

## Web Ordering Guide

HTML-Based Sites  
Version 4.5  
November / 2014

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EFI PrintSmith Site | *Web Ordering Guide: HTML-Based Sites*

November 2014 PrintSmith Site 4.5

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# Getting Started

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## Welcome to Ordering on the Web Site

Welcome to the site. This document covers the basics of placing an order or estimate on the site. You will find that using the site is an easy and quick way to order products, send art files, track your order history, and maintain your online account information. Orders you submit are transmitted directly into a management system and are received immediately. This allows your orders and estimates to be handled accurately and efficiently as they enter the production process.

**Note** The site you are using will look different from that shown in this guide, as will the products offered on the site. The procedures for using the site, however, will be the same.

The screenshot displays the Cactus Printing website interface. At the top, the logo "Cactus Printing" is visible. Below it, there are navigation tabs for "Products", "Cart (3)", and "My Account". A welcome message reads "Welcome Anna Smith | Home | Logout".

The main content area is divided into several sections:

- Cart (3 Items):** Lists items in the cart: "Color Copies" (Qty: 1, N/A), "T-shirts" (Qty: 5, 108.75), and "copies" (Qty: 25, N/A). The "Cart Subtotal" is \$108.75, with a "Go to Cart" button below.
- Categories:** A search bar with the text "Everything you need for planning events!". Below it are four category icons: "Business Materials", "Copy Services", "Brochures", and "Promotional Items".
- Recently Viewed Products:** Lists "B&W Copies", "Business Calendars", and "Long Sleeve T Shirts".
- Shortcuts:** Includes "Send Files", "My Request History", and "My Order History".
- Search:** A search box with a "By Name" dropdown and a "Find it" button.
- PDF Driver Download:** Links to "Windows" and "Mac" drivers, with a "Help" link below.

At the bottom, there are links for "Contact Us", "Help", and "About Website", along with copyright information: "Copyright © 1995-2009 Electronics for Imaging, Inc. Site supports IE 7, Firefox 3.0.1 and Safari 3.2.1".

## Supported Browsers

- Chrome 37.0
- Internet Explorer 11
- Mozilla Firefox 28
- Safari 7.0.3

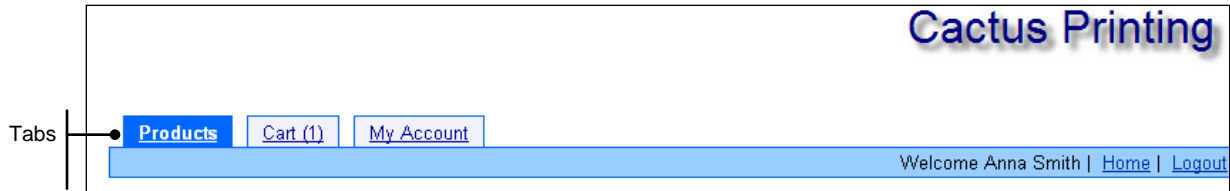
**Note** The browsers that are supported get updated periodically; the latest versions are always listed on the home page.

## Organization of the Site

The site includes three tabs:

- **Products** – Lists the products you can order.
- **Cart** – Shows products you selected and steps you through the checkout process.
- **My Account** – Has the history of your orders and requests, your address book and shipping groups, and your profile. From this tab, you can also send files to the shop and, if you are a designated approver, approve orders.

Details of each tab are provided later in this manual.



## Registering on the Site

The first step is to get registered on the site with a user name and password. The print shop can pre-register you, or you can register yourself.

### Pre-Registration

Pre-registration means that the print shop provides you with an initial user name and password to log into the site. Give the print shop a call to obtain the information you need. Simply go to the Web site using the URL provided to you, enter your user name and password, and click **Login**.

For security reasons, you should immediately change your password once you are on the site. You can also change your user name if you want.

### To change your password and user name

1. Once you are logged in, click **My Account**.
2. Click **My Profile**.

Products Cart (1) My Account Welcome Anna Smith | Home | Logout

**My Account**

- Request History
- Order History
- Address Book
- Shipping Groups
- My Profile
- Send Files

**My Profile**

**Contact Information**

Salutation: Ms.

First Name:  Last Name:

Job Title:  Email:

Address:  City:

State:  Zip Code:

Country:  Telephone:

Fax Number:

**Account Information**

Account #: 12

EFI  
One O'Hare Center  
Rosemont, IL 60018-4268

Telephone: 847-692-6000  
Fax Number: 847-692-6560

**Login Information**

Login Name:

Login Password:  Re-enter password:

3. Under **Login Information**, enter a different password in the **Login Password** field and then enter it again in the **Re-enter Password** field.
4. (Optional) Enter a different user name in the **Login Name** field.
5. Click **Save Changes**.

## Self-Registration

Self registration means you can register yourself on the site. If this is possible on the site, you will see an **Account Registration** link below the **Login** button. If you do not see the **Account Registration** link, contact the print shop to get started.

On some sites, you can either register yourself as a user of a new account (company) or register yourself as a user of an existing account. On other sites, you will automatically be registered as a user of a particular account (no other choices will be available.)

The image shows a screenshot of a login form titled "Login Below". The form has a light blue background and is enclosed in a double-line border. It contains the following elements:

- A "Username:" label followed by a yellow text input field.
- A "Password:" label followed by a yellow text input field.
- A "Login" button located to the right of the password field.
- Below the login fields, there are two links: "[Account Registration](#)" and "[Forget My Information](#)". The "Account Registration" link is highlighted with a red rectangular box.



## Registering yourself as a user of a new account

1. Click **Account Registration**. The Registration page opens.

The screenshot shows a web form titled "Registration" with three main sections:

- Contact Information:** Includes fields for Salutation (dropdown), First Name, Last Name, Job Title, Email Address, Address, City, State, Zip Code, Country (dropdown), Telephone, and Fax number. Required fields are shaded yellow.
- Account Information:** Includes radio buttons for "New Customer" (selected) and "Existing Customer". Fields include Company Name, Company Address, City, State, Zip Code, Country (dropdown), and Company Phone. Required fields are shaded yellow.
- Login Information:** Includes fields for Login Name and Login Password (with a Re-enter password field). Required fields are shaded yellow.

At the bottom right of the form are "Cancel" and "Register Now" buttons.

2. Under **Contact Information**, enter your contact details. Required fields are shaded.
3. Under **Account Information**, select **New Customer** and complete the account details. (If your company already has an account, follow the instructions under "Registering yourself as a user of an existing account" below.)
 

