efi PrintStream

User Guide

Campaign Management
Add On
V21.1.0200

Patents

This product may be covered by one or more of the following U.S. Patents: 4,716,978, 4,828,056, 4,917,488, 4,941,038, 5,109,241, 5,170,182, 5,212,546, 5,260,878, 5,276,490, 5,278,599, 5,335,040, 5,343,311, 5,398,107, 5,424,754, 5,442,429, 5,459,560, 5,467,446, 5,506,946, 5,517,334, 5,537,516, 5,543,940, 5,553,200, 5,563,689, 5,565,960, 5,583,623, 5,596,416, 5,615,314, 5,619,624, 5,625,712, 5,640,228, 5,666,436, 5,745,657, 5,760,913, 5,799,232, 5,818,645, 5,835,788, 5,859,711, 5,867,179, 5,940,186, 5,959,867, 5,970,174, 5,982,937, 5,995,724, 6,002,795, 6,025,922, 6,035,103, 6,041,200, 6,065,041, 6,112,665, 6,116,707, 6,122,407, 6,134,018, 6,141,120, 6,166,821, 6,173,286, 6,185,335, 6,201,614, 6,215,562, 6,219,155, 6,219,659, 6,222,641, 6,224,048, 6,225,974, 6,226,419, 6,238,105, 6,239,895, 6,256,108, 6,269,190, 6,271,937, 6,278,901, 6,279,009, 6,289,122, 6,292,270, 6,299,063, 6,310,697, 6,321,133, 6,327,047, 6,327,050, 6,327,052, 6,330,071, 6,330,363, 6,331,899, 6,340,975, 6,341,017, 6,341,018, 6,341,307, 6,347,256, 6,348,978, 6,356,359, 6,366,918, 6,369,895, 6,381,036, 6,400,443, 6,429,949, 6,449,393, 6,476,927, 6,490,696, 6,501,565, 6,519,053, 6,539,323, 6,543,871, 6,546,364, 6,549,294, 6,549,300, 6,550,991, 6,552,815, 6,559,958, 6,572,293, 6,590,676, 6,606,165, 6,633,396, 6,636,326, 6,643,317, 6,647,149, 6,657,741, 6,662,199, 6,678,068, 6,707,563, 6,741,262, 6,748,471, 6,753,845, 6,757,436, 6,757,440, 6,778,700, 6,781,596, 6,816,276, 6,825,943, 6,832,865, 6,836,342, RE33,973, RE36,947, D341,131, D406,117, D416,550, D417,864, D419,185, D426,206, D439,851, D444,793.

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Table of Contents

Introduction

Overview

Campaign Management was created to allow users to create inventory and sales orders for Fulfillment Campaigns using recipient variable information (Attributes). This guide will teach you how to use Campaign Management.

Contact Information

EFI Support

US Phone:	855.334.4457 (first select option 3, then press option 8, then press option 1)
US Fax:	415.233.4157
US E-mail:	printstream.support@efi.com

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.

Note	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

US Phone:	855.334.4457 (First select option 3, then press option 8, then press option 1)
US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

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.

Getting Started

Campaign Management is made up of several tabbed pages. This guide will outline each tab.

Open up **Streamline Campaign** to see tabs across the top of the screen:
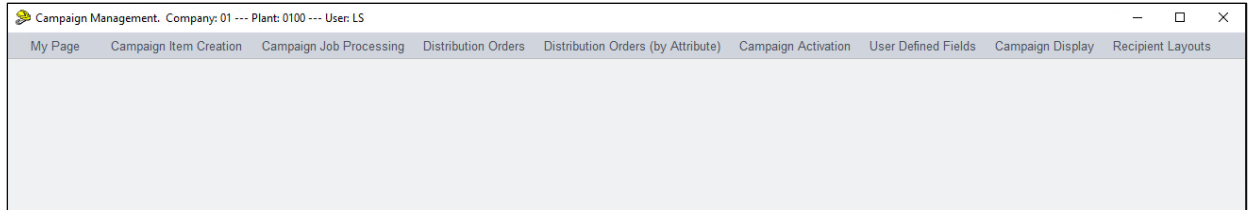
My Page

- Exit Application

- Define My Group Items – Ability to set what selections you want to see

- Minimize The Ribbon – Show more or less of the tabs

Campaign Item Creation

Select Campaign Item Creation from the header toolbar, then click on Campaign Item Creation in the ribbon.
Use this area to create inventory for a campaign.

