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Web Services Order Center

Reference Guide

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Introduction

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

Web Services Order Center is an add-on module 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 the processing of all off-line communication/business interactions received by the Print Service Provider's CSR (Customer Service Representative) through such means as the fax, phone, email or from a "walk-in" customer.

Once the Print Service Provider has received a request for a quotation, Web Services Order Center enables the Print Service Provider to create a quote, and then 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. The built-in follow-up mechanism also allows better customer service and helps drive the Print Service Provider's sales.

NOTE:	Web Services Order Center is not an accounting system; so for general ledger purposes it is still necessary to enter the data into an accounting system.

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

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

Overview

This guide provides all the necessary information, procedures and steps to effectively use Web Services Order Center and includes the following information:

TWO

Configuration

This chapter explains how to configure the system: part of the configuration applies to FreeFlow Web Services, and part of the configuration is unique to Web Services Order Center. Before setting up the system, ensure that the Web Services Order Center software license is enabled.

This chapter is divided into the following tasks:

- Configure Web Services Order Center Email (on page 3)
- Configure Web Services Order Center Settings (on page 4)

Configure Web Services Order Center Email

In order for Web Services Order Center to match the email replies from customers to the relevant quotes and orders, Web Services Order Center needs a dedicated email account. Each CSR must also have an email account, and these accounts must be configured so that emails received by the CSR are also forwarded to the Web Services Order Center email account. The procedure to configure Web Services Order Center email involves the following steps:

1 Add CSR Users (on page 3)

2 Set up Web Services Order Center Email (on page 3)

3 Configure CSR Email Forwarding (on page 4)

Add CSR Users

Navigate to **SYSTEM SETUP -> USERS**, create a user account for each CSR and assign each CSR a *System Admin, Manager,* or *Manager Advanced* **User Type**.

The Manager Advanced user type is only available 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. System Admin users can also create and edit credit notes and cancel receipts. but have more extensive privileges. For more information on user types, see the *Print Service Provider User Guide*.

Set up Web Services Order Center Email

1 Create a dedicated Web Services Order Center email account (for example, an account called Web Services_Email) on the company's exchange server. For assistance, consult your PC support team.

2 Configure the mail listener file, as follows:

   a Open **WINDOWS EXPLORER**, and browse to the folder where Web Services Order Center is installed (default installation path: D:\NewEdition\IPanel\Db).

   b Open the **MAILLISTENER.CONFIG** file for editing (for example, using Notepad).

   c Change the value of the **PopServer** parameter from *NONE* to the name of your organization's POP3 (Incoming email) Server. If necessary, change the **Port** and **useSSL** parameters according to your network configuration.

   d Replace the values of the **Username** and **Password** parameters within the relevant data according to the email account defined for the Web Services Order Center (for example, Web Services_Email).

    e   **Save** and close the mailListener.config file.

3 Restart FreeFlow Web Services using the Toolbox.

Configure CSR Email Forwarding

Perform the following steps to ensure that the CSR's emails are forwarded to the dedicated Web Services Order Center email account. This is not limited to initial Web Services Order Center email setup; use this procedure whenever adding a new CSR user to FreeFlow Web Services.

> **NOTE:**   If more than one CSR is defined in the application, the same dedicated Web Services Order Center email account needs to be used for forwarding emails from all the CSRs.

The following procedure is an example for configuring CSR email forwarding on Microsoft Exchange Server 2007 (the steps for other mail servers will be slightly different):

1 Access the Microsoft Exchange Server 2007 computer.

2 Navigate to **START -> ALL PROGRAMS -> MICROSOFT EXCHANGE SERVER 2007 -> EXCHANGE MANAGEMENT CONSOLE**.

3 Expand the **RECIPIENT CONFIGURATION** node and select **MAILBOX**.

4 For each CSR with permission to use Web Services Order Center, configure the Web Services Order Center email account to also get a copy as follows:

    a   Select the user (CSR).

    b   Click **Properties**, and then select the **MAIL FLOW SETTINGS** tab in the Properties dialog box.

    c   Select **DELIVERY OPTIONS** and click the **Properties** button.

    d   In the *Delivery Options* dialog box that opens, enable the **Forward to** checkbox and then click on the **Browse** button.

    e   In the *Select Recipient* dialog box that opens, enter the name or email address of the Web Services Order Center mailbox (e.g. Web Services_Email) and then click **OK**. The dialog box closes.

    f   In the *Delivery Options* dialog box, ensure that both the CSR email account and the Web Services Order Center email account receive the email, by selecting the **Deliver message to both forwarding address and mailbox** checkbox, and then clicking **OK**. The dialog box closes.

    g   In the *Properties* dialog box, click **OK**. The dialog box closes.

5 **Close** the **EXCHANGE MANAGEMENT CONSOLE**.

To validate that email is set up and working correctly (that the CSRs will be able to use the system to send Quotes/Orders/Billing doc's to a customer), do the following:

1 Create and send a quote (**ACCOUNTS -> SALES -> QUOTES**) to a non-user email account (e.g. a personal mail account), and then reply to it.

2 Make sure that the Quote - Unread Message status icon is displayed in the Sales - Quotes window.

3 Under history, view the emails content in the Activity Details.

> **NOTE:**   In order for Web Services Order Center to know how to match the email replies to the relevant quotes and orders, the recipients must reply to the email without changing the emails subject.

Configure Web Services Order Center Settings

After setting up the Web Services Order Center software, configure the following optional settings:

- Define Accounts and Account Group Settings. (on page 5)
- Define the Banks List (on page 5)
- Modify Follow-up and Validity Periods (on page 5)
- Modify Documents Attachment Format (on page 6)
- Set Sales Tips (on page 6)
- Customize Document Numbering (on page 6)
- Define Invoice Settings (on page 7)

Define Accounts and Account Group Settings

To set-up new accounts and manage existing ones:

1 Navigate to **ACCOUNTS -> ACCOUNT SETUP**.

2 Define at least one user for each account (**ACCOUNTS -> ACCOUNT SETUP -> USERS**).

3 Add *Account Manager* and *Sales Person* custom fields to the account's details (**ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO**) by defining these fields and making them visible in **SYSTEM SETUP -> ADVANCED -> CUSTOMIZED FIELDS**.

To manage account groups, navigate to **SYSTEM SETUP -> ADVANCED -> ACCOUNT GROUPS**.

Define the Banks List

Define the list of banks from which you accept checks. This list is used to select the name of the bank when a payment is made.

1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.

2 Click the **Add** button under the Banks list. In the empty row that is added to the list, type in the banks name.

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

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

NOTE:	To enable the Bank Check payment option, at least one bank must be defined in the Bank list, otherwise the Billing documents cannot be confirmed.

Modify Follow-up and Validity Periods

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

1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.

2 In the **DEFAULT FOLLOW UP** field, type the default time period by which follow-up is expected. The default is 3 days.

3 In the **DEFAULT VALID UNTIL** field, type the time period after which the quote is no longer considered valid. The default is 30 days.

4 Click **Save**.

NOTE:	The date for a specific quote can be changed on the General page of the quote details. When the quote is converted to an order, the order dates are reset regardless of what was set in the quote.

Modify Documents Attachment Format

It is optional to convert the Word documents into PDF format when quotes/orders/billing documents are sent by email to a customer. The documents will still be displayed to the CSR as Word documents that the CSR can modify, and the conversion to PDF will take place when the CSR sends the documents to the customer. To ensure Word documents are converted to PDF format, perform the following steps:

1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.

2 Under the Email attachment format, select **Send attached documents as PDF (applies to Quote, Order and Billing documents)** checkbox.

Set Sales Tips

This optional feature enables the Print Service Provider to define sales tips that will assist the CSR in the sales process. The sales tip can be an image or a URL, and multiple sales tips can be defined for each Job type or Template to be displayed in a loop.

NOTE:	Sales tips are shown for Printable and Not printable Job Types or Templates but not for Book Assembly Templates.

1 Navigate to **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE LIBRARY**.

2 For each job type that you want to define a sales tip:

   a Select the job type and click the **Edit** button.

   b On the **GENERAL PROPERTIES** tab click the **Add Sales Tip Message** button.

NOTE:	The maximum size of a sales tip image:
	• Height: 540px
	• Width: 400px

Customize Document Numbering

All quote, order and billing documents are uniquely 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 sales process. Each document number has an alphabetic prefix that indicates the document type (for example, QUO for quotes) and different document types are numbered independently of each other. The prefixes and the starting number of each counter can be customized and the same counter can be used for several objects, according to the system limitations.

To customize document numbering:

1 Navigate to **SYSTEM SETUP -> ADVANCED -> NUMBERING**.

2 Modify the prefixes in each of the prefix fields as required.

3 Change the starting numbers for each of the objects in the **STARTING NUMBER** fields as 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 then enabled.

