ORDERSTREAM PRO
BUSINESS MANAGER

By VORTEX BUSINESS SOFTWARE

# Overview for Account Executives

**March 2009**

**Vortex Business Software Corporation**

## TABLE OF CONTENTS

# FIGURES

The purpose of AE sites is to provide Account Executives with a personal website to which they can refer clients to:

1. Register personal accounts
2. Find / order promotional products
3. Download images and manage their own image gallery
4. View status of orders in process
5. Re-order promotional products

AE sites are personalized versions of **OrderStreamPro.com**:

1. Personalized domain name (yourname.orderstreampro.com)
2. Photograph of the AE displayed on the home page
3. Personal marketing message on the home page
4. AE email address on the home page
5. Special product offerings from the catalog on the home page
6. Full personalized contact information on all pages and in all locations where contact information is shown

The AE web site will be most effective if the Account Executive registers the client BEFORE referring the client to the site. AE sites are not intended as destinations for casual web surfers

Along with the custom site “front end”, an extensive back office is made available to Account Executives and authorized administrators.  This document provides an overview of key functions of the **OrderStream Pro** back office for Account Executives. Topics covered include:

1. Logging Into the back office
2. Reviewing the back office home page
3. Creating accounts, proposals and orders
4. Updating purchase orders
5. Checking your commissions
6. Customizing your AE website

## Back Office Overview

The **OrderStream Pro** back office provides a number of screens and modules including:

1. **Home page**
    a. View a **summary** of your open orders and proposals, invoiced orders and receivables
2. **My Login Info**
    a. Edit your own login information
3. **Account Module**
    a. Create and update your accounts
    b. Add / edit multiple shipping and billing contacts for an account
    c. Select a national account entry
    d. Customize enabled payment methods and / or product categories
    e. Enter a sales tax exemption number when applicable
    f. View, edit or add images to an account's image gallery
    g. View a listing of your accounts based on your search criteria
    h. Send a "bulk email" to all primary contacts on a page of an account listing
4. **Order Module**
    a. Create and update orders / proposals / duplicate orders / back orders for your accounts
    b. Add / update in hands date, shipping and / or billing information
    c. Add / edit products, quantities, per unit fees, flat fees, imprinting, artwork to an order
        i. Tax is always calculated automatically based on the shipping address and the state-by-state tax exposure of the custom site
    d. Add / edit shipping and / or handling
        i. Live UPS rate calculation is available for enabled UPS methods
    e. Follow orders through to fulfillment and update order status
    f. View status history or payment history for the order
    g. Make a credit card payment

   h. Add notes to the customer or for internal use only
   i. View sales data including commission, gross margin, gross profit
   j. Print an order document or provide a URL to an order document
   k. Email order documents and / or artwork to multiple recipients
   l. View a listing of your orders based on your search criteria

5. **Purchase Order Module**
   a. PO's are automatically generated when orders are created
   b. Update the status of a PO and / or the associated order
   c. View status history for the PO or the associated order
   d. Set / update PO in hands date, follow-up date, art approved date, ship date
   e. Set / update shipping method, "ship to" contact
   f. Add administrator and / or supplier notes
   g. Enter shipping and / or handling costs
   h. Upload files
   i. Print a PO document or provide a URL to a PO document
   j. Email PO documents including uploaded files to multiple recipients
   k. Transmit PO information to a third party
   l. View a listing of PO follow-ups
   m. View a listing of purchase orders based on your search criteria
6. **Commission Module**
   a. View a listing of your commissions based on your search criteria
   b. Commission statements include
      i. Credits (commissions earned)
      ii. Debits (payments made)
      iii. Corrections (changes in order costs)
      iv. Split commissions with other AE's
   c. Administrators (making payments) will view this same screen and data
7. **Suppliers Module**
   a. View a listing of suppliers based on your search criteria

   b. View supplier details

8. **My AE Site**
   a. Customize your personal AE website
      i. Upload a photo for the home page
      ii. Define personalized text for the home page
      iii. Define a 3rd party “more promotional products” link
      iv. Define your contact information
      v. Define your AE site web address
      vi. Upload a logo for order and PO documents

## Login

1. Go to http://www.orderstreampro.com/admin.clw
2. Enter your Login ID and password
   a. If you forget your password, enter your **Login ID** and click on the "**forgot your password?**" link
      i. Click "**Submit**" and a new password will be emailed to you
3. A successful login will bring you to the back office home page


Figure 1: OrderStream Pro back office login

## Back Office Home Page

**AE back office home page:**

1. **Main menu** options shown on the left of the screen
   a. **Update your Login Info**
   b. **View**
      i. View / Create Accounts and Orders
      ii. View Purchase Orders
      iii. View Commissions
      iv. View Suppliers
   c. **Configure**
      i. Customize your AE Site
2. **Shortcut links** shown at the top of the screen
   a. Create an account
   b. Create an order / proposal
   c. List active orders
   d. List PO follow-ups
3. **Retrieve an existing record**: search by account, order or PO number
4. **AE summaries:** a snapshot view of total open proposals and orders, and total invoiced orders
   a. **My Open Proposals & Orders**
   b. **My Invoiced Orders**
   c. **My Receivables**

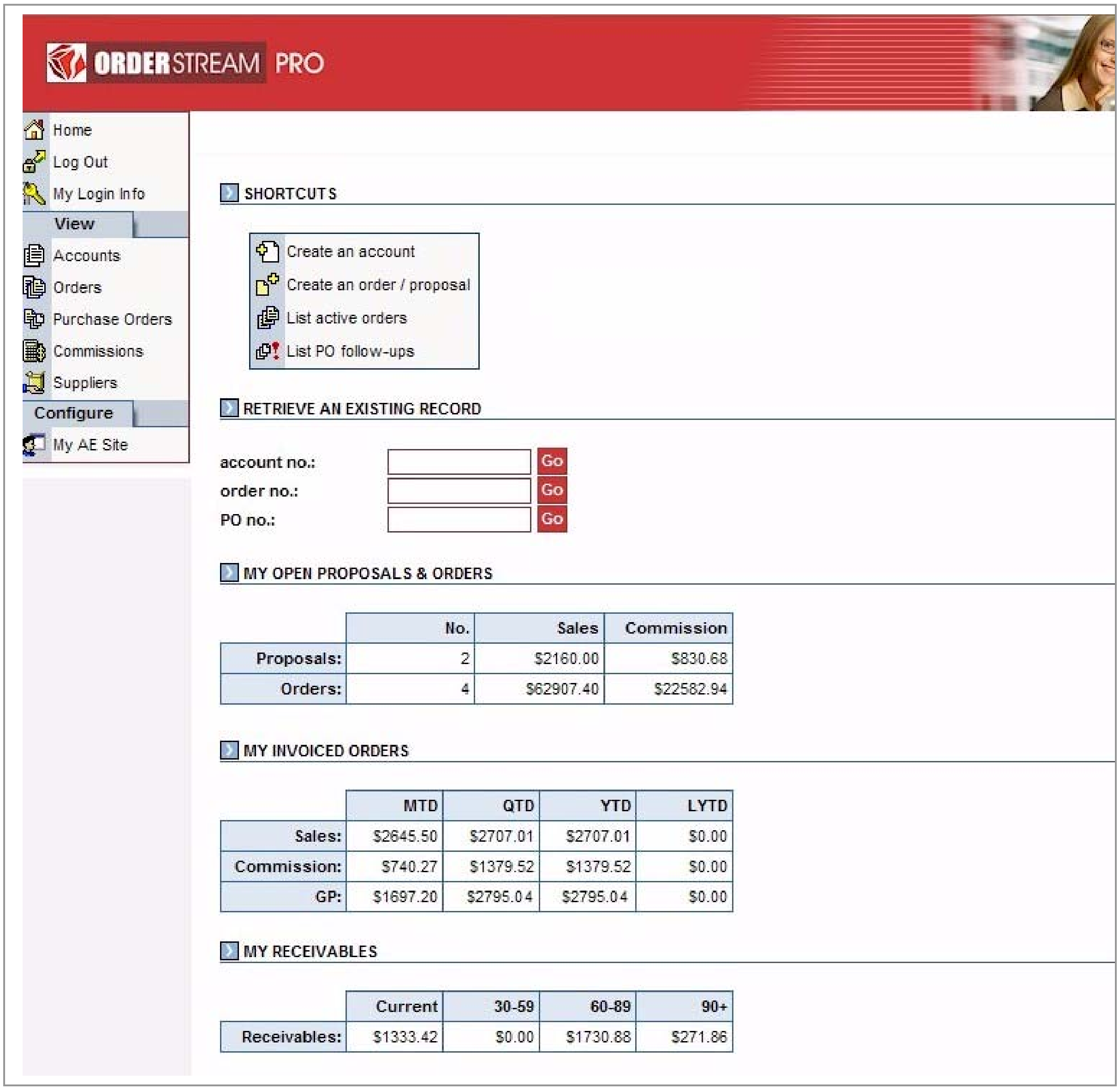



Figure 2: Back office home page for AE's

## Update Login Info

**AE back office Update Login Info:**

1. Accessed by the **My Login Info** main menu option
2. Set up a **Login ID** and **password** that is easy for you to remember
3. Change your Login ID and password from time to time for security reasons
4. Only <u>you</u> know your password!

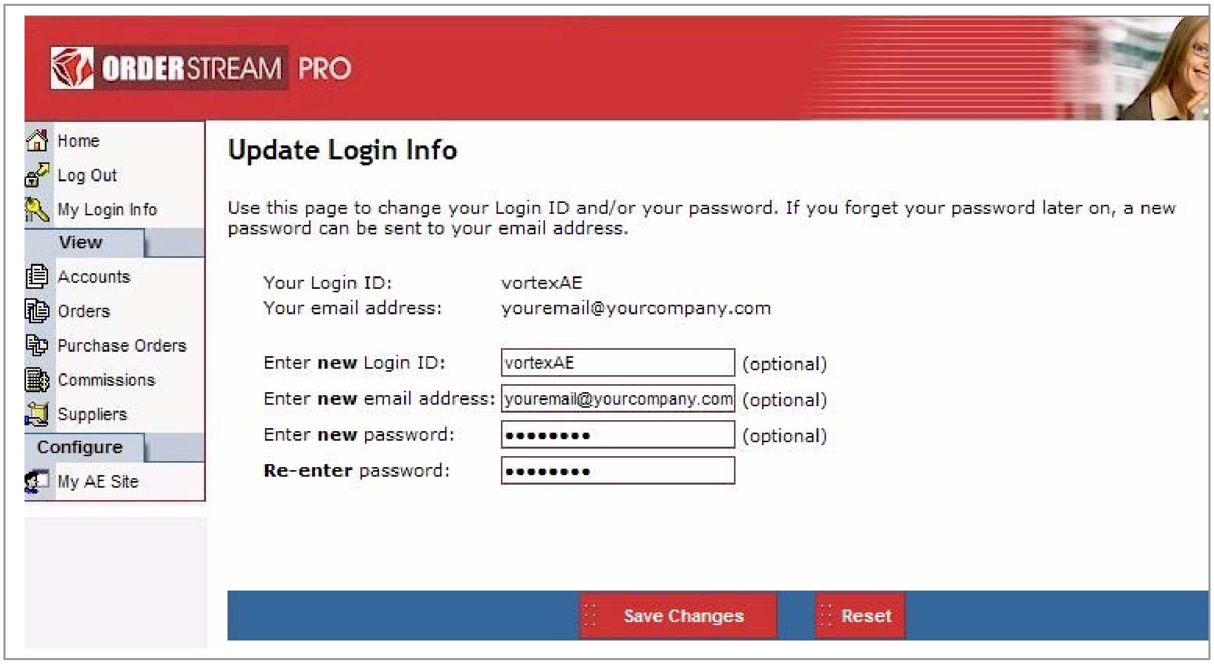



Figure 3: Back office Update Login Info

## Accounts

**Set criteria to create a list**

1. Click the **Accounts** main menu option
2. Set the filters to narrow your list to the desired set of accounts
   a. Custom site where the account was registered
   b. Account number / first name / last name / company name
   c. Date or date range for when the account was created
   d. With or without orders on file
3. Set sorting / viewing options as desired
4. Click **Create List**

**Account listing**

1. A table listing of accounts will be shown based on the filter settings with the total number of matches indicated at the top of the list
2. Only your accounts will be shown
3. Four **action icons** are shown in the **Actions** column for each account in the list. Move your mouse over these icons to read a “tool tip” on their purpose
   a. **Define contact info**: click this icon to go to the account’s **Account Details** page, which includes
      i. The ability to create multiple **ship to** and **bill to** contacts
      ii. The **national account** setting for the account
      iii. Customizable enabled **payment methods**
      iv. Customizable **product categories**
      v. **Sales tax exemption** / resale certificate number (if applicable)
   b. **Define image gallery**: view, edit, or add images to this account’s image gallery
   c. **Create order / proposal**: click this icon to go to the order creation wizard, with the account entries pre-filled
   d. **View orders / proposals** icon is shown if this account has any existing orders / proposals. A listing of the accounts orders are shown on **View Orders and Proposals**