- **Reload Campaign** – Ability to reload a campaign that has already been created

- **New Campaign** – Ability to create a new campaign

- **Add Items to Campaign** – Ability to add items to campaign

- **Create Inventory** – Once campaign and template for the campaign has been created and items from the spreadsheet are loaded you select this tab to create the inventory

- **Save Grid Changes** – You can make changes in the grid and then save them

- **Campaign Template** – Ability to look at the template created for the campaign

- **Delete Campaign** – Ability to delete a campaign

- **Spreadsheet Grid** – Preview and print spreadsheet grid

- **Campaign Items Grid** – Preview and print campaign items in the grid

Campaign Job Processing

Use this area to load campaign items and create Job Orders.

- **Load Campaign Items** – Load items from the campaign that was selected
- **Save Grid Changes** – Ability to save changes made to the grid
- **Create Job Orders** – Create job orders
- **Select All** – Select all items from the grid for the order
- **Clear All** – Clear all selected items from the grid

User Defined Fields

Use this area to define the fields in your spreadsheet.

Reload – Reload the template

- **Save Changes** – Save any changes
- **Delete Template** – Ability to delete a template

Create Distribution Orders

Ability to create distribution sales orders from campaign items.

- **Search** – Search for stores or recipients
- **Load Customer Campaign Items** – Load items for the selected campaign
- **Move Selected Items into Planned Orders** – Ability to add to an order
- **Reload Planned Orders Grid** – Ability to reload orders
- **Save Distribution Orders** – Save orders after changes
- **Create Sales Order** – Create sales orders from the specific criteria selected

Campaign Display

The ability to view and export the campaign to Excel.

- **Load Grid** – Load items from campaign to the grid
- **Export to Excel** – Export to Excel
- **Preview Grid** – Ability to preview and print the grid

Campaign Item Creation

Use this feature to create an inventory item for a campaign. First you must create a campaign and then create inventory for that campaign.

To create a campaign.