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

6 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 then disabled.

NOTE:	The numbering of existing quotes, orders and billing documents is not influenced by changes in numbering.

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

Define Invoice Settings

1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.
2 To enable the automatic creation of invoices and receipts for all the online orders made using online payment, select the **Create an Invoice and Receipt for Web created orders with online payment** check box .
3 To issue the invoices to a parent account instead of to the account that generated the order, select the **Allow issuing invoice for parent account** check box.
4 Click **Save**.

THREE

Sales

This chapter describes how to use Web Services Order Center to handle sales, and covers the sales management life cycle from creating a quote through to committing an order.

The sales cycle begins with a customer's request for a quotation. This request can be received by phone, fax, email or from a "walk-in" customer. Based on the request, a quote is created and then delivered to the customer. When the customer accepts the quote, it can be converted into an official order to be produced and shipped to the customer. After the order is produced, an invoice is sent to the customer and when the customer pays the invoice, a receipt can be issued.

The most common sales cycle would go as follows:

1   Customer requests a quote.

2   Print Service Provider CSR creates a quote and sends it to the customer.

3   Customer approves the quote.

4   Print Service Provider 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   Print Service Provider Designer (artwork) creates the job production files, verifies and corrects supplied customer files, and handles proofing cycles.

6   Print Service Provider Production operators print and finish the jobs.

7   Print Service Provider Dispatch operator packs jobs for delivery, prints delivery labels, and approves the delivery.

8   Print Service Provider Administrator creates an invoice.

9   Customer pays the invoice.

10 Print Service Provider Administrator issues a receipt.

This chapter contains the following major topics.

- Creating a Simple Quote (on page 10)
- Performing Additional Edits in the Quote or Order (on page 12)
    - o   Selecting a Quote and Displaying its Product Tab (on page 12)
    - o   Adding/Deleting Jobs and Items (on page 13)
    - o   Editing Pricing Details (on page 14)
    - o   Uploading, Attaching, and Mapping Files (on page 13)
- Progressing from Quotes to Orders (on page 16)
    - o   Understanding Quote/Order Statuses and Icons (on page 16)
    - o   Moving Through the Stages in the Quote–Order Life Cycle (on page 17)
    - o   Handling Follow-up Activities for Quotes and Orders (on page 20)
    - o   Viewing Quote and Order History (on page 21)

Creating a Simple Quote

Create a quote by performing the following actions in sequence:

Create the Quote

1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
   - o The left pane displays the list of existing Open quotes for the account (that is, quotes that require attention).
   - o The right pane displays the details of the selected quote.
2 Select the account in the drop-down list.
3 To filter the list of quotes by Status or the name of the CSR who created the quote, select values for any combination of the following and then click **Search**:
   - o From the **STATUS** drop-down list, select the status of the quotes. For an explanation of statuses, see Understanding Quote/Order Statuses and Icons (on page 16).
   - o From the **CSR** drop-down list, select the name of the CSR.
4 To search for a specific quote or job with a known number, select either **Quote #** or **Job #** from the drop-down list, fill in the number and then click **Search**.
5 Create a new quote (or duplicate an existing quote), as follows:
   - o To create a new quote, click **Create New**.
   - o To duplicate an existing quote, select the quote and click **Duplicate**.

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

NOTE: A quote can also be created by duplicating an existing order in the **ACCOUNTS -> SALES -> ORDERS** screen.

Quotes and orders have two main statuses – *Draft* and *Committed*. As long as a document is in draft mode, it can be changed and edited as required. When the document is finalized and has to be transferred to the customer, it must be committed. The commit action makes the document official; a committed document can no longer be edited.

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 Define the Billing Address; the default is taken from the Contact Person settings.
4 If supplied, type the reference number in the **Customer Reference** field.
5 In the **Received as** list, select the way the Request For Quote (RFQ) reached you.
6 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**.
7 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**.

8   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**.

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

10 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 20).

11 Optionally add notes as follows:

o   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).

o   In the **Note for Customer** text box, add additional information that should appear in the quote that you send to the customer.

12 Click **Save**.

NOTE: 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 User Guide*.

Add and Define the Products

NOTE:
When filling in the details for the job type or template, see the *Print Service Provider User Guide* for instructions such as:

- Adding Joblets and Joblet options to Intents.
- Defining Tax Groups and Tax Packages.
- Adding Line Items to the Line Item Library.
- Defining Shipping.

Add the products (jobs and/or templates) to the **PRODUCTS** details of the quote, as follows:

1   Click the **Add** button and select one of the following options:

o   **Add New Job** - to add a job to be printed on paper.

o   **Add Job from Template** - to add a job from one of the account's templates.

o   **Add Non-Printable Job** - to add a non-paper job (for example, a mouse pad).

The **CHOOSE JOB TYPE** (or for a template, the **CHOOSE TEMPLATE**) dialog box opens.

2   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 **VARIABLE INFORMATION** if needed) that you use to define the job or template. If Sales tips are defined for the Job Type or Template, the CSR will see them while defining the job details and job intent. See Setting Sales Tips (on page 6) for more information.

3   Select the **JOB DETAILS** tab, fill in the details as in FreeFlow Web Services, and click **Continue**. Note that this is the only place a Cost center can be assigned to a job.

4   Select the **INTENT** tab, fill in the details as in FreeFlow Web Services, and click **Continue**. Note that it is possible to add any joblet or joblet options that were not defined for the job type or template, but defined in the application.

5   If there is a **VARIABLE INFORMATION** tab, select the tab and fill in the details as in FreeFlow Web Services. Note that VDP or Archive templates will not have a preview from the summary panel (these jobs can be previewed by clicking on the **Preview** button on the **EDIT PROPERTIES -> VARIABLE INFORMATION** tab).

6   Select the **PRICING** tab.

o   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 calculation method is Manual, the results matrix returns a line (Type: **MANUAL**; Item: **CSR MANUAL PRICE**) where you can type in the price manually. Fill in the price.
    - ▪ For all 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 14).
7 After filling in the last tab in the **CREATE A NEW JOB** dialog box, click **Finish**. The new job appears on the **PRODUCTS** page.

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 13).

The details in the Products tab of a quote or order are organized into Tax Group tables: items are displayed in tables organized by the tax group that applies to them.

- If all items belong to the same tax group, all items are listed in the same tax group table.
- If items belong to different tax groups, a table for each tax group lists the items that belong to that tax group.

The tables will also contain an urgency surcharge line item and a discount line item (if defined).

NOTE:	When multiple quantities are listed for the same job in a quote, Urgency, Shipping and Tax will not be calculated and displayed on the quote's Product tab. However, when the quote is converted to an Order and the desired quantity is selected, these parameters will be displayed under the Order Product tab.

Define the Shipping Information

After adding at least one job a link to define the shipping information will be displayed. The CSR needs to manually select the desired delivery date and method. Only after selecting these parameters will the shipping information be displayed in the top panel (delivery date, method and delivery address) and the shipping price will be added to the quote pricing breakdown.

- If multiple shipping is defined, only the Multiple shipping string will be displayed and not all the shipping details.
- Web Services Order Center has more flexible delivery date options than in FreeFlow Web Services alone, and jobs can be selected to be ready from the time the quote is created and with an urgent surcharge added.
- If shipping details are not defined, the default values will be selected when committing this quote.

Performing Additional Actions on the Quote

NOTE:	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 (on page 12)
- Adding/Deleting Jobs and Items (on page 13)
- Editing Pricing Details (on page 14)
- Uploading, Attaching, and Mapping Files (on page 13)

Selecting a Quote and Displaying the 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 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
2 Select the account from the **ACCOUNT** list box on the right side of the window.

3 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. The list of displayed quotes can be filtered according to quote status and/or responsible CSR.

4 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 10) 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 (on page 13)
- Duplicating a Job (on page 13)
- Deleting a Job (on page 13)
- Adding an Item from the Line Item Library (on page 13)

Adding Another Job or Template

Follow the instructions in Add and Define the Products (on page 11).

Duplicating a Job

1 In the **PRODUCTS** tab, select the job to duplicate.
2 Click the **Duplicate** button.
3 To edit the duplicated job, select it and click the **Properties** button.

Deleting a Job

1 In the **PRODUCTS** tab, select the job to delete.
2 Click the **Delete** button.

NOTE:	If more than 1 quantity was defined for this job then deleting the job will delete all quantities. In order to change the quantity, select the job, click the **Pricing** button, edit the desired quantity and then click the **Finish** button.

Adding an Item from the Line Item Library

1 In the **PRODUCTS** tab, locate the *Taxes* group to which to add the item.
2 Click the **Add Item** button connected to that *Taxes* group.
3 Select the item and click **Add**.

