







Operation/Task:	PrintStream ERP			Equipment:	NA
Owner:	Vice President of Technology	Date Prepared:	5/11/15	Department Responsibilities:	All IT Staff
		Revision History:	See last page		

ALERTS (see below): Critical Step  Quality Check  Tip  Team Safety 

**Purpose: This SOP/work instruction documents procedures for PrintStream ERP.**

Step #	Alerts	Step Description - "What to Do"	"How to Do it"	"Why to Do it"
1		<b>Objective:</b> PrintStream is the Enterprise Resource Planning system used as the backbone of our production and accounting systems. The PrintStream ERP System will act as the primary repository for transactional data. The primary goal of the system is to store and manage multiple related data streams into a single cohesive front end.		
2		<b>Standard Operating Procedure:</b> PrintStream is managed on a daily basis to coordinate and prioritize all ERP vendor related product issues, internal issues, training and awareness, support and to preview/provide future releases or upgrades.		
3		<b>Create a new PrintStream User.</b>	R:\IT_Documentation_Library\PrintStream	
4		<b>Add a new Sales Rep to the system.</b>	R:\IT_Documentation_Library\PrintStream	
5		<b>XML Job Creator Setup.</b>	R:\IT_Documentation_Library\PrintStream	
6		<b>Quote Letter – Add a new name.</b>	R:\IT_Documentation_Library\PrintStream	
7		<b>Change an Employee's Name.</b>	R:\IT_Documentation_Library\PrintStream	
8		<b>Employee Termination Cleanup Process</b>	R:\IT_Documentation_Library\PrintStream	

9		<b>Send a copy of our database to EFI.</b>	R:\IT_Documentation_Library\PrintStream	
10		<b>Printstream Patching Process.</b>	R:\IT_Documentation_Library\PrintStream	
11		<b>Add or remove programs from Executor.</b>	R:\IT_Documentation_Library\PrintStream	
12		<b>Shopfloor – Allow employees to gang charge for labor.</b>	R:\IT_Documentation_Library\PrintStream	
13		<b>Shopfloor – Add or remove employees from shopfloor lists.</b>	R:\IT_Documentation_Library\PrintStream	
14		<b>Adding/modifying Printstream Scripts.</b>	R:\IT_Documentation_Library\PrintStream	
15		<b>FFMDI – Auto Issue enable/disable.</b>	R:\IT_Documentation_Library\PrintStream	
16		<b>How to fix a PO line item cost.</b>	R:\IT_Documentation_Library\PrintStream	
17		<b>How to fix order qty received.</b>	R:\IT_Documentation_Library\PrintStream	
18		<b>How to unlock a GL Batch.</b>	R:\IT_Documentation_Library\PrintStream	
19		<b>How to change an order status to invoiced.</b>	R:\IT_Documentation_Library\PrintStream	
20		<b>How to update Sales Tax Codes.</b>	R:\IT_Documentation_Library\PrintStream	
21		<b>How and when to run shipping utility.</b>	R:\IT_Documentation_Library\PrintStream	
22		<b>How to remove a commitment in FFMDI.</b>	R:\IT_Documentation_Library\PrintStream	
23		<b>How to remove a paper reservation</b>	R:\IT_Documentation_Library\PrintStream	
24		<b>How to mark a released kit item as shipped.</b>	R:\IT_Documentation_Library\PrintStream	

25		<b>How to zero out 'Qty on hand" for an item in MF Inventory.</b>	R:\IT_Documentation_Library\PrintStream	
26		<b>How to edit an inventory receipt description.</b>	R:\IT_Documentation_Library\PrintStream	
27		<b>How to setup a new project in FFMDI</b>	R:\IT_Documentation_Library\PrintStream	
28		<b>How to change a pick status in FFMDI</b>	R:\IT_Documentation_Library\PrintStream	
29		<b>How to set a line item status to shipped.</b>	R:\IT_Documentation_Library\PrintStream	
30		<b>How to re-open a closed sales order.</b>	R:\IT_Documentation_Library\PrintStream	
31		<b>How to change a sales order type.</b>	R:\IT_Documentation_Library\PrintStream	
32		<b>How to change the header image for webhouse.</b>	R:\IT_Documentation_Library\PrintStream	

**Notes:**

**Definitions:**

<b>Revision History</b>	<b>Description of Changes</b>	<b>Requested by</b>	<b>Date</b>
Rev 1	Revised SOP to new format	Mike Starrett	5/11/15
Rev 2	Added Revision History table	Mike Starrett	8/1/16
Rev 3	Removed Table of Contents Replaced Owner Mike Starrett with IT Systems Manager Replaced references to retired Wiki with pointers to IT Documentation Library Removed references to GLS companies Revised header, font type, font size to be consistent with other SOPs	Mike Starrett	12/30/20
Rev 4	Changed owner to Director of Business and Custom Applications	Mike Starrett	4/28/23

Rev 5	Updated owner to Vice President of Technology	Mike Starrett	11/4/24
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