

PRINTSHOP MAIL SUITE



PrintShop Mail Web User Guide



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1 PrintShop Mail Web

PrintShop Mail Web is a modern and versatile software package which integrates workflow processes and enables you to order and/or create your own (variable) print work.

PrintShop Mail Web:

- Simplifies print order procedures
- Simplifies the creation of variable data print orders
- Provides a pre-flight and preview capability to verify what will be printed
- Addresses each contact in their preferred language
- Is available to create and order print work, 7 days a week, 24 hours a day
- Safeguards the corporate identity
- Can be configured to match the look and feel of the corporate website
- Manages the companies documents, so users always use the correct version
- Lowers cost due to the compact and efficient ordering and production method
- Enables Business to Business (B2B) as well as Business to Customer (B2C) transactions

PrintShop Mail Web gives you more control and flexibility in print production!



2 In practice

This chapter explains the various ordering workflows of PrintShop Mail Web. The ordering workflow incorporates a shopping cart as seen in common ecommerce internet sites.

The ordering process step by step:

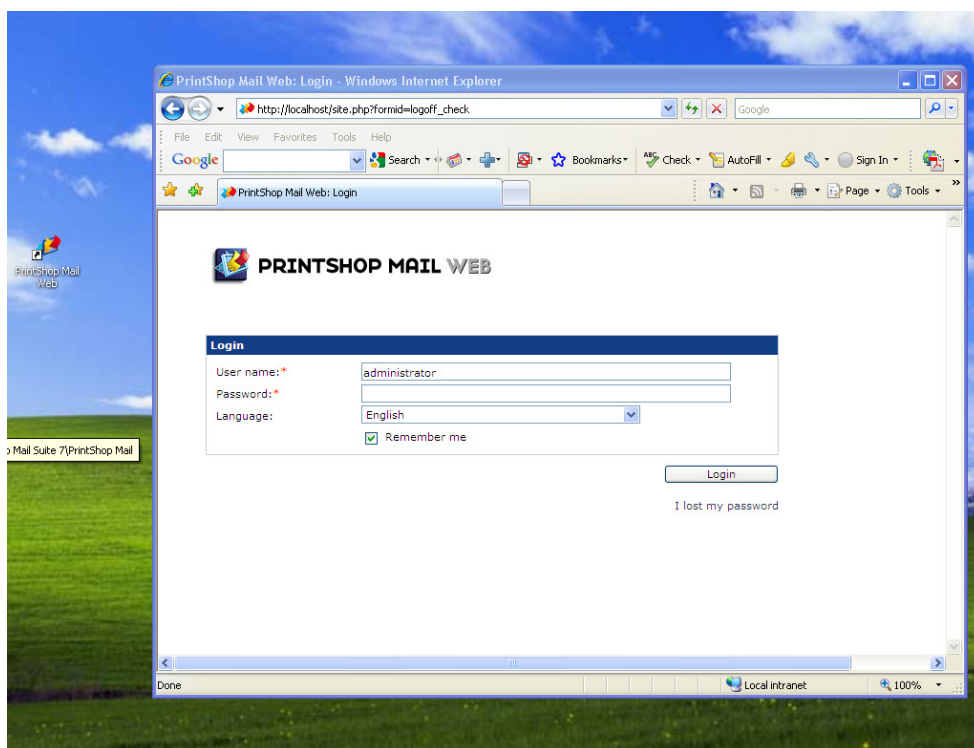
1. **Document Creation:** The *New Document* section is a store front listing the documents available to the customer. Based on the selected document the system invokes a wizard like interface guiding the customer through the steps of the document creation process. At the end of this process the customer is shown a PDF softproof. If the customer is satisfied with this document it can be added to the shopping cart. The customer can continue creating more documents and add those documents to the cart.
2. **Shopping Cart:** The shopping cart (or basket) allows customers to collect documents created via or selected from the *New Document* section. The pricing configuration controls whether the customer may enter a user definable quantity, pick a quantity from a predefined list or whether the uploaded database determines the quantity.
3. **Shipping Options:** This step allows the customer to select one of the available shipping methods (if applicable), select a preferred shipping date, verify the shipping address information and add comments.
4. **Order Summary:** This page summarizes the order. The documents in the cart, the address the order will be shipped to, and the payment information are shown.
5. **Order Confirmation:** If the order has been processed successfully, the order confirmation page is shown. This page includes the PrintShop Mail Web order number and transaction information if applicable.

2.1 Login to the system

In order to access PrintShop Mail Web, direct your browser to the URL provided by your Print Service Provider. The *Login* page lets the user log on to the system. Here you can enter your name and password and you can select a language. Also found on the login page is the *Remember me* option. If the *Remember me* option checkbox is checked a cookie is created. This cookie stores the user name and password. The next time the PrintShop Mail Web web site is visited by the user, the system will check for the cookie and automatically log you in.