NOTE:	To remove an item, select the item in the tax group and click the **Remove Item** button.

The price is updated automatically after adding or removing an item.

Uploading, Attaching, and Mapping Files

Web Services Order Center provides two mechanisms for uploading and attaching files. Although these mechanisms are very similar, each mechanism is intended for a specific situation, and are described accordingly in this section:

- Attaching a File Where Upload is Required (on page 14): If the files were created in-house, or received by digital media, they must be uploaded and assigned to the appropriate job(s).
- Mapping Files from a Reply Email (on page 14): If the customer received a quote by email from the system, and the customer attached the files to the reply email, they will be automatically uploaded to the

quote (the uploading stage is skipped). The files must still be mapped to the appropriate job(s).

Attaching a File Where Upload is Required

1 Do either of the following:
- o 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.
- o If you previously saved the quote, open the Attachments dialog box, as follows:
  - **i** In the **Products** tab in the Quote details pane, select the job or template.
  - **ii** Click the **Attachments** button. The **ATTACHMENTS** dialog box opens.

2 In the **ATTACHMENTS** dialog box, click the **Upload Files** button.

3 In the **UPLOAD FILE** dialog box, ensure that the **Upload a Single file** option is selected, and then click the **Browse** button. The **CHOOSE FILE TO UPLOAD** dialog box opens.

4 Select the file for upload and click **Open**. The **CHOOSE FILE TO UPLOAD** dialog box closes.

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, activate the preflight process by selecting the file and clicking the **Mark for Production** button. The file is processed and marked as ready for production and the job is automatically sent to the Production queue once the quote is converted to an order and then committed.

NOTE:	There is an option to upload multiple files, using Multi-file upload. Note that only one of the files attached to a job can be marked for production. For more information, see the *Print Service Provider User Guide* for instructions.

Mapping Files from a Reply Email

If the customer received a quote by email, and then attached the files to the reply email, they will be automatically uploaded to the quote, but must still be mapped to the correct job.

NOTE:	When a customer replies to the email, the subject or content from the sent mail should not be changed, otherwise the application will not be able to correctly identify the email and map it to the correct quote. The customer must reply to the email and add his text to the existing content.

1 Select the quote or order in the **SALES-QUOTE** or **SALES-ORDER** screen.

2 Select the **FILE MAPPING** tab in the Details pane.

The files that were included in the reply are listed in the File Mapping tab together with all files that were 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.

3 Select the file, and then select the job to which it should be assigned in the **Job Name** dropdown box.

4 If the file requires no prepress work and is ready to print, activate the preflight process by selecting the file and clicking the **Mark for Production** button. The file is processed and marked as ready for production; the job is automatically sent to the Production queue once the quote is converted to an order and then committed.

The following icons indicate the result of the preflight operation:

- o — Preflight processing was successful.

- o — Preflight processing encountered errors.

Double clicking on an icon opens a report on the process.

Editing Pricing Details

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

NOTE: The editing of pricing details is only possible when a quote or order is still in draft mode, and cannot be changed otherwise.

If the **PRICING** tab in the **EDIT PRODUCT** dialog box is not displayed, display it as follows:

1 In the **Products** tab, select the job or template.

2 Click the **Pricing** button (or click the **Properties** button and then select the **Pricing** tab).

The following types of pricing adjustment can be performed.

- Generating Prices for Different Quantities (on page 15)
- Changing the Pricing Calculation for a Job Type or Template (on page 15)
- Requesting a Quote from another Print Provider (on page 16)

NOTE:
- Pricing instructions that apply to FreeFlow Web Services are not repeated. For information on defining pricing in FreeFlow Web Services, see the *Print Service Provider User Guide.*
- This section does not describe how to set up Production Pricing using Web Services Order Center. For more information, see Production Pricing (on page 43).

Generating Prices for Different Quantities

Customers might want to know the prices for different quantities (number of copies) of the same job. Different prices can be generated according to the number of copies as follows:.

1 Click the **Add** button. A new field is added to allow you to specify a number of copies.

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

3 To use a particular quantity in the total costs calculation, select the appropriate number of copies line and the pricing is calculated accordingly.

4 Click **Save**, or if done with all pricing changes, click **Finish**. The Save button is only enabled when editing an existing Quote.

NOTE: When multiple quantities are listed for the same job in a quote, Urgency, Shipping and Tax will not be displayed on the quote's Product tab. However, when the quote is converted to an Order and the desired quantity is selected, these parameters will be displayed under the Order Product tab.

Changing the Pricing Calculation for a Job Type or Template

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

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 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).

2 Select the **Use New Settings** option, which turns the **CALCULATION MODEL** field into a drop-down list.

3 Select the new Calculation Model, or select the same calculation model if you want to make changes to the default calculation model.

4 Depending on your selection, fill in the fields in the **PRICING** tab of the **PLANNING** dialog box:

- o 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 52).
- o If you chose Manual as the calculation model, another line (Type: **MANUAL**; Item: **CSR MANUAL PRICE**) will be added to the result matrix.

5 Click **Save**. The **PLANNING** dialog box closes.

6 Select the quantity and click **Calculate**, to update the **TOTAL PRICE** according to the new price settings. If you chose Manual as the calculation model fill in the price manually.

7 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 Click the **Request for Third Party Quote** button, The **REQUEST FOR QUOTE** dialog box is displayed.

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

   o To add new partner print providers, use the **New Print Provider** button.

   o Details of any partner in the list can be changed using the **Edit Details** button.

   o Any partner can be removed from the list using the **Remove Print Provider** button.

3 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.

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

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

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

NOTE:	Once an answer on the request for quote (RFQ) has been received via email or by any other means, the price must be manually entered in the **PRICING** screen for the job.

Progressing from Quotes to Orders

After defining a quote, the next step is to send the quote to the customer, and then to handle 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, two separate, but related, tasks must be performed in parallel:

* Checking the quote/order statuses—this is just a matter of looking at the status icon in the **QUOTE** or **ORDER** screen, and knowing what the status icon means.

* Performing follow-up activities—for example, contacting the customer if no response is received within a specified period of time.

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

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. The following tables describe the quote and order statuses and icons.

Icon	Name	Description
	Quote - Draft	The quote is in draft form.
	Quote - Committed	The quote has been committed and sent to the customer.

Icon	Name	Description
	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 defined for the quote has been exceeded.
	Quote - Canceled	The quote was not accepted by the customer and was therefore canceled.

Icon	Name	Description
	Order - Draft	The order is in draft form.
	Order - Committed	The order was committed and the jobs are in production.
	Order - Unread Message	A message has been received from the customer regarding the order.
	Order - Follow-up Due	Contact should be made with the customer concerning the order.
	Order - Canceled	The order was not accepted by the customer and was therefore canceled.

NOTE:	• Opening a screen that displays lists of quotes or orders (for example, the **QUOTES** or **ORDERS** screen), by default all Open quotes or orders are displayed. These 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 covers the following topics:

Providing the Quote to the Customer (Committing)

A draft quote that is ready to be sent to the customer must first be committed: the quote must be changed from a draft document to an official document.

1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.

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

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

2 Select the account in the drop-down list.

3 To filter the list of quotes by Status or the name of the CSR who created the quote, select values for any combination of the following and then click **Search**:

- ○ From the **STATUS** drop-down list, select **Draft**.
- ○ From the **CSR** drop-down list, select the name of the CSR.

4 To search for a specific quote with a known number, select **Quote #** from the drop-down list, fill in the number and then click **Search**.

5 Select the quote in the list.

NOTE:	For orders that don't require sending a quote to the customer, quickly convert the draft quote to a committed order by clicking on the **Convert to Committed Order** button. In this case, all the following steps are not relevant.

6 Click the **Commit and Send to Customer** button. The Quote detail pane is replaced by the **COMMIT THE QUOTE AND CONVERT IT INTO AN OFFICIAL QUOTE** pane.

7 Optionally, edit the **VALID UNTIL** and **NEXT FOLLOW-UP** dates.

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

- ○ To send the customer the quote as 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 Setting up the system, the quote document is either attached to the email as a Word document or converted to a PDF and attached, and sent to the customer 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.

NOTE:	If the shipping details were not defined for this quote, the application will notify the user and allow him to stop the committing process or continue with the default shipping details.

Handling the Customer Response

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

- Placing the Order (on page 18)
- Revising the Quote or Order (on page 19)
- Cancelling the Quote or Order (on page 20)

Placing the Order

After the customer has accepted the quote and decided on the quantities to print for each quoted job, convert the quote to an order. Both committed quotes and draft quotes can be converted to orders.