**Note** On some sites, **New Customer** and **Existing Customer** are not available selections; instead, you will automatically be registered as a user of a particular account.
4. Under **Login Information**, enter a **Login Name** (user name) and **Login Password** and then re-enter the password.
5. Click **Register Now**. A message thanks you for registering, and an e-mail is sent to you so you can activate your account by clicking a link in the e-mail. (The text of this e-mail may have been customized by your administrator.)

```

Hello,

You have been registered to use our secure e-commerce ordering system.

Your Login Name is "xxxxx". Before you can start using the system, please
set your password by clicking this link:
http://qa.printstorefront.com/anna/resetPassword.do?tid=2965. Once set,
you'll be taken to the login page from where you can login and start using
the site.

In future, you can access our ordering system at
http://qa.printstorefront.com/anna. You can access your account by logging
in with your user name and password. If you forget your password, you can
always click on the "Forgot My Information" link on the Login page.
  
```

## Registering yourself as a user of an existing account

If your company already has an account with the print shop, and you want to add yourself as an additional user, follow these steps:

1. Click **Account Registration**. The Registration page opens.
2. Under **Contact Information**, enter your contact details. Required fields are shaded.
3. Under **Account Information**, select **Existing Customer**.

If **Existing Customer** is not an available choice and the **Account ID** and **Account Name** are displayed, there is nothing to select. You will automatically be registered with the correct company.

**Account Information**

Account ID : 2      Account Name : subsite21

Otherwise, in the **Account#** field, enter the number of the account and click **Submit**. The account details are then displayed. (Your site administrator can provide you with the account number.)

**Account Information**

New Customer       Existing Customer

Account# :

EFI  
One O'Hare Center  
Rosemont, IL 60018-4288  
Telephone: 847-692-6000  
Fax Number: 847-692-6560

4. Click **Register Now**. A message thanks you for registering, and an e-mail is sent to you so you can activate your account by clicking a link in the e-mail.

## Forgot Your Password?

If you forget your password, you can use the **Forgot My Information** link on the main page.

1. Click **Forgot My Information**.
2. Enter your user name and e-mail address and click **Send E-Mail**.

An e-mail is sent to the address you provided informing you of the account name and providing a link that you can click to enter a new password.

## Products Tab

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## About the Products Tab

The **Products** tab includes the product catalog from which you order products, as well as several features on the left side of the tab as shown below.

The screenshot shows the left sidebar of the Products tab. At the top are two tabs: 'Products' (active) and 'Cart (2)'. Below the tabs are five distinct sections:

- Cart (2 Items)**: A summary of items in the cart. It lists 'Color Copies' (Qty: 1, N/A) and 'T shirts' (Qty: 5, 108.75). The 'Cart Subtotal' is \$108.75, and there is a 'Go to Cart' button.
- Recently Viewed Products**: A list of items recently viewed or added to the cart, including 'B&W Copies', 'Business Calendars', and 'Long Sleeve T Shirts'.
- Shortcuts**: A list of quick links for 'Send Files', 'My Request History', and 'My Order History'.
- Search**: A search box with a dropdown menu set to 'By Name' and a 'Find it' button.
- PDF Driver Download**: A section for downloading a driver, with links for 'Windows', 'Mac', and 'Help'.

Callouts on the right side of the image provide explanations for each section:

- The "mini-cart" summarizes the contents of the shopping cart.
- Products you recently looked at or added to shopping cart.
- Shortcuts make it easy to send files to the shop and look at your request and order history.
- You can search for products by various criteria.
- You can download a driver that allows order-initiation from your document application.

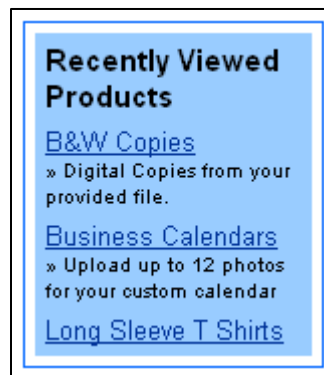
## Mini-cart

The mini-cart on the left side of the **Products** tab summarizes the current contents of the shopping cart. The mini-cart shows the names of the products, their quantities and prices, and the cart subtotal. Click **Go to Cart** to open the shopping cart and start the checkout process. For more information, see page 181818.



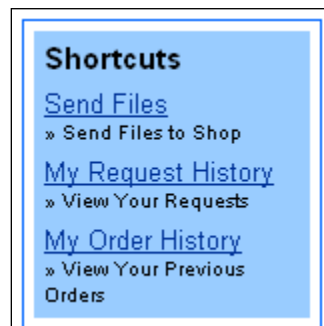
## Recently Viewed Products

When you look at a product (or add it to the cart), the **Recently Viewed Products** area shows the last four products you viewed. If you click the product name, the product detail window opens where you can provide a job name, quantity, and so on, and add the product to the cart.



## Shortcuts

The **Shortcuts** area includes links to frequently-used features on the site.

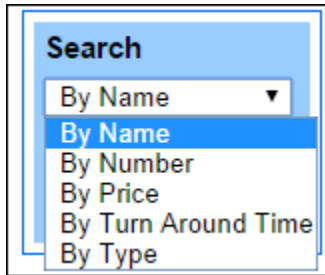


- Click **Send Files** to send a file directly to the print shop. (**Send Files** is also available on the **My Account** tab.) For more information about sending files, see page 35.
- Click **My Request History** to look at your current requests. For more information, see page 27.

- Click **My Order History** to look at your orders. For more information, see page 28.

## Search

You can search for products by various criteria: name, number, price, turnaround time, or type.

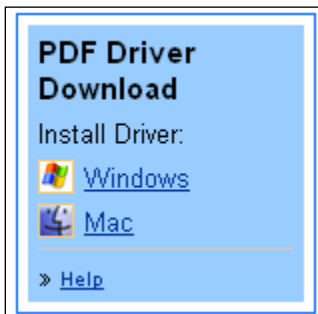


1. Under **Search**, select the criterion by which you want to search, for example, **By Name**.
2. Enter all or part of value you want to match, for example, all or part of the product name.
3. Click **Find it**.

All the matching products are displayed under **Products** on the right side of the page.

## PDF Driver Download

The PrintMessenger PDF driver lets you initiate a print order submission directly from your document-creation application (such as Word) by printing a document to a special printer driver. This driver converts the document into PDF format. Once the PDF conversion has occurred, you can then attach the PDF to individual items in the shopping cart or can send the PDF to the site unattached to an order. (For information about sending files, see page 35.)



**Note** A link for installing the driver is also in the welcome e-mail you receive when you are registered on the site.

### Installing the PDF driver

1. Click either **Windows** or **Mac** depending on your system.
2. Click **Install** and follow the prompts to install the driver.

Once the installation is complete, you can select the PrintMessenger PDF Driver in the standard print dialog box. The PDF Driver carries the name of the site portal.

### Using the PDF driver

Using the PrintMessenger PDF driver is similar to printing from a word processing application. Open your document, select to print the document, and choose the printer that carries the name of the site portal. (This is the PrintMessenger PDF Driver.)

After you select the PDF driver as your printer, the EFI PrintMessenger window opens. When the conversion is complete, you can preview the file. Once you approve it, you can upload the file to the site.