To log in to PrintShop Mail Web:

1. Enter your user name and password
2. Select a language
3. Click *Login*. The following screen appears:



The welcome screen

Selecting *My Account* next to the name in the *Menu* bar allows modification of your settings. Depending on the privileges of each user will the tabs in the *Menu* bar enable the user to:

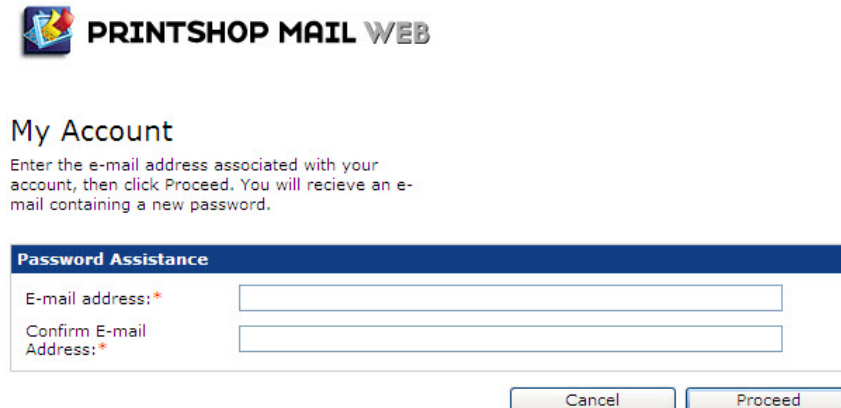
- Create a new print job
- Request a quote
- Approve and order print jobs
- Place print jobs on hold
- Mark print jobs as completed
- Re-order print jobs
- Request detailed order information
- Execute a job search
- Add users and departments

Note: Screen dumps are based on the default skin of PrintShop Mail Web.

2.2 Lost password

The *I lost my password* option allows you to retrieve a new password for your account and is based on the your e-mail address. An e-mail with the new password is send to the e-mail address of the given user. To get a new password:

1. Click the *I lost my password* link on the login screen. The following screen appears:



The screenshot shows the 'PRINTSHOP MAIL WEB' logo at the top. Below it is the 'My Account' section with a sub-header 'Password Assistance'. The form contains two input fields: 'E-mail address: *' and 'Confirm E-mail Address: *'. At the bottom of the form are two buttons: 'Cancel' and 'Proceed'.

Enter e-mail address to receive a new password

2. Enter the e-mail address associated with your account.
3. Confirm the entered e-mail address.
4. Click *Proceed* to generate a new password.
You receive, on the entered e-mail address, a new password. You can use this password to logon. Once logged on you can decide to change the password or keep using this new password.

2.3 Modify my account

Each user can modify his personal account information:

1. Click *My Account* in the *Menu* bar. The following screen appears:

My Account

Properties

General

Company: None

User name: administrator

Person code: administrator

Role: Administrator

Language: English

Remember me: ☒

Additional information

First: * administrator

Last: * administrator

Gender: ☒ Male ☐ Female

Salutation: ☒ Formal ☐ Informal

Job title:

Title:

E-mail address: * admin@localhost.com

Direct number:

Mobile number:

Private number:

Private e-mail:

Password

Set new password:

Confirm new password:

Cancel Save

Change user information in this screen

2. The following items can be changed:

- **General:**

- **Username and Password:** These fields define the information required to logon to the system.
- **Person Code:** This value is a unique code which can be used to link to an administrator or ordering system. Users with the appropriate privilege (role) can edit this field.
- **Language:** The selected language is used for the e-mail message you receives when creating an order or when the status of an order is changed. The language selected in the login window defines the application language.
- **Remember me:** When the *Remember me* checkbox is checked you are recognized by the system and automatically logged in and re-direct to the *Welcome* or last visited page.

- **Additional Information:** The fields in this section are used in the ordering processs.

- **Password:** Each user can set a new password. Enter a new password in the *Set new password* entry field and confirm the password in the *Confirm new password* entryfield.

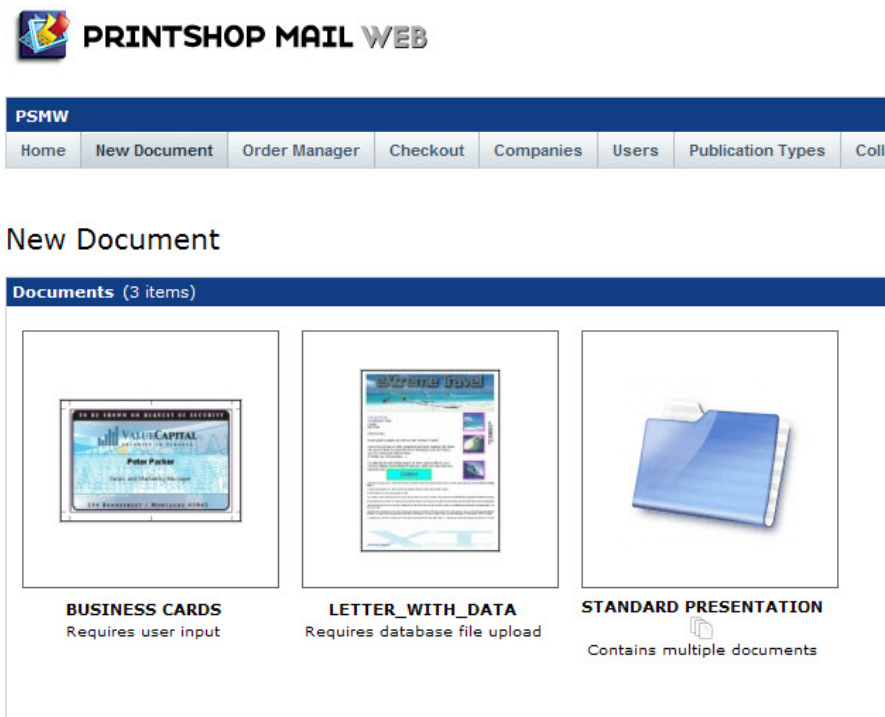
3. Click *Save* to store the changes.