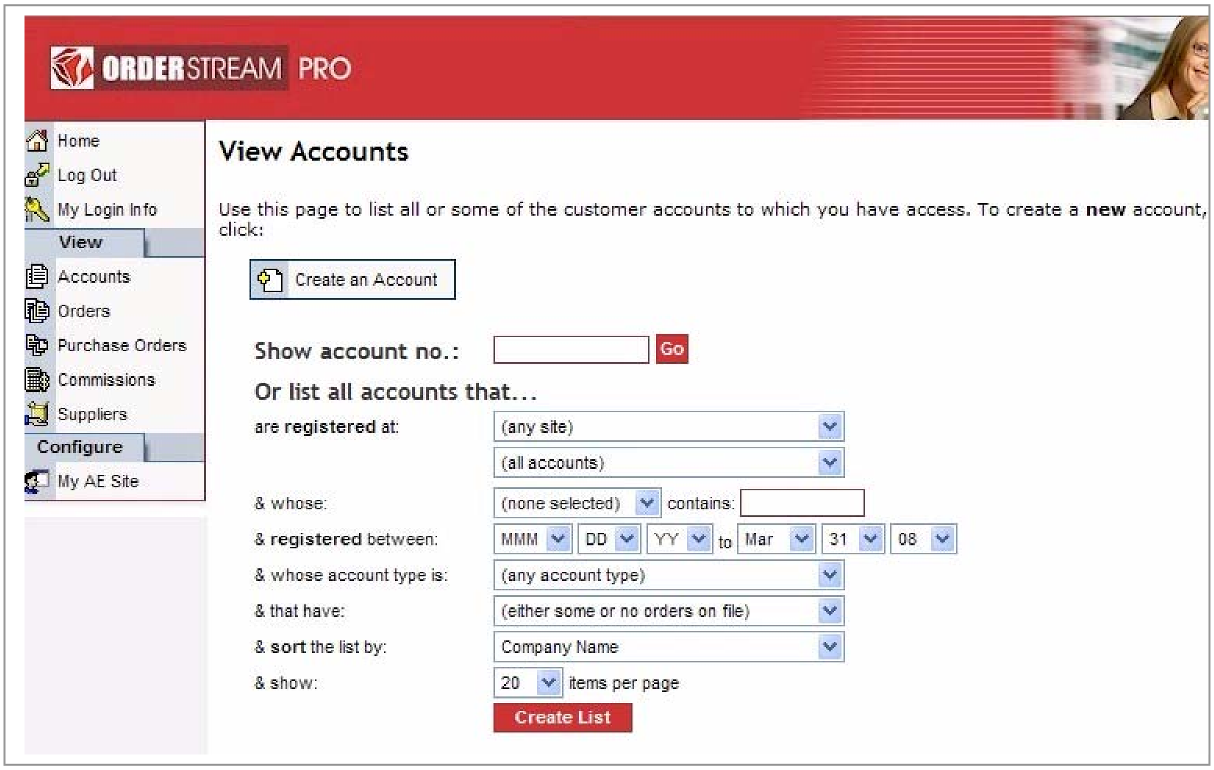



Figure 4: View Accounts: set criteria for creating a list

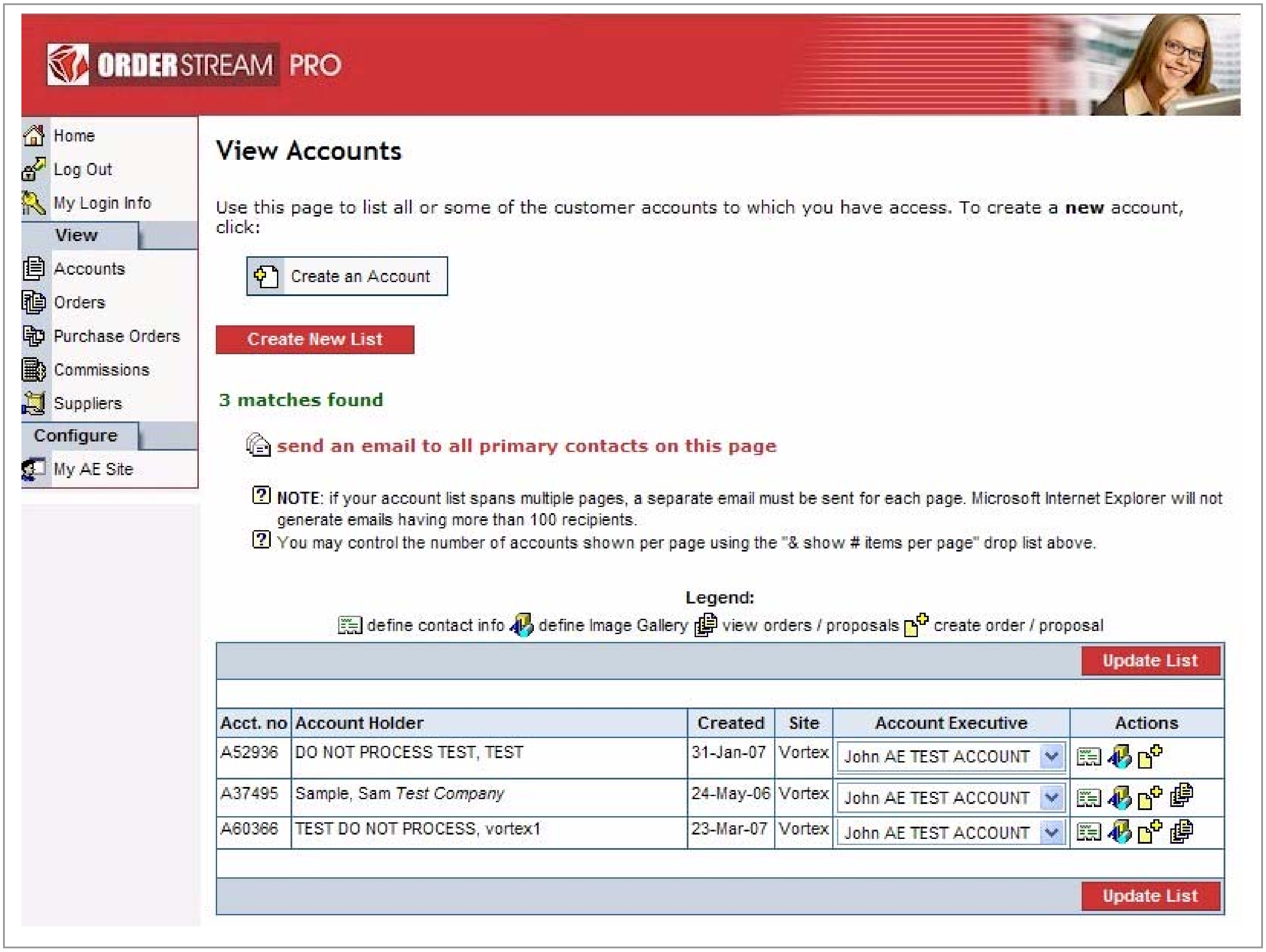



Figure 5: View Accounts account listing example

A **send an email to all primary contacts on this page** feature is available on **View Accounts** once a listing has been created

1. If your account list spans multiple pages, a separate email must be sent for each page
2. You may control the number of accounts shown per page using the **"& show # items per page**" drop list

**View account details**

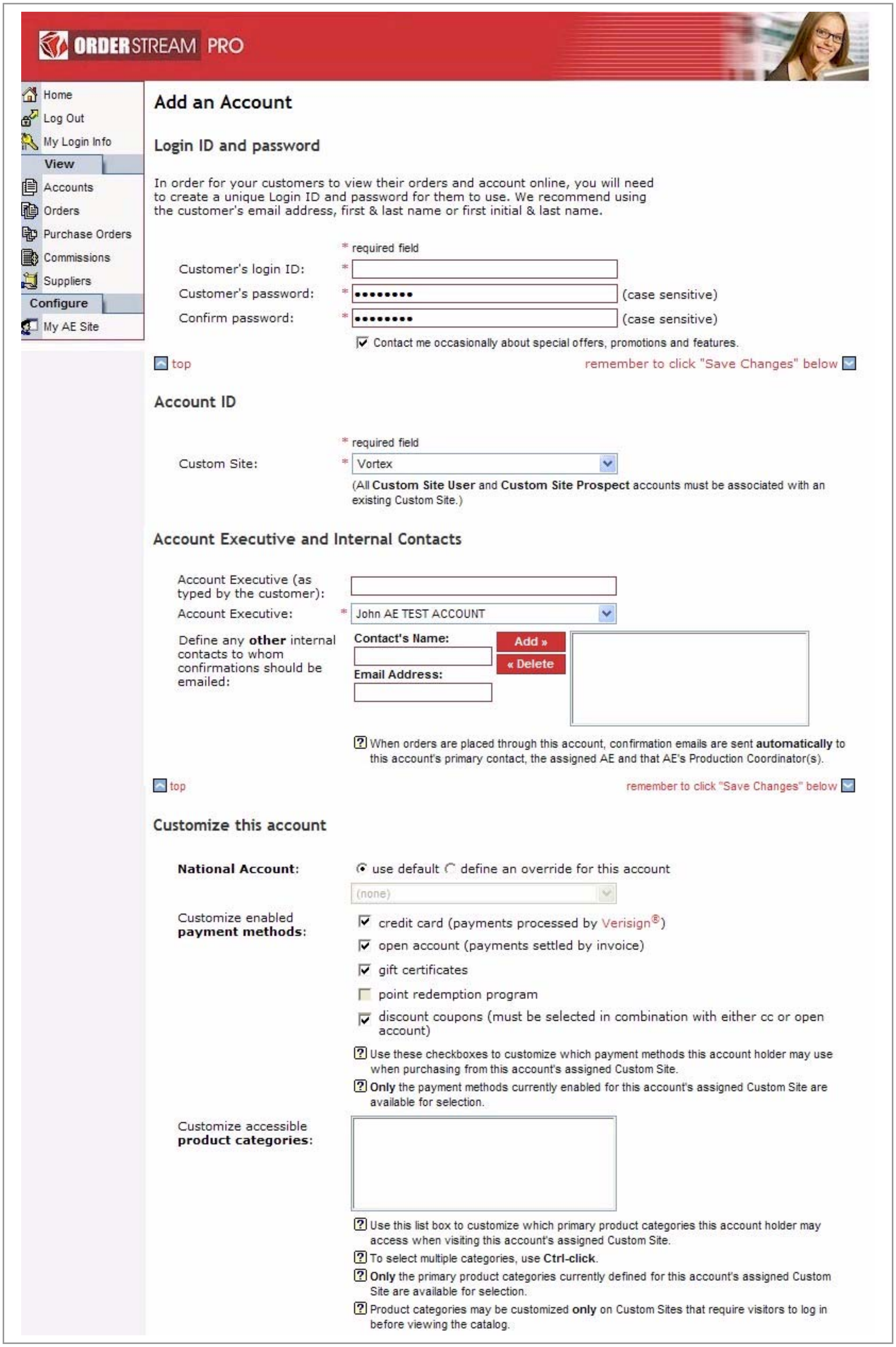
1. Click an **Action** icon in the created list to view an account's **Account Details** or **Image Gallery** and **navigation buttons** will be shown at the top of the page to allow you to navigate from one account in the listing to another without having to return to the **View Accounts** page
2. Alternatively, enter the full account number in the **Show account no.** field and click **GO** to go to the **Account Details** page for that account. A similar field is available on the back office home page for your convenience
3. A small **Account Action submenu** is available in the **Account** module with menu options that are similar to the **View Account** table Action icons to provide easy navigation between account pages (**Account Details**, **Image Gallery**), or access to a listing of the account's orders or creation of an order

**Create a new account**

1. Click the **Create an Account** button on the **View Accounts** page
2. The **Add an Account** page is shown; it is the same layout as the **Account Details** page for an existing account
   a. Create a **Login ID** and **password** for your customer
      i. Customers can use this login information to access your custom site to view their current and past online orders and to place re-orders
   b. Indicate the specific **custom site** that the account should be associated with
   c. **Account Executive**: Your name will be the **Account Executive** shown in the drop list
   d. **Internal Contacts**: Define any **other** contacts to whom order confirmations should be emailed
      i. When orders are placed on the front end through this account, confirmation emails are sent automatically to this account's primary contact, the assigned AE and that AE's Production Coordinator(s)
   **e. Customize enabled payment methods**
      i. Customize which payment methods this account holder may use when purchasing from this account's assigned custom site
      ii. Only the payment methods currently enabled for this account's assigned custom site are available for selection
   **f. Customize accessible product categories**

i. Customize which primary product categories this account holder may access when visiting this account's assigned custom site
ii. Only the primary product categories currently defined for this account's assigned custom site are available for selection
iii. Product categories may be customized only on custom sites that require visitors to log in before viewing the catalog



ORDERSTREAM PRO

Home
Log Out
My Login Info
View
Accounts
Orders
Purchase Orders
Commissions
Suppliers
Configure
My AE Site

## Add an Account

### Login ID and password

In order for your customers to view their orders and account online, you will need to create a unique Login ID and password for them to use. We recommend using the customer's email address, first & last name or first initial & last name.

* required field

Customer's login ID: *

Customer's password: * •••••••• (case sensitive)

Confirm password: * •••••••• (case sensitive)

☑ Contact me occasionally about special offers, promotions and features.

top — remember to click "Save Changes" below

### Account ID

* required field

Custom Site: * Vortex

(All **Custom Site User** and **Custom Site Prospect** accounts must be associated with an existing Custom Site.)

### Account Executive and Internal Contacts

Account Executive (as typed by the customer):

Account Executive: * John AE TEST ACCOUNT

Define any **other** internal contacts to whom confirmations should be emailed:

**Contact's Name:** Add »

**Email Address:** « Delete

? When orders are placed through this account, confirmation emails are sent **automatically** to this account's primary contact, the assigned AE and that AE's Production Coordinator(s).

top — remember to click "Save Changes" below

### Customize this account

**National Account:** ◉ use default ○ define an override for this account

(none)

Customize enabled **payment methods**:

☑ credit card (payments processed by Verisign®)

☑ open account (payments settled by invoice)

☑ gift certificates

☐ point redemption program

☑ discount coupons (must be selected in combination with either cc or open account)

? Use these checkboxes to customize which payment methods this account holder may use when purchasing from this account's assigned Custom Site.

? **Only** the payment methods currently enabled for this account's assigned Custom Site are available for selection.

Customize accessible **product categories**:

? Use this list box to customize which primary product categories this account holder may access when visiting this account's assigned Custom Site.

? To select multiple categories, use **Ctrl-click**.

? **Only** the primary product categories currently defined for this account's assigned Custom Site are available for selection.

? Product categories may be customized **only** on Custom Sites that require visitors to log in before viewing the catalog.

g. **Primary contact information**
   i. Ensure that the required * fields are filled in at the very least
   ii. Provide the sales tax exemption number if applicable
h. **Shipping contact information** (optional)
   i. Define one or more shipping contacts as needed
   ii. All accounts start with one shipping contact. That contact is assumed to be the same as the **primary contact** by default. Set the **Is this contact the same as the primary contact?** option to "**no**" to change the initial shipping contact information from the default
   iii. To create multiple shipping contacts, click the "**add new shipping contact**" button
   iv. Ensure that the required * fields are filled in at the very least for each contact
i. **Billing contact information** (optional)
   i. Define one or more billing contacts as needed
   ii. All accounts start with one billing contact. That contact is assumed to be the same as the **primary contact** by default. Set the **Is this contact the same as the primary contact?** option to "**no**" to change the initial billing contact information from the default
   iii. To create multiple billing contacts, click the "**add new billing contact**" button
   iv. Ensure that the required * fields are filled in at the very least for each contact

3. Be sure to **notify your customer** of the login information, along with the URL for the associated custom site, as account creation confirmation emails are not generated when an account is created in the back office

Note: accounts may be created by your clients on your custom site's front end

## Primary contact information

* required field

Contact first name: *
Contact last name: *
Company name:
Dept/Div/Cost Center:
Industry Category: -select industry category-

Country: * UNITED STATES*

Address 1: *
Address 2:
City: *
State / Province: * Alabama
ZIP / Postal code: *
Required for countries with an *

Direct dial phone: * Ext.
Cell phone:
Home phone:
Fax:
Email: *
Do you have a sales tax exemption / resale certificate number? yes no

top remember to click "Save Changes" below

## Shipping contact information

This contact is: Shipping Contact 1
Is this contact the same as the primary contact? yes no

- All accounts start with one shipping contact. That contact is assumed to be the **same** as the primary contact by default.
- If this or any other shipping contact for this account is **different** than the primary contact, select the "no" radio button above and enter the appropriate information.
- To create **multiple** shipping contacts, click the "add new shipping contact" button below.

add new shipping contact

top remember to click "Save Changes" below

## Billing contact information (optional)

This contact is: Billing Contact 1
Is this contact the same as the primary contact? yes no

- All accounts start with one billing contact. That contact is assumed to be the **same as** the primary contact by default.
- If this or any other billing contact for this account is **different** than the primary contact, select the "no" radio button above and enter the appropriate information.
- To create **multiple** billing contacts, click the "add new billing contact" button below.