## Ordering Products

The product catalog typically contains several categories, each of which can contain multiple categories and products. Once you select a product, you can view larger images of the product (if available), specify a quantity, and attach files to the product. Depending on the product you selected, you may also need to customize the product and/or provide production details. You can then add the product to the shopping cart.

The following illustrates the steps involved in placing a first-time order for business materials.

1. Click the **Products** tab to display a catalog similar to that shown below.

**Cactus Printing**

[Products](#) [Cart \(2\)](#) [My Account](#)

Welcome Anna Smith | [Home](#) | [Logout](#)

**Cart (2 Items)**

[Color Copies](#)  
Qty: 1 N/A

[T shirts](#)  
Qty: 5 108.75

**Cart Subtotal: \$108.75**

[Go to Cart](#)

Everything you need for planning events!

**Categories**

[Business Materials](#)  
Letterhead  
Business Cards  
Envelopes

[Copy Services](#)  
Photocopying  
Color Copying  
Document Copying

[Brochures](#)

[Promotional Items](#)  
T-Shirts

2. Click **Business Materials**.

**Tip** You can find products by using the search feature as described on page 14.

This category has two subcategories: **Business Cards** and **Letterhead**.

**Categories**

[Business Cards](#)  
Standard Cards  
2 Sided Cards  
Custom Enveloped Cards

[Letterhead](#)  
Cover Sheets  
Second Sheets  
Envelopes

3. Click one of the subcategories, for example, **Business Cards**. In this example, the subcategory includes three types of business cards.

**Products**


[4/color Business Cards](#)  
65# Classic Crest  
Cover  
White

[Standard Business Card](#)  
65# Classic Crest  
Cover  
White

[Specialty Business Cards](#)  
65# Classic Crest  
Cover  
White

4. Click one of the products, for example, **Standard Business Card**.

The product details are displayed. (If a **View Detailed Image** link is displayed, you can click it to see a larger image of the product.)

Product Name: <b>Standard Business Card</b> Description: 65# Classic Crest Cover White SKU#: PS-sku-1 Name this Job: <input type="text" value="Standard Business Card"/> Quantity: <input type="button" value="Select"/> ▾ or Type Quantity <input type="text"/>	 Business Cards
--	---

5. Give the job a name. (Depending on how your site is configured, the **Name this Job** field may automatically be filled in with the product name.) Then either select a quantity or enter your own quantity. What you can do depends on the product. For example, the product above gives you a choice of selecting or entering a quantity.

**Note** For some products, if you enter your own quantity rather than select one, an estimate containing the price is e-mailed to you once you submit the order. You can then accept or decline the estimate.

6. If the product requires customization and/or production details, provide the required information.

**Note** Large-format products like banners or posters require width and height dimensions; enter these in the unit specified.

7. (Optional) Attach files to your product if necessary. (You can also attach files during the checkout process.) For more information about attaching files, see page 22.
8. If the product required customization, be sure to review it thoroughly and select the **I've Reviewed and Approve this Job** check box.

<input checked="" type="checkbox"/> <b>I've Reviewed and Approved this Job</b> The Print Shop will not be held responsible for selection, design or spelling errors.	<input type="button" value="Previous"/> <input type="button" value="Add to Cart"/> <input type="button" value="Cancel"/>
---	--

9. Click **Add to Cart**. You can now examine the contents of the cart, make any necessary changes, and proceed with checkout. For information about this process, see page 18.



## Cart Tab

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## About the Cart Tab

The **Cart** tab displays the products you selected for your order and steps you through the checkout process.

## Checkout Process

Checkout is typically a four-step process (as shown at the top of the figure below). You can, however, use “express checkout” to omit the shipping step if you are shipping to the default company address and using the default shipping method (the first one in the list).

During checkout you are given numerous opportunities to review and adjust your order before submitting it.

### To check out

1. When you are ready to check out, either click the **Cart** tab or click **Go to Cart** in the mini-cart on the **Products** tab. The Shopping Cart page opens giving you the opportunity to provide some additional information and change your order.

The screenshot displays the Shopping Cart interface. At the top, there are navigation tabs for 'Products', 'Cart (2)', and 'My Account'. Below this, a progress indicator shows four steps: '1 Shopping Cart', '2 Shipping', '3 Summary and Payment', and '4 Confirmation'. A yellow warning box indicates 'You have selected 2 of 2 item(s) in your cart for checkout.' The main content area is divided into two sections: 'Products for Order' and 'Products for Estimate'. Under 'Products for Order', there is a form for 'Name this Order:' and a product entry for 'Long Sleeve T Shirts' with a quantity of 5 and a total price of \$108.75. Under 'Products for Estimate', there is a form for 'Name this Estimate:', 'Estimate Due Date:', and 'Delivery Due Date:', and a product entry for 'Standard Business Card' with a quantity of 250 and a note 'Requires Estimate'. At the bottom, there are buttons for 'Continue Shopping', 'Empty Cart', 'Update', 'Express Checkout', and 'Checkout'.

2. Under **Products for Order**:
  - a. Review the products you placed in the cart.
  - b. In the **Name this Order** field, enter a description of the order to identify it. (This may be required on the site. Even if it is not required, a name helps you identify the order in order history.)
  - c. In the **Order Due Date** field, change the due date if necessary. (Depending on how the site is configured, you may not be able to change this date.)
  - d. If necessary, change the quantity for a product, remove the product from the cart (by clicking **Remove** next to the product name), or attach one or more files to the product. (For information about attaching files, see page 22.) If you change a quantity, click **Update** at the bottom of the page. You can also click the name of the product to see more details about it and to make changes. After you make the changes, click **Update Cart** to return to the cart.

3. Under **Products for Estimate**, review the products for which you want a quote.
  - a. In the **Name this Estimate** field, enter a description of the estimate. (This may be required on the site. Even if it is not required, a name helps you identify the RFQ in request history.)
  - b. (Optional) Enter dates in the **Estimate Due Date** and **Delivery Due Date** fields.
  - c. If necessary, change the quantity for a product, remove the product from the cart (by clicking **Remove** next to the product name), or attach one or more files to the product. (For information about attaching files, see page 22.) You can also click the name of the product to see more details about it and to make changes. After you make the changes, click **Update Cart** to return to the cart.
4. If you want to add more products to your cart, click **Continue Shopping**. Otherwise, if you are ready to continue with checkout, click **Checkout** to proceed to the Shipping page (where you can manage recipients) or click **Express Checkout** to skip the delivery step and go to the Summary and Payment page. You should click **Express Checkout** only if you are shipping to the default company address and using the default shipping method (the first one in the list).

**Note** To clear the shopping cart completely, click **Empty Cart** at the bottom of the page.

5. On the Shipping page, review the summary of the products that make up the order and select the recipient for the order. If the print shop allows multiple recipients for an order, and the order needs to go to more than one destination, you can specify those recipients. You can also select the shipping method and provide any special shipping instructions.

Click to open the PDF.