1. Click **Campaign Item Creation**.
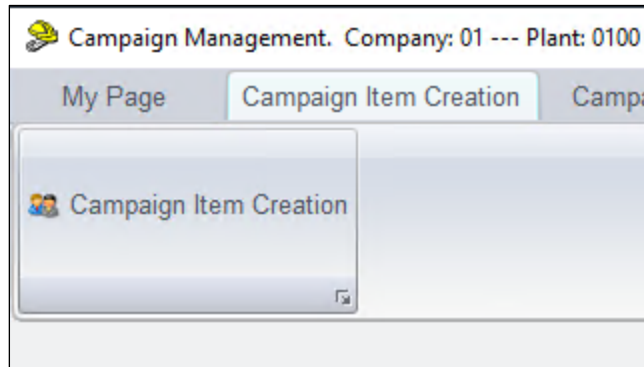
2. Select the **New Campaign** tab.
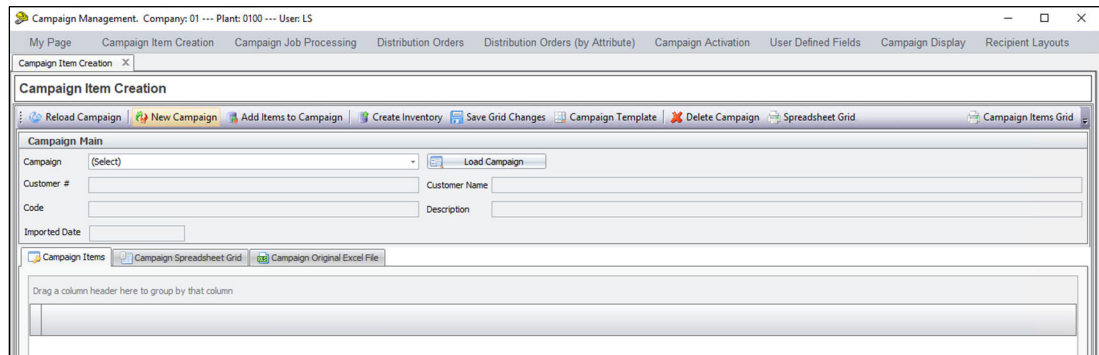
3. Click the search button (…) in the **Browse File** field.
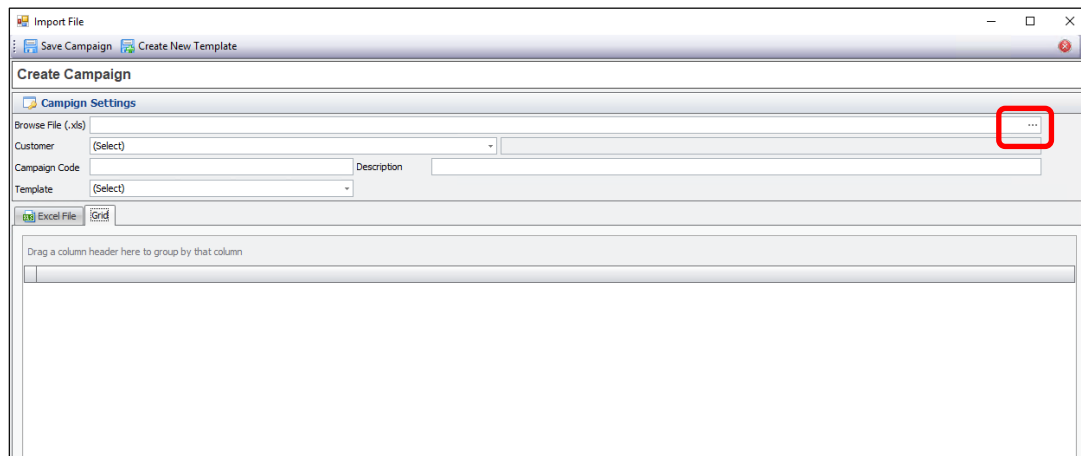
4. In Select Commission Template, choose a file and click **Open**.
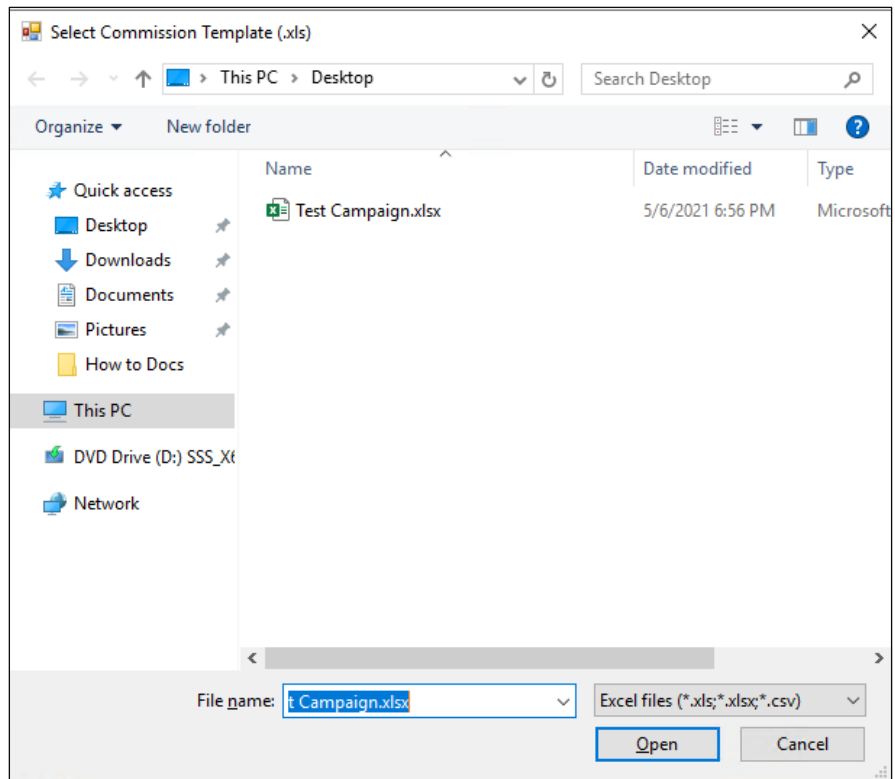
5. Select the **Customer** and then add a **Campaign Code** and **Description** (user defined).

6. From the toolbar click **Create New Template**.

7. In the Template Mappings window enter a template name and select the System Field for the fields in the template. Click **Save Template**.

For **Campaign Management** there are many system fields available for mapping to importing fields on a file, but "**Costing Method**" was missing. Costing Method is needed for Lot tracking items when trying to use FIFO or LIFO. We have made the change to include the costing method to the list of possible fields to map data to for campaign items.

Below shows that prior to the change for costing, there was no field available in the system field drop down for mapping.

For version 21.1.0200, the field has been added and available for use with campaign items.