add new billing contact

Save Changes | Clear | Cancel

## Orders

**Set criteria to create a list**

1. Click the **Orders** main menu option
2. Set the filters to narrow your list to the desired set of orders
   a. **Custom site** where the order was created
   b. Include **front end orders** and / or **back office orders** and / or **proposals**
   c. Specify **type of custom site**
      i. Drop ship sites
      ii. Distributor owned inventory sites
      iii. Customer owned inventory sites
   d. Specify **type of merchandise** contained in the order
      i. Fulfilled by drop ship
      ii. Fulfilled from inventory
      iii. For replenishing inventory
   e. Select from a **drop list of criteria**: Order number, account number, primary contact first name, last name or company name, or customer PO number and enter search text
   f. Specify a **date range** that the order was created within
   g. Specify a **vendor** that was included in the order
   h. Specify an **imprinter** that was included in the order
   i. Specify an **order status** or a range of status types
      i. Selecting a single status will show more entry fields
         i. Specify a date range that the order attained the selected status within
         ii. Indicate whether the order should still have this status now
   j. Specify order **terms**
3. Set sorting / viewing options as desired
4. Click **Create List**

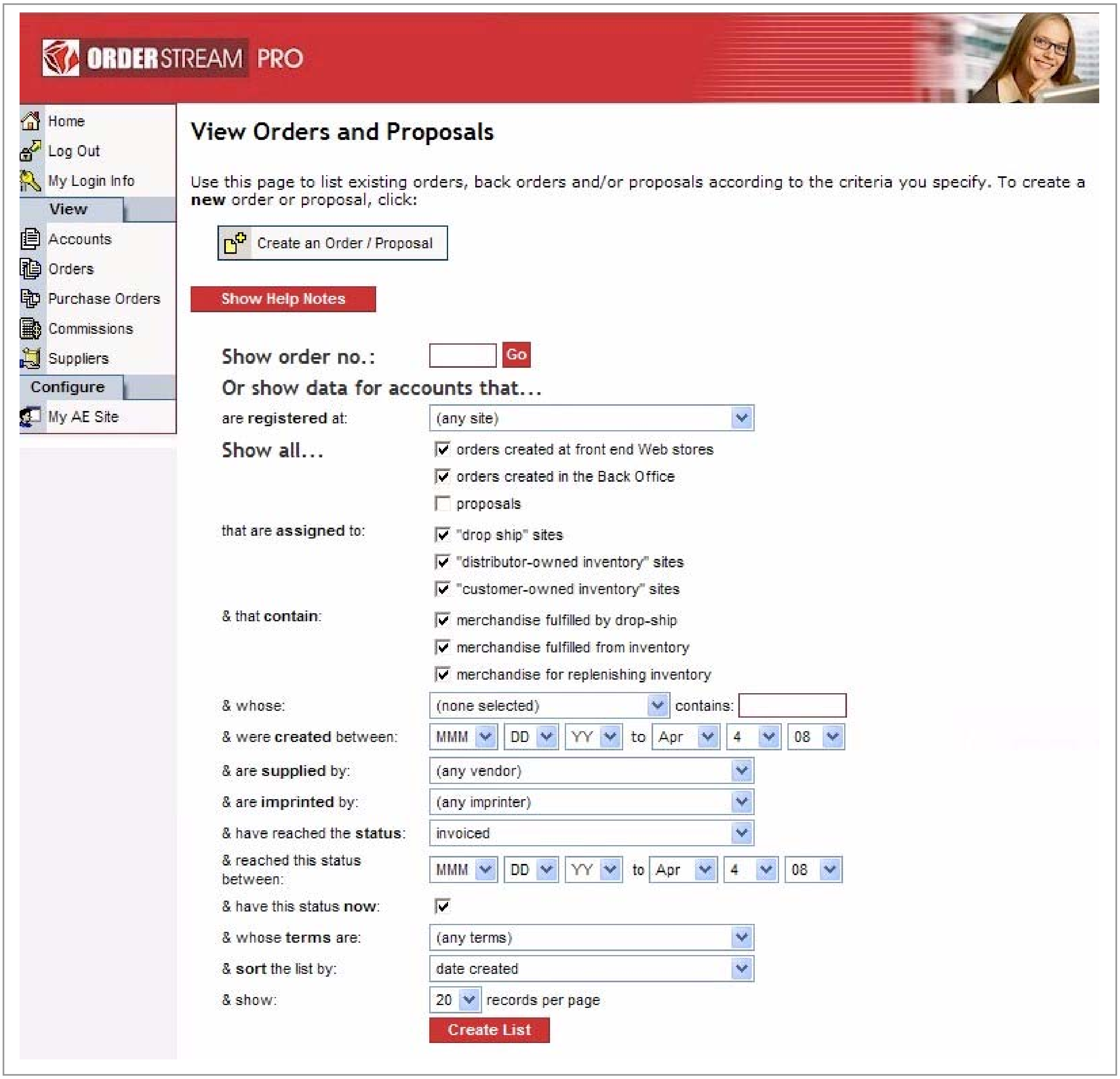



Figure 8: View Orders and Proposals set criteria for creating a list

**Order listing**

1. A table listing of orders will be shown based on the filter settings with the total number of matches indicated at the top of the list
2. Only your orders will be shown
3. A drop list is shown for each order indicating the order's current **status**. This status may be changed within this listing. To update the status of orders that you've edited directly in the list, click the **Update List** button
   a. View the order's status history by clicking on its **view status history** icon next to the status drop list
4. Several **action icons** are shown in the **Actions** column for each order in the list. Move your mouse over these icons to read a "tool tip" on their purpose
   a. **View this order's details**: click this icon to go to the order's **Order Overview**
      i. From the **Order Overview** page: Access and edit order sections. Click your mouse over an order section on **Order Overview** to access that section or use the **Editable Order Details** submenu
   b. **Send an email**: click this icon to send an email that may include an order printout and / or imprint graphics. Multiple recipients are possible
   c. **Print a document**: click this icon to select and view an order document
      **i. Order (Customer Acknowledgement)**
      ii. **Order (Office Copy)**: includes data not visible to the customer such as net costs, gross profit & commissions (for internal use only)
   d. **List purchase orders**: click this icon to view a listing of purchase orders associated with this order
   e. **Duplicate this order**: click on this icon to quickly create a new order that is a duplicate of the original order
   f. **Create a back order**: create a back order of this order – this icon is only shown when applicable

**View order details**

1. Click an **Action** icon in the created list to view the **Order Overview** for the selected order and **navigation buttons** will be shown at the top of the page to allow you to navigate from one order in the listing to another without having to return to the **View Orders and Proposals** page

2. Alternatively, enter the order number in the **Show order no.** field and click **GO** to go to the **Order Overview** for that order. A similar field is available on the back office home page for your convenience
3. A small **Order Action submenu** is available in several modules that provides access to the **Order Overview** and **editable order detail** sections

ORDERSTREAM PRO

- Home
- Log Out
- My Login Info

**View**

- Accounts
- Orders
- Purchase Orders
- Commissions
- Suppliers

**Configure**

- My AE Site

## View Orders and Proposals

Use this page to list existing orders, back orders and/or proposals according to the criteria you specify. To create a **new** order or proposal, click:

Create an Order / Proposal

Show Help Notes

Create New List

**8 matches found**

**Legend**

view order details · send an email · print a document · duplicate this order · create back order · list purchase orders · view status history

Update List

| Description | | Qty | Subtotal | Status | Actions |
|---|---|---|---|---|---|
| order **#195409** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 20-Mar-08<br>In Hands: **14-Apr-08** | |
| Sample 3<br>embroidery: "Sunset.jpg" on As Described | | 2 | $100.00 | new order | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$237.94** | | |
| order **#195408** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 20-Mar-08<br>In Hands: 26-Apr-08 | |
| Sample 3<br>imprinting: "ArtToFollow.gif" on Back | | 2 | $100.00 | shipped | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$254.33** | | |
| order **#195361** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 19-Mar-08<br>In Hands: 29-Apr-08 | |
| Test Product Men's Champion Long Mesh Shorts | | 25 | $474.75 | in process | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$700.16** | | |
| order **#195360** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 19-Mar-08<br>In Hands: unspecified | |
| Nike SAMPLE PRODUCT Classic Cap<br>silk-screening: "masterpiece.jpg" on Back of Cap | | 1185 | $63990.00 | ready to invoice | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$67493.90** | | |
| order **#194781** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 03-Mar-08<br>In Hands: 05-Mar-08 | |
| Nike SAMPLE PRODUCT Classic Cap | | 23 | $1242.00 | invoiced | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$1429.69** | | |
| order **#192004** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 12-Feb-08<br>In Hands: unspecified | |
| compact modem 3sp<br>embroidery: "(art to follow)" on Front Center and on Front Bottom | | 20 | $390.00 | invoiced | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$584.11** | | |
| order **#190764** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 01-Feb-08<br>In Hands: 01-Mar-08 | |
| Nike SAMPLE PRODUCT Classic Cap<br>silk-screening: "masterpiece.jpg" on Back of Cap | | 1175 | $1433.85 | invoiced | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$71.51** | | |
| order **#190734** | For: acct. A36965, DO NOT PROCESS: TEST<br>AE: John AE TEST ACCOUNT | | | Created: 01-Feb-08<br>In Hands: 29-Feb-08 | |
| Nike SAMPLE PRODUCT Classic Cap<br>silk-screening: "masterpiece.jpg" on Back of Cap | | 1175 | $1433.85 | invoiced | |
| **TOTAL** (after imprinting, packaging, s & h, taxes): | | | **$80.61** | | |

Update List

**Create a new order or proposal**

1. There are many different ways to initiate the creation of an order
   a. Click the **Create an Order / Proposal** link on the **back office home** page OR
   b. Click the **Create an Order / Proposal** button on **View Orders and Proposals** OR
   c. Click the **Create order / proposal** icon in a listing of accounts and the account entries will be pre-filled for you OR
   d. Click the **Create order / proposal** menu option in the **Account Actions submenu** (available in the account, order and PO modules) and the account entries will be pre-filled for you OR
   e. Click the **Duplicate this order** icon on the **View Orders and Proposals** page to create a new order that is a duplicate of the original order OR
   f. Click the **Create a back order** icon on the **View Orders and Proposals** page to create a new order that is a back order of the original order
2. With the exception of duplicate orders and back orders, order creation requires you to go through the **order creation wizard**, which consists of a series of steps (order sections) that need to be completed before the order is created
   a. A red asterisk (*) indicates required fields
   b. **TBD** (to be determined) is an accepted entry in fields where a price or cost is expected
   c. Navigation through the order creation wizard is done through a **Save and Next >>** button and a **<< Back button** shown on each section
   d. ii If you need to revisit the previous page, **only** use the **<<Back button** shown on the screen for navigation; do **not** use the **browser** back button
   e. **Save and Next >>** <u>must</u> be clicked before your current entries are saved. If you click **<<Back** to return to the previous screen, your current entries will be lost unless you have already clicked **Save and Next>>** on the current screen
      i. **Example**: you have finished your entries on the **Merchandise Details** but you need to make a change on the **Shipping and Billing Details**. Click **Save and Next >>** to go to the **Notes** <u>first</u> to save your changes, and then click the **<<Back** button to go back to

the **Merchandise Details** and again to go back to the **Shipping and Billing Details**

f. **Save and Next >>** will not permanently save your entries; your order will be **lost** if you close out of the order creation wizard before clicking **Finish** on the last section

**Create a new order or proposal: General Details**

1. Select whether you are creating an **order** or a **proposal** (required). A red asterisk (*) indicates other required fields
2. **Account Executive**: your name will appear here
3. **Production Coordinator**: your PC's name will appear here by default unless multiple PC's are assigned to your account
4. **Custom Site**: your custom site can be selected or will be shown here
5. **Account**: select your client's account number / name
6. **Client's PO no** (optional): enter your client's PO number
7. **In hands** date: enter an in hands date. Indicate if it is a firm date
8. **Order status: "new order"** is the default order status
9. **Terms**: select the appropriate terms from the list
10. Click **Save and Next >>** to go to the **Shipping and Billing Details** page
    a. If you need to revisit the previous page, **only** use the **<<Back** button shown on the screen for navigation; do **not** use the **browser** back button
    b. **Save and Next >>** will not permanently save your entries; your order will be **lost** if you close the order creation wizard before clicking **Finish**

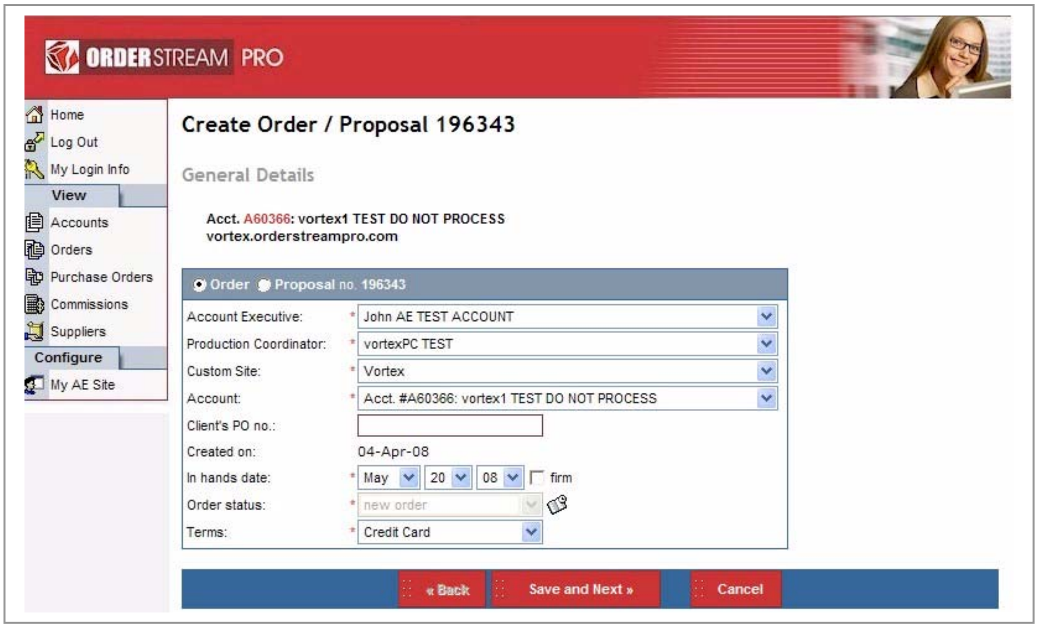



Figure 10: Create Order/Proposal: General Details

**Create a new order or proposal: Shipping and Billing Details**

1. **Shipping** and **billing** contact details will default to the entries as set up or updated in **Account Details**
2. For both the **shipping** and **billing contact**: leave at default selection or select a contact already in the list or select “**create new contact**”
3. **Shipping method**: select the appropriate shipping method from the drop list
4. **Shipping account no**: enter shipping account number if provided by the client
5. **Sales tax exemption no**: if the account was set up as tax exempt, the sales tax exemption number will be shown here (read only)
6. Click **Save and Next >>** when done to go to the **Merchandise Details** section