Convert quotes to a:

- **Committed Order** when all the order details are finalized.
- **Draft Order** when the order information is not complete and finalized (for example, files still need to be supplied).

NOTE:	A quote can be repeatedly converted into an order, potentially generating an unlimited number of orders, each with a unique order number. This is useful for creating repeat orders from the same quote.

1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.

2 Select the account in the drop-down list.

3 Filter the quotes list to only display committed quotes by selecting **Committed** in the **STATUS** drop-down list.

4 Select the quote.

5 Click one of the following icons:

  o Click the **Convert** icon ( ) to convert the quote to a draft order.

  o Click the **Convert to Committed Order** icon ( ) to convert the quote to a committed order.

6 The **CONVERT THE QUOTE INTO AN ORDER** screen appears.

7 Adjust the number of copies, if required.

8 Click the **Convert** button. The *Next Follow up* and *Valid Until* dates are reset.

NOTE:	If a budget inventory template is used for this quote and there is insufficient budget or customer inventory when converting the quote to an order, the CSR will not be blocked.

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

- The quote still appears in the **QUOTE** screen with its quote ID and it's status is set to **Quote-Ordered**. The details pane indicates that the quote has been ordered.
- The quote is added as an order to the **ORDER** screen (**ACCOUNTS -> SALES -> ORDERS**). The default prefix for this order is changed to OSR and it is assigned a new numeric increment. The status of the order is set as follows:
  o If the quote was converted to a draft order, the status of the order is set to **Draft**.
  o If the quote was converted to a committed order, the status of the order is set to **Committed**.

When converting a quote to a committed order, the *Next Follow up* and *Valid Until* dates are reset and the attached jobs are automatically sent to the appropriate queue:

- Jobs with attached files that are marked for production are sent to the Production queue.
- Jobs without attached files and jobs with attached files that are not marked for production, are sent to the Artwork queue.

NOTE:	Uploaded jobs from the customer where *Send file separately* was selected will also go to the Artwork queue

Revising the Quote or Order

To revise a committed quote that has been sent to a customer (for example, the customer will not accept the quote without certain changes), or make changes to a committed order:

1 Select the quote or order in the **QUOTES** or **ORDERS** screen. To simplify selection, do the following:

  o To display the list of draft quotes, select **Draft** in the **STATUS** drop down list.

  o 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 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 revision number is updated in the General tab with the relevant revision number.

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

4 After updating or revising the quote or order, commit it. To send a revised quote to the customer, see .

NOTE:	When revising a committed order, all jobs from this order will be removed from the Print Service Provider queues.

Cancelling the Quote or Order

If the customer 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 Navigate to **ACCOUNTS -> SALES -> QUOTES** to cancel a quote, or navigate to **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 for future decisions):
   o Name of the print provider to whom you have lost the business.
   o 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**.

NOTE:	• A quote that has already been converted into an order cannot be canceled.
	• When an order is canceled, jobs from this order will be removed from the Print Service Provider queues.
	• The competitor's name, price and internal note can be viewed in the **HISTORY** tab of the Quote or Order screen. For details, see Viewing Quote and Order History (on page 21).

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 after a predetermined amount of time the customer has still not responded to your quote, you should check whether to proceed with the order. To remind you to follow-up with the customer, 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 schedule a meeting with a customer, 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:

• Automatically generated and scheduled activities.
   o 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 The Artwork Queue (on page 37).
   o 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.

• Manually created (ad-hoc) activities that you create according to need.

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 **ORDERS** screen (**ACCOUNTS -> SALES -> ORDERS**). The Orders and Quotes windows are almost identical.

1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
   o The left pane displays the list of existing Open quotes for the account (that is, quotes that require attention).
   o The right pane displays the details of the selected quote.

2 Select the account in the drop-down list.

3 To filter the list of quotes by Status or the name of the CSR who created the quote, select values for any combination of the following and then click **Search**:

- o From the **STATUS** drop-down list, select the status of the quotes. For an explanation of statuses, see Understanding Quote/Order Statuses and Icons (on page 16).

- o From the **CSR** drop-down list, select the name of the CSR.

4 To search for a specific quote or job with a known number, select either **Quote #** or **Job #** from the drop-down list, fill in the number and then click **Search**.

5 Select the quote.

6 In the details pane, click the **Activities** button. The Activities screen opens. By default, the window lists Active activities for the quote.

7 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** Click **Search**.

The filtered list of activities is displayed in the window.

8 Do any of the following in the Activities window:

- o **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.

- o **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). Note that System activities (like next follow up) can't be duplicated.

- o **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). Note that only uncompleted activities can be edited.

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

- o You can edit the list of available activity types (for instructions, see Step 6).

- o By adjusting the priority value and then sorting on priority, you can view the most important activities first.

- o You can adjust the **% COMPLETE** values and the due date according to need, to make the information more accurate and valuable.

- o You can adjust the status according to subsequent follow-up results (for instructions see Step 7).

10 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.

11 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**.

12 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 16).

    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.

To view the 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 details, click the **Close** button in the Activity Details dialog box.

NOTE:	Any action in the Quote or Order History tab is written in the same language the user was logged in with while performing this action.

FOUR

Invoicing and Billing

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

- Separate screens, under **ACCOUNTS -> BILLING**, for generating and handling invoices, receipts, credit notes, and deposits, at the account level.

- The **BILLING MANAGER** screen (**TASKS -> BILLING**) that provides a single entry point for monitoring and intervening in billing issues for any account. This screen and its usage is described in Section **5 Managing Your Business And Production**.

This chapter provides instructions for performing the following tasks:

- Handling Deposits (on page 23)
- Handling Invoices (on page 25)
- Handling Credit Notes (on page 28)
- Handling Receipts (on page 30)

Handling Deposits

A deposit is a partial payment for an order, made by the customer in advance before commencing work on a job, and is therefore linked to a specific order. Because it is possible to make several advance payments, multiple deposits can be linked to a single order.

Deposits for an account are handled in the Deposits screen. The screen contains two panes:

- The left pane lists the deposits for the account. By default, only the draft deposits are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.

- The right pane lists information about the selected deposit. It contains two tabs:

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

  o Details tab—displays key details specific to the particular deposit. This includes order number, total order amount, and the existing confirmed deposit amount.

This section contains the following procedures:

- Opening the Deposits screen and Displaying Deposits (on page 24)
- Creating or Editing a Deposit (on page 24)
- Confirming a Draft Deposit (on page 25)
- Canceling a Deposit (on page 25)
- Printing a Deposit (on page 25)

Opening the Deposits screen and Displaying Deposits

1 Open the Deposit screen as follows:

    a Navigate to **ACCOUNTS -> BILLING -> DEPOSITS**.

    b Select the account in the dropdown list.

2 To filter the list by any combination of status, name of CSR who created the deposit, issue dates, or value dates, select values for any combination of the following and then click **Search**:

    ○ From the **STATUS** drop-down list, select the status of the deposits.

    ○ From the **CREATED BY** drop-down list, select the name of the 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).

3 To search for a specific deposit with a known number, fill in the **DEPOSIT #** and click **Search**.

4 To clear the search results and display the entire list of deposits, click **Reset**.

Creating or Editing a Deposit

You can create new deposits and edit draft deposits for committed orders only. A deposit cannot be edited if the order is already a part of a draft or confirmed invoice.

1 In the **DEPOSIT** screen, do either of the following:

    ○ To create a new deposit, click **Create New** under the list of deposits. The **NEW 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** tab of the **NEW 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.

    b Fill in any extra information:

        ▪ Internal Note for internal use only.

        ▪ Customer's Note that will appear on the deposit printout to the customer.

3 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. Only committed orders that have not been invoiced will be displayed (clicking an order number link will open a dialog box with the order details for viewing only, and changes should not be made from this screen).

    b Click **OK**. The dialog box closes and the order information appears in the **INSERT DEPOSIT** dialog box. The total will be updated with the selected order's amount and any previous deposit amount (if any - else 0).

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 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.

NOTE: The payment screens have no interface to online payment gateways.

6   Type the total payments amount in the **Total Amount** text box. Payment must be greater than 0 and less than or equal to the order total minus all previous deposits (if any).

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

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

7   Save the deposit as follows:

   o   To save as a draft deposit, click **OK**.

   o   To save as a confirmed deposit, click **Confirm**.

Confirming a Draft Deposit

1   Select the draft deposit.

2   Click the **Confirm** button.

3   In the confirmation prompt warning that the deposit will not be editable, click **Yes**. The message dialog box is closed and the status of the deposit is changed to **CONFIRMED**.

NOTE:	Confirmed deposits cannot be edited. If you find a mistake in a confirmed deposit, cancel the deposit and create a new deposit in its place.