1 Shopping Cart
2 Shipping
3 Summary and Payment
4 Confirmation

**Products for Order** [Edit Order](#)

Order Name:					
Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
Long Sleeve T Shirts	T shirts	5	N/A	\$108.75	
Total does not include applicable shipping and taxes. <b>Total: \$108.75</b>					

**Products for Estimate** [Edit Estimate](#)

Estimate Name:		Estimate Due Date:		Delivery Due Date:	
Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
Standard Business Card	Simple Business Cards	250	Requires Estimate	-	

**Recipients**

**Manage Recipient(s)**

▼ **Jane Doe** ([Edit](#) | [Remove](#))

Jane Doe 1 My Lane Boston, MA 02111 United States	<b>Product</b>	<b>Job Name</b>	<b>Quantity</b>	<b>Shipping Method</b>
	Long Sleeve T Shirts	T shirts	5	Overnight
	Standard Business Card	Simple Business Cards	250	Shipping Instructions:

- a. Under **Products for Order** and/or **Products for Estimate**, review the contents of the order or estimate. If necessary, click **Edit Order** or **Edit Estimate** to make changes to the products that make up the order or estimate.
- b. By default, the company address is displayed under **Recipients**. If you do not want to ship the order to this address, click **Remove** and click **OK** to remove the recipient. Then click **Add Recipient(s)** to select or provide another address.
- c. If you want to ship to the company address but also want to ship the order to other destinations, click **Add Recipient(s)**. (The site must allow shipping to multiple recipients.) The Add Recipient(s) window opens. In this window, select **Add New Address**, **Search Personal Address Book**, or **Search Shipping Groups**; make your selection(s); and click **OK**. The recipients are now displayed under **Recipients** in the cart.

**Notes** You set up shipping groups on the **My Account** tab. For more information about setting up and using shipping groups, see page 32.

If you exceed the number of recipients allowed, you must trim the list of recipients.

You can edit or remove individual recipients or remove all the recipients by clicking **Delete All Recipients**.

6. If you have just one recipient, select a **Shipping Method** and optionally enter any **Shipping Instructions**.

If you have multiple recipients, enter the **Quantity** of each product that each recipient should get, select a **Shipping Method** for each recipient, and optionally enter any **Shipping Instructions**.

**Note** When multiple recipients are involved, the quantities you enter for all the recipients must total the quantity specified for the product. For example, if you specified a quantity of 200 booklets, and have 3 recipients, the total of the quantities you enter for the 3 recipients must be 200.

7. Click **Next** to proceed to the Summary and Payment page. This shows the products that make up the order and/or estimate and the recipient(s) of the products. After reviewing this information (and changing it if necessary), you must provide payment information.

1 [Shopping Cart](#)
2 [Shipping](#)
3 [Summary and Payment](#)
4 [Confirmation](#)

**Products for Order** [Edit Order](#)

Order Name:					
Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
Long Sleeve T Shirts	T shirts	5	N/A	\$108.75	

Total does not include applicable shipping and taxes. **Total: \$108.75**

**Products for Estimate** [Edit Estimate](#)

Estimate Name:		Estimate Due Date:		Delivery Due Date:	
Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
Standard Business Card	Simple Business Cards	250	Requires Estimate	-	

**Recipients** [Edit Recipients](#)

<b>Jane Doe</b>		<b>Shipping Method: Overnight</b>			
1 My Lane Boston, MA 02111 United States			Product	Job Name	Quantity
			Long Sleeve T Shirts	T shirts	5
			Standard Business Card	Simple Business Cards	250





**Payment Details**

Payment Method: <span style="border: 1px solid gray; padding: 2px;">Charge to Account</span>		Billing Address: <span style="border: 1px solid gray; padding: 2px;">Anna Smith</span>	
		<span style="border: 1px solid gray; padding: 2px; font-size: small;">Edit Address</span> Anna Smith 1 My Street . . . My City, NY 11111	
		<span style="border: 1px solid gray; padding: 2px; font-size: small;">Add Address</span>	

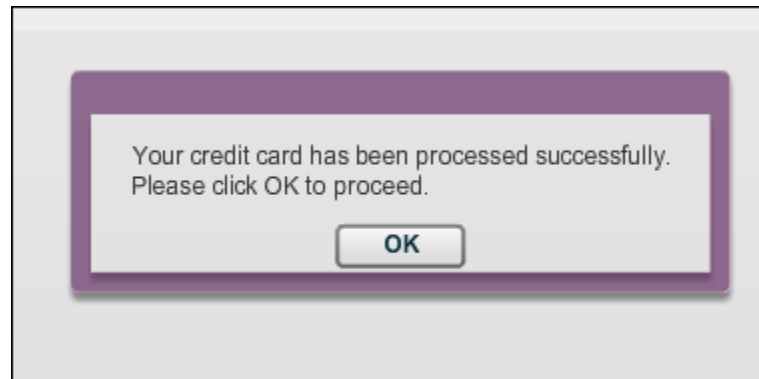
Continue Shopping
Submit

- a. Review the information under **Products for Order** and/or **Products for Estimate**. If necessary, click **Edit Order** or **Edit Estimate**.
- b. Review the recipients. If you need to make any changes, click **Edit Recipients**.
- c. If the **PDF Preview** column includes a PDF icon, click it to view the PDF.


- d. In the **Payment Method** field under **Payment Details**, select your payment method. (The methods that are available depend on the site.) If you select **Purchase Order**, you must provide a purchase order number.
  - e. By default, your company billing address is selected. If necessary, select a different address in the **Billing Address** field, click **Edit Address** to change the selected address, or click **Add Address** to create a different billing address. (Note that if you are paying by credit card, the billing address must match the address on the credit card.)
  - f. Click **Submit** to submit your order.
9. If you selected **Credit Card** as the payment method, a secure payment form opens after you submit the order. so you can provide your credit card information. (This form may look slightly different if it was customized by the print shop.)
- a. Enter your credit card information.

Payment Information	
Payment Amount: 113.29	
Invoice Number: 44181139771	
Credit Card Information	
<input type="radio"/>  <input type="radio"/>  <input type="radio"/>  <input type="radio"/> 	
Card Number: <input type="text"/>	Card ID (CVV2/CID) Number: <input type="text"/> <small>What is the Card ID?</small>
Card Expiration Date: <input type="text"/> <small>MMYY</small>	Card Billing Address: <input type="text"/>
Card Holder Name: <input type="text"/>	Card Billing Zipcode: <input type="text"/>
<a href="#">Process Payment</a>	

- b. Click **Process Payment**.
- c. A confirmation message is displayed in the cart. Click **OK**.



10. A confirmation page opens that you can print for your records. Besides reviewing the order or RFQ, you can:
- Click **Print Now** to print a copy of the order or RFQ.
  - Click **View Request History** or **View Order History** to see all your requests or orders.

<b>Thank You!</b> Your payment was successful. View your order details below.	
 <b>Order and Estimate Successfully Submitted!</b> <b>Print this page for your records.</b>	<a href="#">Print Now!</a>
Submitted on: March 30, 2010 1:13:06 PM EST Your Web Order Number: 12561 Your Web Estimate Number: 12562	<a href="#">View Request History</a>

You may also receive an e-mail that your order is waiting for approval or that your estimate was received. For more information about e-mail notifications, see page 22.