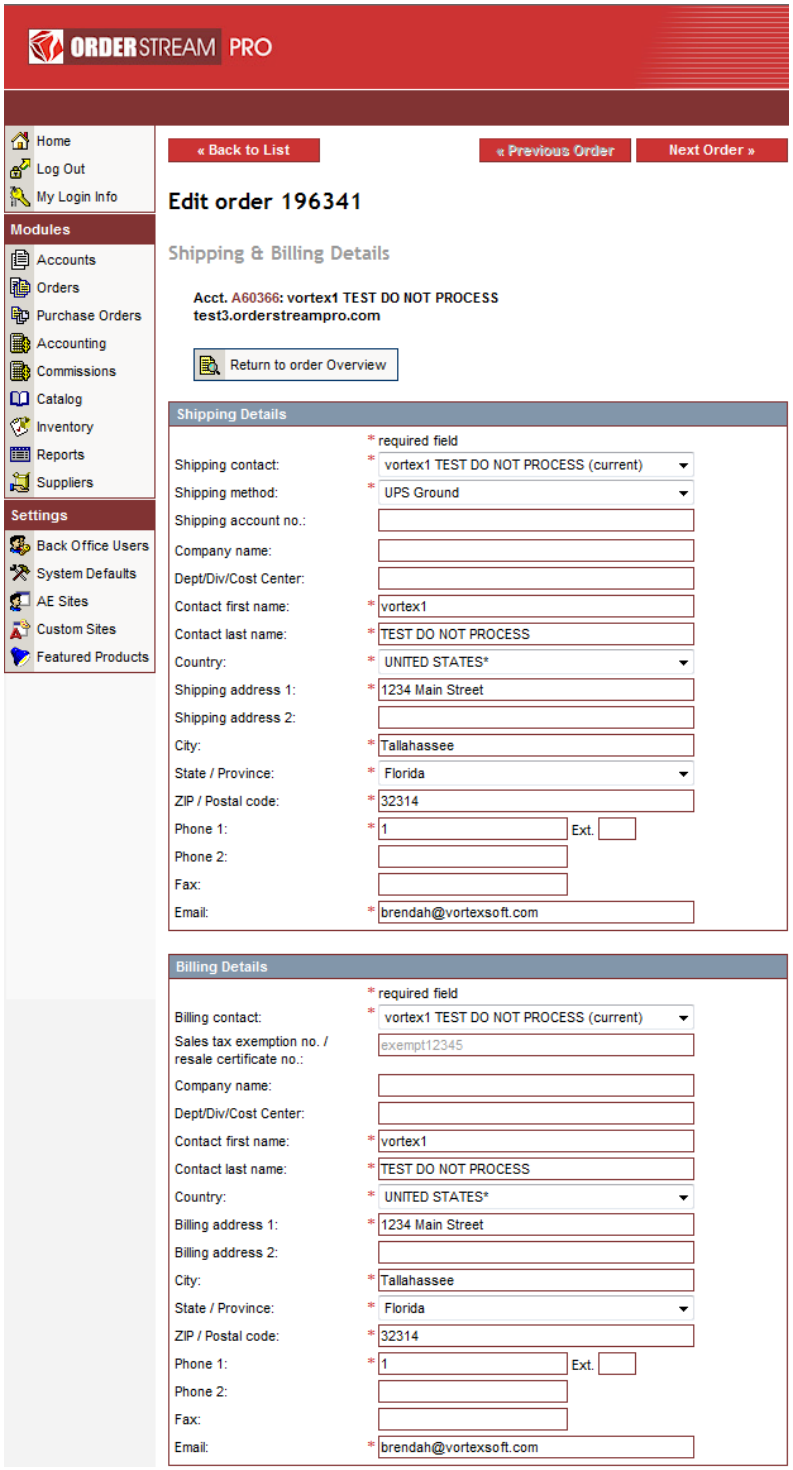



Figure 11: Create Order/Proposal: Shipping and Billing Details

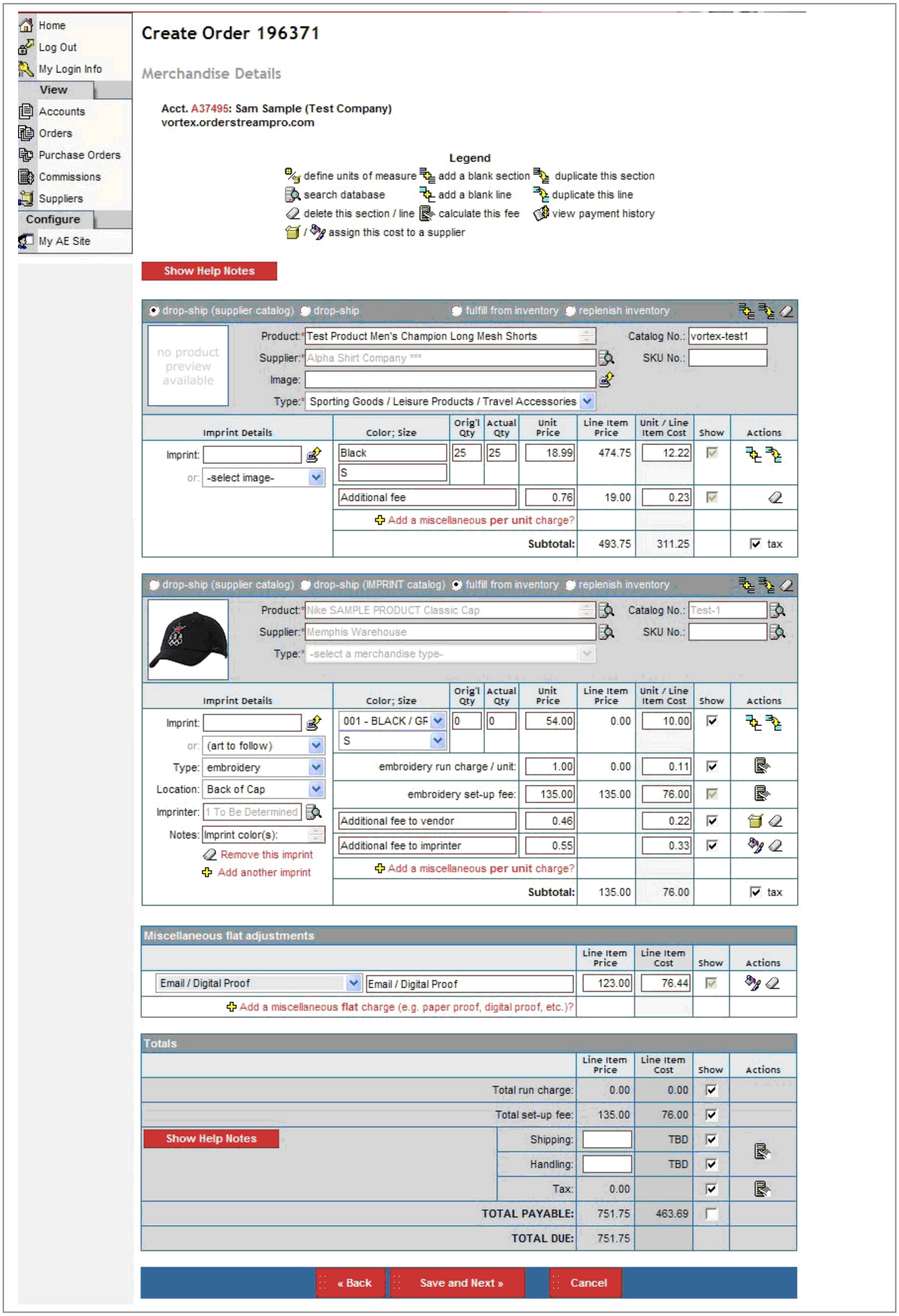
**Create a new order or proposal: Merchandise Details**

1. If working with an online store, indicate whether the item is from “**drop-ship (custom site catalog)**” “**fulfill from inventory**”, or “**Replenish inventory**”; otherwise use “**drop-ship (supplier catalog)**”
    a. Some of these options may be unavailable depending on the store type
    b. Other than “**drop-ship (supplier catalog)**”, selecting a product is done through clicking the “**Find a product**” icon which shows a product selection popup. Selecting a product through the product popup will automatically pre-fill several other entry fields
2. **Supplier**: click the “**Find a supplier**” icon to show a supplier selection popup. Selecting a supplier for an item that is not “**drop-ship (supplier catalog)**” will help narrow the products available in the product selection popup
3. **Product**: basic product description. Enter the product description otherwise click the “**Find a product**” icon to show a product popup
4. **Catalog No**. is shown to the customer. Filled automatically if a product is selected from the “**Find a product**” popup
5. **SKU No**. is shown to the supplier. Filled automatically if a product is selected from the “**Find a product**” popup
6. **Type**: Filled automatically if a product is selected from the “**Find a product**” popup otherwise a selection must be made
7. **Tax**: checked by default. For a taxable order, check this checkbox if no tax is to be applied specifically to this item
8. **Color**; **Size**: Select a colour & size from the drop lists or enter text if this is a “**drop-ship (supplier catalog)**” item
9. **Orig’l Qty, Actual Qty**: enter an amount in the **Orig’l Qty** entry field and the same amount will automatically fill the **Actual Qty** field. Both of these fields are editable. The amount in the **Actual Qty** field might need adjusting if the product quantity delivered was not the same as the product quantity ordered
10. **Unit Price , Unit / Line Item Cost**: price and cost per unit of this color/size selection are automatically shown – or enter figures if this is a “**drop-ship (supplier catalog)**” item
    **a. Unit Price**: price to the client for the product
    **b. Unit Cost**: net cost for the product
11. **Show**: Use the checkboxes in the "**show**" column to control whether a given line item is displayed on the customer's copy. All line items with a non-zero price are shown

12. **Add a blank line, Duplicate this line, Delete this line**: the **Actions** column shows these icons which allow you to add additional colors/sizes "from scratch" or by duplicating current line entries or you may delete the current color/size line entries for this item. An order section must include at least one color/size line
13. **Add a miscellaneous per unit charge**: for any additional per unit charges
    a. **Assign this cost to a supplier**: Adjust supplier / imprinter assignment
14. **Imprinting**: a field with an "**upload an image file**" icon is shown as well as a "**select image**" drop list if imprinting is available for the selected product. You may upload a new image file, use an existing one or leave these fields as is if no imprinting is needed. **(art to follow)** is available as a selection if art is not currently available
    a. **Type**: This drop list is shown once an image has been uploaded / selected. Select the type of imprinting to be used
    b. **Location**: This drop list or text box is shown once an imprinting type has been selected. Select or enter the location of the imprint
    c. **Imprinter**: Click the **Find an Imprinter** icon to show the **Find an imprinter** popup. Select an imprinter for this imprint
        i. Use "**imprint by vendor**" if the imprinter is the same as the supplier
        ii. Although this field is **required**, it will be left blank should a customer create an order on the front end with imprinting. Be sure to fill in an imprinter yourself on such orders
    d. **Notes**: optional field available to enter imprint-specific notes
    e. **Run charge / unit, set up fee**: these fields will be shown once an imprinting type has been selected. Default (editable) entries may be shown
    f. **Remove this imprint**, **Add another imprint**: links to allow the addition / removal of imprinting to an item
15. **Add a blank section, Duplicate this section, Delete this section**: these icons are shown at the top of each order section on this page. These icons allow you to add new sections for additional products or delete the current section (product & related entries) from this order. An order must contain at least one section
16. **Add a miscellaneous flat charge**: for any additional **flat** one time charges
    a. Enter or select a **description**, **line item price** and **line item cost**
    b. **Assign this cost to a supplier**: Adjust supplier / imprinter assignment

17. **Shipping** and **Handling** prices: enter your estimates or leave blank until ready to invoice. Costs are entered in the order's purchase orders
    a. **Click Save and Next >>** when done to go to the **Notes** section (make sure to do this first even if you need to go back to a previous page to make changes otherwise **your Merchandise Details** entries will be lost). Subtotals, totals, tax and default shipping and handling will be calculated for you when the page is saved (when applicable). Tax is always calculated automatically based on the shipping address and the state-by-state tax exposure of the custom site when **Merchandise Details** is saved



Home
Log Out
My Login Info
View
Accounts
Orders
Purchase Orders
Commissions
Suppliers
Configure
My AE Site

# Create Order 196371

Merchandise Details

Acct. A37495: Sam Sample (Test Company)
vortex.orderstreampro.com

**Legend**
define units of measure · add a blank section · duplicate this section
search database · add a blank line · duplicate this line
delete this section / line · calculate this fee · view payment history
/ assign this cost to a supplier

Show Help Notes

drop-ship (supplier catalog) · drop-ship · fulfill from inventory · replenish inventory

no product preview available

Product:* Test Product Men's Champion Long Mesh Shorts — Catalog No.: vortex-test1
Supplier:* Alpha Shirt Company *** — SKU No.:
Image:
Type:* Sporting Goods / Leisure Products / Travel Accessories

| Imprint Details | Color; Size | Orig'l Qty | Actual Qty | Unit Price | Line Item Price | Unit / Line Item Cost | Show | Actions |
|---|---|---|---|---|---|---|---|---|
| Imprint: | Black / S | 25 | 25 | 18.99 | 474.75 | 12.22 | ☑ | |
| or: -select image- | Additional fee | | | 0.76 | 19.00 | 0.23 | ☑ | |
| | Add a miscellaneous **per unit** charge? | | | | | | | |
| | | | | **Subtotal:** | 493.75 | 311.25 | | ☑ tax |

drop-ship (supplier catalog) · drop-ship (IMPRINT catalog) · fulfill from inventory · replenish inventory

Product:* Nike SAMPLE PRODUCT Classic Cap — Catalog No.: Test-1
Supplier:* Memphis Warehouse — SKU No.:
Type:* -select a merchandise type-

| Imprint Details | Color; Size | Orig'l Qty | Actual Qty | Unit Price | Line Item Price | Unit / Line Item Cost | Show | Actions |
|---|---|---|---|---|---|---|---|---|
| Imprint: / or: (art to follow) | 001 - BLACK / GF / S | 0 | 0 | 54.00 | 0.00 | 10.00 | ☑ | |
| Type: embroidery | embroidery run charge / unit: | | | 1.00 | 0.00 | 0.11 | ☑ | |
| Location: Back of Cap | embroidery set-up fee: | | | 135.00 | 135.00 | 76.00 | ☑ | |
| Imprinter: 1 To Be Determined | Additional fee to vendor | | | 0.46 | | 0.22 | ☑ | |
| Notes: Imprint color(s): | Additional fee to imprinter | | | 0.55 | | 0.33 | ☑ | |
| Remove this imprint / Add another imprint | Add a miscellaneous **per unit** charge? | | | | | | | |
| | | | | **Subtotal:** | 135.00 | 76.00 | | ☑ tax |

**Miscellaneous flat adjustments**

| | | Line Item Price | Line Item Cost | Show | Actions |
|---|---|---|---|---|---|
| Email / Digital Proof | Email / Digital Proof | 123.00 | 76.44 | ☑ | |
| Add a miscellaneous **flat** charge (e.g. paper proof, digital proof, etc.)? | | | | | |

**Totals**

| | Line Item Price | Line Item Cost | Show | Actions |
|---|---|---|---|---|
| Total run charge: | 0.00 | 0.00 | ☑ | |
| Total set-up fee: | 135.00 | 76.00 | ☑ | |
| Shipping: | | TBD | ☑ | |
| Handling: | | TBD | ☑ | |
| Tax: | 0.00 | | ☑ | |
| **TOTAL PAYABLE:** | 751.75 | 463.69 | ☐ | |
| **TOTAL DUE:** | 751.75 | | | |

Show Help Notes

« Back · Save and Next » · Cancel

**Create a new order or proposal: Notes**

1. **Customer Notes**: use the **Editor** to enter any notes intended for the customer
   a. To add a clickable **link**, select the text you want to add a link to and click the button. Enter the full web address. Web links should have the form **http://www.webaddress.com**; email links should have the form **mailto:youraddress@yourdomain.com**; however your email address will automatically be set up by simply entering an email address into the customer notes
2. **Internal Notes**: enter notes that are intended for the PC, order or invoice – these notes will not be shown to the customer
3. Click **Finish** when done to complete and save your order / proposal in the system
4. **URL**: include in your correspondence if you would like the receiver to access the details of the order online

