



User Guide

CSR Matrix  
V21.1.0200

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EFI PrintStream | V21.1.0200 CSR Matrix User Guide

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# Introduction

## Overview

CSR Matrix was designed to aid in the creation of a Schedule Report for job processes by CSR's or Sales Reps, enabling them to follow jobs and know when critical events are scheduled (i.e., used for milestones like sign offs); so CSR's and salespeople can print this report instead of looking through an entire schedule. These reports are also beneficial for department managers, etc.

Examples of benefits:

- 1. Create a "samples due" listing.
- 2. View when sign offs are scheduled.
- 3. View when press checks are scheduled.

You can select what you want the report to include and how you want to filter it (i.e., all sales reps, CSR's, or combination) to enable team reporting.

## Contact Information

### EFI Support

<b>US Phone:</b>	855.334.4457 (first select option 3, then press option 8, then press option 1)
<b>US Fax:</b>	415.233.4157_
<b>US E-mail:</b>	<a href="mailto:printstream.support@efi.com">printstream.support@efi.com</a>
Regular Service Desk hours are 8:00 AM to 7:00 PM Central Time, Monday – Friday. Outside of these hours, you may leave a voice mail message and an on-call support representative will be paged. Response time is based on the severity of the issue.	
<b>Note</b>	For problems involving infrastructure (i.e., computers, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot support these types of issues.

### EFI Professional Services

<b>US Phone:</b>	651.365.5321
<b>US Fax:</b>	651.365.5334
<b>E-Mail:</b>	<a href="mailto:ProfessionalServicesOperations@efi.com">ProfessionalServicesOperations@efi.com</a>

EFI Professional Services can help you perform EFI software installations, upgrades, and updates. This group can also help you implement, customize, and optimize your EFI software plus offer a range of training options.



## Create a Report



1. Open the CSR Matrix.
2. Select **Add Report**.

**Add Report**

New Report Name:

☐ Copy From an Existing Report

new  
SignOffs Due  
Samples  
Linda

Create

Cancel

3. Enter a New Report Name (i.e., Press Checks).
4. Select **Create**.

The report displays in the left column.

**CSR Matrix**

File About

Reports	User Defined Columns			
	Column Caption	Process	CDD	Field to Display
Proofs				
turn paper				
Press Checks				

Add Report... Delete Report... Save Columns

☒ Estimator  
☐ CSR  
☐ Sales Rep.  
☐ Planner

Betty White  
 Cherry Terrell  
 Chris Botsch  
 DMM Everything  
 Donnie Jordan  
 jim  
 Leah  
 Monika Rynkiewicz  
 Norma Nelsen

Select All

Date Range

From: 12/8/2011

To: + 2 (Days)

Or To: (Date)

Page Size

☒ Letter 8 1/2 x 11 in  
☐ Legal 8 1/2 x 14 in

Close

Print

5. Highlight the Report to define the columns.

When the Report is highlighted on the right, the User Defined Columns grid will display columns that have been defined within the grid. In the example above, NO columns have been defined; in the example below the columns have been defined:

CSR Matrix

FileAbout

Reports

Proofs  
turn paper  
Press Checks

User Defined Columns

	Column Caption	Process	CDD	Field to Display
1	Press Check Due		Press Check	SCHEDULED_DATE
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

Add Report...Delete Report...Save Columns

Estimator

CSR

Sales Rep.

Planner

Betty White  
Cherry Terrell  
Chris Botsch  
DMM Everything  
Donnie Jordan  
jim  
Leah  
Monika Rynkiewicz  
Norma Nelsen

Select All

Date Range

From: 12/8/2011  
To: + 2 (Days)  
Or To: (Date)

Page Size  

Letter 8 1/2 x 11 in

Legal 8 1/2 x 14 in

Close

Print

6. Using the first example: **Press Checks**, highlight the Report and start to define the columns on the right:

CSR Matrix

FileAbout

Reports

new  
SignOffs Due  
Samples  
Linda  
Press Checks

User Defined Columns

	Column Caption	Process	CDD	Field to Display
1	Press check due			
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

- **Column Caption:** Free form field on the report. The column header for the fields defined.
- **Process:** Drop down box. These are YOUR activities as defined in your system. (Master Files)
- **CDD:** Drop down box. These are the special events specific to YOUR company as seen in **Estimating > Order Entry > Scheduling > Spec. Events**.