## Attaching Files to a Product

You can attach files to individual products during checkout. Once a file is attached to one product, you can click **Select from attached file(s)** if you want to use the same file with another product.

### To attach a file to a product

1. Click **Upload File**. The Attach File window opens.

2. Click **Browse** to locate and select the file you want to attach.
3. In the **Comments** field, enter any notes about the file.
4. Click **Upload**. A message confirms the file was uploaded.
5. Click **Upload Another** if you want to upload additional files; otherwise, click **Done**.

## E-Mail Notifications

After you submit an order or a request for a quote, you will get an e-mail notification that the print shop received the order or RFQ. The type of e-mail you receive depends on what you submitted. The sections that follow explain the most common e-mails that are sent.

**Important** The sample e-mails shown below consist of the standard text supplied by EFI. The site administrator may have customized the e-mails so the text of the e-mails that you receive may be very different.

### Order acceptance

If you submitted an order that included a product with pricing displayed on the site, you receive an order acceptance e-mail since you agreed to the pricing during the checkout process. The top part of the e-mail provides information about the shipping date and delivery method, and includes the document and web reference numbers, the name of the organization, and shipping address(es).

Subject: Order Acceptance - thank you.

Thank you for your order. We have started the process to complete your project by 6/2/09, your shipping date. We will be utilizing Overnight for handling the delivery.

For your reference the document number is 1137 and the web reference number is 12396.

Organization: EFI

Shipping Address:  
 1 My Street  
 My Town, VT 05001  
 United States

The bottom part of the order acceptance e-mail shows any customer notes and the details of the order, including any taxes.

Customer Notes: Express order; must go out today.  
 Comments: Ship To: 1 My Street  
 My Town VT 05001

QUANTITY	DESCRIPTION	PRICE
2500	Letterhead [Letterhead], 8.5 x 11 White 24# Classic text, printed 1 color front	\$188.67
	Environmental Fee	\$0.46
	SUBTOTAL	\$189.13
	TAX	\$14.61
	TOTAL	\$203.74

## Order pending approval

If your order must be approved before it enters the production process, you receive an order pending approval e-mail. This lets you know that your order was received, but needs to be approved.

Your Order is pending for Approval. We are pleased to provide you the details of the Order Placed :

Ship via: Overnight

Ship to:  
 Jane Doe  
 1 My Lane  
 Boston MA 02111 United States

Bill to:  
 Company Address  
 One O'Hare Center  
 6250 River Road Ste 1000  
 Rosemont IL 60018-4288

Order Id: 12549

Order Name:

Order Delivery Date #: N/A

QUANTITY	PRODUCT	PRICE
5	Short Sleeve T Shirts-Short Sleeve T Shirts	90.63
	SubTotal:	90.63

## Estimate placed

When you submit a request for a quote, an e-mail informs you that the RFQ was received.

Thank you for your estimate request. We are pleased to provide you the details of the estimate placed :

Ship via: Customer Pickup

Ship to:  
 Susan Jones  
 1 My Street  
 My City NY 11111 United States

Bill to:  
 Susan Jones  
 1 My Street  
 My City NY 11111 United States

Estimate Id: 12437

Estimate Name:

Estimate Expiration Date: N/A

QUANTITY	PRODUCT	PRICE
12	Business Calendars-Business Calendars	NA
SubTotal:		NA

## Estimate from

After the print shop generates a quote for you, an e-mail is sent to inform you. The bottom part of the e-mail includes the quote and links you can click to accept or reject the quote.

Web Reference #: 12437  
 Document #: 73  
 Date: May 28, 2009  
 Due Date:

QUANTITY	DESCRIPTION	PRICE
12	Business Calendars [Calendars], 8.5 x 11 White 80# Scott Text Gloss, 12 sheets, digitally printed on 1 side	195.55
6	Scan - 3 x 5 photo	
12	1/4 comb binding 0.25	
1	Sq.ft. Lamination	
12	Laminate 8.5 x 11	
	Environmental Fee	0.49
	SUBTOTAL	196.04
	TAX	15.15
	TOTAL	211.19

To accept this estimate and place an order, please click:  
<https://qa.printstorefront.com/anna/college/walkinLogin.do?tid=2933&quote=accept>

To reject this estimate, please click:  
<https://qa.printstorefront.com/anna/college/walkinLogin.do?tid=2933&quote=reject>



## My Account Tab

### *In this chapter*

About the My Account Tab	26
Request History	27
Order History and Re-Ordering	28
Viewing Order or Request Details	30
Address Book	31
Shipping Groups	32
My Profile	34
Send Files	35
Approvals	36

## About the My Account Tab

The **My Account** tab gives you access to your request and order history, address book and shipping groups, and your personal profile. From this tab you can also send files to the print shop. In addition, if you are a designated approver, you can approve or reject orders from the **My Account** tab.

Cactus Printing

Products
Cart
My Account

Welcome Anna Smith | [Home](#) | [Logout](#)

**My Account**

- [Request History](#)
- [Order History](#)
- [Address Book](#)
- [Shipping Groups](#)
- [My Profile](#)
- [Send Files](#)

1-10
[Next >](#)

	Request #	Name	Total	Due	Status	
▶	12550	<a href="#">N/A</a>	\$0.0	unknown	REQUESTED	-
▶	12549	<a href="#">N/A</a>	\$90.63	unknown	PENDING APPROVAL	-
▶	12531	<a href="#">N/A</a>	\$97.89	7/4/09	ESTIMATE ACCEPTED	-

## Request History

Use the Request History page to review your requests (RFQs) and to accept or decline quotes.

1. Click the **My Account** tab and click **Request History**. The Request History page opens.

**My Account**

- Request History
- [Order History](#)
- [Address Book](#)
- [Shipping Groups](#)
- [My Profile](#)
- [Send Files](#)

1-10 [Next >](#)