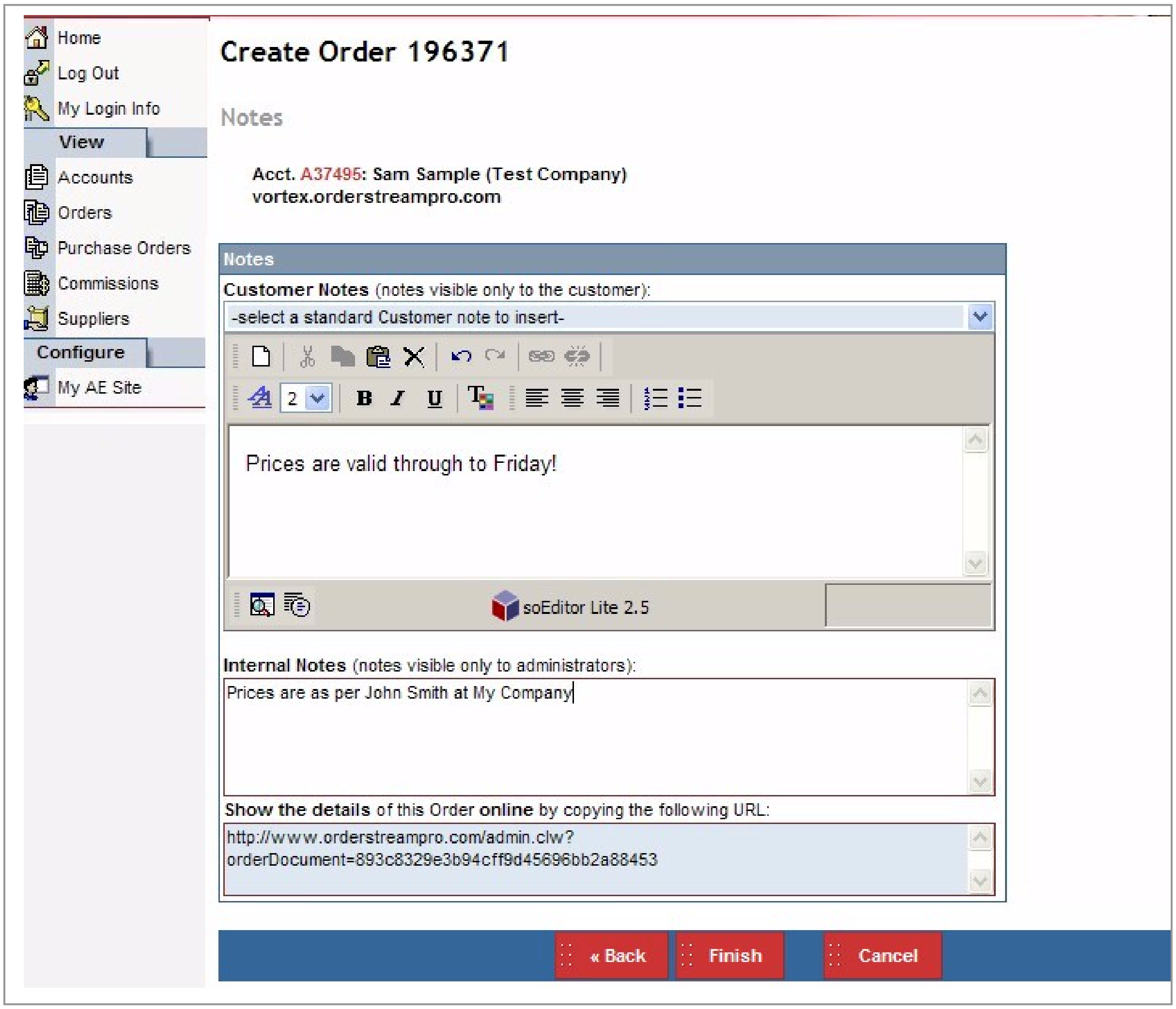


Figure 13: Create Order/Proposal: Notes

**Editing an existing order or proposal**

1. **Order Overview**: click on a section to edit information or use the **Editable Order Details** section of the Actions submenu:
    a. General Details
    b. Shipping and Billing Details
    c. Merchandise Details
    d. Notes
    e. Sales Data
2. Sections may be disabled (unavailable or read only) if the order has a certain status or if the order is currently being edited by another user
3. Once you have completed editing an order section, be sure to save your changes. Click **Save Changes** to save the changes and remain on the same page, or click **Save and Finish** to save the changes and return to **Order Overview**

## Purchase Orders

Purchase orders are automatically generated when orders (not proposals) are created

**Set criteria to create a list**

1. Click the **Purchase Orders** main menu option
2. Set the filters to narrow your list to the desired set of purchase orders
    a. **Custom site** where the associated order was created
    b. Specify **type** of purchase order
        i. Any PO type
        ii. Vendor PO’s
        iii. Imprinter PO’s
        iv. Warehouse PO’s
        v. Re-stock PO’s
    c. Specify a **date range** that the purchase orders were created within
    d. Specify a **purchase order status** or a range of status types
        i. Selecting a single status will show more entry fields

   i. Specify a date range that the purchase order attained the selected status within
   ii. Indicate whether the purchase order should still have this status now
3. Set sorting / viewing options as desired
4. Click **Create List**

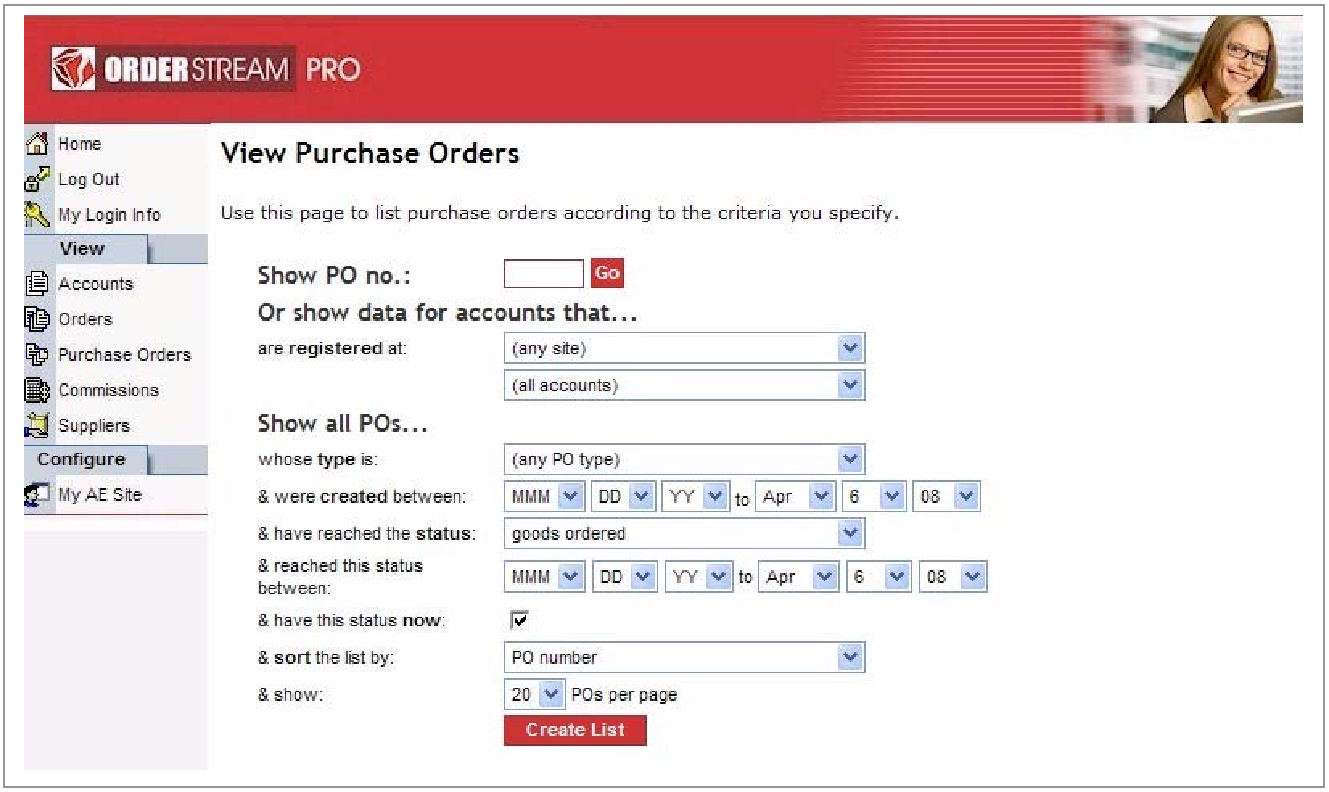



Figure 14: View Purchase Orders: set criteria for creating a list

### Purchase order listing

1. A table listing of PO's will be shown based on the filter settings with the total number of matches indicated at the top of the list
2. Only PO's for your orders will be shown
3. A drop list is shown for each order indicating the order's current **status**. This status may be changed within this listing. To update the status of orders that you've edited directly in the list, click the **Update List** button

   a. View the associated order's status history by clicking on its **view status history** icon next to the status drop list

4. A drop list is also shown for each purchase order indicating the PO's current **status**. This status may be changed within this listing. To update the status of PO's that you've edited directly in the list, click the **Update List** button
   a. View the PO's status history by clicking on its **view status history** icon next to the status drop list
5. Several **action icons** are shown in the **Actions** column for each PO in the list. Move your mouse over these icons to read a "tool tip" on their purpose
   a. **View this PO's details**: click this icon to go to the **Edit Purchase Order** page
   b. **Send an email**: click this icon to send an email that may include a purchase order printout. Multiple recipients are possible
   c. **Print a document**: click this icon to select and subsequently view a purchase order document
      i. **Supplier's Copy of PO**
      ii. **Packing Slip**: Customer Order Pick List (COPL)

d. **Transmit to …**: purchase order transmission to a third party may be provided through an icon