**Mail Estimating (Print & Mail)**

Quote Header  
 Estimating  
 Review Pricing  
 Order Entry  
 Scripts  
 General  
 Inventory Details  
 Shipping  
 Work Order  
 Work Ticket  
 Inventory Matrix  
 Prepared for Address  
 Change Orders  
 Scheduling

Add Spec. Events    Ripple Dates    Close out Job    Cancel    Job Notes  
 Delete Events    Clone Materials    Print    Save    Job Header

Display Types  
☒ Q (Processes)    ☒ W (Receipts)  
☒ X (Spec. Event)    ☒ I (Issues)    ☒ No Status    ☒ Wait Order  
☒ P (Printing)    ☒ T (Transfers)    ☒ Open    ☒ Wait Approval  
☒ B (Retu)    ☒ H (Hold)    ☒ Approved

Process	Cost Center	F
Receive<-envelope	0	8E
Receive<-letter	0	8E
letter Overs->???	0	8E
envelope Overs->???	0	8E
Issue letter->INSERT	INSERT	8E
Issue envelope->INSERT	INSERT	8E
MERGE/PURGE	PROGRAM	Pr
ADDRESS STANDARD	PROGRAM	Pr
INSERT, METER, SORT	INSERT	M.

**Special Events**

☐ Laser Signoff  
☐ Linda  
☒ Press Check  
☐ Samples Approved  
☐ Waiting for Postage Check  
☐ Waiting for Samples

Enter Special Event :  
 Event :

Cancel    Ok

**Note** To Create Special Events, please see the end of this document for instructions.

- **Field to display:** Drop down field. Corresponds to table data.

**Note** For each line, either choose a **Process** OR a **CDD** – both CANNOT be chosen.

A report may be complex or as simple as the example below.

CSR Matrix

File   About

Reports

Proofs  
turn paper  
Press Checks

User Defined Columns

	Column Caption	Process	CDD	Field to Display
1	Press Check Due		Press Check	SCHEDULED_DATE
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

Add Report...

Delete Report...

Save Columns

☒ Estimator

☐ CSB

☐ Sales Rep.

☐ Planner

Belty White

Cherry Terrell

Chris Botsch

DMM Everything

Donnie Jordan

jim

Leah

Monika Rynkiewicz

Norma Nelsen

Select All

Date Range

From: 12/8/2011

To + 2 (Days)

Or To: (Date)