Request #	Name	Total	Due	Status									
▶ 12550	<a href="#">N/A</a>	\$0.0	unknown	REQUESTED	-								
▶ 12549	<a href="#">N/A</a>	\$90.63	unknown	PENDING APPROVAL	-								
▶ 12531	<a href="#">N/A</a>	\$97.89	7/4/09	ESTIMATE ACCEPTED	-								
▶ 12529	<a href="#">Brochures</a>	\$2,333.54	unknown	ESTIMATED	-								
▶ 12505	<a href="#">Merchandise</a>	\$437.40	6/3/09	ESTIMATED	-								
▶ 12439	<a href="#">Letterhead</a>	\$188.67	6/4/09	PENDING APPROVAL	-								
▶ 12438	<a href="#">N/A</a>	\$247.79	6/4/09	DISAPPROVED	<a href="#">Reorder</a>								
▶ 12437	<a href="#">N/A</a>	\$211.19	unknown	ESTIMATED	-								
▼ 12436	<a href="#">Letterhead</a>	\$188.67	6/4/09	APPROVED	-								
<table style="width: 100%; border-collapse: collapse;"> <thead> <tr style="background-color: #e6f2ff;"> <th style="width: 20%;">Name</th> <th style="width: 40%;">Description</th> <th style="width: 20%;">Quantity</th> <th style="width: 20%;">Subtotal</th> </tr> </thead> <tbody> <tr> <td>Letterhead</td> <td>24# Classic Laid text\rWhite</td> <td>2500</td> <td>188.67</td> </tr> </tbody> </table>		Name	Description	Quantity	Subtotal	Letterhead	24# Classic Laid text\rWhite	2500	188.67				
Name	Description	Quantity	Subtotal										
Letterhead	24# Classic Laid text\rWhite	2500	188.67										
▶ 12434	<a href="#">N/A</a>	\$24.34	unknown	ESTIMATED	-								

1-10 [Next >](#)

▼ **Search** [Clear Search](#)

Keyword:

Request #:  to

Request Date:  to  (mm/dd/yyyy)

Status: ALL ▼

Click to see products that make up the request.

2. The site displays 10 requests at a time. Use **Next** and **Prev** to scroll through a long list.
3. To search for a particular request, click the right arrow to the left of **Search** at the bottom of the page. Enter your search criteria and click **Search**. For example, you can search by **Status** or enter part or all of the order name in the **Keyword** field.

**Tip** Click **Clear Search** to display all the requests again.

4. To see a summary of the products that make up the request, click the right arrow to the left of the request number. (To hide this summary, click the down arrow.)
5. To see the details of a particular request, click its name. For more information, see "Viewing Order or Request Details" on page 30.

- If the request has a status of ESTIMATED, click the right arrow to the left of the request number so you can accept or reject the quote.

To accept the quote, select **Approve this Estimate and Checkout** and then click **Approve**.

To reject the quote, select **Decline this Estimate**, optionally enter an explanation of your rejection, and then click **Decline**.

Request #	Name	Total	Due	Status	
▶ 12550	<a href="#">N/A</a>	\$0.0	unknown	REQUESTED	-
▶ 12549	<a href="#">N/A</a>	\$90.63	unknown	PENDING APPROVAL	-
▶ 12531	<a href="#">N/A</a>	\$97.89	7/4/09	ESTIMATE ACCEPTED	-
▶ 12529	<a href="#">Brochures</a>	\$2,333.54	unknown	ESTIMATED	-
▼ 12505	<a href="#">Merchandise</a>	\$437.40	6/3/09	ESTIMATED	-

Name	Description	Quantity	Subtotal
Merchandise	Added for quote initiation	100	405

**Approve this Estimate and Checkout!**  
 **Decline this Estimate**  
 Decline Comments: (optional)

- If the request has a status of DISAPPROVED, but you want to try again, click **Reorder** to resubmit the RFQ.

## Order History and Re-Ordering

Use the Order History page to review your orders. From this page you can also reorder a job as well as place an "instant reorder" if you want exactly the same job as before without having to go through the shopping cart. With an instant reorder, you can change the payment method or remove a product (if there are multiple products) from the order, but no other changes are possible. If you want to make other changes, reorder the job instead

- Click the **My Account** tab and click **Order History**. The Order History page opens.

**My Account**

- [Request History](#)
- [Order History](#)
- [Address Book](#)
- [Shipping Groups](#)
- [My Profile](#)
- [Send Files](#)

Order #	Order Name	Total	Due	Order Status	Job Status
▶ 12506	<a href="#">Manuals</a>	\$19,873.45	6/3/09	ACCEPTED	<a href="#">Reorder</a>
▶ 12396	<a href="#">N/A</a>	\$203.74	6/3/09	ACCEPTED	<a href="#">Instant Reorder</a> <a href="#">Reorder</a>

[Clear Search](#)

Click to search by specific criteria. (Arrow points to the search input field)

- The site displays 10 orders at a time. Use **Next** and **Prev** to scroll through a long list.

- To search for a particular order, click the right arrow to the left of **Search** at the bottom of the page. Enter your search criteria and click **Search**. For example, you can search by **Status** or enter part or all of the order name in the **Keyword** field.

**Tip** Click **Clear Search** to display all the orders again.

- To see a summary of the products that make up the order, click the right arrow to the left of the order number. (To hide this summary, click the down arrow.)
- To see the details of a particular order, click its name. For more information, see “Viewing Order or Request Details” on page 30.
- To reorder a job, click **Reorder**. The shopping cart opens so you can check out. This gives you the opportunity to attach files, change the quantity, edit shipping information, and so on. (You can also reorder while viewing the order details.)

**Note** If you change the quantity when reordering, be sure to click **Update** (at the bottom of the page).

- To reorder exactly the same job *without* going through the shopping cart, click **Instant Reorder**. After you do so, the Order History page changes so that the order is displayed at the top.

View My Requests
View My Orders

---

Submitted on: May 27, 2009 02:43:51 PM EDT  
 Your Web Order Number: 12396  
 Status: ReOrdering Order: 12396

**Payment Details**

**Payment Details**

Billing Address: One O'Hare Center  
Rosemont, IL 60018-4288

Payment Method: Charge to Account ▼

---

**Products for Order**

Order Name: N/A		Order Due Date: 06/03/2009				
<input checked="" type="checkbox"/>	Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
▶ <input checked="" type="checkbox"/>	Letterhead	Letterhead	2500	\$0.08	\$188.67	

**Environmental Fee:** \$0.46

**Subtotal:** \$189.13

**Tax:** \$14.61

**Total:** \$203.74

Instant Reorder


- If necessary, select a different way of paying in the **Payment Method** field. (The methods that are available depend on your site configuration.)
- If multiple products make up the order, and you want to remove a product from the order, clear the check box to the left of the product name. No other changes are possible.
- Click **Instant Reorder** to submit the order. A message confirms the order was placed.

## Viewing Order or Request Details

When you are looking at your order or request history, you can click the name of an order or request to see the details of that request. For example, you can review the payment details, products that make up the order or request, recipient information, and history. If a PDF was attached to a product, you can open it by clicking the PDF icon in the **PDF Preview** column. In addition, you can reorder items.

1. On the Order History or Request History page, click the name of the order or request you want to review.

Click to see details.

	12436	<a href="#">Letterhead</a>	\$188.67	6/4/09	APPROVED
---	-------	----------------------------	----------	--------	----------

2. Review the information on the page. If more information is available about a product, you can click the right arrow to the left of its name.

