Envelope Design Forms

Overview

Introduction

In this tutorial, you will learn how to enter an envelope design forms.

Many envelopes can be entered without ever accessing a design form, however, when a customer requires imprinting even something as simple as a return address, you will be required to visit the design form screen and enter the appropriate information for the order.

Envelope Design Form

This is an example of the Envelope design form:

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Envelope Design Form, cont.

Envelope Design Form

To enter a new Envelope design form, follow the steps below.

Step	Action
1	Navigate to **Contacts** from the **File** menu in CMS by clicking on the Sub-menu title **Contacts**.
2	Using the mouse, **Click** on the method by which you will be searching for a contact to place an order. NOTE: You can search by <u>Phone Number</u>, <u>Short Name</u>, <u>Long Name</u>, or <u>Customer Number.</u>
3	Type the information you're looking for [Example: Phone number –area code not required]. Press **Enter**
4	Once the customer is highlighted in the customer list, press **Enter**.
5	**Enter** the product number in the first field of the first line. *Note*: If you do not know the product number, enter the first few letters of the product code and press **Enter** to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press **Enter**. NOTE: If this is a repeat order, press **F3** to select from the Detailed Order History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press **Enter**.
6	In the next field enter an **N** for new [only available on the customer's first order], **R** for repeat, or an **A** for an add-on sale.
7	In the **Quantity** field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

Envelope Design Form, cont.

Step	Action
8	TAB past the **STK/Start #** [these fields are not required on these orders].
9	**OVR**, use this field to over ride the set price or to use special or value pricing. OVR Codes M – Sell Price Override N – Flex Pricing U – Universal X – 20% Off Next Imprint Order Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting Flex Pricing, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]
10	The **%** <Percentage> field is used to give an additional discount for the item. NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.
11	The **Price** field will fill automatically (unless **M** is in the OVR field in that case the price must be manually entered).
12	Add a recall date, CSR code, and any comments in the last three fields. NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.
13	For orders that require a design form the **D** at the end of the product line field will change to a **T** when the design form is created.
14	Press **F9** to access the Design Form screens.
15	Select **New** in the **Order Type** field.
16	In the **Product Type** field, using the mouse, **Click** to select **Envelope**. Once your product type is highlighted click the **Select** button.

Envelope Design Form, cont.

Step	Action
17	Use the **Tab** key to navigate through the fields within the design form and **Enter** the data required for that particular product type. NOTE: Check the bottom of the design form screen for additional screen prompts or buttons that need to be completed. Example of additional screen prompts: F3=Imprint Information F8=Special Instructions F10=Save ESC=Exit
18	***Main Screen:*** Enter the information required in the fields below: ➢ ***Rush*** – use the spacebar to place a ✓ in this field if the design form is for a rush order. ➢ ***Proof*** – enter the letter corresponding to the type of proof requested. [e.g. "F" = Fax proof]. NOTE: If the order requires an electronic proof, select fax and add a note in special instructions to let the plant know you require an electronic proof. Use the corresponding ENPROOFE code on the order screen. ➢ ***Ink*** – enter the corresponding 3-digit color code [BLK = black] in this field. NOTE: If this is a two-color job, enter one color here and key a note in special instructions for the additional color. ➢ ***Logo from SG Cutbook*** – place the corresponding logo number here ➢ ***Logo***: ***Previous Plate #*** - enter the plate # for a previous job you are referencing for logo information ➢ ***Order Type*** – use the spacebar to scroll through the options o ***Laser*** – the reference order type for the logo was a laser check o ***One-Write*** - the reference order type for the logo was a One-Write check o ***Form*** - the reference order type for the logo was a form ➢ ***Base Neg*** – enter the appropriate base neg # if ordering a catalog size envelope from the Base Neg Guide. ➢ ***Format Style*** – No longer a valid field. Disregard. ➢ ***Typestyle*** - No longer a valid field. Disregard.

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Envelope Design Form, cont.

Step	Action
19	***Imprint Information Screen:*** Enter the imprint information required and the point size if the default is not the required size. IMPRINT INFORMATION · F10=SAVE ESC=CANCEL · SIZE · · · 1. · · · 2. · · · 3. · · · 4.
20	Press **F10** to save the Imprint Information.
21	***Special Instructions screen:*** This is an example of the Special Instructions Laser check screen: SPECIAL INSTRUCTIONS · · · · · · · · · · · · · · F10=SAVE ESC=CANCEL Use this screen to enter any additional information the composition department might need to complete your Envelope design.
22	Press **F10** to save the Special Instructions screen.
23	Press **F10** to save the design form.
24	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
25	Press **F10** to save the order and transmit.