Page Size

☒ Letter 8 1/2 x 11 in

☐ Legal 8 1/2 x 14 in

Close

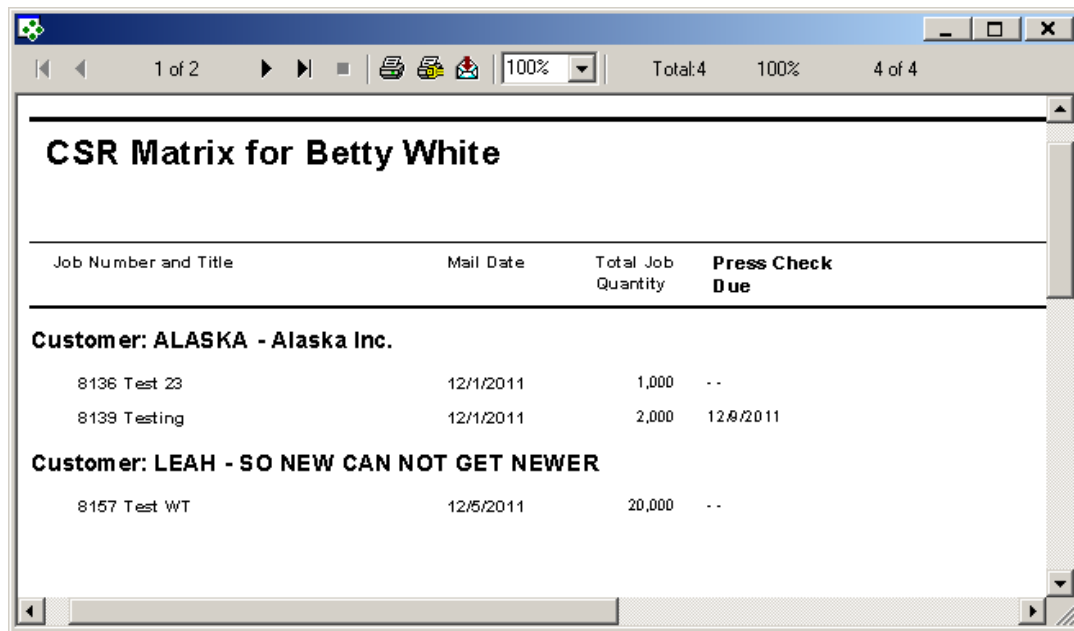
Print

7. Remember to **Save Columns** after you have made the initial entries or when changes are made to save.
8. To print the report, select the report, filter by **Employee Type**, **Date Range** and **Page Size** and Print to run. To choose more than one person but not all, hold the Ctrl key and select the names.

**Note** In the date range, the date it is looking at for the jobs is the FIRST Mail DATE.



The report as defined above will display as follows:



**CSR Matrix for Betty White**

Job Number and Title	Mail Date	Total Job Quantity	Press Check Due
<b>Customer: ALASKA - Alaska Inc.</b>			
8136 Test 23	12/1/2011	1,000	--
8139 Testing	12/1/2011	2,000	12/8/2011
<b>Customer: LEAH - SO NEW CAN NOT GET NEWER</b>			
8157 Test WT	12/5/2011	20,000	--

**Note** Numerous reports can be created and existing reports can also be edited.

**Additional Notes** Job Number and description of the job are by default included on the report; no need to add a separate line for this.

Each CSR, Sales Rep, or Estimator will print out on a separate page.

Recommended to preview the report until satisfied all columns, etc., is defined as needed.

## Run Existing Report



1. Open the **CSR Matrix**.

The program opens to a list of reports already created and are displayed in the left column of the grid.

2. Select the Report and filter by **Employee Type**, **Date Range** and **Page Size**.
3. Click **Print** to run the Report.

The screenshot shows the CSR Matrix application window. The title bar is 'CSR Matrix' with a menu bar containing 'File' and 'About'. The main area is divided into two panes. The left pane, titled 'Reports', contains a list of reports: 'Proofs', 'turn paper', and 'Press Checks'. The 'Press Checks' report is selected. The right pane, titled 'User Defined Columns', contains a table with columns: 'Column Caption', 'Process', 'CDD', and 'Field to Display'. The table has 14 rows. The first row is populated with 'Press Check Due', a dropdown arrow, 'Press Check', and 'SCHEDULED\_DATE'. Below the table are three buttons: 'Add Report...', 'Delete Report...', and 'Save Columns'. At the bottom of the window, there are two sections. The left section has radio buttons for 'Estimator', 'CSR', 'Sales Rep.', and 'Planner' (which is selected). Next to these is a text box containing the names 'Cherry Terrell', 'Jack Summer', and 'suellen'. Below this is a 'Select All' button. The right section is titled 'Date Range' and contains 'From' and 'To' date pickers. The 'From' date is '12/8/2011'. Between the date pickers is a 'To + 2 (Days)' option. Below the date pickers is an 'Or To: (Date)' option. To the right of the date range section is a 'Page Size' section with two radio buttons: 'Letter 8 1/2 x 11 in' (selected) and 'Legal 8 1/2 x 14 in'. At the bottom left is a 'Close' button, and at the bottom right is a 'Print' button.

	Column Caption	Process	CDD	Field to Display
1	Press Check Due		Press Check	SCHEDULED_DATE
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

## Edit/Change a Report

The ability to add a line or change the order of the current columns in a report is now available. Follow the steps as you would to create a report:

1. Launch CSR Matrix module.
2. Select the report by clicking the report name found under the column Reports.

All current columns for the report display.

CSR Matrix				
File About				
Reports	User Defined Columns			
new				
SignOffs Due				
Samples				
Linda				
Press Checks				
	Column Caption	Process	CDD	Field to Display
1	Date of Sign Off		Laser Signoff	SCHEDULED_DATE
2	Job Number		Laser Signoff	JOB_NUMBER
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				

### To insert a row / move rows up or down / delete a row

1. Right click the row where you want to make the change to view the selection options – this will highlight the row.
2. Select the appropriate option.
3. Make changes.
4. Click **Save**.