For the import file the values that are accepted are "**F**" for FIFO, "**L**" for LIFO, "**Q**" for Quoted Cost, "**S**" for Standard Cost and "**A**" for Average Cost.

8. Now in the Campaign window there is data from the template. Click **Save Campaign**.

    Note   You may select any template from the drop-down.

9. In the Campaign Main window click **Load Campaign**. The data will be loaded but will be in a gray background since they have not been processed.

Now you can create inventory for the campaign.

10. From the Campaign Main window select the **Create Inventory** tab.

11. If you scroll to the far right of the grid you will see that there is a column that shows **Inventory Created** and shows that the items were created. The Status Message shows that the items were created.

Note   These items will now be available in Inventory Manager.

12. In the Campaign Main window there are three tabs above the inventory grid:

Campaign Items – Displays items that were processed.

Campaign Spreadsheet Grid – From here you can edit fields.

Campaign Original Excel File – Displays the original excel file.

Options in Campaign Order Creation

The following are other options with the Campaign Order Creation module.

Reload Campaign

Select to reload the Campaign.

Add Items to Campaign

Use this feature to add items to a current Campaign.

First load the file containing the item(s) that you want to add, select that item(s) and click **Attach to Campaign**.

The new items are now added but not processed. Click **Create Inventory** to add them.

Save Grid Changes

Use this feature to make changes to the spreadsheet. Once you have made changes click **Save Grid Changes**.

Validate Inventory Updates

Verify that the inventory is updated.

Campaign Template

Gives you access to a template to view or edit.

Delete Campaign

Use to delete the current campaign.

Campaign Job Processing

Use the Job Processing module to create an order for a job to produce the inventory which is attached to a campaign.
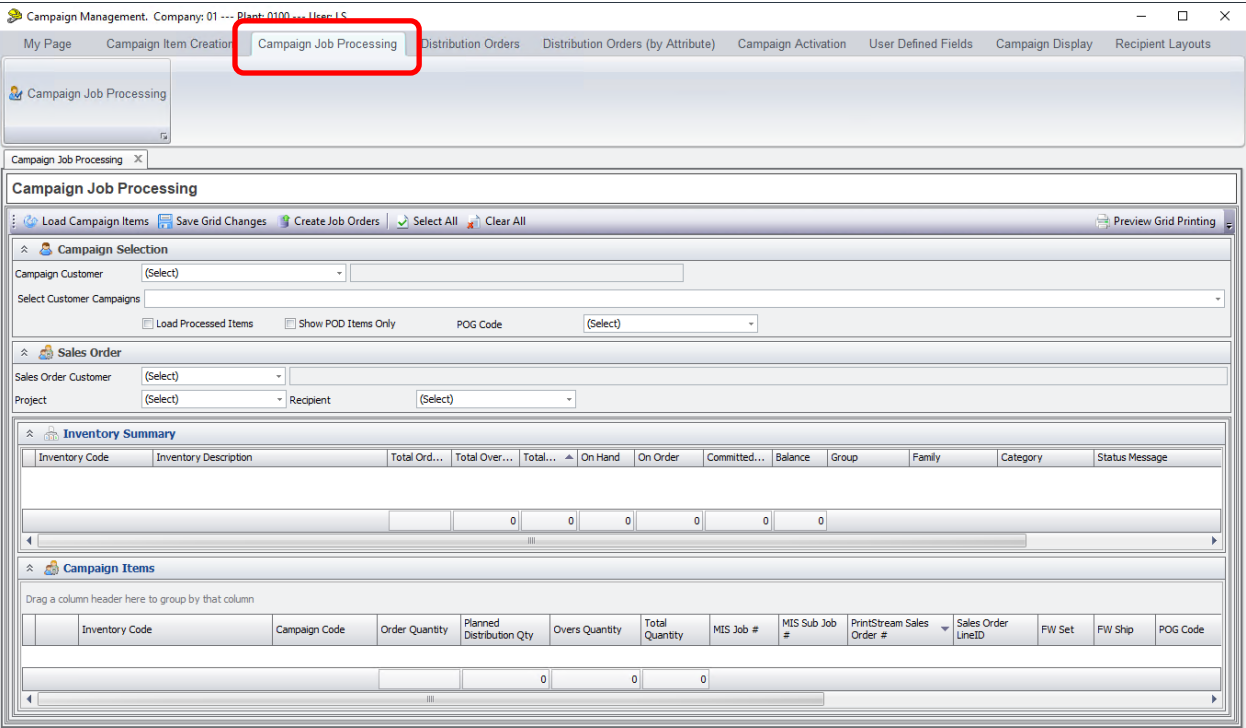
To create job orders for inventory