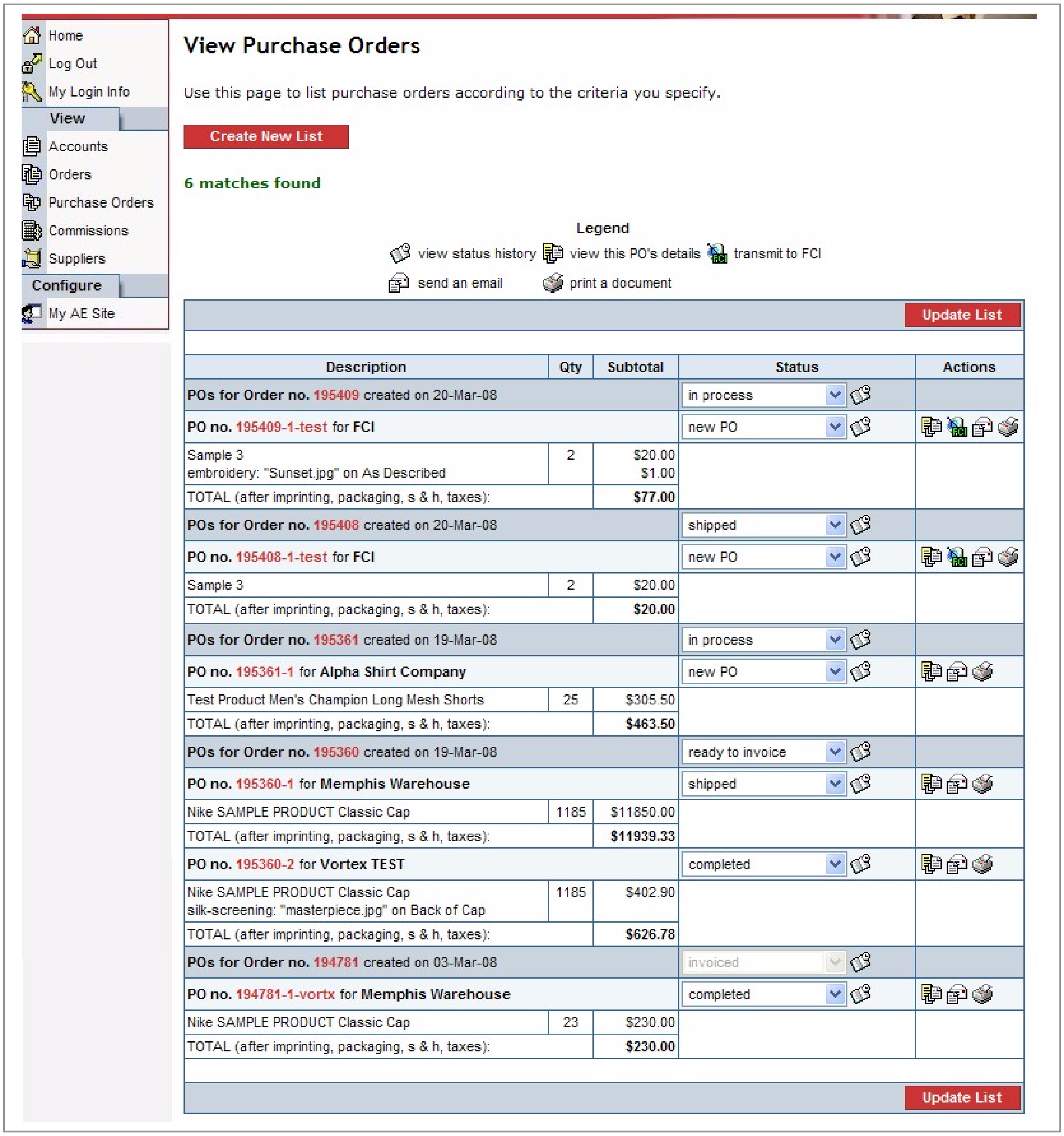


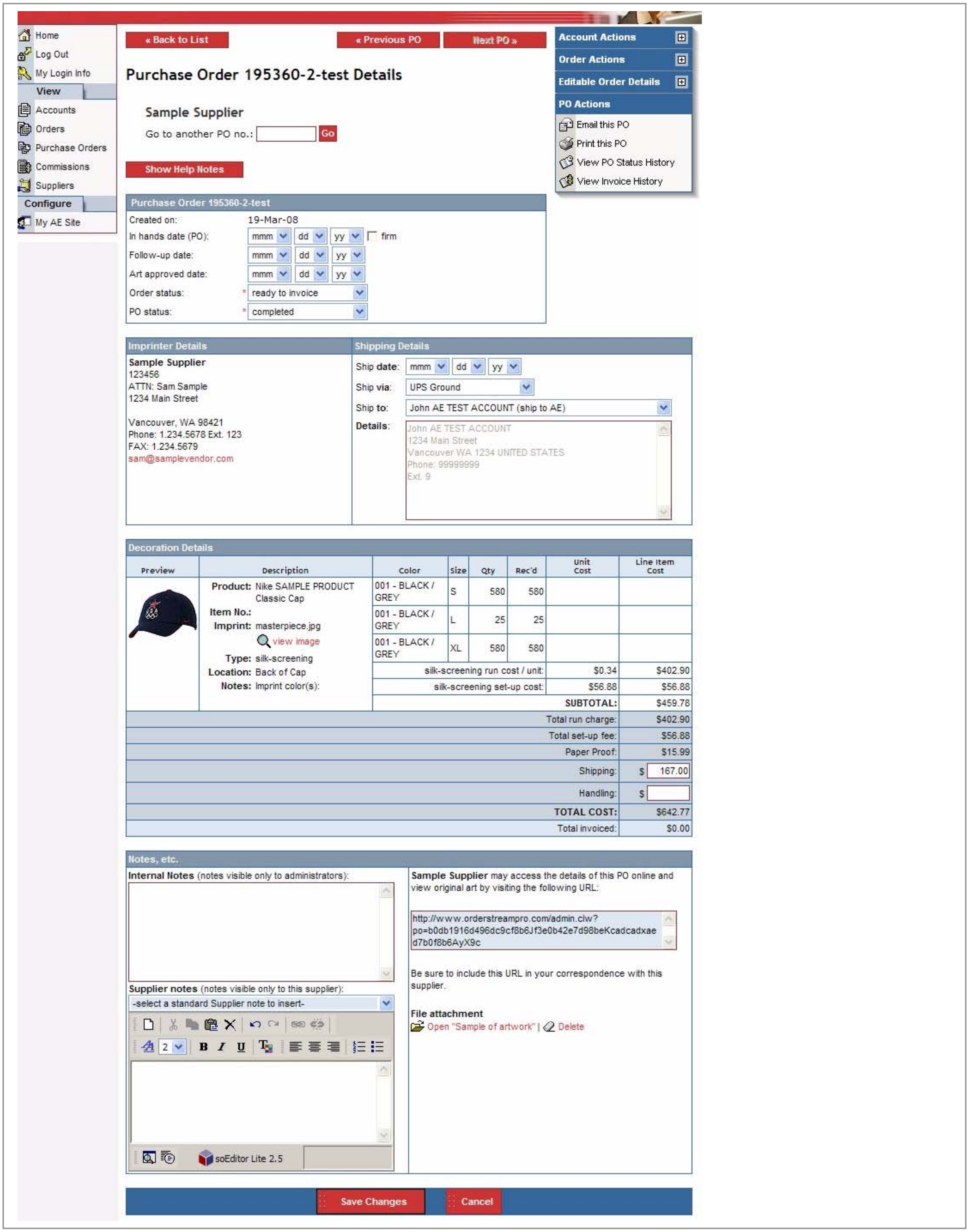

Figure 15: View Purchase Orders: PO listing example

**View purchase order details**

1. Click an **Action** icon in the created list to view the **PO's Details** and **navigation buttons** will be shown at the top of the page to allow you to navigate between PO's in the listing to another without having to return to **View Purchase Orders**
2. Alternatively, enter the PO number in the **Show PO no.** field and click **GO** to go to **Purchase Order Details** for that PO. A similar field is available on the back office home page and on **Purchase Order Details** for your convenience

**Purchase order details**

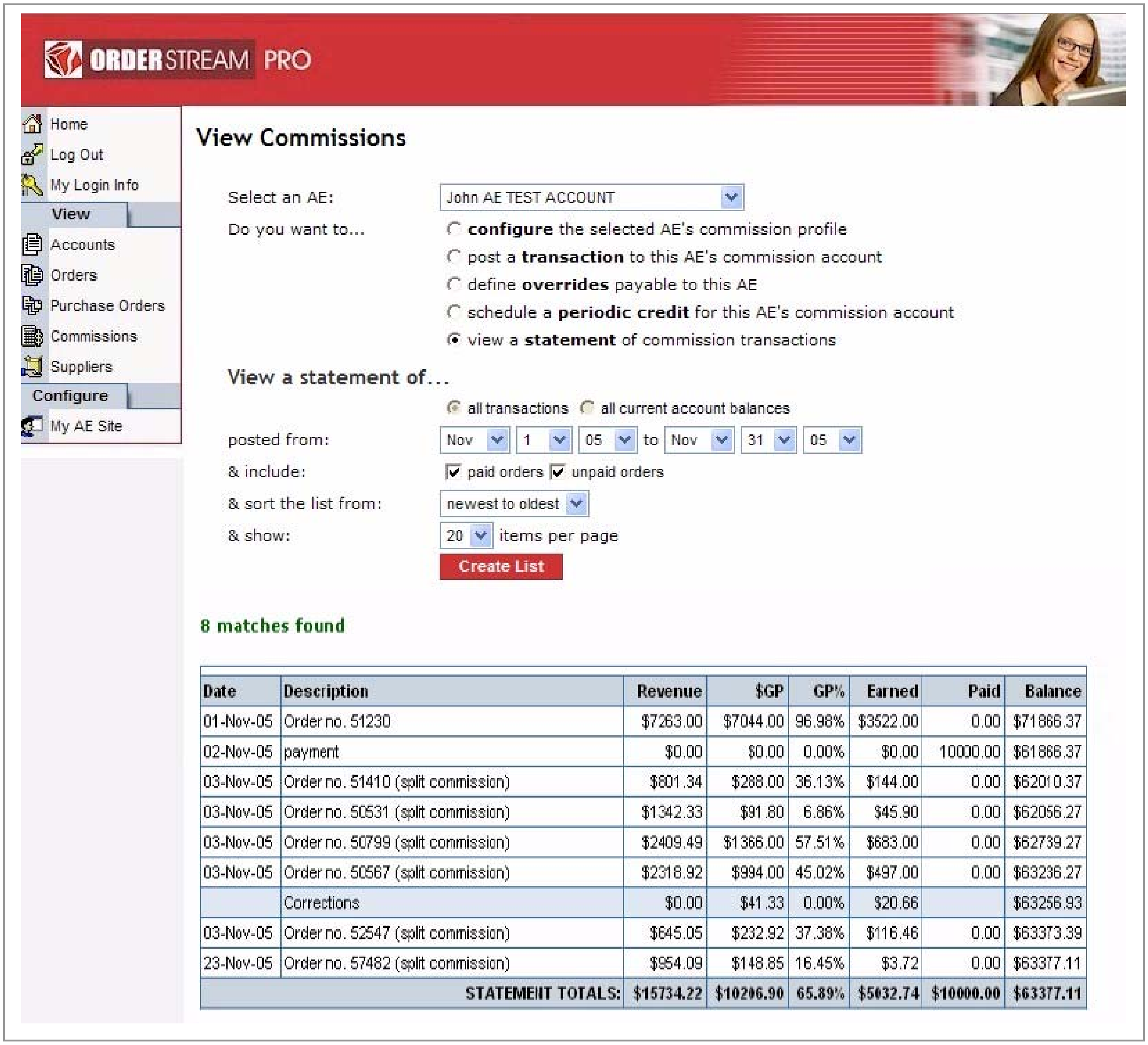
1. **In hands date (PO)**: enter an in hands date. Indicate if it is a firm date
2. **Follow-up date**: set a follow-up date here – use the **List PO follow-ups** shortcut link on the back office home page to view PO's with a follow-up date
3. **Art approved date**: set an art approved date here
4. **Order status**: may be updated here
5. **PO status**: may be updated here (default is **new PO**)
6. **Ship date:** enter a ship date
7. **Ship via**: may be updated here (default is the order's shipping method)
8. **Ship to**: update the **ship to contact** by selecting an entry in the drop list. Select **(customize shipping details)** to enter a new contact in the text area
9. **Shipping / Handling**: enter shipping and / or handling costs
10. **Internal Notes**: enter notes that are intended for the PC, order or invoice – these notes will not be shown to the supplier
11. **Supplier Notes**: use the **Editor** to enter any notes intended for the supplier
    a. To add a clickable **link**, select the text you want to add a link to and click the button. Enter the full web address. Web links should have the form **http://www.webaddress.com**; email links should have the form **mailto:youraddress@yourdomain.com**; however your email address will automatically be set up by simply entering an email address into the supplier notes
12. **Upload a file for this PO**?: upload a file for this purchase order
13. **URL**: provided for you to include in your correspondence with the supplier so that the supplier may access the details of the PO online


Home
Log Out
My Login Info
View
Accounts
Orders
Purchase Orders
Commissions
Suppliers
Configure
My AE Site
« Back to List
« Previous PO
Next PO »
Purchase Order 195360-2-test Details
Sample Supplier
Go to another PO no.:
Go
Show Help Notes
Account Actions
Order Actions
Editable Order Details
PO Actions
Email this PO
Print this PO
View PO Status History
View Invoice History
Purchase Order 195360-2-test
Created on: 19-Mar-08
In hands date (PO): mmm dd yy firm
Follow-up date: mmm dd yy
Art approved date: mmm dd yy
Order status: * ready to invoice
PO status: * completed
Imprinter Details
Sample Supplier
123456
ATTN: Sam Sample
1234 Main Street
Vancouver, WA 98421
Phone: 1.234.5678 Ext. 123
FAX: 1.234.5679
sam@samplevendor.com
Shipping Details
Ship date: mmm dd yy
Ship via: UPS Ground
Ship to: John AE TEST ACCOUNT (ship to AE)
Details: John AE TEST ACCOUNT
1234 Main Street
Vancouver WA 1234 UNITED STATES
Phone: 99999999
Ext. 9
Decoration Details
Preview
Description
Color
Size
Qty
Rec'd
Unit Cost
Line Item Cost
Product: Nike SAMPLE PRODUCT Classic Cap
Item No.:
Imprint: masterpiece.jpg
view image
Type: silk-screening
Location: Back of Cap
Notes: Imprint color(s):
001 - BLACK / GREY S 580 580
001 - BLACK / GREY L 25 25
001 - BLACK / GREY XL 580 580
silk-screening run cost / unit: $0.34 $402.90
silk-screening set-up cost: $56.88 $56.88
SUBTOTAL: $459.78
Total run charge: $402.90
Total set-up fee: $56.88
Paper Proof: $15.99
Shipping: $ 167.00
Handling: $
TOTAL COST: $642.77
Total invoiced: $0.00
Notes, etc.
Internal Notes (notes visible only to administrators):
Supplier notes (notes visible only to this supplier):
-select a standard Supplier note to insert-
soEditor Lite 2.5
Sample Supplier may access the details of this PO online and view original art by visiting the following URL:
http://www.orderstreampro.com/admin.clw?po=b0db1916d496dc9cf8b6Jf3e0b42e7d98beKcadcadxaed7b0f8b6AyX9c
Be sure to include this URL in your correspondence with this supplier.
File attachment
Open "Sample of artwork" | Delete
Save Changes
Cancel

## Commissions

**Set criteria to create a list**

1. Click the **Commissions** main menu option
2. Set the filters to narrow down your list to the desired set of commissions
    a. **Posted from**: specify a **date range** that the commissions were posted within
    b. Specify **type** of orders
        i. Paid orders
        ii. Unpaid orders
3. Set sorting / viewing options as desired
4. Click **Create List**
5. Commission statements include
    a. Credits (commissions earned)
    b. Debits (payments made)
    c. Corrections (changes in order costs)
6. Split commissions with other AE's are also included
7. Accounting administrators (making payments) will view this same screen and data




| Date | Description | Revenue | $GP | GP% | Earned | Paid | Balance |
|---|---|---|---|---|---|---|---|
| 01-Nov-05 | Order no. 51230 | $7263.00 | $7044.00 | 96.98% | $3522.00 | 0.00 | $71866.37 |
| 02-Nov-05 | payment | $0.00 | $0.00 | 0.00% | $0.00 | 10000.00 | $61866.37 |
| 03-Nov-05 | Order no. 51410 (split commission) | $801.34 | $288.00 | 36.13% | $144.00 | 0.00 | $62010.37 |
| 03-Nov-05 | Order no. 50531 (split commission) | $1342.33 | $91.80 | 6.86% | $45.90 | 0.00 | $62056.27 |
| 03-Nov-05 | Order no. 50799 (split commission) | $2409.49 | $1366.00 | 57.51% | $683.00 | 0.00 | $62739.27 |
| 03-Nov-05 | Order no. 50567 (split commission) | $2318.92 | $994.00 | 45.02% | $497.00 | 0.00 | $63236.27 |
| | Corrections | $0.00 | $41.33 | 0.00% | $20.66 | | $63256.93 |
| 03-Nov-05 | Order no. 52547 (split commission) | $645.05 | $232.92 | 37.38% | $116.46 | 0.00 | $63373.39 |
| 23-Nov-05 | Order no. 57482 (split commission) | $954.09 | $148.85 | 16.45% | $3.72 | 0.00 | $63377.11 |
| | STATEMENT TOTALS: | $15734.22 | $10206.90 | 65.89% | $5032.74 | $10000.00 | $63377.11 |

Figure 17: Commissions statement example

## Suppliers

**Set criteria to create a list**

1. Click the **Suppliers** main menu option
2. Set the filters to narrow down your list to the desired set of suppliers
    a. **Supplier type** where the order was created
    b. Select from a **drop list of criteria**: company name, line name, ASI number, contact first name or contact last name and enter search text
    c. **Products** offered by this supplier
    d. Set sorting / viewing options as desired
    e. Click **Create List**

**View supplier details**

1. Click an **Action** icon in the created list to view **Edit Supplier** for the selected supplier and **navigation buttons** will be shown at the top of the page to allow you to navigate from one supplier in the listing to another without having to return to **View Suppliers**
2. Alternatively, enter the supplier ID in the **Show supplier ID** field and click **GO** to go to **Edit Supplier** for that supplier
3. **Supplier information is read only**

