



# Modifications

*Version 4.0*  
*Build 04.09.29*

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## **FUNCTION MODIFICATIONS**

### **WEBDESK ORDER SUBMISSION NOTIFICATION**

On the order form a control has been added that will show the number of web orders in the "Submitted" status and the number of web orders in the "Pending Approval" status.

The submitted box shows two numbers: Number of submitted orders / Number of submitted orders since the previous check

Approximately every 5 minutes the count will be checked. If there are new submitted web orders since the previous check, the control outline and submitted text will turn red to alert the user that new web entries have entered the submitted state.

This feature is activated in the Owner Configuration Section. Check the box for WEBdesk installed.

### **ACCOUNT NUMBER MENU ACCESS IN ORDER/QUOTE SCREEN**

The Account Number setup can be accessed by double clicking the label or account number.

### **GO TO ORDER FUNCTION ADDED IN STORE ORDER**

The Go to Order feature has been added to the Store Order menu to enable quick access to orders.

### **FIXED "0" POPULATED IN ADD-ON CODES FROM WEBDESK ORDERS**

The "0" that was populated in the Add-On transaction when orders were submitted from the WEBdesk program has been fixed.

### **IMPROVED COPY/ORDER FEATURE**

The feature to Copy/Order has been modified to include all selected Paper, Bindery and Add-On transactions.

### **ABLE TO HAVE DROP LIST FOR ACCOUNT NUMBERS ON SALES BY SPECIFIC ACCOUNT NUMBER**


When you run the Sales by Specific Account Number report you can select from the drop down of available account numbers or all for a complete list.

### **IMPROVED PAPER STOCK DETAIL ON QUOTE/ORDER FORM**


The system will recalculate the number sheets of paper stock required if the quantity of Copies/Sets is modified. This eliminates the need to manually modify these quantities every time you make changes to the order.

## NEW FEATURES

### ABLE TO TRACK LABOR ACTIVITY ON AN ORDER

This feature will enable you to track the amount of time spent on each task. You will track the person, amount of time and associated cost. This feature is set up in the Administration Menu. An  icon is on the Quote/Order form for quick print reports.

### ABLE TO TRACK STATUS CHANGE ACTIVITY ON AN ORDER

This feature will keep track every time the Status changes on an order. The system will track the status change by User, date and time. An  icon is on the Quote/Order form for quick reports.

Sample Report:

#### Order Status History

Order Number 1486

<i>Date</i>	<i>Status</i>	<i>User</i>	<i>Interface</i>
9/21/2004 8:31:47 AM	In Production	user	PSP Manager
9/21/2004 8:43:40 AM	In Bindery	user	PSP Manager
9/21/2004 8:43:59 AM	Bindery Complete	user	PSP Manager
9/21/2004 9:05:29 AM	Complete	user	PSP Manager
9/29/2004 8:32:43 AM	In Bindery	user	PSP Manager
9/29/2004 8:32:55 AM	In Camera	user	PSP Manager

## REPORTS

### CREATED ADD-ON TRANSACTION REPORT

A new report has been created that will report all ADD-On transaction for a selected period.

#### Sample Report:

edu Business Solutions		ADD-ON Transaction Summary Report	
Chula Vista Elementary School District - Publications			
Report Period: 1/1/2004 to 12/31/2004			
Transaction	Quantity	Revenue	
4 Newsletter Test	1	\$3.00	
Business Card Offset	3	\$3.00	
Business Cards (per 100)	175	\$1,225.00	
Graphic Design (per hour)	12	\$300.00	
Labor	28	\$182.00	
Labor (per 15min)	123.25	\$770.31	
Manual Collating (per sheet)	4010	\$401.00	
Manual Stapling (per set)	2005	\$200.50	
Mounting Certificates	80	\$2,000.00	
Shrink Wrap	4	\$1.00	
<b>TOTALS</b>	<b>6,441.25</b>	<b>\$5,005.81</b>	

### CREATED ACTUAL VS BUDGET SPENDING FOR ACCOUNT NUMBERS

This report will display all the transaction for an Account Number and a Summary for order charges by month for the established fiscal year. In addition, the report will display the current charges against the amount allocated for the account number. The amount allocated for the account number is modified in the Account Number set up menu.