1. Click **Campaign Job Processing** to open the Campaign Job Processing main page.

2. Under Campaign Selection and Sales Order, select the Campaign Customer, Select Customer Campaigns, Sales Order Customer, Project, and Recipient.
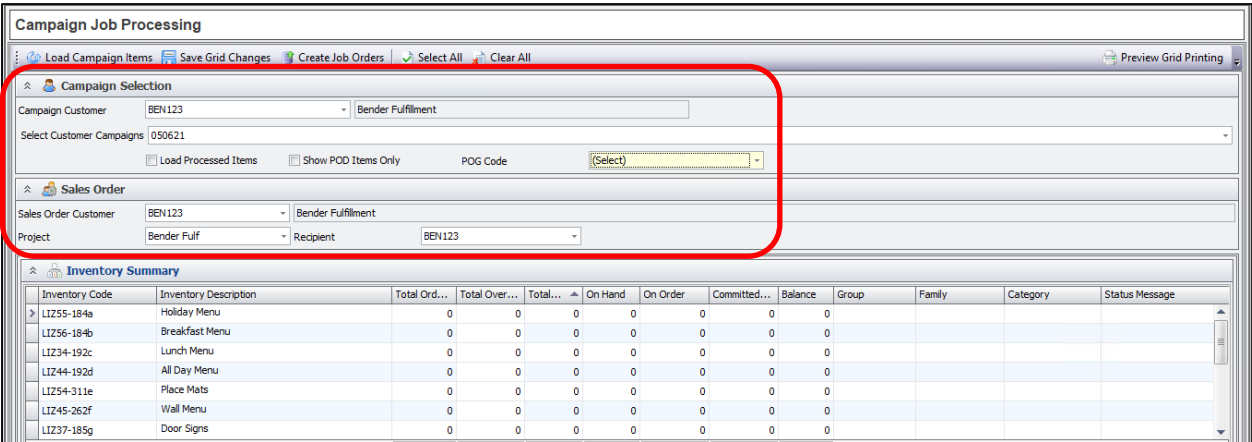
3. In the Campaign Items grid select the items you want to add. Click Select All to add all of them at once. Once you add them, the items will display in the Inventory Summary grid.

4. Make any edits as needed. You can change the quantities in the Campaign Items grid and it will update the quantities in the Inventory Summary grid. For example, item LIZ84-109m the Over quantity was changed from 100 to 50.

5. Click **Save Grid Changes**.

6. Click **Create Job Orders**.
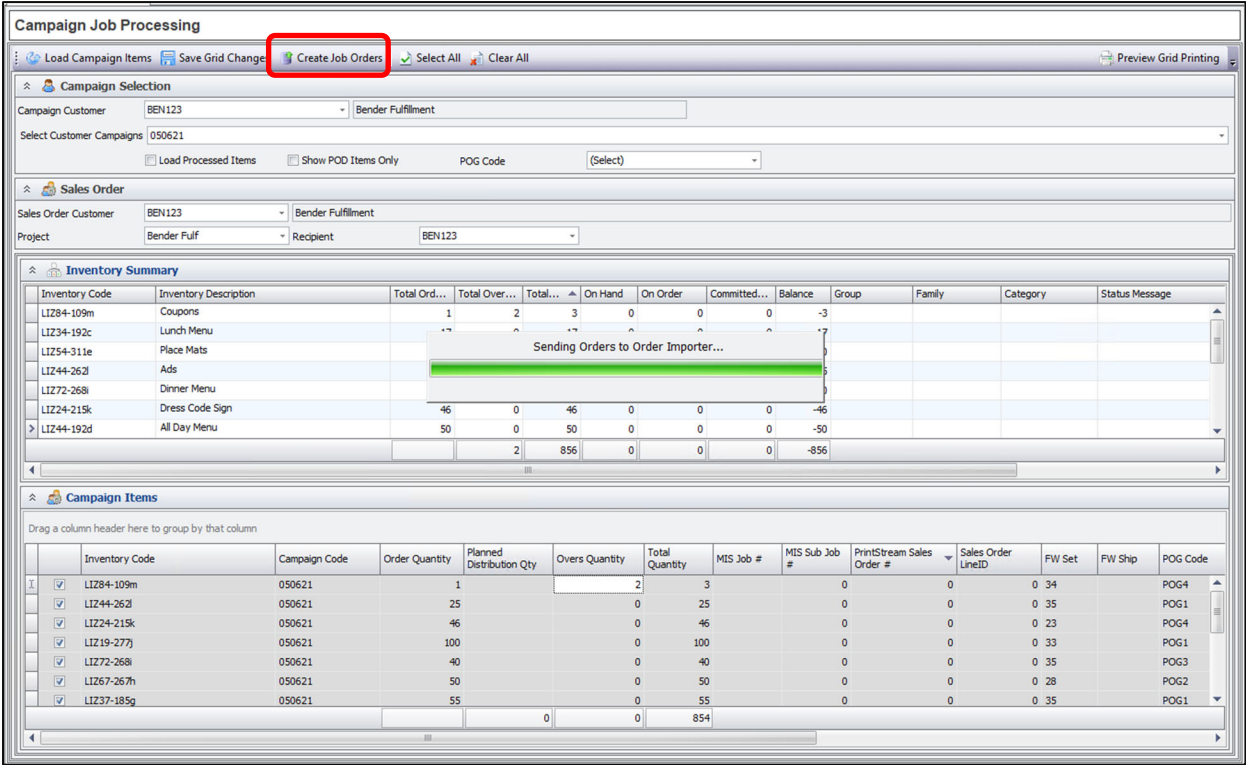
Once it completes you will see the Campaign Items completed with the green background. You will also see that there is a PrintStream Sales Order # populated.