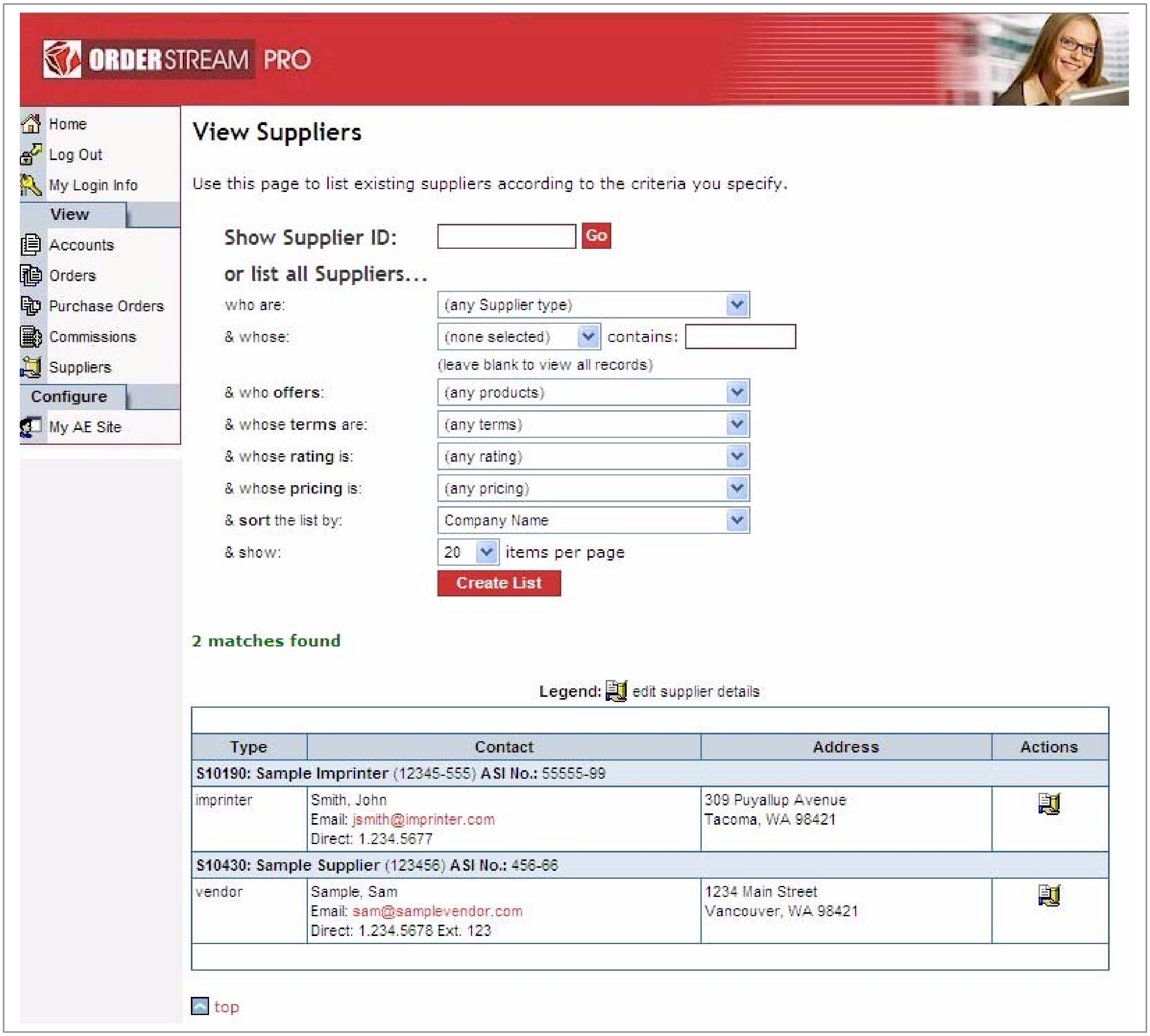



Figure 18: View Suppliers

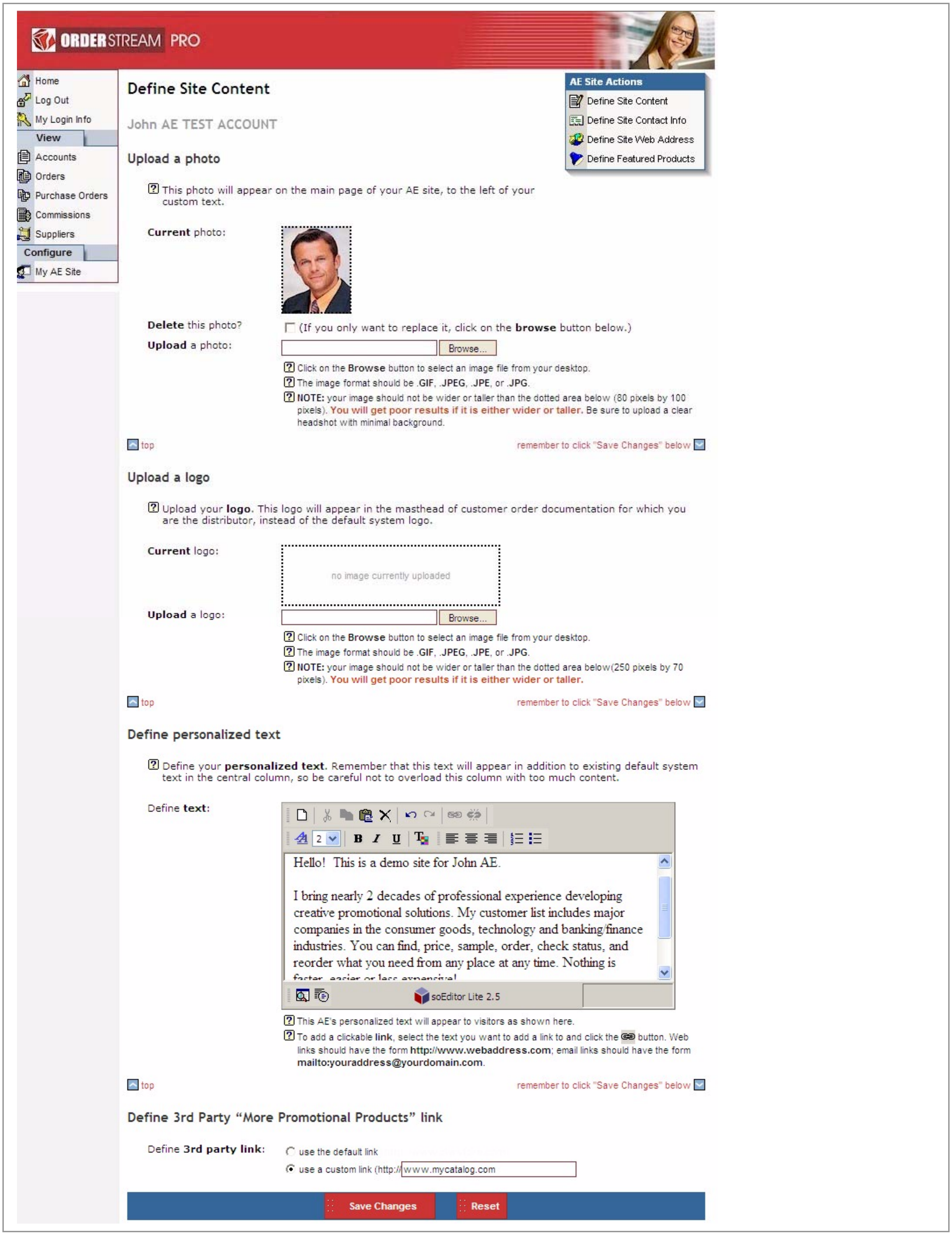
## My AE Site

**Customize your personal AE website**

1. Click the **My AE Site** main menu option to go to **Define Site Content**
   a. **Upload a photo**: This photo will appear on the main page of your AE site, to the left of your custom text
      i. Be sure to upload a clear headshot with minimal background 80 pixels by 100 pixels
      ii. Click on the **Browse…** button to select an image file from your desktop
      iii. The image format should be .**GIF**, .**JPEG**, .**JPE**, or .**JPG**
   b. **Upload a logo**: This logo will appear in the masthead of customer order printouts for which you are the distributor, instead of the default system logo
      i. Click on the **Browse…** button to select an image file 250 pixels by 70 pixels from your desktop
      ii. The image format should be .**GIF**, .**JPEG**, .**JPE**, or .**JPG**
   c. **Define personalized text**: use the **Editor** to enter personalized home page text. Remember that this text will appear in addition to existing default system text in the central column, so be careful not to overload this column with too much content
      i. To add a clickable link, select the text you want to add a link to and click the button. Enter the full web address. Web links should have the form http://www.webaddress.com; email links should have the form mailto:youraddress@yourdomain.com; however your email address will automatically be set up by simply entering an email address into the text area
   d. **Define 3rd party "more promotional products" link**: you may provide a link for your customers to access a promotional catalog
      i. If you have a custom link to a third party vendor's web site, you may specify it here. Customers who click the "**More Promotional Products**" link on your personalized site will go to the site you specify
2. Remember to **save** your **changes**
3. Use the **AE Site Actions** submenu to access other customizable content

4. **Define Site Contact Info**: your contact information that will appear in printouts and on the public AE site
5. **Define Site Web Address**: your AE site web address
    a. AE site addresses replace the familiar "www" prefix on many website addresses with a unique identifier (e.g. "johnsmith.yourdomain.com")


ORDERSTREAM PRO
Home
Log Out
My Login Info
View
Accounts
Orders
Purchase Orders
Commissions
Suppliers
Configure
My AE Site
Define Site Content
John AE TEST ACCOUNT
AE Site Actions
Define Site Content
Define Site Contact Info
Define Site Web Address
Define Featured Products
Upload a photo
This photo will appear on the main page of your AE site, to the left of your custom text.
Current photo:
Delete this photo?
(If you only want to replace it, click on the browse button below.)
Upload a photo:
Browse...
Click on the Browse button to select an image file from your desktop.
The image format should be .GIF, .JPEG, .JPE, or .JPG.
NOTE: your image should not be wider or taller than the dotted area below (80 pixels by 100 pixels). You will get poor results if it is either wider or taller. Be sure to upload a clear headshot with minimal background.
top
remember to click "Save Changes" below
Upload a logo
Upload your logo. This logo will appear in the masthead of customer order documentation for which you are the distributor, instead of the default system logo.
Current logo:
no image currently uploaded
Upload a logo:
Browse...
Click on the Browse button to select an image file from your desktop.
The image format should be .GIF, .JPEG, .JPE, or .JPG.
NOTE: your image should not be wider or taller than the dotted area below(250 pixels by 70 pixels). You will get poor results if it is either wider or taller.
top
remember to click "Save Changes" below
Define personalized text
Define your personalized text. Remember that this text will appear in addition to existing default system text in the central column, so be careful not to overload this column with too much content.
Define text:
Hello! This is a demo site for John AE.
I bring nearly 2 decades of professional experience developing creative promotional solutions. My customer list includes major companies in the consumer goods, technology and banking/finance industries. You can find, price, sample, order, check status, and reorder what you need from any place at any time. Nothing is
soEditor Lite 2.5
This AE's personalized text will appear to visitors as shown here.
To add a clickable link, select the text you want to add a link to and click the button. Web links should have the form http://www.webaddress.com; email links should have the form mailto:youraddress@yourdomain.com.
top
remember to click "Save Changes" below
Define 3rd Party "More Promotional Products" link
Define 3rd party link:
use the default link
use a custom link (http://
www.mycatalog.com
Save Changes
Reset

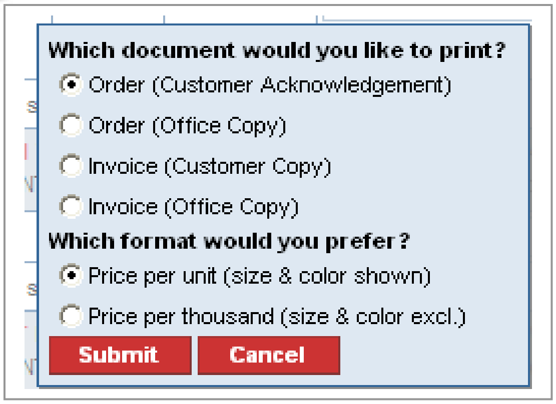
## Documents

### Print a document

1. **Print a document**: either an **order** or a **PO** document, depending on menu option clicked or context of table listing where the print a document icon is clicked. This feature can be accessed in different ways
   a. An **action icon** in an order or PO table listing
   b. A **menu option** in the order or PO **actions submenu**
2. Click on the icon or menu option and the **print a document** popup is shown
3. **Order** documents
   a. **Order** documents: available through **Print this Order** menu option on the **Order Actions submenu** or the **print a document** icon in a **View Orders** table listing:
      i. **Order (Customer Acknowledgment)**
      ii. **Order (Office Copy)**: includes data not visible to the customer such as net costs, gross profit & commissions (for internal use only)
      iii. **Invoice (Customer Copy)**: this document is not available to AE's
      iv. **Invoice (Office Copy)**: includes data not visible to the customer such as net costs, gross profit & commissions (for internal use only). This document is not available to AE's
   b. **Preferred document format**: select **price per unit** or **price per 1000**
   c. Click **Submit** and the selected document will be shown in a new browser window
   d. The **Order (Customer Acknowledgement)** document is also available online and can be accessed by the URL provided on the order's **Order Overview** or on the order's **Notes** section
4. **PO** documents
   a. **PO** documents are available through **Print this Order** menu option on the **PO Actions submenu** or the **print a document** icon in a **View Purchase Orders** table listing
      i. **Supplier's Copy of PO**
      ii. **Packing Slip**: Customer Order Pick List (COPL)

5. Note: the **print a document** icon will be **hidden** for **PO's** where the associated order's status is less than "**in process**" (**new order** or **pending approval**). Order documents will still be available
6. Click **Submit** and the selected document will be shown in a new browser window
7. The **Supplier's Copy of PO** document is also available online and can be accessed by the URL provided on the PO's **Purchase Order Details**. You may include this URL in your correspondence with the supplier


Which document would you like to print?
Order (Customer Acknowledgement)
Order (Office Copy)
Invoice (Customer Copy)
Invoice (Office Copy)
Which format would you prefer?
Price per unit (size & color shown)
Price per thousand (size & color excl.)
Submit
Cancel