Canceling a Deposit

1   Select the deposit.

2   Click the **Cancel Deposit** button.

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

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

NOTE:	A deposit for an invoiced order cannot be canceled.

Printing a Deposit

1   Select the deposit.

2   Click the **Print** button. The Send Document dialog box opens.

3   Click the link to open the deposit for editing / printing or click the Send **Email** button.

NOTE:	• The email will be sent to the email Billing address displayed on the General Tab.
	• The deposit will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).

Handling Invoices

An invoice is a request for payment for orders produced within the system. Invoices for an account are handled in the Invoices screen. The screen contains two panes:

• The left pane lists the invoices for the account. By default, only the draft invoices are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.

• The right pane lists information about the selected invoice. It contains two tabs:

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

   o   Details tab—displays key details specific to the particular invoice.

The key details specific to the invoice are displayed in the Details tab. The Details tab includes the following:

- A list of the orders to be paid—order lines are links. Clicking an order number link opens a dialog box with the order details. Note that the order window is for viewing only, and changes should not be made from this screen.
- 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.
- A price breakdown that also includes:
  - ○ TOTAL CREDIT NOTES amount line—if credit notes exist for the invoice, the Total Credit Notes amount becomes an active link. Clicking the link opens the CREDIT NOTES window in a dialog box, for viewing credit note information for this invoice.
  - ○ TOTAL DEPOSITS amount line—if a deposit exists for the connected order, the Total Deposits amount becomes an active link. Clicking the link opens the DEPOSITS window in a dialog box, for viewing deposit information for the order(s) in this invoice.

This section contains the following procedures:

Opening the Invoices Screen and Displaying Invoices

1 Open the Invoice screen as follows:
  a Navigate to **ACCOUNTS -> BILLING -> INVOICES**.
  b Select the account in the dropdown list.
2 To filter the list by any combination of status, name of CSR who created the invoice, issue dates, or value dates, select values for any combination of the following and then click **Search**:
  ○ From the **STATUS** drop-down list, select the status of the invoices.
  ○ From the **CREATED BY** drop-down list, select the name of the 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).
3 To search for a specific invoice with a known number, fill in the **INVOICE #** and click **Search**.
4 To clear the search results and display the entire list of invoices, click **Reset**.

Creating or Editing an Invoice

1 In the **INVOICE** screen, do either of the following:
  ○ To create a new invoice, click **Create New** under the list of invoices. The **NEW INVOICE** dialog box opens.
  ○ To edit an existing draft invoice, select the invoice and click **Edit** under the invoice details pane. 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** tab 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.
  b Fill in any extra information:

- Internal Note for internal use only.
- Customer's Note that will appear on the invoice printout to the customer.

3 Select the **Details** tab.

4 Add order(s) to the invoice as follows:

   a Click the **Select Orders** button. The **SELECT ORDERS** dialog box appears, listing all the committed (online and offline) orders that have not been invoiced for the account. The list does not include any orders that are already connected to a draft invoice.

   b If necessary, filter the orders using the search feature. The listed orders display the following information: Order number, description, creation date, total, total deposits for the order, amount left to pay on the order, shipped status of the order and whether the order was placed online or by a CSR (clicking an order number link will open a dialog box with the order details for viewing only, and changes should not be made from this screen).

   c Select the check boxes next to the orders to be included in the invoice and click **OK**. The **SELECT ORDERS** dialog box closes, and the selected orders appear in the **NEW INVOICE** dialog box. The invoice total is also recalculated.

5 If required, add a new price component to the total amount of the selected invoice draft (e.g. an item or service such as art design that cannot be ordered through Web Services but needs to be charged for):

   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 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 To manage the deposits for this invoice, click the **TOTAL DEPOSITS** link near the bottom of the dialog box to open the **DEPOSITS** screen. The link is only available if at least one deposit exists for one of the orders to be invoiced. For more information on creating and editing deposits, see Handling Deposits (on page 23).

9 To manage the credit notes for this invoice, click the **TOTAL CREDIT NOTES** link near the bottom of the dialog box to open the **CREDIT NOTES** screen. The link is only available if at least one credit note exists for one of the orders to be invoiced. For more information on creating and editing credit notes, see Handling Credit Notes (on page 28).

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

Confirming a Draft Invoice

1 Select the draft invoice.

2 Click the **Confirm** button.

3 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**.

NOTE: 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.

Canceling an Invoice

Only invoices in Draft or Confirmed status can be canceled. For invoices in any other status the Cancel Invoice button is disabled.

1 Select the invoice.

2 Click the **Cancel Invoice** button.

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

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

NOTE:	• Canceling an invoice also cancels 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 canceled invoice, and it is linked to the canceled invoice. This is done for balancing the books.

Issuing 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. See Handling Credit Notes (on page 28) for more information.

1 Select the invoice.

2 Click the **Issue Credit Note** button. The **NEW CREDIT NOTE** dialog box opens.

3 Fill in the necessary information. The number of the selected invoice is displayed in the **Issued for Invoice #** field of the **DETAILS** page.

4 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.

Printing an Invoice

1 Select the invoice.

2 Click the **Print** button. The Send Document dialog box opens.

3 Click the link to open the invoice for editing / printing or click the Send **Email** button.

NOTE:	• The email will be sent to the email Billing address displayed on the General Tab.
	• The invoice will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).

Handling Credit Notes

A credit note is a billing document issued to a customer in order to record the reduction of an invoice because of a discount, product return or cancelation.

- 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

Credit Notes for an account are handled in the Credit Notes screen. The screen contains two panes:

- The left pane lists the credit notes for the account. By default, only the draft credit notes are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.

- The right pane lists information about the selected credit note. It contains two tabs:

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

o   Details tab—displays key details specific to the particular credit note. The credit note details contain information on the connected invoice, the credit note amount and tax.

This section contains the following procedures:

Opening the Credit Notes Screen and Displaying Credit Notes

1   Open the Credit Note screen as follows:

a   Navigate to **ACCOUNTS -> BILLING -> CREDIT NOTES**.

b   Select the account in the dropdown list.

2   To filter the list by any combination of status, name of CSR who created the credit note, issue dates, or value dates, select values for any combination of the following and then click **Search**:

o   From the **STATUS** drop-down list, select the status of the credit notes.

o   From the **CREATED BY** drop-down list, select the name of the CSR.

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

o   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).

3   To search for a specific credit note with a known number, fill in the **CREDIT NOTE #** and click **Search**.

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

Creating or Editing a Credit Note

Only users with System Administrator or Manager Advanced user type privileges can create or edit credit notes, and only draft credit notes that are connected to a confirmed but not yet paid invoice can be edited.

1   In the **CREDIT NOTE** screen, do either of the following:

o   To create a new credit note, click **Create New** under the list of credit notes. The **NEW CREDIT NOTE** dialog box opens.

o   To edit an existing draft credit note, select the credit note and click **Edit** under the credit note details pane. The **EDIT CREDIT NOTE** dialog box opens. 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** tab 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, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account.

b   Fill in any extra information:

■   Internal Note for internal use only.

■   Customer's Note that will appear on the credit note printout to the customer.

3   Select the **Details** tab.

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

a   Select the invoice. Only invoices with the following status will be displayed: Confirmed, Partially Paid or invoices with a Draft credit note.

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

5   Enter an amount for the credit note and set the tax. The amount must be more than zero and less than or

equal to the amount left to pay on the invoice.

6 Save the credit note as follows:
- o To save as a draft credit note, click **OK**.
- o To save as a confirmed credit note, click **Confirm**.

Confirming a Draft Credit Note

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

1 Select the draft credit note.

2 Click the **Confirm** button.

3 In the confirmation prompt warning that the credit note will not be editable, click **Yes**. The message dialog box is closed and the status of the credit note is changed to **CONFIRMED**.

NOTE:	Confirmed credit notes cannot be edited. If you find a mistake in a confirmed credit note, cancel the credit note and create a new credit note in its place.

Once the credit note is confirmed, the Left to Pay total for the invoice is updated.

Canceling a Credit Note

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

1 Select the credit note.

2 Click the **Cancel Credit Note** button.

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

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

NOTE:	• Credit notes that are connected to an invoice that was paid cannot be canceled.
	• If the canceled credit note was a confirmed credit, a new credit note is created with a negative amount equal to the amount of the canceled credit note. This is done for balancing the books.

Printing a Credit Note

1 Select the credit note.

2 Click the **Print** button. The Send Document dialog box opens.

3 Click the link to open the credit note for editing / printing or click the Send **Email** button.

NOTE:	• The email will be sent to the email Billing address displayed on the General Tab.
	• The credit note will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).