2.4 Create a static document

A static document is a document where no data entry is required by the user and no database file is required. PDF documents and PrintShop Mail documents without variables or database upload fields are static documents.

In order to create and order a static print job:

1. Click *New Document* in the *Menu* bar. An overview of documents is shown from which the document can be selected.



The new document page

The information below each document indicates the type of data that must be supplied. A symbol behind the *Publication Type* folder name indicates that there are several documents available in that publication type.


2. Select a static document from the overview by clicking on the document. A PDF softproof of the document is shown to allow the user to verify that the output is correct
3. Click *Add to Cart* to add the document to your shopping cart.

2.5 Create a file upload document

A *File Upload* document requires you to upload a document from your local hard drive to PrintShop Mail Web. The uploaded document is added to the checkout as part of an order.

In order to create and order a file upload print job:

1. Click *New Document* in the *Menu* bar. An overview of documents is shown from which the document can be selected.
The information below each document indicates the type of data that must be supplied. A symbol below the *Publication Type* folder name indicates that there are several documents available in that particular publication type.



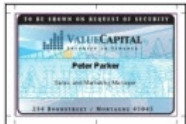
PRINTSHOP MAIL WEB

PSMW


Home New Document Order Manager Checkout Companies Users Publication Types Coll

New Document


Documents (3 items)



BUSINESS CARDS
Requires user input



LETTER_WITH_DATA
Requires database file upload



STANDARD PRESENTATION
Contains multiple documents

The new document page

2. Select a document from the overview by clicking on the document.

File Upload

This document requires you to upload a file from your local hard drive. Follow the instructions below.

TEST

General

Document Name: TEST

File Upload

Source File:

Permitted File Types: pdf (Maximum File Size 2MB)

The file upload page

3. Read the *Instructions* in the *File Upload section* from the *File Upload page* (if available).
4. Check if the file you will upload has a permitted file type and if the file size not exceeds. In case no file types are specified it is only possible to upload PDF documents.
5. Click *Browse* to select the file which is located on your computer.
6. Click *Upload* to upload the file and proceed to the next step. After a successful upload the *File Upload Summary* page is visible. You can check on this page the file name and file size of the document. In case of a PDF document a thumbnail is created and visible.
7. Click *Add to Cart* to add the document to your shopping cart.

A variable document requires, the user to provide data. This can be done by uploading a database file or by manually inputting data. Documents that require user input use a web form to collect information entered by the customer. Such a form consists of one or more modifiable elements called input fields (e.g. text fields, checkboxes, radio buttons, etc.).

1. Click *New Document* in the *Menu* bar. An overview of documents is shown from which the document can be selected.
2. Select a document from the overview by clicking on the document.
The information below each document indicates the type of data that must be supplied. A symbol behind the *Publication Type folder name* indicates that there are several documents available in that particular publication type.

User Input fields

Sample of a user input page.

- Objectif Lune Inc. © 2010

2.6.1 Uploading a database file

If the selected document requires a database file to be uploaded the following screen will be shown:

File Upload
This document requires you to upload a file from your local hard drive. Follow the instructions below.

TEST

General

Document Name: TEST

File Upload

Source File:

Permitted File Types: pdf (Maximum File Size 2MB)

Upload

Upload database file page

The list of variable data fields which occur in the document are shown. The database file to be uploaded should contain at least these fields. The database file can be in Excel, DBF or CSV format. The first row in the database file is solely intended for the column headings and must not contain any information which is to be published. Uploading the database file may take some time depending on the size of the database file and the speed of the internet connection

1. Click *Browse* to select the database file which is located on your computer.
2. Click *Upload* to upload the database file and proceed to the next step.
3. After the database file has been uploaded the data in the database can be matched to the fields needed in the document. PrintShop Mail Web automatically matches field names from the uploaded data with names in the document.
If the database fields do not correspond with the database fields from the database file, it is possible to drag them to the correct spot.
The *Live update* option is checked by default; ensuring that the preview is immediately refreshed if a different record is selected. This can be achieved by clicking the *Previous* or *Next* buttons. It is also possible to directly enter the record number in the *Record* entry field.
Click the *Preflight* link to check the uploaded data for possible problems. A report is shown that states the problematic records in the data if applicable.
4. Click the *Next* button to proceed to the next step.