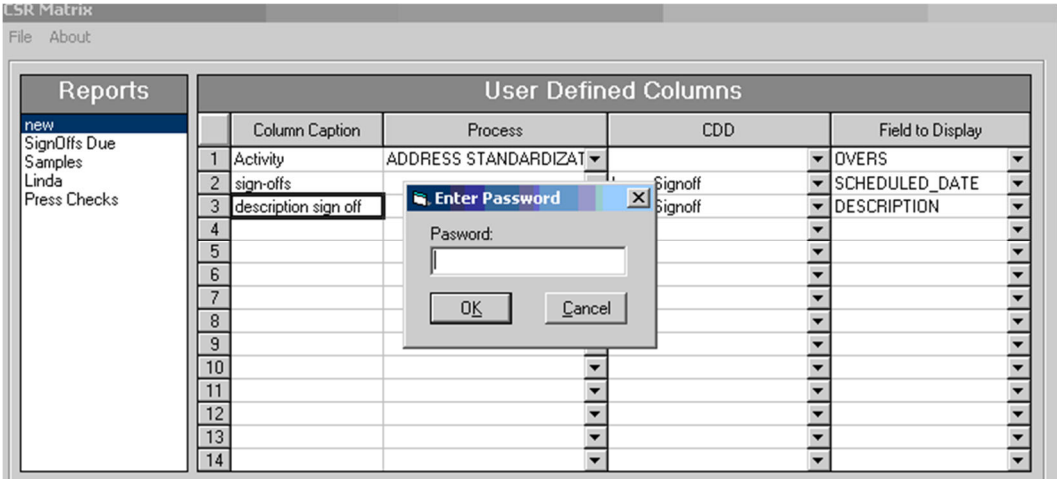
CSR Matrix				
File About				
Reports	User Defined Columns			
new				
SignOffs Due				
Samples				
Linda				
Press Checks				
	Column Caption	Process	CDD	Field to Display
1	Date of Sign Off		Laser Signoff	SCHEDULED_DATE
2	Job Number		Laser Signoff	JOB_NUMBER
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				