Handling Receipts

Receipts are issued in response to payments made. Receipts for an account are handled in the Receipts screen. The screen contains two panes:

- The left pane lists the receipts for the account. By default, only the draft receipts are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.

- The right pane lists information about the selected receipt. It contains two tabs:

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

o   Details tab—displays key details specific to the particular receipt.

The key details specific to the receipt are displayed in the Details tab. 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 - for display only.
- Confirmed credit note total for an invoice—this amount is shown in the **Invoices** table.
- Total amount of the receipt.
- Total credit notes.
- Amount and type of each payment.
- Total payments.

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:

Opening the Receipts Screen and Displaying Receipts

1   Open the Receipt screen as follows:

  a   Navigate to **ACCOUNTS -> BILLING -> RECEIPTS**.

  b   Select the account in the dropdown list.

2   To filter the list by any combination of status, name of CSR who created the receipt, issue dates, or value dates, select values for any combination of the following and then click **Search**:

  o   From the **STATUS** drop-down list, select the status of the receipts.

  o   From the **CREATED BY** drop-down list, select the name of the CSR.

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

  o   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).

3   To search for a specific receipt with a known number, fill in the **RECEIPT #** and click **Search**.

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

Creating or Editing a Receipt

1 In the **RECEIPT** screen, do either of the following:

- o To create a new receipt, click **Create New** under the list of receipts. The **NEW RECEIPT** dialog box opens.

- o 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** tab of the **NEW RECEIPT** (or **EDIT RECEIPT**) 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.

- **b** Fill in any extra information:

  - ▪ Internal Note for internal use only.

  - ▪ Customer's Note that will appear on the receipt printout to the customer.

3 Select the **Details** tab.

4 Add an invoice to the receipt as follows:

- **a** Click the **Select Invoices** button. The **SELECT INVOICES** dialog box appears. Only confirmed invoices that have not been fully paid are displayed.

- **b** If necessary, filter the invoices using the search feature.

- **c** Select the check boxes next to the invoice(s) to be included and click **OK**. The **SELECT INVOICES** dialog box closes.

  The invoices now appear in the **INSERT RECEIPT** dialog box and also include the following information:

  - o **LEFT TO PAY** shows the current amount left for payment on the invoice - this is the invoice amount less credit notes, deposits and previous receipts (if any).

  - o **PAID AMOUNT** by default contains the same amount as **LEFT TO PAY**. If the payment amount is less than this amount (see below) then this field must be manually updated to the paid amount.

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

6 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 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 for entering the required information.

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

NOTE: The payment screens have no interface to online payment gateways.

7 If the payment amount does not cover the full amount left to pay on the invoice(s), type the paid amount per invoice in the **Paid Amount** text box.

8 (Optional) Enter a positive or negative **Rounding Value** to generate a *Rounded Total*.

9 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**.

Confirming a Draft Receipt

1 Select the draft receipt.

2 Click the **Confirm** button.

3 In the confirmation prompt warning that the receipt will not be editable, click **Yes**. The message dialog box is closed and the status of the receipt is changed to **CONFIRMED**.

NOTE:	Confirmed receipts cannot be edited. If you find a mistake in a confirmed receipt, cancel the receipt and create a new receipt in its place.

The statuses of all the invoices included in the receipt are changed to **PAID** or **PARTIALLY PAID**, depending on the amount paid.

Canceling a Receipt

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

1 Select the receipt.

2 Click the **Cancel Receipt** button.

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

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

The statuses of all the invoices included in the receipt, will be updated as follows:

- If the invoice does not have another receipt it will be changed to *Confirmed* status.
- If there is another confirmed receipt for this invoice it will be changed to *Partially Paid* status.

Viewing the Details of an Invoice in the Receipt

1 Select the receipt.

2 Select the **Details** tab.

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

Printing a Receipt

1 Select the receipt.

2 Click the **Print** button. The Send Document dialog box opens.

3 Click the link to open the receipt for editing / printing or click the Send **Email** button.

NOTE:	• The email will be sent to the email Billing address displayed on the General Tab.
	• The receipt will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).

Managing Your Business and Production

This chapter describes various tasks performed using Web Services Order Center. Many of these tasks utilize the functionality described in the earlier chapters of this guide, but Web Services Order Center also provides several more screens to help simplify a number of these management tasks. Some these screens are queue screens 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 needs to be revised (following user confirmation of the request to revise), the Job is withdrawn from the Production or Delivery queues (if already located there).
- Jobs can now be approved for production without an attached file.
- Users can now select the target file that is to be printed from among existing files.

This chapter covers the following topics:

- The Dashboard (on page 35) for viewing account data at a glance — generally performed by the CSR.
- The Commercial Queue (on page 37) for monitoring open quotes and orders — generally performed by the CSR.
- The Artwork Queue (on page 37) for handling jobs that are not ready for production — generally performed by the designer.
- The Activities Screen (on page 41) for managing an account's activities — generally performed by the CSR.
- The Billing Manager (on page 42) for managing the billing process — generally performed by administrative personnel.

The Dashboard

The Dashboard is best used as an entry point to managing accounts and viewing all the relevant account business data at a glance. Reviewing account data on a frequent basis can make it much easier to keep the customer satisfied.

Print Service Provider users must have Manager, Manager Advanced or Administrator privileges to have access to the Dashboard screen.

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."
- 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.

To review account data in the Dashboard

1   Navigate to **ACCOUNTS -> DASHBOARD**. The Dashboard screen contains the following panes:

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

    o   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 Account Business Details pane. This pane contains the following sections that provide key information about the account at a glance:

    o   **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 **QUOTES** screen (as if you selected **ACCOUNTS -> SALES -> QUOTES** and then selected **Drafts** as the **TYPE** filter).

        ▪   Buttons to perform common actions (create new quotes and add new activities).

        ▪   Summary and pie chart indicating the Web orders and Offline orders for the month.

    o   **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.

    o   **CONTACT PERSON**—displays the contact details of the contact in the Print Buyer's organization.

    o   **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 screen (for example, to access Quote Drafts in the **QUOTES** screen), click the appropriate link in the **INFORMATION AND ACTION** section.

The following table lists the shortcut links, the screens that those links open, and the lists displayed in the opened screens.

Shortcut Links in the Dashboard

Link	Screen 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	All the jobs in the Production queue
Not Billed Orders	Sales - Orders	Filtered list of committed orders
Invoice Drafts	Billing - Invoices	Filtered list of draft invoices

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

    o   To create a new quote, click **Create New Quote**. (Alternatively, you can perform this action in the Quotes screen). For instruction on filling in quote details, see Creating a Simple Quote (on page 10).

    o   To add a new activity, click **Add New Activity**. (Alternatively, you can perform this action in the Activities screen). For instructions on filling in activity details, see The Activities Screen (on page 41).

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

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

The Commercial Queue

Although you can view and handle quotes in the **SALES - QUOTES** window, and orders in the **SALES - ORDERS** window, the Commercial Queue provides a single location for handling quotes and orders for all accounts. The **COMMERCIAL** window provides:

- 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** screens, the Commercial Queue 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.

- 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   Navigate to **TASKS -> COMMERCIAL**.

By default, the Commercial Queue displays all quotes and orders having one of the various Open statuses, as well as overdue account level activities. Open statuses include the **FOLLOW-UP**, **EXPIRED**, **DRAFTS**, and **UNREAD MESSAGES** statuses.

2   (Optional) Filter the displayed items as follows:
    o   Specify a **Status** in the dropdown box.
    o   Specify the responsible **CSR** in the dropdown box.
    o   Search for a specific quote/order/job number by selecting the item type, filling in the number and then clicking on the **Search** button.

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.)

The Artwork Queue

Concepts

Jobs that are not ready for production arrive in the **ARTWORK** queue. 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.

Use the **ARTWORK** queue screen to manage the jobs that require some work before they can be sent to production. These jobs can generally be made ready for production in one of the following ways.

- At the request of the Print Buyer, the Print Service Provider can create or design the production file and then get it approved by the Print Buyer.
- The Print Buyer can supply the production file (as might normally be done before the order has been committed).

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 are 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 (the thumbnail will be empty if there is no production file), job number and name, number of ordered copies, shipping date, account name, order change status, and soft proof status.

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 displays the No Production File icon while the job has no file attached. After a file has been added, additional alerts may be displayed regarding preflight problems, font problems, etc. For more information about alerts, see the chapter discussing Production, in the Print Service Provider User Guide.

* Details of the selected job.

* Details for the order that contains the selected job: order number (linked to the order), number of jobs in order, account name, price, order date and shipping date.

NOTE:	The Order # link is for viewing the order's information only; no editing of the order should be applied at this stage. To edit the order, navigate to **ACCOUNTS -> SALES -> ORDERS**.