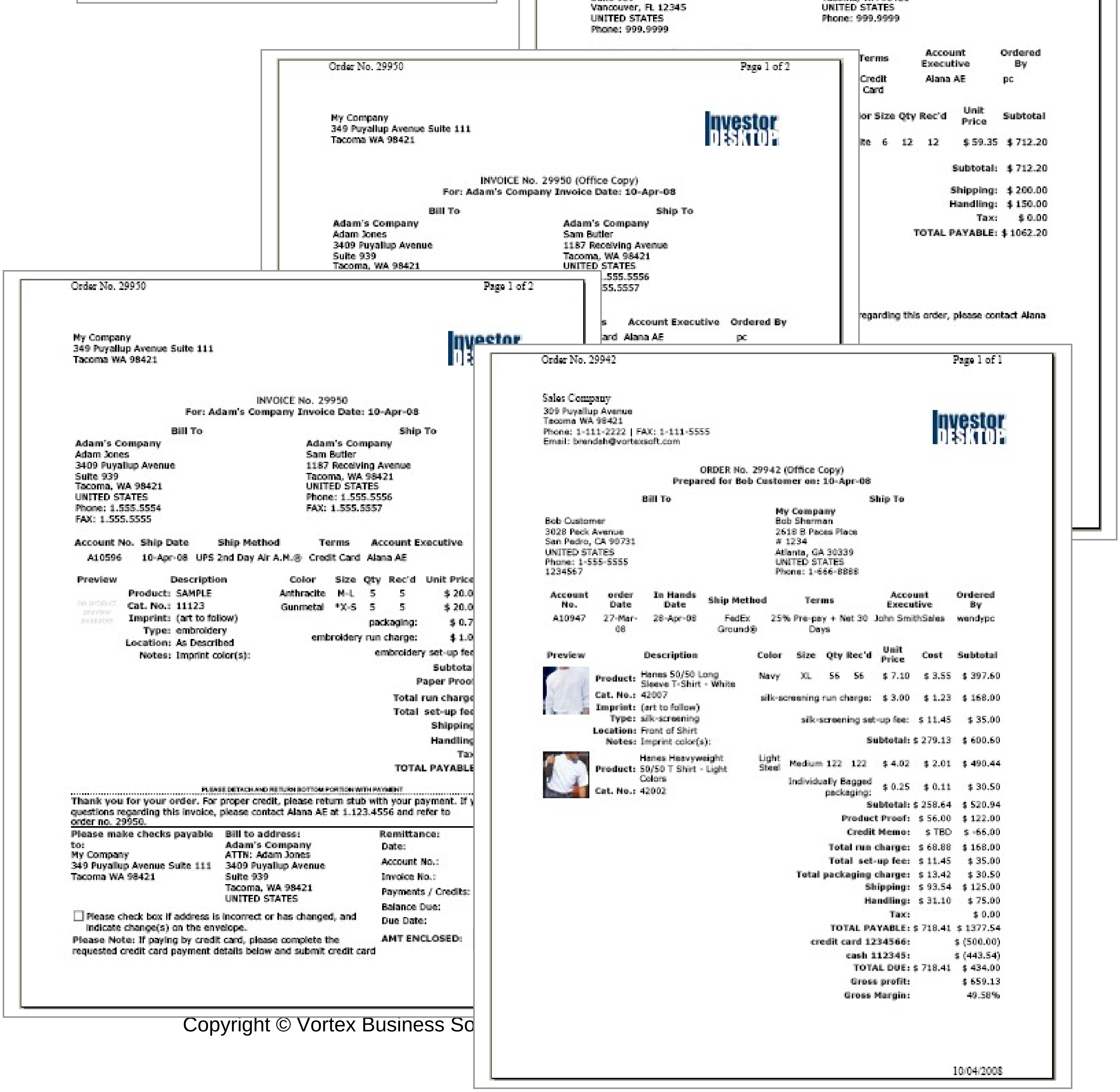
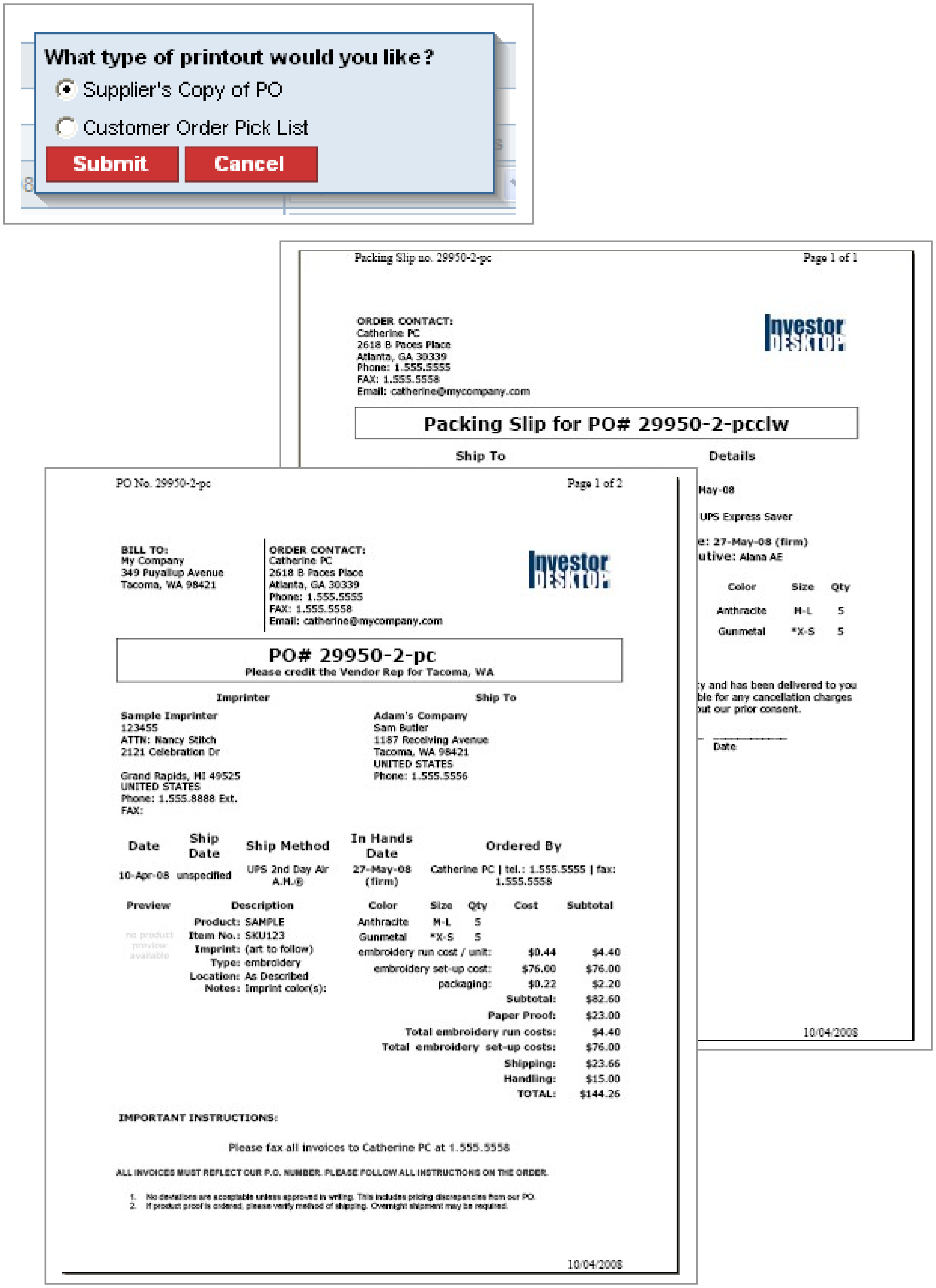

Order No. 29947
Page 1 of 2
My Company
349 Puyallup Avenue Suite 111
Tacoma WA 98421
ORDER No. 29947 (Acknowledgement)
Prepared for Adam's Company on: 10-Apr-08
Bill To
Ship To
Adam's Company
Adam account test
1234 Main
Suite 939
Vancouver, FL 12345
UNITED STATES
Phone: 999.9999
Adam's Company
Adam account test
309 Puyallup Avenue
Tacoma, WA 98421
UNITED STATES
Phone: 999.9999
Subtotal: $ 712.20
Shipping: $ 200.00
Handling: $ 150.00
Tax: $ 0.00
TOTAL PAYABLE: $ 1062.20
Order No. 29950
Page 1 of 2
INVOICE No. 29950 (Office Copy)
For: Adam's Company Invoice Date: 10-Apr-08
INVOICE No. 29950
For: Adam's Company Invoice Date: 10-Apr-08
Bill To
Ship To
Adam's Company
Adam Jones
3409 Puyallup Avenue
Suite 939
Tacoma, WA 98421
UNITED STATES
Phone: 1.555.5554
FAX: 1.555.5555
Adam's Company
Sam Butler
1187 Receiving Avenue
Tacoma, WA 98421
UNITED STATES
Phone: 1.555.5556
FAX: 1.555.5557
Account No. Ship Date Ship Method Terms Account Executive
A10596 10-Apr-08 UPS 2nd Day Air A.M.® Credit Card Alana AE
Thank you for your order. For proper credit, please return stub with your payment.
Please make checks payable to:
My Company
349 Puyallup Avenue Suite 111
Tacoma WA 98421
Order No. 29942
Page 1 of 1
Sales Company
309 Puyallup Avenue
Tacoma WA 98421
Phone: 1-111-2222 | FAX: 1-111-5555
Email: brendah@vortexsoft.com
ORDER No. 29942 (Office Copy)
Prepared for Bob Customer on: 10-Apr-08
Bill To
Ship To
Bob Customer
3028 Peck Avenue
San Pedro, CA 90731
UNITED STATES
Phone: 1-555-5555
1234567
My Company
Bob Sherman
2618 B Paces Place
# 1234
Atlanta, GA 30339
UNITED STATES
Phone: 1-666-8888
TOTAL PAYABLE: $ 718.41 $ 1377.54
TOTAL DUE: $ 718.41 $ 434.00
Gross profit: $ 659.13
Gross Margin: 49.58%
10/04/2008

Figure 21: Purchase Order documents



**Send an email**

1. Send an email that may include an order document (and / or imprint graphics) or PO document. Multiple recipients are possible This feature can be accessed in different ways
    a. An **action icon** in an order or PO table listing
    b. A **menu option** in the order and PO **actions submenu**
2. PO's: the **send an email** icon will be **hidden** for PO's where the associated order's status is less than "**in process**" (**new order** or **pending approval**)
3. Click on the icon or menu option and the **send an email** popup will be shown
4. **To**: select one or more recipients for this email
    a. Press and hold down the **Ctrl** key to select multiple email addresses
5. **And to**: enter additional email addresses not already listed
6. **Subject**: default subject is the order number or PO number
7. **Send reply to**: this is the address to which replies to this email will go
8. **Message**: type a personalized message to the recipients
9. **Attach**: select which document you want to email. Available documents will depend on whether an order or PO is being emailed and on back office user type
    a. **Order** documents:
        i. **Order (Customer Acknowledgment)**
        ii. **Order (Office Copy)**: includes data not visible to the customer such as net costs, gross profit & commissions (for internal use only)
        iii. **Invoice (Customer Copy)**: this document is not available to AE's
        iv. **Invoice (Office Copy)**: includes data not visible to the customer such as net costs, gross profit & commissions (for internal use only). This document is not available to AE's
    b. **PO** documents
        i. **Supplier's Copy of PO**
        ii. **Packing Slip**: Customer Order Pick List (COPL)
10. **Preferred document format** (orders): select **price per unit** or **price per 1000**
11. **Attach a file**

a. Orders: select imprinting artwork to send along with the email (optional)
b. PO's: files uploaded in **PO Details** may be included in the email (optional)

12. Click **Submit**
13. A **confirmation message** will indicate that your email has been sent

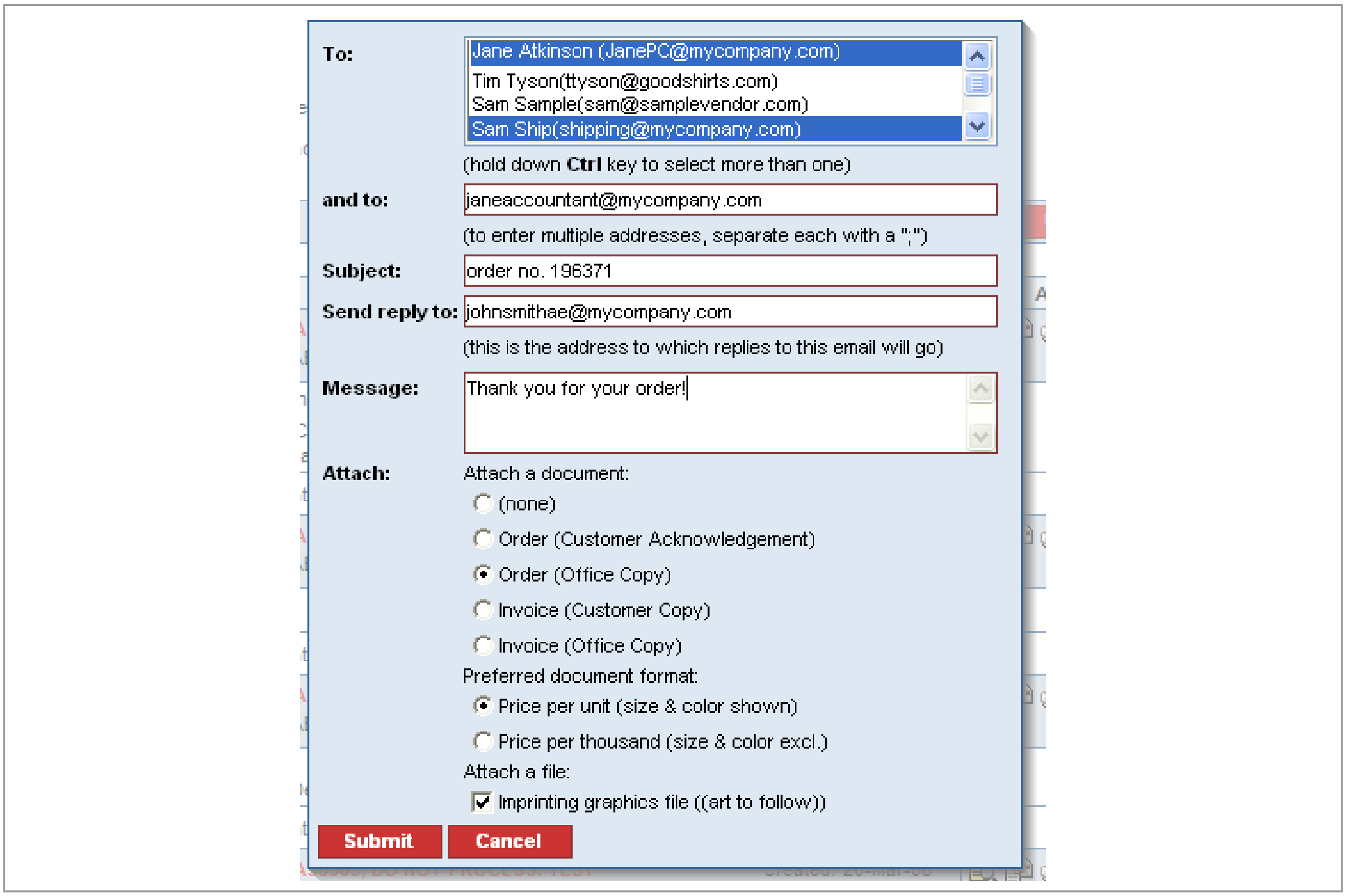



Figure 22: Send an email: email this order example

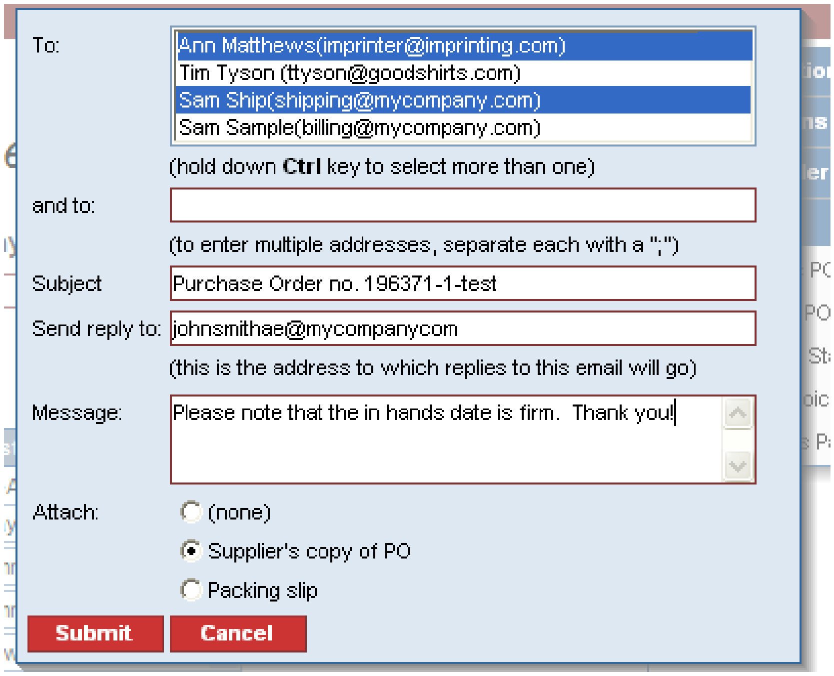



Figure 23: Send an email: email this PO example

## Important Notes

1. Only use one session of **OrderStream Pro** at a time. The system is not built to support multiple windows or multiple tabs open within a browser all using **OrderStream Pro** at the same time
2. Always log out of the back office properly by clicking **log out**. Do not simply close the browser else your orders may become locked or other problems may occur
3. Eventually the session will time out on its own if you leave the window open too long. Ensure that an existing order is re-saved if your work on a section will take some time. If creating an order with many sections, it might be preferable to create it with only a few sections, and then add the remaining sections once it has been created, while saving the page often
4. **Do not** type directly into a field that has a **Browse…** button next to it! You must use **Browse…** to fill in that field
5. Avoid using the **browser Back** button, as errors are likely to occur. Navigation buttons are usually supplied
6. **Orders: Do not** use commas in the **Quantity** fields
7. **Orders**: If the order is being imprinted, use the **Imprint Details** area to fill out the imprinting information which will show the **run charge** & **setup fee**
8. **Orders**: Any notes you do not want the customer to see should go in the **internal notes** field
9. **Orders**: Fill in the **in hands date** with the estimated production time provided by the vendor OR the FIRM In Hands Date. Make sure to verify production time for FIRM dates