This indicates that the CSR should handle the job.

■ The appropriate activity is added to the order details.

■ A activity flag is added to the job in the **Order Change Status** column (second column from the right) in the Artwork queue.

When the CSR marks the activity as completed, the flag in the Artwork queue is changed to confirmed. Optionally, the CSR can notify the designer that the change is approved, and the designer can confirm the change from the artwork queue.

To define a change in the job

1   Select **Tasks > Artwork**. The **Artwork** window is displayed.

2   Select the job requiring a change. All relevant details and parameters are displayed in the adjacent details pane.

3   In the job details pane, click 🔼 (Define Change in Order/Job Activity). The **Define Change in Order/Job Activity** dialog box opens. In the dialog box, the default activity type is **Change in Order**.

4   Change the activity properties as required.

5   Click **OK**. The 🔼 icon appears in the list, indicating that the job status was changed to **Waiting for change approval**.

An activity is added to the order and the order appears in the commercial queue as an order with overdue activities.

To approve a change in the job

1   Select **Tasks› Artwork**. The **Artwork** window is displayed.

2   Select a job that is waiting for change approval.

3   Click 🔲 (Confirm Change in Activity). The **Confirm Change in Activity** dialog box opens.

4   If necessary change the name of the confirming person and the date of the confirmation.

5   Add a note, if required.

6   Click **OK**. The 🔲 icon appears in the list, indicating that the change was confirmed.

Moving Jobs from the Artwork Queue to Other Queues

To approve a job in the Artwork queue for production

The **Approve** functionality is used across the system queues, as the standard way of moving a job to the next processing step (queue). In the case of the **Artwork** queue, it means moving the job to the **Production** queue.

1   Select **Tasks > Artwork**. The **Artwork** window is displayed.

2   Select the job.

3   Click Approve. The job is moved to the **Production** queue.

To move a job from the Artwork queue to the Printing queue or Delivery queue without any processing

Use this option to move a job without any processing to the **Printing** or **Delivery** queues, skipping the standard step of production.

1   Select **Tasks > Artwork**. The **Artwork** window is displayed.

2   Select the job.

3   Click Move To.... The **Change Job Status** dialog box opens.

4   Select the queue to which the job should move.

5   Click OK. The dialog box closes and the job is moved to the selected queue.

Managing An Account's Activities—The Activities Window

Generally, you perform follow-up activities that are relevant to a feature from the window that is relevant to the feature (for example, you perform follow-up activities on quotes in the **Sales–Quote** window). However, Web Services Order Center provides a single entry point, the Activities window, from which you can view and handle activities for an account.

This window is the same as the Activities window that you can open directly from the **Sales-Quote** or **Sales-Order** window, except that it allows you a greater choice in selecting the combination of activities to be displayed.

1   In the main menu, select **Accounts** and select the account for which you want to view, create or edit activities

2   Select **Activities**. The Activities window (Figure 24) is displayed.

Figure 24: Activities Window
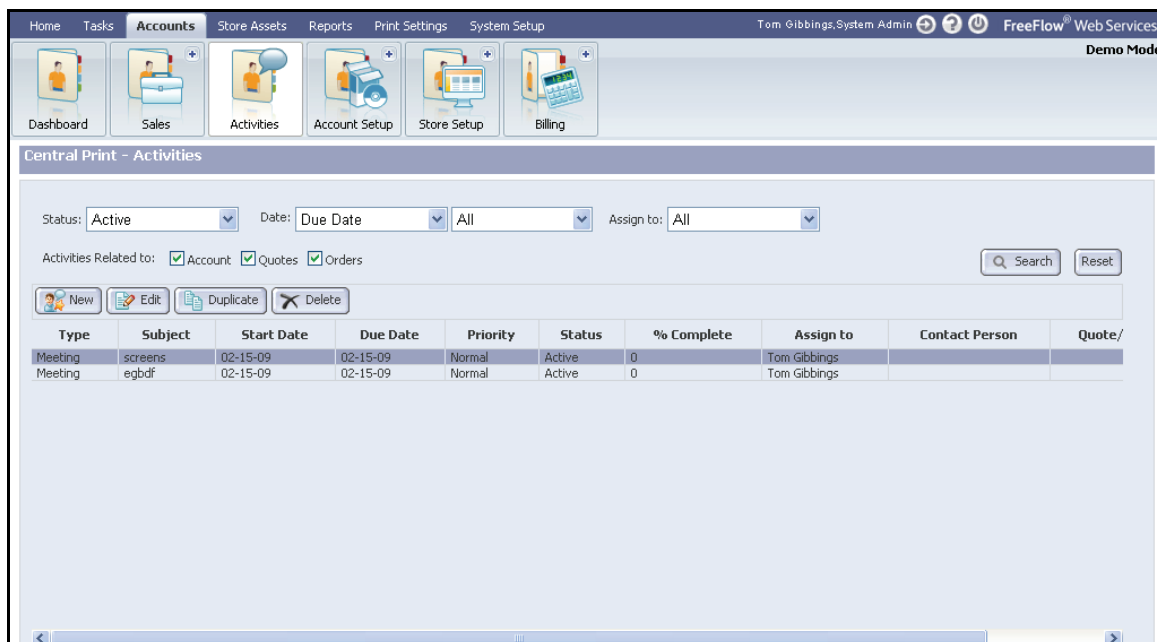
3   Filter the displayed activities as needed, as follows:

a   Specify filtering criteria based on status, date type (Start, Due) and period, and person assigned to the activity. After setting filtering criteria, click **Search**.)

b   In the **Activities Related to:** check boxes, select which levels of quotes you want to see (Account, Quotes, Orders).

c   Slick **Search**.

The filtered list of activities is displayed in the window.

4   Perform activities as you would if you opened the window from the **Sales - Quote** window or the **Sales - Order** window. (For instructions, see Handling Follow-up Activities for Quotes and Orders on page 43.)

Managing Billing—The Billing Manager

The **Billing Manager** window provides a single entry point from which you can view and access accounting documents for all accounts, and perform different billing related actions on the documents.

> If the **Billing** module is not activated on the license, only invoices-related functionality is available, and the. Accounts list is filtered to show only committed, un-invoiced orders.

1 In the main menu, select **Tasks > Billing Manager**. The **Billing Manager** window is displayed ().

The **Billing Manager** window contains two panes:

- the left pane displays the Accounts List.
- the right pane, called the **Accounts Documents** pane, displays the list of documents for the selected account.

The account list displays the following information for each account:

- **ID** – the automatically generated account identification number.
- **Account** – the name of the account.
- **Receivables** – total amount in un-invoiced orders, and the number of un-invoiced orders in brackets.
- **Shipped** – total amount in shipped jobs that were not invoiced yet, and the number of these jobs in brackets.
- **Un-paid Invoices** – total amount in un-paid invoices and the number of un-paid invoices in brackets.

Figure 25: Billing Manager Window

2   Filter the list of displayed billing documents as needed, as follows:

     a   To filter on billing document status and or group name, select the status in the **Show** drop-down list, and/or select the group name in the **Groups** drop-down list.

     b   Optionally, specify an account name (or prefix)

     c   Click **Search**.

3   To perform any of the following actions on documents, click the appropriate button in the Accounts Documents pane.

- Generate new invoices.
- Generate new receipts.
- Issue deposits.
- Issue credit notes.
- View billing documents.
- Edit billing documents in draft mode.
- Cancel billing documents.
- Confirm draft documents.
- Print billing documents.

For more information about performing related tasks after clicking a button, see the relevant section in Section 4 Section 4 Handling Invoicing and Billing.