# Delete a Report

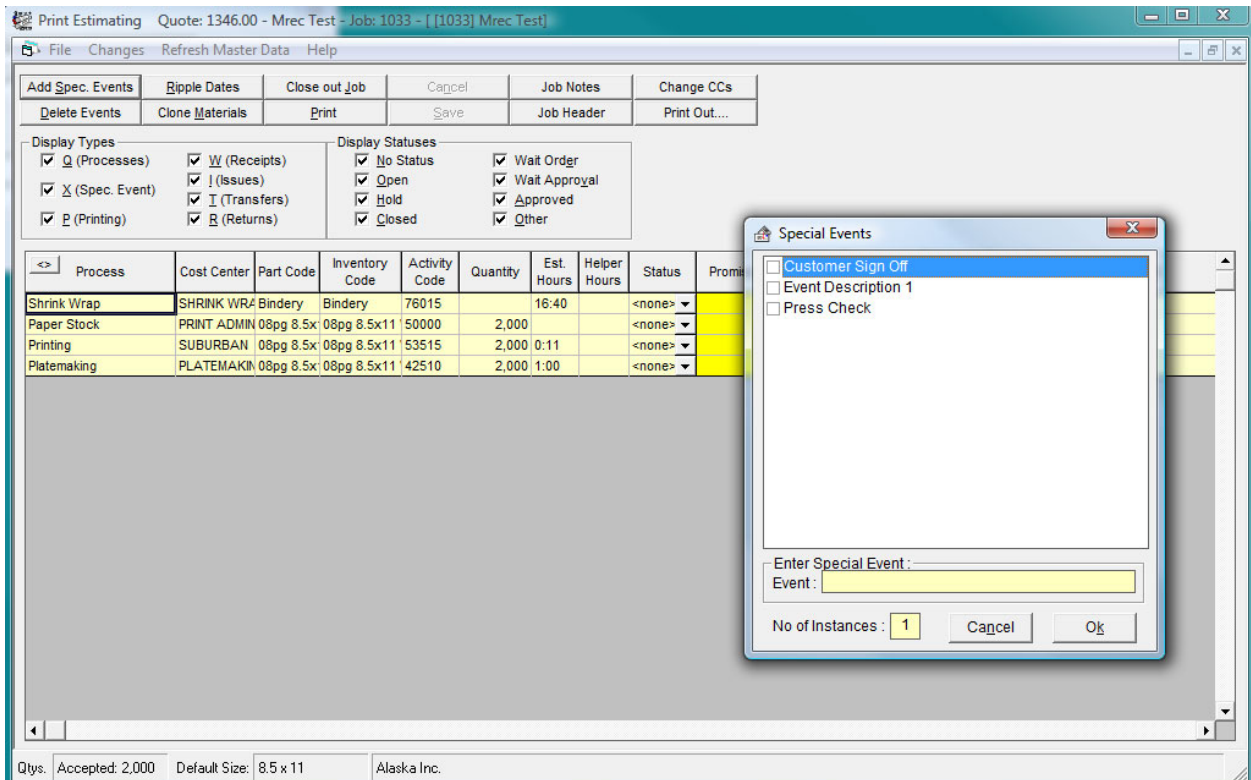
*To delete a report*

- 1. Launch **CSR Matrix** module.
- 2. Select the report by clicking the report name found under the column Reports.
- 3. Select **Delete Report**.
- 4. Enter the password when prompted (Intentionally omitted from documentation). Please see your production support representative for the password.

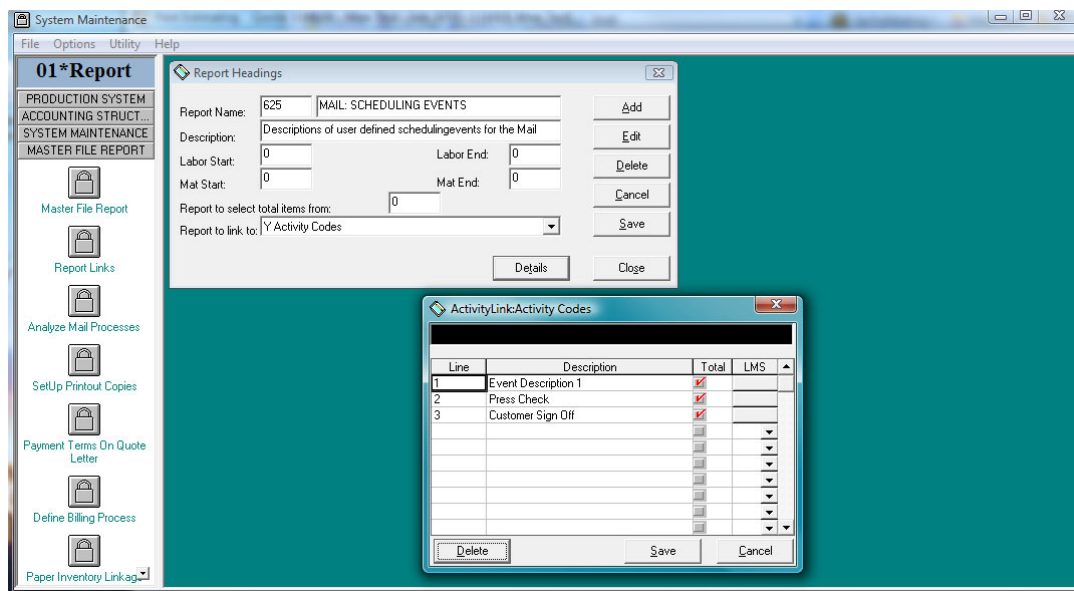


## Create Special Events

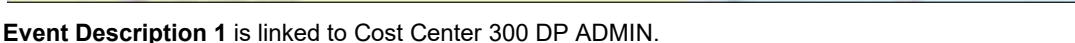
Special Events can be set up in Master Files Reports > Master File Report > Report #625.



1. Select **Details** and enter **Line** and **Description**. Select **Total** and **Save**.



- System Maintenance



Mail Estimating for the Company: (01) Streamline Solutions - (0100) 01 San Rafael LS - [ (1045) Test Job for Training Class ]

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