Tasks Handled in the Artwork Queue

You can perform the following tasks in the Artwork queue:

Managing Production Files

This section contains covers the following topics:

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, and how to mark files for production. The 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 with the following icon: 📁 — the file is ready for production

To handle file attachments

1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed. You can filter the display.

2 Select the job.

3 In the details pane, click the **Attachments** icon (📎). 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** button. The **UPLOAD FILE** dialog box opens.

    b   Ensure **Upload a Single file** is selected, and click **Browse**. The **CHOOSE FILE** dialog box opens.

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

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    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 the **Download** icon ( ).The **DOWNLOAD FILE** dialog box opens and displays one or two file download links.

NOTE:
- When downloading one file, the dialog box will contain two links: for the single file and a zip file containing the file to be downloaded.
- When downloading several files, the dialog box will only contain a link to a zip file containing all the files to be downloaded.

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    a   Click the link. The **FILE DOWNLOAD** dialog box opens.

    b   Save the file to the desired location as you would any file in the web browser.

    c   Close the **DOWNLOAD FILE** dialog box.

1 To delete a file, select the file and click the **Delete** 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.

2 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 ( ) appears by the file.

3 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 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.

2 Select the job to send as a soft proof.

3 Click the **Send Soft Proof** icon ( ). The **SEND SOFT PROOF** dialog box opens. The dialog box displays the list of files already attached to the job (if any).

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 fill in an email address.

5 Fill in a Subject and Message for the email. The default Subject and Message does not include any information about the Job ID or Order ID; in case this information is needed, add it manually.

6   To upload additional files to be sent, click the **Upload Additional Files** button. The Attachments dialog box opens. Attach the files as described in Handling File Attachments (on page 38).

7   Select the check boxes of the files for soft proofing.

8   Click **OK**. An email with the soft proofs is sent and a message confirming that the email was sent appears.

9   Click **OK** to close the confirmation message. The ⬜ icon appears in the list, indicating that a soft proof has been sent.

To indicate that the Print Buyer approved the soft proof, do the following:

1   Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.

2   Select the job that has been approved by the Print Buyer.

3   Click the **Confirm Soft Proof** icon (⬜). The **CONFIRM SOFT PROOF** dialog box opens.

4   If necessary, change the name of the Confirmed By user. Click the name of the user and then select a different user from the Select Contact Person dialog box, or select the **Other User Name** check box and fill in the name of the person.

5   Set the Confirmation Date.

6   Add a Note if necessary.

7   Click **OK**. The Confirmed 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 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.

- An 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   Navigate to **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 the **Define Change in Order/Job Activity** icon (⬜). 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   Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.

2   Select the job that is waiting for change approval.

3 Click the **Confirm Change in Activity** icon ( ). The **CONFIRM CHANGE IN ACTIVITY** dialog box opens.

4 If necessary, change the name of the Confirmed By user. Click the name of the user and then select a different user from the Select Contact Person dialog box, or select the **Other User Name** check box and fill in the name of the person.

5 Set the Confirmation Date.

6 Add a Note if necessary.

7 Click **OK**. The Confirmed 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 by all the system queues as the standard way to move 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 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.

2 Select the job.

3 Click the **Approve** button. The job is moved to the **PRODUCTION** queue.

To move a job from the Artwork queue to the Delivery queue without any processing

Use this option to move a job without any processing to the **DELIVERY** queue, skipping the standard step of production.

1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.

2 Select the job.

3 Click the **Move To...** button. The **CHANGE JOB STATUS** dialog box opens.

4 Select the **Delivery** queue.

5 Click **OK**. The dialog box closes and the job is moved to the selected queue.

The Activities Screen

Generally, follow-up activities that are relevant to a feature are performed from the screen that is relevant to that feature (for example, performing follow-up activities on quotes in the Quote screen). The Activities screen provides a single entry point from which to view and handle activities for an account, and is the same screen as the Activities screen that is opened directly from the Quote or Order screen, except that it allows for a greater choice in selecting the combination of activities to be displayed.

1 Navigate to **ACCOUNTS -> ACTIVITIES**.

2 Select the account from the **ACCOUNT** dropdown box on the right side of the screen.

3 Filter the displayed activities as follows:

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

   b In the **ACTIVITIES RELATED TO:** check boxes, select the activities to include (Account, Quotes and/or Orders).

   c Slick **Search**.

   The filtered list of activities is displayed in the screen.

4 Perform activities as you would if you opened the screen from the **QUOTE** screen or the **ORDER** screen. For more information see Handling Follow-up Activities for Quotes and Orders (on page 20).

The Billing Manager

The **BILLING MANAGER** screen provides a single entry point from which to view and access accounting documents for all accounts, and perform different billing related actions on the documents.

1   Navigate to **TASKS -> BILLING MANAGER**. The Billing Manager screen contains two panes:

- o   the left pane displays the Accounts List.
- o   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:

- o   **ID** – the automatically generated account identification number.
- o   **ACCOUNT** – the name of the account.
- o   **RECEIVABLES** – total amount in un-invoiced orders, and the number of un-invoiced orders in brackets.
- o   **SHIPPED** – total amount in shipped jobs that were not invoiced yet, and the number of these jobs in brackets.
- o   **UN-PAID INVOICES** – total amount in un-paid invoices and the number of un-paid invoices in brackets.

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.

- o   Generate new invoices.
- o   Generate new receipts.
- o   Issue deposits.
- o   Issue credit notes.
- o   View billing documents.
- o   Edit billing documents in draft mode.
- o   Cancel billing documents.
- o   Confirm draft documents.
- o   Print billing documents.

For more information about performing related tasks after clicking a button, see the relevant section in Invoicing and Billing (on page 23).

SIX

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 (on page 43)
- Setting Up Production Pricing (on page 46)

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 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 (on page 43)
- Hierarchy FreeFlow Web Services Uses To Calculate The Price Of A Job (on page 44)
- Expanded Pricing Capabilities Provided By Web Services Order Center (on page 44)
- Choosing between Intent Pricing and Production Pricing (on page 45)

Regular FreeFlow Web Services Pricing Mechanism

The regular FreeFlow Web Services pricing mechanism uses the following flow:

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

   o   Business parameters—this set of parameters include currency and how to round off amounts (**SYSTEM SETUP -> BASIC -> REGION AND LANGUAGE**).

   o   Tax Packages—this set of parameters includes various taxing packages that can be added to the price of the job.

   o   Line Items Library—this set of parameters consists of individual items that you generally define elsewhere (for example, stock paper items, shipping items). Not all the 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, etc.). 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:

   o   Calculation model to be used in determining the job's pricing. This is the default pricing model and can be one 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 to define the price manually while the job has not been ordered yet (in shopping cart, saved job, etc.).
- Excel pricing—this model allows the CSR to define pricing at the account level using an Excel file.

o 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.

o 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 override for a pre-ordered job. This is where the Print Service Provider has overridden the default pricing model and manually selected the pricing model to use for the job (including setting the prices manually).

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 for the use of various forms of Production Pricing to determine the 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, etc.).

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

1 When defining System Setup:

a Enable production pricing. (**PRINT SETTINGS -> PRICING -> BUSINESS**).

b Define Process Estimators. FreeFlow Web Services uses 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 (on page 44) used to calculate the price of a job remains unchanged with production pricing, however the Pricing result matrix will be displayed differently. In the result matrix:

o   All intents used for this job and priced at the intent level will be displayed under JBF Options.

o   All selected intent options will be displayed with the cost as set in the Estimators but with a Price of 0 since the intent pricing module is enabled for this job.

o   For each option that was not calculated with Production pricing there is an option to add the production pricing by clicking on the Restore default Price icon - this will add the selected item price to the total.

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.

4   If different output devices are used, each 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. The plans can be viewed while creating the quote and are limited to a maximum of 7 plans.

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. 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 Print Buyers and for CSRs who prepare quotations for offline orders. Several pricing plans (up to seven) can be presented to the CSR, who can then choose the best plan (generally according to price).

Setting Up Production Pricing

You set up Production Pricing by performing the following high-level steps:

- Enable Production Pricing (on page 46)
- Define Output Device Pricing Parameters (on page 46)
- Define Stock pricing (on page 47)
- Define Process Estimator parameters (on page 47)

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 (on page 52)

Enable Production Pricing

To enable production pricing:

1   Navigate to **PRINT SETTINGS -> PRICING -> BUSINESS**.
2   Select the **Enable pricing based on production pricing** check box.
3   Click the **Save** button.