2.6.2 Defining the preview range

After mapping the database fields the user can select the range of records to use for the softproof:

1. Clicking *Previous* or *Next* allows specific records to be examined
2. *Preview range* allows you to check specific records. For example: 1 to 10, 50 to 59, 63 to 90 etc.
3. Clicking the *Next* button request a proof of the selected records. A PDF rendition of the document is shown to allow the user to verify that the output is correct.
4. Click *Add to Cart* to add the document to your shopping cart.

Note: Creating a softproof can take some time depending on the size of the uploaded database, the speed of the server and internet connection. While the softproof is being created a progress bar is shown.

2.7 Create an order

The shopping cart allows customers to collect multiple documents in the cart before placing an order. This section describes the steps to create an order for the documents in the cart.

2.7.1 The Shopping Cart

The *Checkout* page shows the documents added to the *Shopping Cart*. Each item in the cart can have a different pricing setup and quantity entry method.

Checkout

You can continue shopping and add new items via the New Document menu item.

Your shopping cart (4 items)					
<input type="checkbox"/>	ID	Thumbnail	Job	Quantity	Price (EUR)
<input type="checkbox"/>	58		Postcard Requires database file upload and user input	10	N/A
<input type="checkbox"/>	57		Business Card Requires user input	<input type="text" value="250"/>	N/A
<input type="checkbox"/>	55		Letterhead Requires user input	<input type="text" value="100"/>	N/A
<input type="checkbox"/>	54		Business Card Requires user input	<input type="text" value="250"/>	N/A
Subtotal:					-

The shopping cart containing multiple documents with different quantity entry methods

1. Define the quantity for each document. The appearance of the quantity field depends on the entry method set for the document or is defined by the document type. Documents that require a database file upload have quantity, which is determined by the number of records in the database file. The quantity entry method could be one of the following:
 - **Free EntryField:** The customer can enter a custom quantity within the minimum and maximum quantity range (*Pricing Options* page).
 - **Predefined List:** The customer can select a quantity from a predefined list. This list is derived from the volume discount table.

Click the the thumbnail of a document to view the softproof.

Click the pencil icon next to the document name to edit the content of that document. Edit content is only available for PrintShop Mail documents with variables. Edit content allows you to upload a new database file replacing the active one.

2. Click *Continue Shopping* to add additional document to the checkout or click *Proceed* to move to the next step.

2.7.2 Shipping Options

The *Shipping* page lets the customer edit the shipping address and specify shipping related items like the shipping method (if applicable) and the preferred shipping date. Shipping methods are managed in the *Settings* section of the system. The calculation of shipping charges can be enabled and disabled per company.



1. Select the preferred *Shipping Method* (if available). The printshop can setup shipping methods and accompanying shipping rates.
2. Click the calendar icon to display a calendar dialog to select a preferred shipping date.

Shipping date 

April 2008


S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

Previous Next

 Today
 Production Day
 Rush Order Day
 Shipping date
 Working Day

Cancel

The Shipping Date calendar

The system will check if *Rush Order Production Time* is applicable. In this case the calendar icon shows a notification triangle (). Shipping dates that require a rush order are marked in the calendar and are selectable by the customer. The rush rate charges for those documents that require a rush order are added to the final price calculation.

3. Enter a remark in the *Comments* field.
4. Verify or edit the shipping address information.
5. Check the *I accept the Terms and Conditions* checkbox if you agreed. If you want to read the terms and conditions before checking the checkbox, click the *Terms and Conditions* link to open the terms and conditions dialog. First after checking the terms and conditions checkbox the *Proceed* button is enabled and is it possible to continue the ordering process.
6. Click *Proceed* to continue.

2.7.3 Order Summary

Once all order information is collected the summary page is shown. This page summarizes the order information and shows the final pricing including shipping charges, rush rates and tax. Based on the customers role the *Order* and *Approve* buttons are shown.

1. Click the *Order* or *Approve* button to create the order. PrintShop Mail Web invokes a workflow specific to the selected payment connector. The default payment connector (Purchase Order), pops up a processing dialog and no user interaction is required to place the order. Once the order is placed a confirmation page is shown and a email notification message is sent.

2.8 Select an order status overview

PrintShop Mail Web can generate detailed order overviews, allowing a user to view all orders at each stage of the production process. Orders with the *Approved* status are ready for production. Those orders have been approved by the customer and are released for print production.

Every order goes through the following stages:

- Ordered
- Approved
- In-plant
- Shipping
- Completed

In addition to this there is the *On hold* status. This folder contains orders that require a quote from the print shop, these orders remain in this status until pricing is agreed.