View My Requests
View My Orders
Print Order

Submitted on: May 28, 2009 12:50:59 PM EDT  
 Your Web Order Number: 12436  
 Status: APPROVED

**Payment Details**

Payment Method: PO Number PO Number: 2121	Billing Address: Anna Smith 1 My Street My City, NY 11111
--	---

**Products for Order**

Order Name: Letterhead		Requested Due Date: 6/4/09				
<input type="checkbox"/>	Product	Job Name	Quantity	Unit Price	Item Total	PDF Preview
<input type="checkbox"/>	Letterhead	Letterhead	2500	\$188.67	\$188.67	
Total does not include applicable shipping and taxes.					<b>Total:</b>	\$188.67

**Recipients**

<b>Anna Smith</b>		Shipping Method: 3-5 Day
Anna Smith 1 My Street My City NY - 11111 United States		

Product	Product Name:	Quantity	PDF Preview
Letterhead	Letterhead	2500	

**History**

Date	Action	Action By
05/28/2009	Pending Approval	Anna Smith
05/28/2009	Order Approved	Susan Jones
06/03/2009	Prepress	Printer

View My Requests
View My Orders
Print Order

3. If you want to reorder a product, select it under **Products for Order** (by selecting its check box) and then click **Reorder**. The shopping cart opens, and you can proceed with checkout.
4. To print the order, click **Print Order**.
5. To return to your request or order history, click **View My Requests** or **View My Orders**.

## Address Book

Your address book contains all the billing and shipping addresses you use. By keeping an address book, you can avoid entering an address each time you want to ship an order to someone; you just select the recipient from your address book during the checkout process. You manage the address book by adding, editing, and deleting addresses.

### Adding addresses

You can add shipping and billing addresses on the Address Book page. (You can also add these addresses during checkout.)

1. Click the **My Account** tab and click **Address Book**. The Address Book page opens.

The screenshot shows the 'Address Book' page. On the left is a 'My Account' sidebar with links: Request History, Order History, Address Book, Shipping Groups, My Profile, and Send Files. The main content area is titled 'Address Book' and contains the following elements:

- Radio buttons for 'Create New' (selected) and 'Edit Existing'.
- Dropdown menus for 'Show All' and 'Choose One'.
- Form fields for: First Name, Last Name, Email Address, Telephone, Display Name, Company, Address, City, State, and Zip Code. The 'First Name' field is shaded yellow.
- A 'Country' dropdown menu.
- Checkboxes for 'Contact Type': Shipping and Billing.
- 'Delete' and 'Save Changes' buttons at the bottom.

2. Select **Create New**.
3. Enter all the required fields (indicated by shading).
4. For **Contact Type**, select the **Shipping** and/or **Billing** check boxes to indicate if this is a shipping and/or billing address.
5. Click **Save Changes**.

### Viewing and editing addresses

You can review and edit shipping and billing addresses in your address book. (You can also edit these addresses from the shopping cart.)

1. Click the **My Account** tab and click **Address Book**. The Address Book page opens.
2. Select **Edit Existing**.
3. Select **Show All**, **Shipping Only**, or **Billing Only**.
4. Select an address.
5. Make any necessary changes.
6. Click **Save Changes**.

### Deleting addresses

You can delete an address you no longer use.

1. Click the **My Account** tab and click **Address Book**. The Address Book page opens.

2. Select **Edit Existing**.
3. Select **Show All, Shipping Only, or Billing Only**.
4. Select an address.
5. Click **Delete** and click **OK** to confirm the deletion.

## Shipping Groups

If the site allows it, you can ship an order to multiple recipients. A shipping group is a set of recipients to whom you routinely ship an order at the same time. During checkout, you can select a shipping group as the recipient instead of having to select several individual recipients. (You can always remove a particular recipient if you do not want to ship to a recipient who is part of the group you selected.)

**Note** Only a recipient who is already in your address book can be included in a shipping group.

### Creating a shipping group

1. Click the **My Account** tab and click **Shipping Groups**. The Shipping Groups page opens.

2. In the **Shipping Groups** field, select **Create New**.
3. In the **Shipping Group Name** field, enter a descriptive name for the group so it is easy to identify during checkout.
4. Move users between **Existing Users** and **Associated Users** by selecting users and using the **Add** and **Remove** buttons. (Use **Add All** and **Remove All** to move all the users from one list to another). Anyone in the **Associated Users** list is part of the shipping group.

**Note** A user must be in your address book to be listed under **Existing Users**.

5. Click **Save Changes**.



## Using shipping groups during checkout

After you create shipping groups they can be selected during the shipping step of checkout. If you click **Add Recipients** and select **Search Shipping Groups**, all the shipping groups you defined are available as selections.

Address Book - Mozilla Firefox

http://qa2.printstorefront.com/anna/addressBook.do

Add Recipient(s)

Add New Address  Search Personal Address Book  **Search Shipping Groups**

Search Shipping Groups:

Group(s) found: 3

<input type="checkbox"/>	Shipping Group Name	No. of Addresses
<input type="checkbox"/>	Monthly Promos	2
<input type="checkbox"/>	Specials	2
<input type="checkbox"/>	Promos	3

When you select the check boxes of the shipping groups you want to use and click **OK**, the individual addresses in the shipping group(s) are listed under **Recipients** in the cart. If you do not want to send products to all these recipients, remove the ones you do not want.

Recipients

Manage Recipient(s)

▼ **Anna Smith** (Remove)

Anna Smith  
1 My Street  
...  
My City, NY - 11111  
United States

Product	Job Name	Quantity
Letterhead	Letterhead	2500

Shipping Method: Customer Pickup

Shipping Instructions:

▼ **Jane Doe** (Edit | Remove)

Jane Doe  
1 My Lane  
Boston, MA - 02111  
United States

Product	Job Name	Quantity
Letterhead	Letterhead	0

Shipping Method: Customer Pickup

Shipping Instructions:

▼ **Tom Smith** (Edit | Remove)

Tom Smith  
1 My Street  
My Town, VT - 05001  
United States

Product	Job Name	Quantity
Letterhead	Letterhead	0

Shipping Method: Customer Pickup

Shipping Instructions:

## Editing a shipping group

1. Click the **My Account** tab and click **Shipping Groups**.
2. In the **Shipping Groups** field, select **Edit Existing**.

3. In the **Shipping Group Name** field, select the group you want to edit.
4. Make your changes to the group (for example, add or remove users) and click **Save Changes**.

## Deleting a shipping group

1. Click the **My Account** tab and click **Shipping Groups**.
2. In the **Shipping Groups** field, select **Delete**.
3. In the **Shipping Group Name** field, select the group you want to delete.
4. Click **Delete** and click **OK** to confirm the deletion.

## My Profile

Use the My Profile page to update your contact and login information. (You cannot change the account information.)