Define Output Device Pricing Parameters

Define output device pricing parameters as follows (for each output device):

1   Navigate to **PRINT SETTINGS -> PRODUCTION -> OUTPUT DEVICES**.
2   Select the output device to configure in the **OUTPUT DEVICES** window.
3   Select the **PRESS SETUP** tab.
    - In the **SETUP TIME** field, define the minutes needed for the initial output device setup.
    - In the **PASS SETUP TIME** field, define the minutes needed for setting up one pass through the device.
    - For offset devices, define the minutes needed to set up each print head per pass in the **PRINT HEAD SETUP TIME** box.

    Click **Save**.
4   Select the **SPEED AND WASTE** tab.

    Configure the definitions depending on the output device type.
    - For digital devices or copiers:
        - 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.
        - 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.
        - Click **Add** to add more runs to the job and define the additional values.
        - In the **PRODUCTION FACTORS** area, define the **Process Color**, **Spot Color**, and **Duplex Mode** speed factors.
    - For offset devices:
        - In the **FIXED WASTE** field, define the number of run sheets that are wasted during a run.
        - In the **RUN LENGTH** field, define the number of copies that can be run.
        - In the **SPEED** field, define the number of sheets that can be run per hour.
        - In the **WASTE** field, define the approximate percentage of run sheet waste (derived from output device adjustments, run sheet examination, or other waste factors).
        - Click **Add** for additional job runs; define the parameters in the resulting fields.
        - In the **PRODUCTION FACTORS** area, define speed and waste factors in the **PROCESS COLOR**, **SPOT COLOR**, and **PAPER WEIGHT** fields.

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

  Click **Save**.

5 Select the **LABOR CHARGE** tab

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

- o To define a digital labor charge:
  - Define the **Mark-up** percentage.

  For both Setup-Time and Run-Time:
  - Define the **Labor Cost** per hour.
  - Define the **Min Labor** time in minutes.
- o To define an offset labor charge:
  - Define the **Mark-up** percentage.
  - Define the **Plate Fee**.

  For both the Setup time and the Run time:
  - Define the **Labor Cost** per hour.
  - Define the **Min Labor** time in minutes.
  - Define the **Process Wash-up Cost**.
  - Define the **Spot Wash-up Cost**.

  Click **Save**.

- Select the **CLICK CHARGE** tab.

  You can use external devices for digital print jobs, and calculate the cost per click in the production costs, as follows:
  - o Define the **Mark-up percentage**.
  - o Define the **Color page 'click' costs**.
  - o Define the **Black and White page 'click' costs**.

  Click **Save**.

NOTE:	Click Charges are calculated based on the planned number of press sheets and do not include the clicks on any waste in the calculation.

Define Stock pricing

Navigate to **PRINT SETTINGS -> PRODUCTION -> STOCK LIBRARY**. For each stock item for which you are defining pricing, do the following:

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

2 Define the cost and the price at the bottom of the screen, per number of copies. These costs and prices can only be defined if Production Pricing is enabled.

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

4 Click **OK**.

NOTE:	Make sure that the other parameters on the page contain real values as they are also used in the production pricing calculation. For example, without setting the Thickness of the stock item, the cutting process estimator will not be calculated correctly.

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:

- Cutting—cutting the printed sheets/copies at the end of the print process. In the case that press sheets are made from the Parent sheet paper, the cutting costs and price will be calculated as well.
- Folding—folding the printed material for a brochure, calendar, etc. It is assumed that only one fold type is defined for a job and folding is calculated per press sheet.
- Drilling—drilling holes in the printed sheets.
- Laminating—laminating the printed sheets.
- Numbering—adding serial numbers to the printed sheets.
- Wide-Format Printing—printing large format jobs such as posters, advertisements for building, etc.

NOTE: You can only define process estimators if production pricing is enabled. For instructions on enabling production pricing, see Enable Production Pricing (on page 46).

Cutting Process Estimators

1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.

2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Cutting**.

3 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.

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.
  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 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.
  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.

5 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.

6 Click **Save**.

Folding Process Estimators

1 Navigate to **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**.

Drilling Process Estimators

1 Navigate to **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**.

Laminating Process Estimators

1 Navigate to **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:

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

o 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**.

Numbering Process Estimators

1 Navigate to **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:

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

o 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**.

Wide-Format Printing Process Estimators

1 Navigate to **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.

a 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

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.

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 format 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.

NOTE: Selecting one of the above values disables Intent pricing for this job type, and pricing calculations will be based on the production pricing parameters.

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.

SEVEN

Tips and Known Issues

The following tables list known issues as well as useful tips and hints for this version, organized by category.

Quotes and Orders

Description
Protected files can be uploaded to a Quote or Order.
Reusing quotes: Converting a committed quote to an order for the second time (or more) can only be done from the Quotes screen (ACCOUNTS -> SALES -> QUOTES).
Changing the contact person does not automatically change the Billing address; change the address manually by clicking on the Billing Address on the QUOTES -> GENERAL tab.
Templates of a Parent Account are not displayed when ordering a job via Web Services Order Center.
When requesting a Third Party Quote, the job ticket that is sent will include pricing information.
When editing an Web Services order via Web Services Order Center, the source of the order will be changed to Web Services Order Center.
When editing a Book Assembly or Inventory template job inside the quote, the intent tab is displayed although it is irrelevant.
When deleting the database file of an archive template in a Quote or Order, the job Variable Information tab will have an error.
When a job is sent to the Artwork Queue, the relevant order history tab displays the message that the job was sent to the Production Queue.
Printer logo disappears from the quote document after it is edited.
The order link in the Production Queue, the Artwork Queue and at the quote level, displays the order details for information only. To make changes to the order, navigate to ACCOUNT -> SALES -> ORDERS.
If a CSR wishes to change the job quantity in a quote or order, it must only be done from the job's Pricing tab and not from the result matrix.

Activities

Description
Sorting the Activities table by Type or Quotes/Orders is not working (ACCOUNTS -> ACTIVITIES).
When creating an Account Activity and not changing the default contact person, the contact person column will appear empty under the account Activities table.

Billing

Description
The disabled Billing option "Allow Issuing an Invoice for parent Account" works as if enabled (SYSTEM SETUP -> ADVANCED -> BILLING).
Canceling an invoice is only supported from the ACCOUNT -> BILLING -> INVOICES screen (and not from the Billing Manager).
When a CSR with Manager privileges searches for the Billing documents of an Account that actually has no Billing documents, an error message will be displayed instead of a No Results message.
Generating a report or searching per Account Group will always return 0 results (REPORTS -> BILLING or TASKS -> BILLING MANAGER).
Searching for accounts with unpaid invoices will also display accounts without unpaid invoice (TASKS -> BILLING MANAGER).
Viewing the Canceled Document from TASKS -> BILLING MANAGER doesn't show the cancelation reason and cancelation details.
Under the Details tab of a receipt the selected invoice table includes a Tax column; this will always be 0 since no Tax can be defined for a receipt.
When creating a receipt and searching for an invoice that does not exist, nothing will happen.
When selecting an invoice while creating a receipt, the paid amount for the invoice will include the Deposit amount that was set for the orders in this invoice plus the Credit Note amount that was set for this invoice.

Artwork

Description
The maximum file size allowed for the attachment to the Soft Proof Email is 10 M. If the error message "The size of the selected files exceeds the size permitted…" appears when sending an attachment that is less than 10 M, install the following Windows HotFix: • HF NDP40-KB2183292-x64.exe for Windows 2008 R2 64 bit. • HF NDP40-KB2183292-x86.exe for Windows 2008 and 2003 32 bit.
Soft Proof status will not display in the Artwork queue, but will be displayed on the Job Order History Tab – when sending a soft proof there is only an indication that the soft proof was sent, but if it was approved or rejected it will not be displayed in the Artwork queue.
Preflight error indication will not be displayed in the Artwork queue's Job Details right hand panel.
When approving a job from the Artwork queue it is moved to the Production queue without any warning in the case that a Soft Proof is not approved, an activity is not completed, or the job has no production file.
After setting a file as "Mark for Production", the preflight icon and thumbnails are not automatically refreshed.
Layout Jobs are not supported in the Artwork queue.

Commercial

Description
Changing activity status will not be reflected in the Commercial Queue unless it is manually refreshed.

Production Pricing

Description
Wide format pricing will not add the additional cost and price to the Production Pricing calculations.
When the Print Service Provider changes a job price to manual, and Production Pricing is enabled in the application, manual and Production Pricing will be displayed in the job matrix breakdown and the price will be the sum of the 2 models. The Print Service Provider needs to manually delete the line items related to the Production Pricing so that the price will be calculated from the manual lines only.
The press setup time price and/or the setup labor price line items (defined in the output device) are not added to the job price calculation.

Account Group

Description
When resetting the search for an Account Group it will reset to the last changes that were done for the group (like Revert).
Account Group description is limited to 50 characters.

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