To view the orders of a specific status:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown:

In-plant

The screenshot displays the 'Order Manager' interface. On the left, a table titled 'Order(s) (2 items)' shows two orders. The first order (ID 5) is for 'OL PRINT SHOP' with a price of 276.48 CAD. The second order (ID 1) is also for 'OL PRINT SHOP' with a price of 126.72 CAD. A 'Delete' button is located below the table. On the right, the 'Order Manager' sidebar includes a 'General' section with status filters: Ordered [0], Approved [0], In-plant [2] (highlighted), Shipping [0], On hold [0], and Completed [0]. Below this is the 'Personal Order folders' section with checkboxes for 'My orders', 'My approved orders', and 'All companies'. A 'Search' section contains a search bar and a dropdown menu set to 'Document'. At the bottom, a 'Summary' section provides statistics: Number of orders: 2, Total price: CAD 403.20, Rush orders: -, Required by today: 1, and Exceeded date orders: -.

ID	Company	Department	Created	Shipping Date	Price (CAD)
5	OL PRINT SHOP	MARKET RESEARCH	2009-07-28	2009-07-31	276.48
1	OL PRINT SHOP	MARKET RESEARCH	2009-07-27	2009-07-30	126.72

Order Manager

General

- Ordered [0]
- Approved [0]
- In-plant [2]**
- Shipping [0]
- On hold [0]
- Completed [0]

Personal Order folders

- ☐ My orders
- ☐ My approved orders
- ☐ All companies

Search

Search:

In:

Search

Summary

- Number of orders: 2
- Total price: CAD 403.20
- Rush orders: -
- Required by today: 1
- Exceeded date orders: -

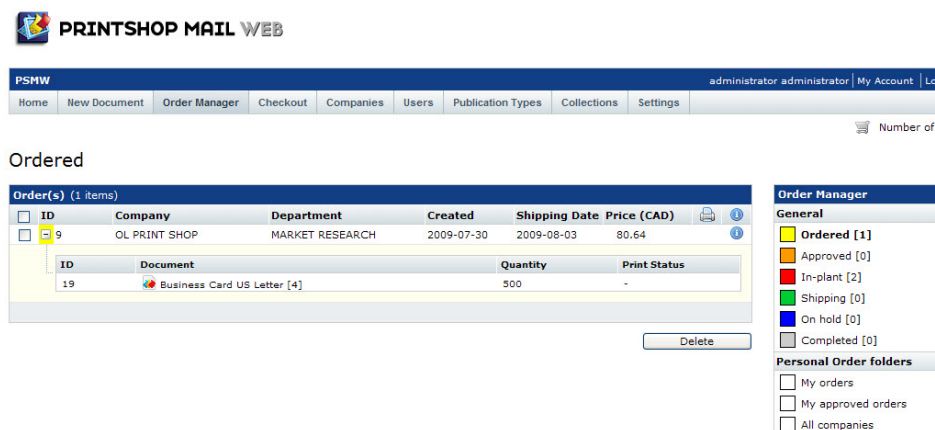
By clicking on an order in the Order Manager overview, details of the order can be viewed

2. Click an item in the *Status* section of the *Order Manager* side menu to view the orders of that production status. The orders of this status are shown in the orders overview table. The colored cubes at the beginning of each row indicate the status of the order and refer to the status folder. The *Approved* item in the *Order Manager* side menu, shows the orders that are released for print. Rush orders have a mark (★) behind the order ID. Overdue orders are colored red.
3. Click the + symbol next to the order ID to view the jobs belonging to that order. The job overview shows the name of the document, the ordered quantity and the current print status.

2.9 Change the status of an order

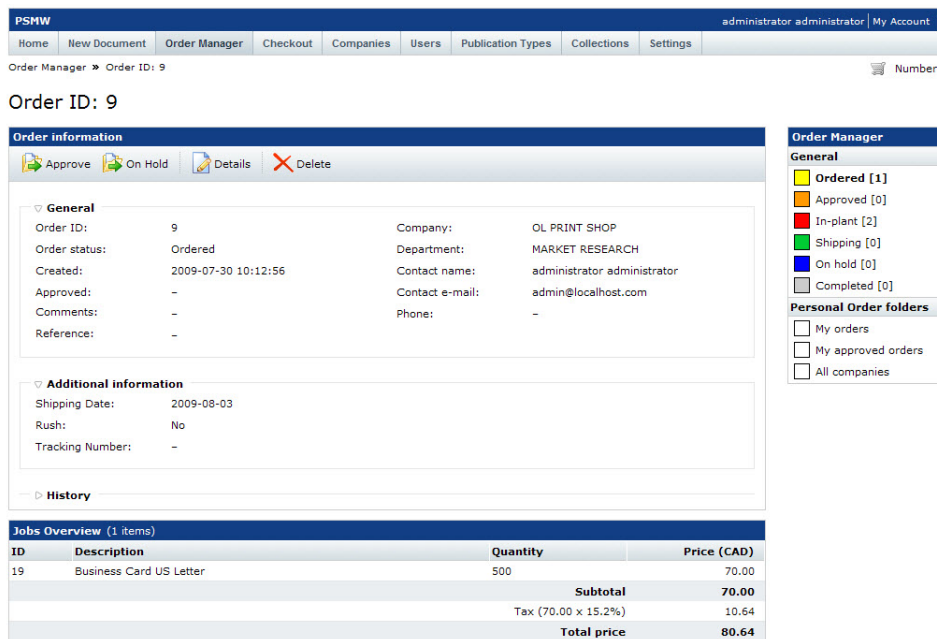
To change the status of an order in the *Order Manager*:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown:



By clicking on an order in the *Order Manager* overview, details of the order can be viewed

2. Click the ID of an order. The order properties page is shown.



The *Order Properties* page

The *Order Properties* page consists of a details section and an overview of the jobs belonging to this order. The *Action* bar along the top contains a range of buttons to change the status of the order, edit the order details and delete the order. The set of status change icons that are visible depends on the current status of the order.