7. In Fulfillment, you will see the order.

Create Distribution Orders

Attributes Upload

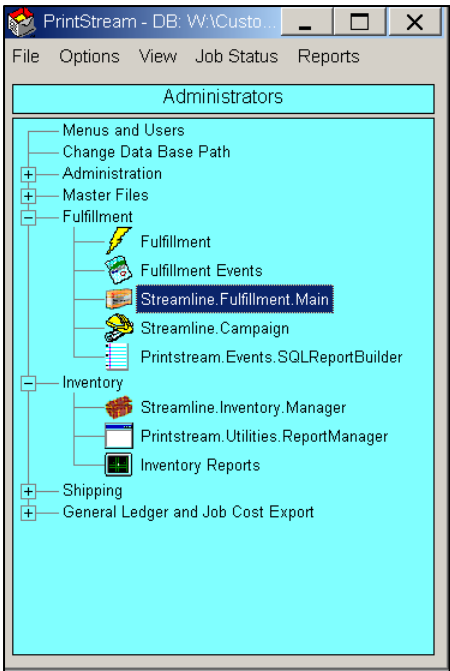The Master Customer Attributes file is only updated when any new attributes are added (new region, district, etc…)

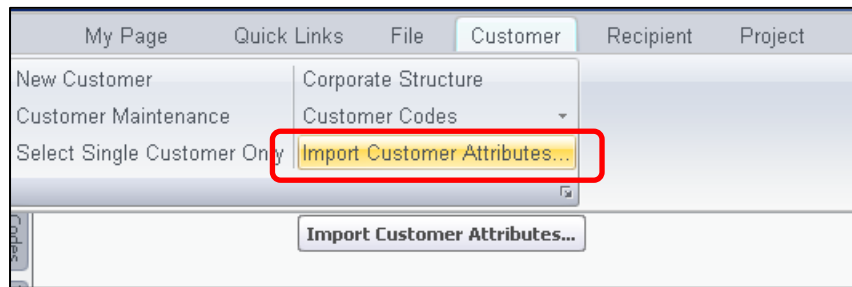**Note**   OptionValue has to be in column B header.
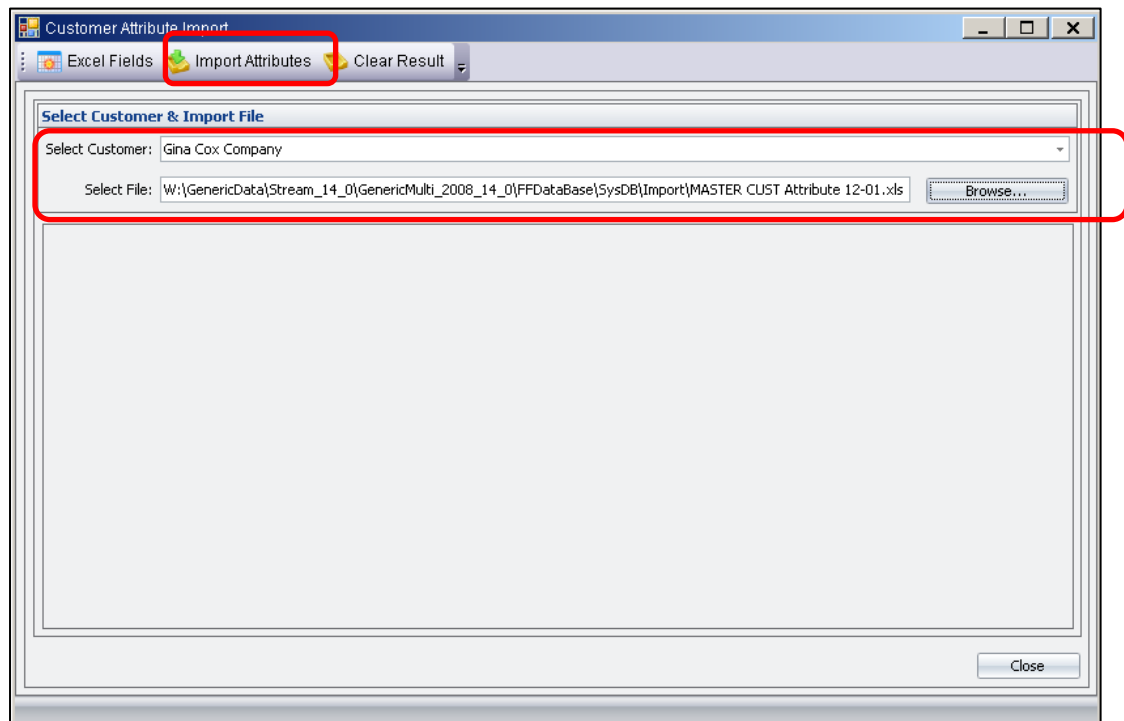

To upload attributes

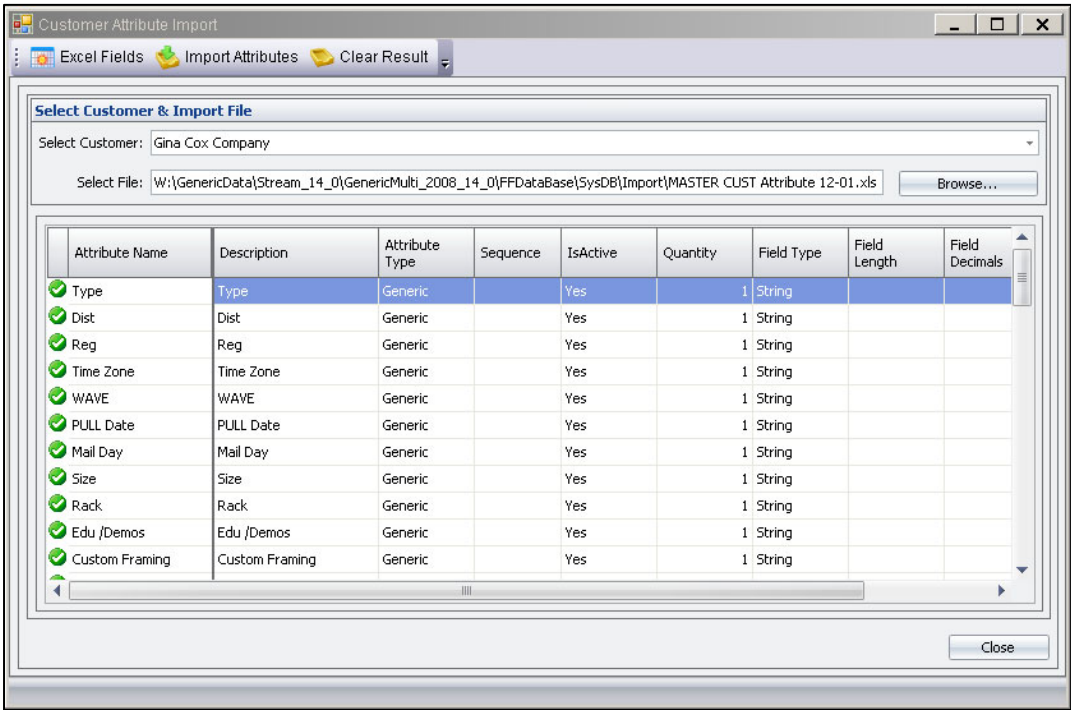1. Open **Fulfillment > Streamline Fulfillment Main**.