#### Sample Report:

Chula Vista Elementary School District - Publications		Monthly Statement September 2004			
Account Number: G00006210720517					
Order # Req #	Job Name	Site/Dept. Name	Contact Name	Quantity	Total Price
1525	n/a	EDU WEB TEST_042809_14	Arroyo Vista	Diagnotics User	1000 \$322.95
<b>Total for Account :</b>					<b>\$322.95</b>

Fiscal Year Starting : 7/1/2003

Fiscal Year Expense vs Budget - By Account	
Account Number : G00006210720517	
July, 2003	\$0.00
August, 2003	\$0.00
September, 2003	\$0.00
October, 2003	\$0.00
November, 2003	\$0.00
December, 2003	\$0.00
January, 2004	\$178.33
February, 2004	\$202.25
March, 2004	\$0.00
April, 2004	\$0.00
May, 2004	\$0.00
June, 2004	\$0.00
July, 2004	\$0.00
Account Total to Date:	\$380.58
Account Annual Budget:	\$10,000.00
Budget Remaining:	\$9,619.42

**MODIFIED FORMAL QUOTE**

The Formal Quote report has been modified to include the print shop address. The paper quantities have been eliminated. This has confused the customer since it does not equal the number of Copies/Sets requested. However the type of paper has remained.



Chula Vista Elementary School District - Publications  
 84 East J Street  
 Chula Vista, CA, 919106115  
 Ph: (619) 425-9800 Fax: (619) 427-3549 September 28, 2004

**Print Estimate**

To: Diagnostics User  
 Arroyo Vista  
 2491 School House Road  
 Chula Vista, CA 91915

Job Name: EDU WEB TEST\_042809\_14 Estimate No: 1525  
 Billing: 600006210720517 Requisition No: n/a  
 Order Type: 11 x 17 Quantity: 1000 Sheets Per Set: 7

Bindery: None  
 Finish:  
 Additional Items: . . . . .

Paper Selected		
Paper	Color Ink Used	2-Sided
20# Bond, WHITE	1 Regular Color,	<input type="checkbox"/>
65# Card, LUNAR BLUE	2 Regular Color,	<input type="checkbox"/>
67# Card, GREEN	1 Regular Color,	<input type="checkbox"/>

Special Instructions Telephone: 616-615-9292

**Estimate Price: \$322.95**

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**CREATED A CLICK CHARGE SUMMARY REPORT**

This report will display the revenue generated per resource for the year. It will provide totals by month and year.

**Sample Report:**

**Resource Click Summary**

2004

(Calculated Click Charges)

Resource	No of Jobs	Year to Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
Ryobi 8.5 x11	28	\$3,664.80						\$3,665						
Ryobi Envelopes	4	\$175.07						\$175						
Xerox 6100	7	\$801.55						\$100	\$180		\$522			
<b>TOTALS</b>	<b>39</b>	<b>\$4,641.42</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>	<b>\$3,940</b>	<b>\$180</b>	<b>\$0</b>	<b>\$522</b>	<b>\$0</b>	<b>\$0</b>	<b>\$0</b>

### CREATED INVENTORY ALLOCATION REPORT

This report will display all the paper stock requested for a period against the paper stock available in inventory. **Sample Report:**



**Chula Vista Elementary School District - Publications**  
 84 East J Street  
 Chula Vista, CA, 919106115  
 Ph: (619) 425-9600 Fax: (619) 427-3549