3. Click a status item in the *Action* bar to change the status of the order.
An order with the status *Ordered* can be set to the *On hold*-status by the customer and will be placed in the *On hold*-folder. Orders with the quote request status are placed in the *On hold* folder, waiting for a price to be set. If a price is added the customer can accept the print job by ordering or releasing the order or reject the print job by deleting the order.

As soon as an order is placed in the *Approved* folder, customers can no longer change the status of the order. It is possible for customers to track their personal orders via the *My orders* folder, or (if they have the necessary access rights) via the *My departments* or *My company* folder.

Note: When the order reaches the *Shipping* state the customer can set the status of the order to *Completed*. When an order is not delivered to your customer, the job status should be changed to *Completed* by the operator or production manager when the order is dispatched.

2.10 Re-order print jobs

Each user can re-order print jobs:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* overview appears.

Order Manager

The screenshot shows the 'Order Manager' interface. On the left, there's a sidebar with a tree view containing 'Today', 'Yesterday', 'This week' (selected), 'Last week', 'This month', 'Last month', '2008', and 'April'. The main area displays a table of orders with columns: Order ID, Company, Department, and Order date. The table contains 9 rows of data. On the right, there's a sidebar with 'General' status filters (Ordered [0], Approved [0], In-plant [0], Shipping [0], On hold [0], Completed [11]), 'Personal Order folders' (My orders, My approved orders, All companies), a 'Search' section with input fields for 'Search:' and 'In:' (set to 'Order ID'), and a 'Summary' section showing 'Number of orders: 9' and 'Total price: EUR 0.00'.

Order ID	Company	Department	Order date
1	Financial Consu...		2008-04-23
2	Financial Consu...		2008-04-23
3	Financial Consu...		2008-04-23
4	Financial Consu...		2008-04-23
5	Financial Consu...		2008-04-23
6	Financial Consu...		2008-04-24
7	Financial Consu...		2008-04-24
8	Financial Consu...		2008-04-24
9	Financial Consu...		2008-04-24

2. Select the *Completed* status folder in the side menu.
3. Select one of the predefined queries on the left side of the Order overview to locate the order. The available options are:
 - Today
 - Yesterday
 - This week
 - Last week
 - This month
 - Last month
 - Year overview with sub selections per month

In the addition to this the *Search* item in the side menu can be used to look for specific jobs. The available search parameters are:

- Order ID
 - Job ID
 - Content of user input fields
4. Click the plus-symbol next to the order ID to view the jobs of this order.
 5. Select a job by clicking its ID or document name. The *Job Properties* page is shown.

Order ID: 1

Job Properties

Re-order

General

Job ID: 3

Order status: Completed

Approved: 2009-07-27

Quantity: 1000

Comments: -

Company: OL PRINT SHOP

Department: MARKET RESEARCH

Contact name: administrator administrator

Contact e-mail: BREAUFT@CA.OBJECTIFLUNE.COM

Reference: -

Completed: 2009-07-30

Additional information

Publication Type: LETTER_WITH_DATA

Document Name: demo_solution

Description: -

Engine: PrintShop Mail (Win) Version 7.0 (build 27)

Operator Instructions: -

Technology: Optimized PostScript

Document Path: /files/publicationtypes/3/3/

Job Path: /files/jobs/1/3/

Output history

Date	Person	Destination	#
2009-07-30 10:27:54	administrator administrator	PrintShop Mail Printer	2
2009-07-28 15:54:39	administrator administrator	PlanetPress Watch	-
2009-07-28 14:01:44	administrator administrator	PrintShop Mail Printer	2

Order Manager

General

Ordered [1]

Approved [0]

In-plant [1]

Shipping [0]

On hold [0]

Completed [2]

Personal Order folders

☐ My orders
 ☐ My approved orders
 ☐ All companies

Preview

View Order

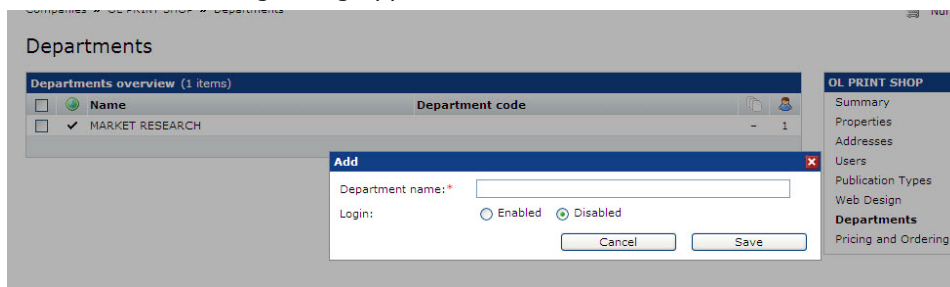
The Job Properties page

- Click the *Re-order* item in the *Action* bar to add the document to the checkout. In case of a variable document a pencil icon is shown and allows the customer to change the user input and/or database file of the new job.

2.11 Add departments

To add a department to a company:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking on the company name.
3. Select *Departments* in the side menu.
4. Click *Add*. The following dialog appears:



The screenshot shows the 'Departments' overview page with a table containing one item: 'MARKET RESEARCH'. An 'Add' dialog box is open in the foreground. The dialog has a title bar 'Add' with a close button. It contains a text field for 'Department name:' with a red asterisk, a 'Login:' section with radio buttons for 'Enabled' and 'Disabled' (the 'Disabled' option is selected), and 'Cancel' and 'Save' buttons at the bottom. The background shows the 'Departments overview (1 items)' table with columns 'Name' and 'Department code'. The 'MARKET RESEARCH' entry is selected. The right sidebar shows the 'OL PRINT SHOP' menu with options like Summary, Properties, Addresses, Users, Publication Types, Web Design, Departments (highlighted), and Pricing and Ordering.

Add a department to a company page

5. Enter the *Department name*.
6. Click *Save* to store the changes.

2.12 Modify department properties

After creating a new department it is possible to modify all department properties. To modify the department properties:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking on the company name.
3. Click *Departments* in the side menu. The *Departments* overview page is shown.
4. Select a department from the overview by clicking on the department name. The *Departments Summary* page is shown and on the right hand side a menu is displayed. This side menu allows management of the following items of the currently selected department:
 - Properties
 - Addresses
 - Users
 - Publication Types.
5. On the *Documents Summary* page the basic department information is displayed in the *Properties* section. To modify the information in the *Properties* section click the *Edit* link or click *Properties* in the side menu.
6. Click *Edit*. The following screen appears:

Departments

Summary

▼ General

Department name: HUMAN RESSOURCE

Department code: -

Login: Enabled

URL: -

Contact person: None

Edit

▶ Addresses

▼ Pricing and Ordering

Tax Rate Profile: System Default

Calculate Shipping Charges: No

Payment Modules:

- Purchase Order

Edit

HUMAN RESSOURCE

Summary

Properties

Addresses

Users

Publication Types

Pricing and Ordering

Back

Disable

Change the department properties in this screen

7. Enter basic information about the department:
 - **Department Code:** This value is a unique code which can be used to link to an administration or ordering system.
 - **Url:** The customers company URL can be entered here.
 - **Contact Person:** When users have been added to the department, a department contact person should be selected in the *Contact person* pull-down-menu.
8. Click *Save* to store the changes. The department properties page is shown.

2.13 Add or modify address

To add the department address in PrintShop Mail Web:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking the company name.
3. Click *Departments* in the side menu.
4. Select a department from the overview by clicking the department name. The *Department Summary* page is shown. On the summary page the basic department information is displayed. By default the *Company Address* is placed in a collapsible information window.
5. To make the *Address information* visible, click the text. The address information can add or modified by clicking the *Edit link* or click *Addresses* in the side menu.
6. Click *Edit*. The following screen appears:

Departments

Summary

▼ General

Department name:

HUMAN RESSOURCE

Department code:

-

Login:

Enabled

URL:

-

Contact person:

None

Edit

▼ Addresses

Shipping address

Use company address:

Yes

Country:

-

Address 1:

-

Address 2:

-

Zip code:

-

City:

-

State:

-

Phone:

-

Fax:

-

Billing address

Use company address:

Yes

Country:

-

Address 1:

-

Address 2:

-

Zip code:

-

City:

-

State:

-

Phone:

-

Fax:

-

Edit

HUMAN RESSOURCE

Summary

Properties

Addresses

Users

Publication Types

Pricing and Ordering

Enter or modify the department address information in this screen

7. The *Shipping and Billing address* information is used during the ordering process and can be used as default value for input fields in the *New Document* section. Enter the required information. By default the company address information is entered and the *Use company address* checkbox is checked. When you uncheck the *Use company address* checkbox it is possible to edit the *Shipping* and *Billing* information:
 - **Country:** Select a country in the pull-down-menu. By default the value *None* is selected.
 - **Address Fields:** Enter the address information in this fields. Maximal 255 characters can be typed or pasted in this fields.
 - **Zip code:** The *Zip code* is related to the selected country. In some cases a regular expression is added to check the entered zip code.
 - **State:** The *State* is also related to the selected country. When selecting US or Canada a pull-down-menu is shown, presenting the states of the US or Canada. State is a required field than. In all other cases an entry field is visible.
8. Click *Save* to store the changes.

2.14 Add users

To create a new user account for a department:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking on the company name.
3. Click *Departments* in the side menu.
4. Select a department from the overview by clicking on the department name.
5. Select *Users* in the side menu.
6. Click *Add*. The following dialog appears:

Enter basic information about the user in this screen

7. Enter the required information:
 - **User Name and Password:** These fields define the information required to logon to the system and need to be entered in the *Login* page.
 - **Role:** The selected role defines the privileges and access level of the user.
 - **Login:** Set this option to *Enabled* to allow the user logon to the system.
 - **First, Last, Gender and E-mail address:** The values of these fields are used in the ordering process and can be used as default values for user input fields in the *New Document* section.
8. Click *Save*. You have now added a user, which is added directly to the departments' *User overview*. More users can be added by clicking on *Add* again.

Note: When users have been assigned to departments, a department contact person should be selected: click on *Departments* in the side menu, select a department from the overview and click *Edit*. This will open the *Edit department info* page, where the correct contact person can be selected from a pull-down-menu. Click *Save* to store the changes.

2.15 User roles

Each user account has certain privileges assigned to it; therefore assigning a role to users determines not only their level of authority but also the start-up screen they will be able to view when they log in.

- **Customer:** These users can:
 - retrieve a new password
 - create and order print jobs
 - edit job content
 - request a quote
 - adjust the job status (on hold and shipping)
 - request an overview of print jobs
 - re-order print jobs
 - search for specific print jobs
- **Customer Plus:** Has the same privileges as the *Customer* and can also:
 - approve their own print jobs
- **Power User:** Users with this role have the same privileges as the *Customer Plus* role with the following addition:
 - approve print jobs for users in the same department (or company if there are no departments)
- **Department Manager:** *Department Managers* have control over one or several departments, have the same privileges as power users and can also:
 - add, assign and delete users within their department(s)
 - modify details within their department(s)
- **Company Manager:** Have control over one company and its departments, have the same privileges as department managers and can also:
 - add, assign and delete customers, customers plus, power users, department managers and company managers within the company and within departments
 - add departments
 - assign publication types to a department
 - modify the company, departments and users settings
- **Public Customer:** This role is given to new customers who created an account before proceeding with an order they placed while shopping in a public company (which allows any visitor to use the shopping cart, but requires a logged-in user to proceed with checkout). These users have the lowest functionality. They can:
 - Create and order print jobs
 - Approve their own print jobs

2.16 Modify user info

To modify the user information:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking on the company name.
3. Click *Departments* in the side menu.
4. Select a department from the overview by clicking on the department name.
5. Select *Users* in the side menu.
6. select a user from the overview by clicking the user name.
7. Click Edit. The following screen appears:

Users

Properties

General

User name:* CUSTOMER_PLUS_1

Person code:

Role: Customer plus

Language: English

Login: ☒ Enabled ☐ Disabled

Additional information

First:* JOHN

Last:* DOE

Gender: ☒ Male ☐ Female

Salutation: ☐ Formal ☒ Informal

Job title: ASSISTANT MKT

Title:

E-mail address:* DOEJ@MKTCTE.COM

Direct number:

Mobile number:

Private number:

Private e-mail:

Password

Set new password:

Confirm new password:

OL PRINT SHOP

- Summary
- Properties
- Addresses
- Users**
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Enter or edit the basic information about the user in this screen

8. Enter the required information:
 - **Person Code:** This value is a unique code which can be used to link to an administration or ordering system.
 - **Language:** The selected language defines the language used for the e-mail messages send by PrintShop Web. The language of the web site is defined by the language selected in the *Login* page.
 - **Login:** Set this option to *Enabled* to allow the user logon to the system.
 - **Additional Information:** The values of these fields are used in the ordering process and can be used as default values for user input fields in the *New Document* section.
9. Click *Save* to store the changes.

2.17 Assign users to a department

To assign a user account to a department:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking its name.
3. Select *Departments* in the side menu and select a department from the overview.
4. Select *Users* in the side menu. An overview is shown with the user accounts in that department:

Users

Users overview (1 items)		
<input type="checkbox"/>	Name	Role
<input checked="" type="checkbox"/>	Rick Garcia	Customer

RemoveAssignAdd

With the assign button users can be assigned to a department

5. Click *Assign*. The following screen appears:

The screenshot shows a 'Users' assignment window. The window has a title bar 'Users' and a close button. It contains two lists: 'Assigned' with 'JOHN DOE' and 'Unassigned' with 'JANE BROWN'. Between the lists are buttons '< Assign' and 'Unassign >'. At the bottom are 'Cancel' and 'Save' buttons. The background shows the 'Users overview' table with 'JOHN DOE' selected and a sidebar menu with 'MARKET RESEARCH' and 'Users' highlighted.

Users can be assigned to a department

6. Select a user from the *Unassigned* list and click *Assign* or double click a name to assign. The *Unassigned Users* are those users that are not part of the department. The users shown in the list depend on the role of the currently logged on user. A role defines which roles the user can assign when creating new accounts. The list shows those users of which the role can be assigned by the current user.
7. Click *Save* to store the changes. The assigned user(s) will be visible from the users overview of the department.