1. Click the **My Account** tab and click **My Profile**.

The screenshot shows the 'My Profile' page with the following details:

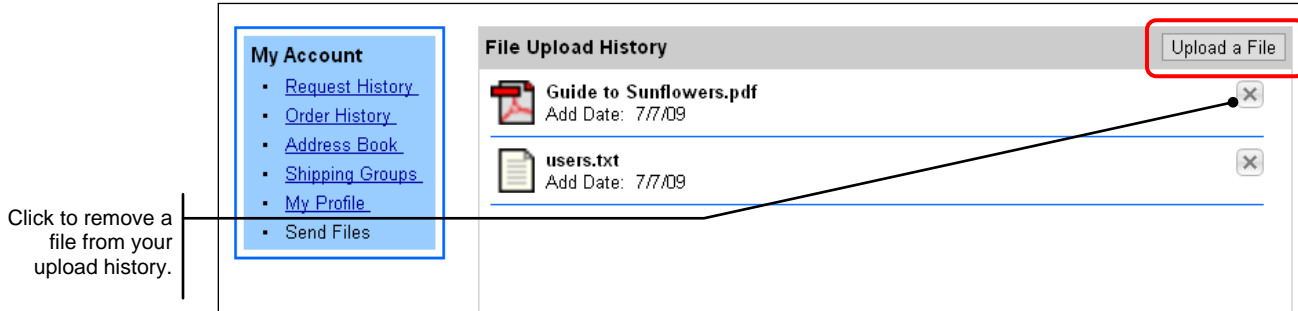
- Navigation:** Products, Cart (1), My Account (selected). Welcome Anna Smith | Home | Logout
- My Account Sidebar:** Request History, Order History, Address Book, Shipping Groups, My Profile, Send Files.
- Contact Information:**
  - Salutation: Ms.
  - First Name: Anna
  - Last Name: Smith
  - Job Title: [Empty]
  - Email: anna.smith@mycompany.com
  - Address: [Empty]
  - City: [Empty]
  - State: [Empty]
  - Zip Code: [Empty]
  - Country: [Dropdown]
  - Telephone: 111-111-1111
  - Fax Number: [Empty]
- Account Information:**
  - Account #: 12
  - Address: EFI, One O'Hare Center, Rosemont, IL 60018-4288
  - Telephone: 847-692-6000
  - Fax Number: 847-692-6560
- Login Information:**
  - Login Name: annas
  - Login Password: [Masked]
  - Re-enter password: [Masked]
- Buttons:** Save Changes

2. Make any necessary changes under **Contact Information** and **Login Information**, for example, correct the address.
3. Click **Save Changes**. A message confirms that your profile was updated.

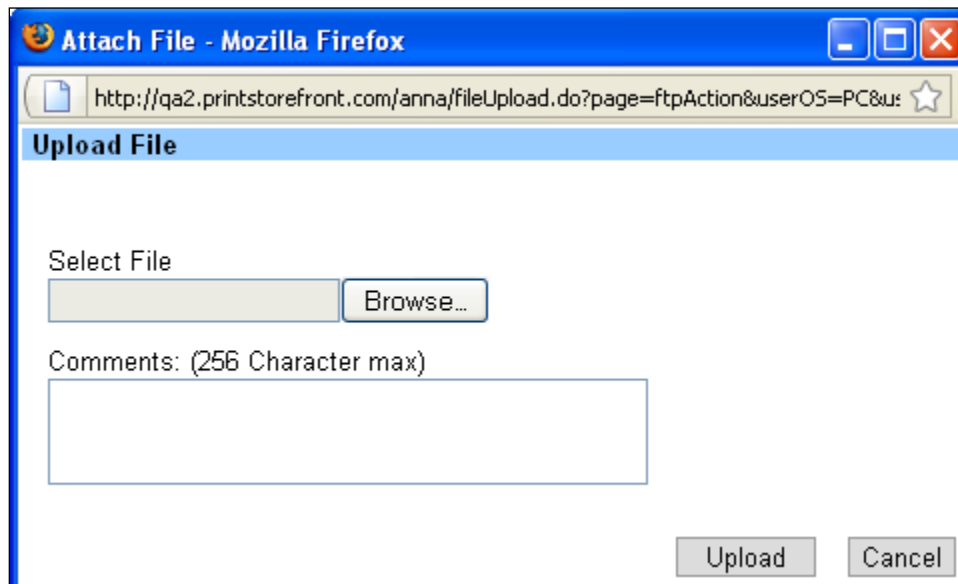
## Send Files

You can upload files that are not associated with orders to the site. The site administrator can then access those files.

1. Click the **My Account** tab and click **Send Files**. If you already uploaded some files, they are listed under **File Upload History**. (You can delete these files if you no longer need them.)



2. Click **Upload a File**. The Attach File window opens.



3. Click **Browse** to locate and select the file you want to upload.
4. (Optional) In the **Comments** field, enter any notes about the file you are uploading.
5. Click **Upload**. A message informs you that the file was uploaded. An e-mail is also sent to your site administrator.
6. To send another file to the site, click **Upload Another** and repeat steps 3 through 5. If you have no more files to send, click **Done**.

## Approvals

The Approvals page is available only if you are a designated approver. On this page you can approve and decline orders and RFQs.

**Note** If you are an approver, you also receive e-mail notification of orders and RFQs needing approval.

### Approving orders

1. Click the **My Account** tab and click **Approvals**. The Approvals page opens.

Click to see more details of an order.

Link is displayed only if you are a designated approver.

Request #	Name	Total	Due	Status								
▶ <input type="checkbox"/> 12549	<a href="#">N/A</a>	\$90.63	unknown	PENDING APPROVAL								
<input type="checkbox"/> 12531	<a href="#">N/A</a>	\$18.13	7/4/09	ESTIMATE ACCEPTED								
▼ <input type="checkbox"/> 12439	<a href="#">Letterhead</a>	\$188.67	6/4/09	PENDING APPROVAL								
<table border="1"> <thead> <tr> <th>Name</th> <th>Description</th> <th>Quantity</th> <th>Subtotal</th> </tr> </thead> <tbody> <tr> <td>Letterhead</td> <td>24# Classic Laid textWWhite</td> <td>2500</td> <td>188.67</td> </tr> </tbody> </table>		Name	Description	Quantity	Subtotal	Letterhead	24# Classic Laid textWWhite	2500	188.67			
Name	Description	Quantity	Subtotal									
Letterhead	24# Classic Laid textWWhite	2500	188.67									
▶ <input type="checkbox"/> 12438	<a href="#">N/A</a>	\$247.79	6/4/09	DISAPPROVED								
▶ <input type="checkbox"/> 12436	<a href="#">Letterhead</a>	\$188.67	6/4/09	APPROVED								

Selected:

2. To see more details of an order, click the right arrow to the left of the order.
3. Select the order or RFQ you want to approve by selecting its check box.
4. Click **Approve**. The status of the order or RFQ changes to APPROVED.

The person who placed the order is notified that the order was approved.

### Declining orders

1. Click the **My Account** tab and click **Approvals**. The Approvals page opens.
2. To see more details of an order, click the right arrow to the left of the order.
3. Select the order or RFQ you want to decline by selecting its check box.
4. Click **Decline**.
5. Enter any comments related to the disapproval and click **OK**. The status of the order or RFQ changes to DISAPPROVED.

The person who placed the order is notified that the order was not approved.