#### Inventory Allocation Report

Stock Item	Sheets Allocated	Units in Stock	Units on Order	Pending Orders Sheets Needed	Current Inventory Available
WHT- 210102	145,076	985,000	0	2,192,062	839,924
YLW- 222351	450	<-674,313>	0	450	<-674,763>
PINK- 222352		<-120,650>	0		
GREEN- 222353		995,000	0	7,000	
BLUE- 222354		<-338,157>	0	1,090,332	
SOL YLW- 210220		1,000,000	0	2,948	
LUNAR BLU- 210222		3,500	0		
TER GRN- 210223	0	<-13,350>	0	0	<-13,350>
ORBIT OR- 210224		2,200	0	200	
GAM GRN- 210225		<-24,998,400>	0	15,000	
PULSR PNK- 210226		4,200	0		
LIFTOFF LEM- 210227		3,965	0		
ROKT RED- 210228	3,200	<-4,370>	0	3,200	<-7,570>
NEPT BLUE - 210229		2,500	0	200	
CELEST BLUE- 210230		3,712	0		
PLANET PUR- 210232		4,680	0	59,237	
ORAN COSM- 210233		978	0		
WHT 14" - 222349		<-105,792>	0		
WHT 17" - 222360	81	4,471	0	432	4,390
YLW C- 222370		<-3,750>	0		
GREEN C- 222372		<-185>	0		

### CREATED WORK DETAIL REPORT

This report will display all the activity on an order. The report will show the person, time on task and cost.

**Sample Report:**

#### Order Work Detail

Start Time	End Time	User	Order Status	Type	Billable	# Mins	Cost
<b>Order # 1486</b>							
9/21/2004 8:41:54 AM	9/21/2004 8:43:47 AM	user	Quote Only	Bindery	<input checked="" type="checkbox"/>	1.9	\$0.78
9/29/2004 8:33:15 AM	9/29/2004 8:33:25 AM	user	In Camera	Press	<input checked="" type="checkbox"/>	0.2	\$0.03
9/29/2004 8:33:31 AM	9/29/2004 8:33:40 AM	user	In Camera	Shipping	<input checked="" type="checkbox"/>	0.2	\$0.01
Order # 1486 totals :						2.2	\$0.83
<b>Order # 1488</b>							
9/22/2004 9:53:01 AM	9/22/2004 9:53:13 AM	user	Quote Only	Press	<input checked="" type="checkbox"/>	0.2	\$0.03
staagt							
Order # 1488 totals :						0.2	\$0.03
<b>Order # 1496</b>							
9/22/2004 1:23:14 PM	9/22/2004 1:27:41 PM	user	In Production	Bindery	<input checked="" type="checkbox"/>	4.5	\$1.85
Order # 1496 totals :						4.5	\$1.85
Over all totals :						6.9	\$2.71

**ORDER STATUS REPORT IMPROVED**

When you select the Order Status Report, the system will prompt you to select a specific status or "All" for a complete list.

**IMPRESSION REPORTS**

There are 3 new reports for Impression Counts. These reports are located under the Specialty Reports Section. They are Impression Report by Account, Impression Report by Customer, and Impression Report by Customer-Detailed. These reports provide the number of Impressions and Jobs by Customers and Accounts for a data range.

***Impression Report by Customer***

**Onieda Boces - Printing Services**  
 502 Court Street  
 Utica, NY, 13502

Ph: (315) 793-8509

Fax:

**Impression Report**

Report Period: 9/1/2004 to 9/30/2004

by Customer

<i>Customer</i>	<i>Total Jobs</i>	<i>Total Impressions</i>	<i>Total Cost</i>
	8.00		\$0.00
Administration (Mettleman)	14.00	38,250.00	\$2,046.82
Albany Street Utica	13.00	30,330.00	\$1,238.43
Alternative Education	7.00	7,550.00	\$1,285.15
Brookfield District Office	21.00	24,664.00	\$1,263.79
Career & Tech. Center	14.00	10,332.00	\$1,144.62
Chatham Middle School	4.00	3,000.00	\$749.38
Clinton District Office	20.00	22,404.00	\$1,268.59

***Impression Report by Customer-Account Detail***

**Onieda Boces - Printing Services**  
 502 Court Street  
 Utica, NY, 13502

Ph: (315) 793-8509

Fax:

**Impression Report**

Report Period: 9/1/2004 to 9/30/2004

by Customer -Detailed

**Holland Patent Elementary**

<i>Account</i>	<i>Jobs</i>	<i>Impressions</i>	<i>Cost</i>
1003	5.00	3,600.00	\$558.27
1010	1.00	50.00	\$53.42
<b>Total for Holland Patent Elementary</b>	<b>6.00</b>	<b>3,650.00</b>	<b>\$611.69</b>