2. Select **Customer > Import Customer Attributes**.

3. Select the customer and the file and then click **Import Attributes**.
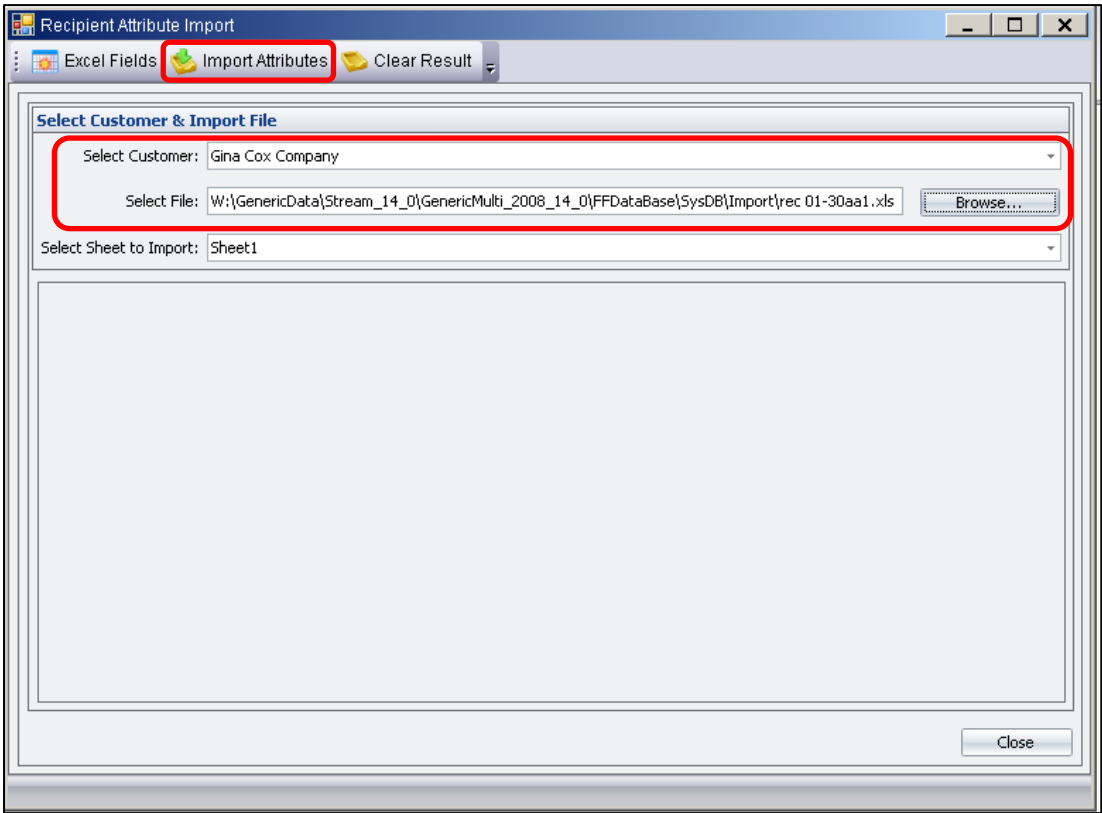
The results will display:

Recipient Attribute Update

To update a recipient they must already be available in the Recipient area.

Below is an example of the file format.

Note   The first column has to have CustRecipID in the header.

To update recipients

1. In **Streamline Fulfillment Main** select **Recipient > Import Recipient Attributes**.
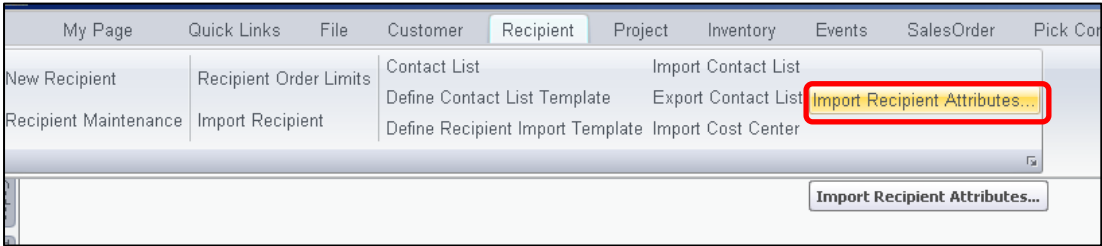
2. Select the customer and file. Select **Import Attributes**.

The results will display: