

User Guide

Campaign Management
Add On
V21.1.0200

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EFI PrintStream | V21.1.0200 *Campaign Management Add On User Guide*

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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.	
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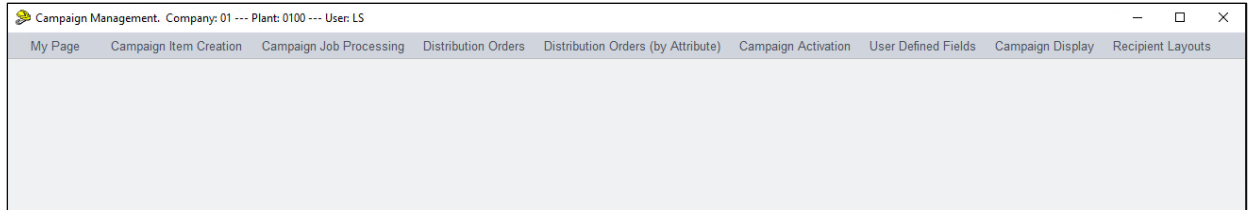
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US Fax:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com
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Getting Started

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.

The screenshot displays the 'Campaign Management' application window. The title bar indicates 'Company: 01 --- Plant: 0100 --- User: LS'. The main menu bar includes 'My Page', 'Campaign Item Creation', 'Campaign Job Processing', 'Distribution Orders', 'Distribution Orders (by Attribute)', 'Campaign Activation', 'User Defined Fields', 'Campaign Display', and 'Recipient Layouts'. The 'Campaign Item Creation' ribbon is active, showing tabs for 'Campaign Item Creation', 'Campaign Job Processing', 'Distribution Orders', 'Distribution Orders (by Attribute)', 'Campaign Activation', 'User Defined Fields', 'Campaign Display', and 'Recipient Layouts'. The 'Campaign Item Creation' tab is selected, revealing a toolbar with icons for 'Reload Campaign', 'New Campaign', 'Add Items to Campaign', 'Create Inventory', 'Save Grid Changes', 'Campaign Template', 'Delete Campaign', 'Spreadsheet Grid', and 'Campaign Items Grid'. Below the toolbar, the 'Campaign Main' section contains a 'Campaign' dropdown menu (set to '(Select)') with a 'Load Campaign' button, and input fields for 'Customer #', 'Customer Name', 'Code', 'Description', and 'Imported Date'. At the bottom, there are three tabs: 'Campaign Items', 'Campaign Spreadsheet Grid', and 'Campaign Original Excel File'.

- **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.

The screenshot shows the 'Create Distribution Orders' window. At the top is a title bar with the text 'Create Distribution Orders'. Below it is a menu bar with icons and labels: 'Load Campaign Items', 'Search Stores', 'Move Selected Items into Planned Orders', 'Reload Planned Orders Grid', 'Save Distribution Orders', and 'Create Sales Order'. The main area is titled 'Customer/Campaign Selection' and contains two dropdown menus: 'Customer (Select)' and 'Project (Select)'. Below these is a 'Select Campaign' text field. At the bottom, there are two tabs: 'Campaign Item and Store Selection' and 'Planned Distribution Orders'.

- **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.

The screenshot shows the 'Campaign Display' window. It has a title bar with 'Campaign Display'. The menu bar includes 'Load Grid', 'Export to Excel', and 'Preview Grid'. The main area is divided into two sections. The first section, 'Item Selection', contains three input fields: 'Inventory Code (Select)', 'Description', and 'Item #'. Below these are 'POG Codes' and 'Layout Modules' dropdowns, a 'Clear' button, and a checked checkbox labeled 'Last Campaign Data Only'. The second section, 'Item Campaigns', contains a text prompt 'Drag a column header here to group by that column' and a large empty rectangular area below it.

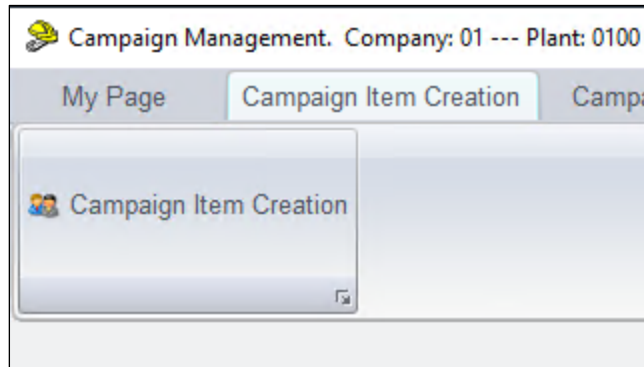
- **Load Grid** – Load items from campaign to the grid
- **Export to Excel** – Export to Excel
- **Preview Grid** – Ability to preview and print the grid

Campaign Item Creation

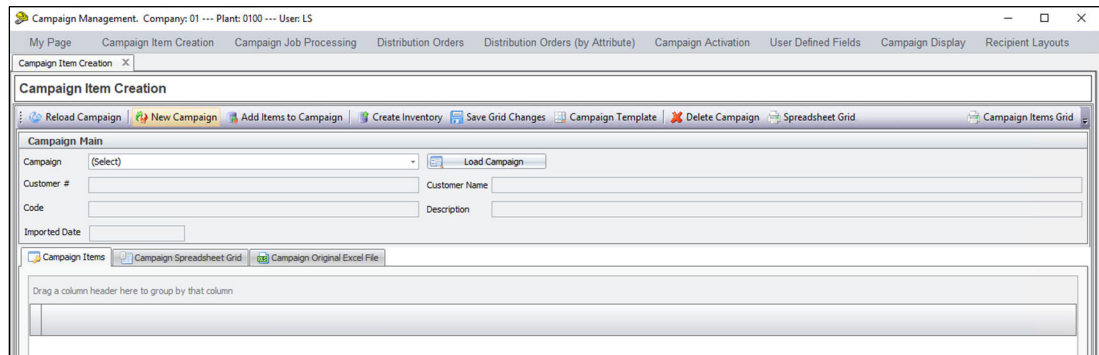
Use this feature to create an inventory item for a campaign. First you must create a campaign and then create inventory for that campaign.

To create a campaign.

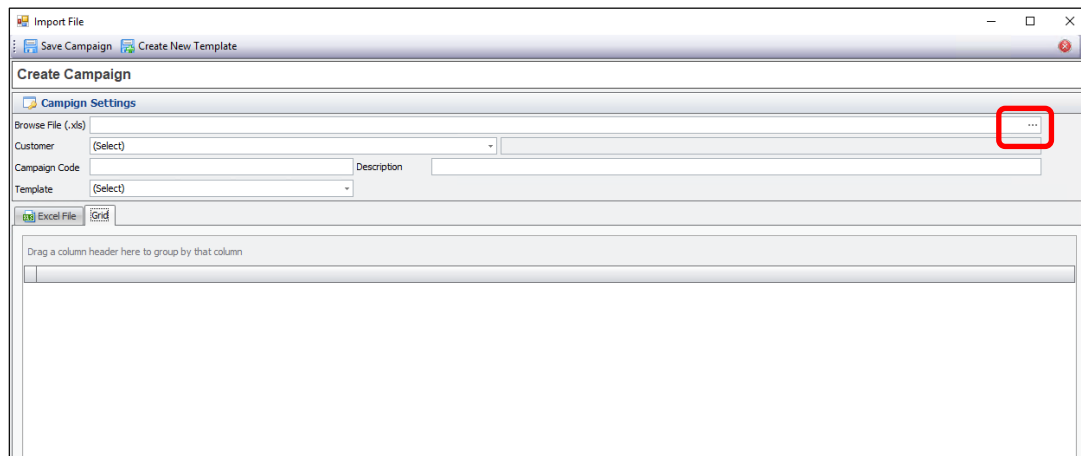
1. Click **Campaign Item Creation**.



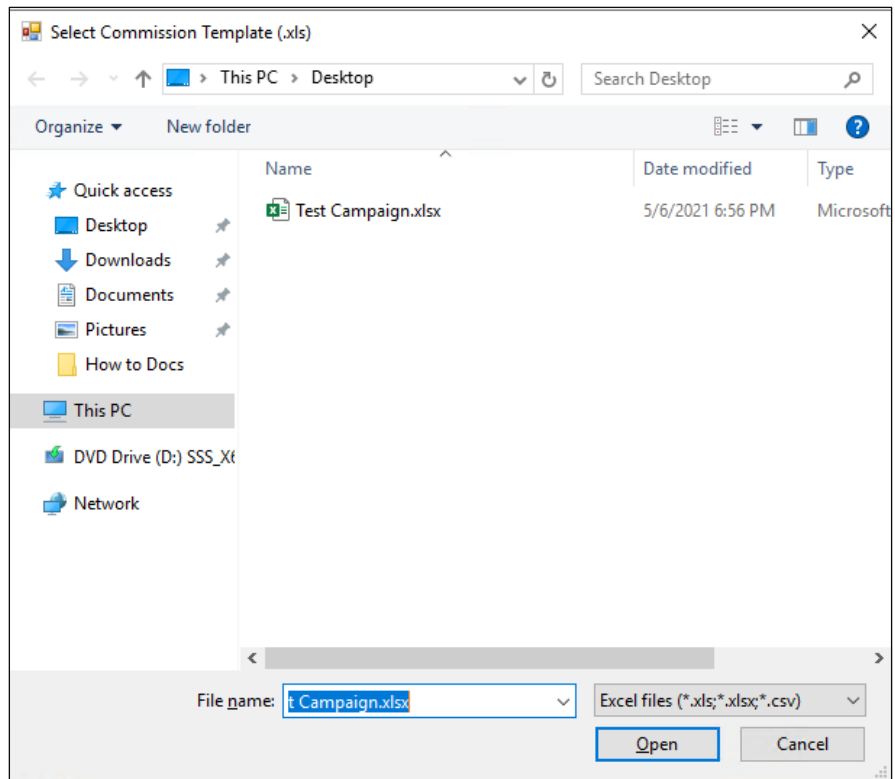
2. Select the **New Campaign** tab.



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).

Create Campaign

Campaign Settings

Browse File (.xls) C:\Users\elzabbe\Desktop\Test Campaign.xlsx

Customer BEN123 Bender Fulfillment

Campaign Code MayTest Description 050621Test

Template 041416a

Excel File iGrid

Drag a column header here to group by that column

POD Y/N	Partial POD	Product Code	Inv Code	Active/Curr...	MIS ID	DN	Location	UP	Std PK	STD PK...	Description 1	Description 2	Reorder Level	TI Qty	Sign Type
Y	Y	65	GCS55-184a	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Holiday Menu	Each	200	200	Catalog
Y	Y	65	GCS56-184b	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Breakfast ...	Each	100	100	Catalog
Y	Y	65	GCS34-192c	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	Lunch Menu	Each	50	17	Stanchion
Y	Y	65	GCS44-192d	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	All Day Menu	Each	100	50	Miscellaneous
Y	Y	65	GCS54-311e	Y	BC2	9/29/2033	1.1.1.1	9/22/2014	Each	1	Place Mats	Each	50	20	Stanchion
Y	Y	65	GCS45-262f	Y	BC2	12/30/2015	1.1.1.1	9/1/2014	Each	1	Wall Menu	Each	200	150	Coupon
Y	Y	65	GCS37-185g	Y	BC2	10/5/2063	1.1.1.1	9/29/2014	Each	1	Door Signs	Each	40	55	Stanchion
Y	Y	65	GCS67-267h	Y	BC2	10/9/2016	1.1.1.1	8/11/2014	Each	1	Open Close...	Each	25	50	Miscellaneous
Y	Y	65	GCS72-268i	Y	ENV10	11/14/2015	1.1.1.1	9/30/2014	Each	1	Dinner Menu	Each	50	40	Stanchion
Y	Y	65	GCS19-277j	Y	ENV10	10/19/2018	1.1.1.1	9/15/2014	Each	1	Register Sign	Each	50	100	Stanchion
Y	Y	65	GCS24-215k	Y	ENV10	10/26/2016	1.1.1.1	7/7/2014	Each	1	Dress Code...	Each	15	46	Miscellaneous
Y	Y	65	GCS44-262l	Y	ENV10	12/31/2015	1.1.1.1	10/1/2014	Each	1	Ads	Each	50	25	Coupon
Y	Y	65	GCS84-109m	Y	ENV10	11/2/2015	1.1.1.1	9/8/2014	Each	1	Coupons	Each	20	1	Ceiling Gra...

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

Import File

Save Campaign **Create New Template**

Create Campaign

Campaign Settings

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

Field Name	System Field	Field Data Type	Is Option	LM Code	Decimal Precision (Numeric Fields)	String Length (String Fields)	Lookup	Lookup Setup	Sequence #
POD Y/N	POD (Y/N)	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	1
Partial POD	Partial POD (Y/N)		<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	2
Product Code	Product Code		<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	3
Inv Code	Inventory Code	String	<input type="checkbox"/>		0	40	<input type="checkbox"/>	Lookup Items Setup	4
Active/Current	Active	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	5
MIS ID	MIS TemplateID	String	<input type="checkbox"/>		0	40	<input type="checkbox"/>	Lookup Items Setup	6
DN	Expiration Date	Date	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	7
Location	Default Pick Location	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	8
UP	UOM Purchase	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	9
STD PK	Unit Of Cost Description	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	10
STD PK QUANTITY	UCM	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	11
Description 1	Inventory Description	String	<input type="checkbox"/>		0	130	<input type="checkbox"/>	Lookup Items Setup	12
Description 2			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	13
Reorder Level	Reorder Qty	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	14
TI Qty	Distribution Quantity	Numeric	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	15
Sign Type	Sign Type	String	<input type="checkbox"/>		0	100	<input type="checkbox"/>	Lookup Items Setup	16
FW Ship	Need Date	Date	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	17
FW Set	Fiscal Week Set	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	18
Bindery			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	19
SameSign			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	20
Color Side 1	Color Side 1	String	<input type="checkbox"/>		0	250	<input type="checkbox"/>	Lookup Items Setup	21
Color Side 2	Color Side 2	String	<input type="checkbox"/>		0	250	<input type="checkbox"/>	Lookup Items Setup	22
Flat Size	Flat Size	String	<input type="checkbox"/>		0	50	<input type="checkbox"/>	Lookup Items Setup	23
Finish Size	FinishSize	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	24
Weight	Weight	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Items Setup	25
POG Code	POG Code	String	<input type="checkbox"/>		0	50	<input type="checkbox"/>	Lookup Items Setup	26
A00			<input type="checkbox"/>	A00	0	0	<input type="checkbox"/>	Lookup Items Setup	27
A01			<input type="checkbox"/>	A01	0	0	<input type="checkbox"/>	Lookup Items Setup	28

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.

Field Name	System Field	Field Data Type
FW Set	Fiscal Week Set	String
Reorder #	Inventory Code	String
Lot Track		
Sell Method		
Costing	Color Side 1	String
Planner	System Field	
How To #	Color Side 1	
Sign Type	Color Side 2	
Width	Combine in Cartons	
Length	Country OF Origin	
Pages		
Pgs Back	x	

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.

User Defined Fields

Reload
 Save Changes
 Delete Template

Filter Fields By Template

Template:

User Defined Field List for Campaign

Drag a column header here to group by that column

	Field Name	System Field	Field Data Type
	FW Ship	Fiscal Week Ship	String
	FW Set	Fiscal Week Set	String
	Reorder #	Inventory Code	String
	Lot Track	Lot Tracking	String
	Sell Method	Sell Method	String
I	Costing	Costing Method(F/L/Q/S/A)	String
	Planner	System Field	
	How To #	Color Side 1	
	SIGN TYPE	Color Side 2	
	Width	Combine in Cartons	
	Length	Costing Method(F/L/Q/S/A)	
	Pages	Country Of Origin	
	Pgs Back	×	

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.

Import File Save Campaign Create New Template

Create Campaign

Campaign Settings

Browse File (.xls) C:\Users\elzabbe\Desktop\Test Campaign.xlsx

Customer BEN123 Bender Fulfillment

Campaign Code MayTest Description 050621Test

Template 050621Test

Excel File Grid

Drag a column header here to group by that column

POD Y/N	Partial POD	Product Code	Inv Code	Active/Curr...	MIS ID	DN	Location	UP	Std Pk	STD PK...	Description 1	Description 2	Reorder Level	TI Qty	Sign Type
Y	Y	65	GCS55-184a	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Holiday Menu	Each	200	200	Catalog
Y	Y	65	GCS56-184b	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Breakfast ...	Each	100	100	Catalog
Y	Y	65	GCS34-192c	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	Lunch Menu	Each	50	17	Stanchion
Y	Y	65	GCS44-192d	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	All Day Menu	Each	100	50	Miscellaneous
Y	Y	65	GCS54-311e	Y	BC2	9/29/2033	1.1.1.1	9/22/2014	Each	1	Place Mats	Each	50	20	Stanchion
Y	Y	65	GCS45-262f	Y	BC2	12/30/2015	1.1.1.1	9/1/2014	Each	1	Wall Menu	Each	200	150	Coupon
Y	Y	65	GCS37-185g	Y	BC2	10/5/2063	1.1.1.1	9/29/2014	Each	1	Door Signs	Each	40	55	Stanchion
Y	Y	65	GCS67-267h	Y	BC2	10/9/2016	1.1.1.1	8/11/2014	Each	1	Open Close...	Each	25	50	Miscellaneous
Y	Y	65	GCS72-268i	Y	ENV10	11/14/2015	1.1.1.1	9/30/2014	Each	1	Dinner Menu	Each	50	40	Stanchion
Y	Y	65	GCS19-277j	Y	ENV10	10/19/2018	1.1.1.1	9/15/2014	Each	1	Register Sign	Each	50	100	Stanchion
Y	Y	65	GCS24-215k	Y	ENV10	10/26/2016	1.1.1.1	7/7/2014	Each	1	Dress Code...	Each	15	46	Miscellaneous
Y	Y	65	GCS44-262l	Y	ENV10	12/31/2015	1.1.1.1	10/1/2014	Each	1	Ads	Each	50	25	Coupon
Y	Y	65	GCS84-109m	Y	ENV10	11/2/2015	1.1.1.1	9/8/2014	Each	1	Coupons	Each	20	1	Ceiling Gra...

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.

Campaign Management. Company: 01 --- Plant: 0100 --- User: LS

My Page Campaign Item Creation Campaign Job Processing Distribution Orders Distribution Orders (by Attribute) Campaign Activation User Defined Fields Campaign Display Recipient Layouts

Campaign Item Creation X

Campaign Item Creation

Reload Campaign New Campaign Add Items to Campaign Create Inventory Save Grid Changes Campaign Template Delete Campaign Spreadsheet Grid Campaign Items Grid

Campaign Main

Campaign MayTest Load Campaign

Customer # BEN123 Customer Name Bender Fulfillment

Code MayTest Description 050621Test

Imported Date 5/6/2021

Campaign Items Campaign Spreadsheet Grid Campaign Original Excel File

Drag a column header here to group by that column

Process Item	POD Y/N	Partial POD Y/N	Product Code	Inventory Code	Active	MIS Template ID	Expiration Date	Default Pick Location	UOM Purchase	Unit Of Cost Description	UOM	Inventory Description	Reorder Qty	Distribution Quantity	Sign Type	Need Date	F/S
<input checked="" type="checkbox"/>	Y	Y	65	GCS84-109m	Y	ENV10	11/2/2015	1.1.1.1	9/8/2014	Each	1	Coupons	20	1	Ceiling Gra...		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS44-262l	Y	ENV10	12/31/2015	1.1.1.1	10/1/2014	Each	1	Ads	50	25	Coupon		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS24-215k	Y	ENV10	10/26/2016	1.1.1.1	7/7/2014	Each	1	Dress Code...	15	46	Miscellaneous		2
<input checked="" type="checkbox"/>	Y	Y	65	GCS19-277j	Y	ENV10	10/19/2018	1.1.1.1	9/15/2014	Each	1	Register Sign	50	100	Stanchion		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS72-268i	Y	ENV10	11/14/2015	1.1.1.1	9/30/2014	Each	1	Dinner Menu	50	40	Stanchion		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS67-267h	Y	BC2	10/9/2016	1.1.1.1	8/11/2014	Each	1	Open Close...	25	50	Miscellaneous		2
<input checked="" type="checkbox"/>	Y	Y	65	GCS37-185g	Y	BC2	10/5/2063	1.1.1.1	9/29/2014	Each	1	Door Signs	40	55	Stanchion		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS45-262f	Y	BC2	12/30/2015	1.1.1.1	9/1/2014	Each	1	Wall Menu	200	150	Coupon		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS54-311e	Y	BC2	9/29/2033	1.1.1.1	9/22/2014	Each	1	Place Mats	50	20	Stanchion		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS44-192d	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	All Day Menu	100	50	Miscellaneous		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS34-192c	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	Lunch Menu	50	17	Stanchion		3
<input checked="" type="checkbox"/>	Y	Y	65	GCS56-184b	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Breakfast ...	100	100	Catalog		2
<input checked="" type="checkbox"/>	Y	Y	65	GCS55-184a	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Holiday Menu	200	200	Catalog		2

Now you can create inventory for the campaign.

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

The screenshot shows the 'Campaign Item Creation' window. The top menu bar includes 'Reload Campaign', 'New Campaign', 'Add Items to Campaign', 'Create Inventory' (highlighted with a red box), 'Save Grid Changes', 'Campaign Template', 'Delete Campaign', and 'Spreadsheet Grid'. Below the menu bar, the 'Campaign Main' section contains fields for Campaign (050621), Customer # (BEN123), Code (050621), and Imported Date (5/6/2021). The 'Campaign Items' tab is selected in the bottom tab bar, which also includes 'Campaign Spreadsheet Grid' and 'Campaign Original Excel File'.

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.

The screenshot shows the 'Campaign Item Creation' window with the 'Campaign Items' tab selected. The grid displays a list of items with columns for 'Unit Of Cost Description', 'UOM', 'Inventory Description', 'Reorder Qty', 'Distribution Quantity', 'Sign Type', 'Need Date', 'Fiscal Week Set', 'Color Side 1', 'Color Side 2', 'Flat Size', 'Finish Size', 'Weight', 'POG Code', 'Inventory Created', 'In...', and 'Status Message'. The 'Inventory Created' column has checkboxes, and the 'Status Message' column shows 'Created Item #...'. The first two rows are highlighted with red boxes.

	Unit Of Cost Description	UOM	Inventory Description	Reorder Qty	Distribution Quantity	Sign Type	Need Date	Fiscal Week Set	Color Side 1	Color Side 2	Flat Size	Finish Size	Weight	POG Code	Inventory Created	In...	Status Message
#	Each	1	Holiday Menu	200	200	Catalog	27	4	4	25.375x10...	8.5x10.875		5#	POG1	<input checked="" type="checkbox"/>		Created Item #...
#	Each	1	Breakfast ...	100	100	Catalog	27	4	4	34.5x10.875	8.5x10.875		5#	POG2	<input checked="" type="checkbox"/>		Created Item #...

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.

The screenshot shows the 'Campaign Item Creation' window with the 'Campaign Items' tab selected. The bottom tab bar contains three tabs: 'Campaign Items' (highlighted with a red box), 'Campaign Spreadsheet Grid', and 'Campaign 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.

Campaign Item Creation

Campaign Main

Campaign: 050621
 Customer #: BEN123 Customer Name: Bender Fulfillment
 Code: 050621 Description: 050621 Test Campaign
 Imported Date: 5/6/2021

Drag a column header here to group by that column

	Process Item	POD (Y/N)	Partial POD (Y/N)	Product Code	Inventory Code	Active	MIS Template ID	Expiration Date	Default Pick Location	UOM Purchase	Unit Of Cost Description	UOM	Inventory Description	Reorder Qty	Distribution Quantity	Sign Type	Need Date	Fi	Si
<input type="checkbox"/>		Y	Y	65	LIZ55-184a	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Holiday Menu	200	200	Catalog		2	
<input type="checkbox"/>		Y	Y	65	LIZ56-184b	Y	BC2	9/28/2016	1.1.1.1	8/4/2014	Each	1	Breakfast ...	100	100	Catalog		2	
<input type="checkbox"/>		Y	Y	65	LIZ34-192c	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	Lunch Menu	50	17	Stanchion		3	
<input type="checkbox"/>		Y	Y	65	LIZ44-192d	Y	BC2	9/29/2017	1.1.1.1	9/15/2014	Each	1	All Day Menu	100	50	Miscellaneous		3	
<input type="checkbox"/>		Y	Y	65	LIZ54-311e	Y	BC2	9/29/2033	1.1.1.1	9/22/2014	Each	1	Place Mats	50	20	Stanchion		3	
<input type="checkbox"/>		Y	Y	65	LIZ45-262f	Y	BC2	12/30/2015	1.1.1.1	9/1/2014	Each	1	Wall Menu	200	150	Coupon		3	
<input checked="" type="checkbox"/>		Y	Y	65	LIZ37-185g	Y	BC2	10/5/2063	1.1.1.1	9/29/2014	Each	1	Door Signs	40	55	Stanchion		3	
<input type="checkbox"/>		Y	Y	65	LIZ67-267h	Y	BC2	10/9/2016	1.1.1.1	8/11/2014	Each	1	Open Close...	25	50	Miscellaneous		2	
<input type="checkbox"/>		Y	Y	65	LIZ72-268i	Y	BNW10	11/14/2015	1.1.1.1	9/30/2014	Each	1	Dinner Menu	50	40	Stanchion		3	
<input type="checkbox"/>		Y	Y	65	LIZ19-277j	Y	BNW10	10/19/2018	1.1.1.1	9/15/2014	Each	1	Register Sign	50	100	Stanchion		3	
<input type="checkbox"/>		Y	Y	65	LIZ24-215k	Y	BNW10	10/26/2016	1.1.1.1	7/7/2014	Each	1	Dress Code...	15	46	Miscellaneous		2	
<input type="checkbox"/>		Y	Y	65	LIZ44-262l	Y	BNW10	12/31/2015	1.1.1.1	10/1/2014	Each	1	Ads	50	25	Coupon		3	
<input type="checkbox"/>		Y	Y	65	LIZ84-109m	Y	BNW10	11/2/2015	1.1.1.1	9/8/2014	Each	1	Coupons	20	1	Ceiling Gra...		3	

Add Items to Campaign

Use this feature to add items to a current Campaign.

Campaign Item Creation

[Reload Campaign](#)
[New Campaign](#)
[Add Items to Campaign](#)
[Create Inventory](#)
[Save Grid Changes](#)
[Campaign Template](#)
[Delete Campaign](#)

Campaign Main

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

Attach To Campaign

Campaign Settings

Browse File (.xls) [W:\GenericData\Stream_14_0\FFDataBase\SysDB\Import\test_campaign_generic3_add_items.xls](#)

Campaign Code: 01gin26 Description: 01gin26

Excel File | Grid

	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
	POD	EFI Dept ID	EFI Category ID	Product Code	Length	Width	Pages	PagesBack	CATEGORY	SUB CATEGORY	POG Code	FW Third Party Vendor	FW Ship	FW Set	Reorder#	How To #	Sign Type
1	N								POG	Basic Craft	BDLAC	NA	10	12	104-1828Aa	NA	Blade Sign - All Stores
2	N	998	953	10	44.00000000	7.50000000	10	10	POG	Basic Craft	BDLAC	NA	10	12	104-1828Bb	NA	Blade Sign - All Stores
3	N	998	953	10	44.00000000	7.50000000	10	10	POG	Basic Craft	BDLAC	NA	10	12	104-1828Cc	NA	Pop Off - 84"
4	N	998	953	10	24.50000000	12.25000000	10	10									
5																	
6																	
7																	
8																	
9																	

[Signing Component List](#)
[How-To Sheet Component List](#)
[How to Use a Component List](#)
[Color Code Matrix](#)
[Site List](#)
[Dropdowns](#)
[Component Matrix](#)

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

Campaign Item Creation

[Reload Campaign](#)
[New Campaign](#)
[Add Items to Campaign](#)
[Create Inventory](#)
[Save Grid Changes](#)
[Validate Inventory Updates](#)
[Campaign Template](#)
[Delete Campaign](#)

Campaign Main

Campaign: 01gin26 Load File

Customer #: GINA Customer Name: Gina Cox Company

Code: 01gin26 Description: 01gin26

Imported Date: 6/7/2013

[Campaign Items](#)
[Campaign Spreadsheet Grid](#)
[Campaign Original Excel File](#)

Drag a column header here to group by that column

	Process Item	POD (Y/N)	EFI DepartmentID	EFI CategoryID	Product Code	Length	Width	Pages	PagesBack	POG Code	Inventory Code	Inventory Description	Overs Quantity	Distribution Quantit
>		N	998	953	10	44	7.5	10	10	BDLAC	104-1828A	Blade Sign 1	100	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828B	Blade Sign 2	100	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828C	Invitation Large Pop-Off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828D	Unity Candle Small Pop-Off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828E	Treat Boxes Small Pop-Off	75	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828F	Candy Buffet Large Pop-Off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828G	Cupcakes in box Small pop-off	50	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828H	beaded frame large pop-off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828J	baby photo small pop-off	50	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828Q	"Need More" Copy Small Pop-Off	50	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828Aa	Blade Sign 1	100	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828Bb	Blade Sign 2	100	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828Cc	Invitation Large Pop-Off	75	

Save Grid Changes

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

Campaign Item Creation

[Reload Campaign](#) |
 [New Campaign](#) |
 [Add Items to Campaign](#) |
 [Create Inventory](#) |
 Save Grid Changes |
 [Validate Inventory Updates](#) |
 [Campaign Template](#) |
 [Delete Campaign](#)

Campaign Main
 Campaign: 01gin26 [Load File](#)
 Customer #: GINA Customer Name: Gina Cox Company
 Code: 01gin26 Description: 01gin26
 Imported Date: 6/7/2013

[Campaign Items](#) |
 [Campaign Spreadsheet Grid](#) |
 [Campaign Original Excel File](#)

Drag a column header here to group by that column

	Overs	TOTAL Print QUANTITY - STD PK	STD PK	STD PK QUANTITY	TOTAL Print QUANTITY - EACHES	Reorder Level	Max Order	Existing Inventory	Samples	Crafting COST PER VERSION Total Sum at Bottom	Photo
	100		395 each	1	400	40	1	Y	1		
	100		395 each	1	395	40	1	Y	1		
I	75		304 each	1	310	40	1	Y	1		\$725.
	75		304 each	1	304	40	1	Y	1		
	75		304 each	1	304	40	1	Y	1		
	75		304 each	1	304	40	1	Y	1		\$600.
	50		211 each	1	211	40	1	Y	1		
	75		304 each	1	304	40	1	Y	1		\$600.
	50		211 each	1	211	40	1	Y	1		\$725.
	50		279 each	1	279	40	1	Y	1		
	100		395 each	1	395	40	1	Y	1		
	100		395 each	1	395	40	1	Y	1		
	75		304 each	1	304	40	1	Y	1		\$725.

Validate Inventory Updates

Verify that the inventory is updated.

Campaign Item Creation

[Reload Campaign](#) |
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 Validate Inventory Updates |
 [Campaign Template](#) |
 [Delete Campaign](#)

Campaign Main
 Campaign: 01gin26 [Load File](#)
 Customer #: GINA Customer Name: Gina Cox Company
 Code: 01gin26 Description: 01gin26
 Imported Date: 6/7/2013

[Campaign Items](#) |
 [Campaign Spreadsheet Grid](#) |
 [Campaign Original Excel File](#)

Drag a column header here to group by that column

	Process Item	POD (Y/N)	EFI DepartmentID	EFI CategoryID	Product Code	Length	Width	Pages	PagesBack	POG Code	Inventory Code	Inventory Description	Overs Quantity	Distribution Quantit
>		N	998	953	10	44	7.5	10	10	BDLAC	104-1828A	Blade Sign 1	200	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828B	Blade Sign 2	100	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828C	Invitation Large Pop-Off	175	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828D	Unity Candle Small Pop-Off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828E	Treat Boxes Small Pop-Off	75	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828F	Candy Buffet Large Pop-Off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828G	Cupcakes in box Small pop-off	50	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828H	beaded frame large pop-off	75	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828J	baby photo small pop-off	50	
		N	998	953	10	13.75	8.5	10	10	BDLAC	104-1828Q	"Need More" Copy Small Pop-Off	50	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828Aa	Blade Sign 1	100	
		N	998	953	10	44	7.5	10	10	BDLAC	104-1828Bb	Blade Sign 2	100	
		N	998	953	10	24.5	12.25	10	10	BDLAC	104-1828Cc	Invitation Large Pop-Off	75	

Campaign Template

Gives you access to a template to view or edit.

Campaign Item Creation

Reload Campaign
 New Campaign
 Add Items to Campaign
 Create Inventory
 Save Grid Changes
 Campaign Template
 Delete Campaign

Campaign Main

User Defined Fields

Reload
 Save Changes
 Delete Template

Filter Fields By Template

Template: 050621Testa

User Defined Field List for Campaign

Drag a column header here to group by that column

Field Name	System Field	Field Data Type	Is Option	LM Code	Decimal Precision (Numeric Fields)	String Length (String Fields)	Lookup	Lookup Setup
POD Y/N	POD (Y/N)	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Partial POD	Partial POD (Y/N)		<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Product Code	Product Code		<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Inv Code	Inventory Code	String	<input type="checkbox"/>		0	40	<input type="checkbox"/>	Lookup Item Setup
Active/Current	Active	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
MIS ID	MIS TemplateID	String	<input type="checkbox"/>		0	40	<input type="checkbox"/>	Lookup Item Setup
DN	Expiration Date	Date	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Location	Default Pick Location	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
UP	UOM Purchase	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
STD PK	Unit Of Cost Description	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
STD PK QUANTITY	UOM	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Description 1	Inventory Description	String	<input type="checkbox"/>		0	130	<input type="checkbox"/>	Lookup Item Setup
Description 2			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Reorder Level	Reorder Qty	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
TI Qty	Distribution Quantity	Numeric	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Sign Type	Sign Type	String	<input type="checkbox"/>		0	100	<input type="checkbox"/>	Lookup Item Setup
FW Ship	Need Date	Date	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
FW Set	Fiscal Week Set	String	<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Bindery			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
SameSign			<input type="checkbox"/>		0	0	<input type="checkbox"/>	Lookup Item Setup
Color Side 1	Color Side 1	String	<input type="checkbox"/>		0	250	<input type="checkbox"/>	Lookup Item Setup
Color Side 2	Color Side 2	String	<input type="checkbox"/>		0	250	<input type="checkbox"/>	Lookup Item Setup

Delete Campaign

Use to delete the current campaign.

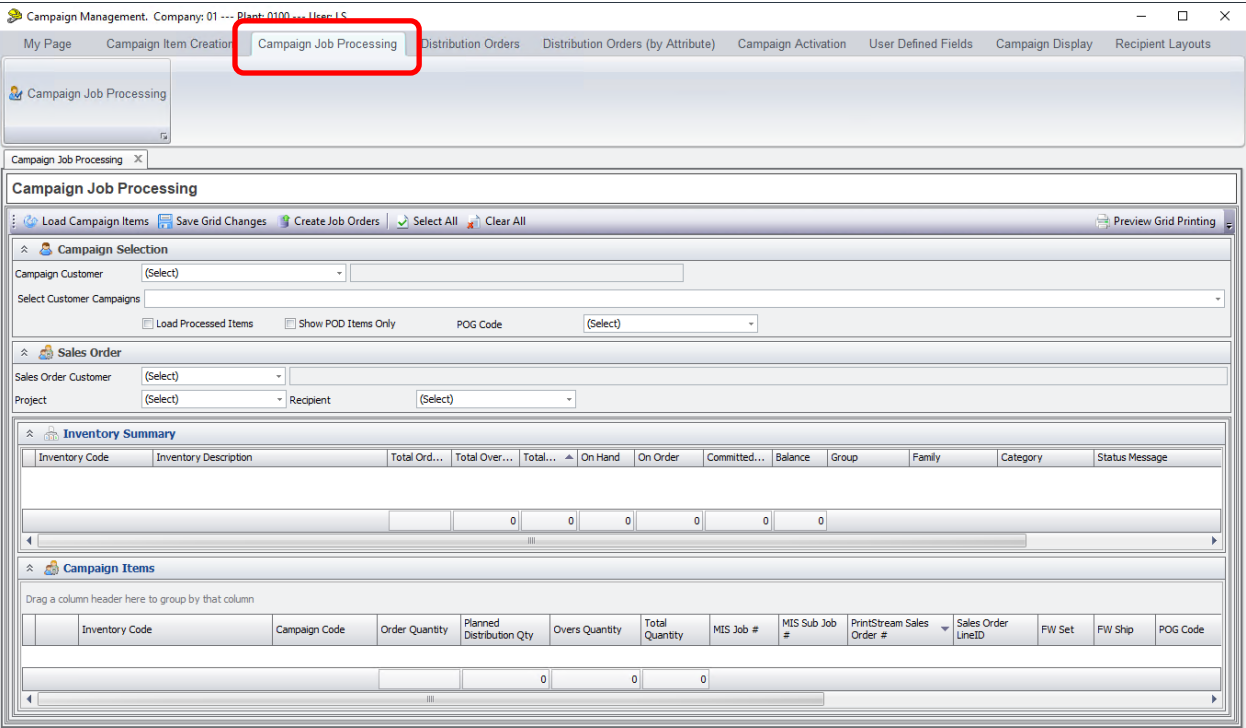
Campaign Item Creation

Reload Campaign
 New Campaign
 Add Items to Campaign
 Create Inventory
 Save Grid Changes
 Campaign Template
 Delete Campaign

Campaign Main

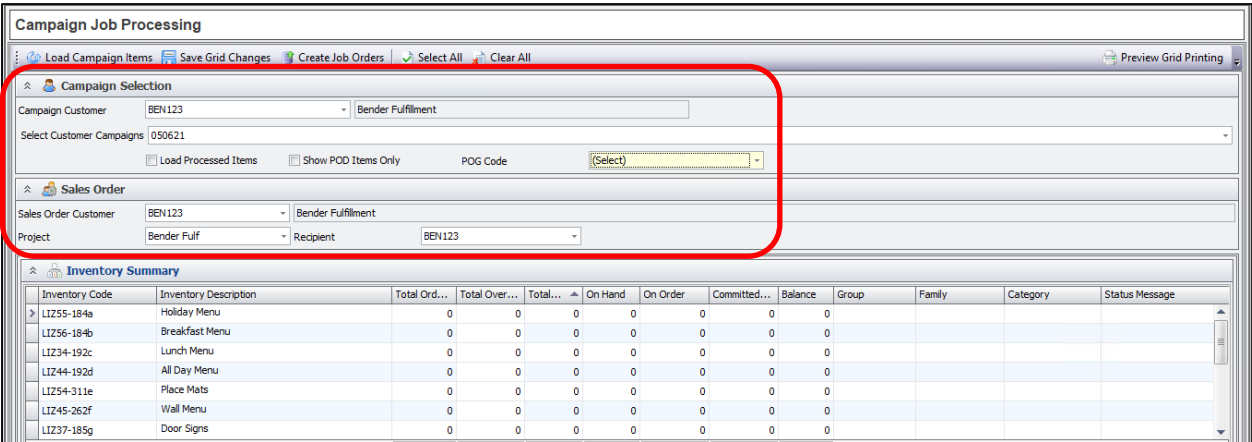
Campaign Job Processing

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.

Campaign Job Processing

Load Campaign Items Save Grid Changes Create Job Orders Select All Clear All Preview Grid Printing

Campaign Selection

Campaign Customer: BEN123 Bender Fulfillment

Select Customer Campaigns: 050621

☐ Load Processed Items ☐ Show POD Items Only POG Code: (Select)

Sales Order

Sales Order Customer: BEN123 Bender Fulfillment

Project: Bender Pulf Recipient: BEN123

Inventory Summary

Inventory Code	Inventory Description	Total Ord...	Total Over...	Total...	On Hand	On Order	Committed...	Balance	Group	Family	Category	Status Message
LIZ84-109m	Coupons	1	0	1	0	0	0	-1				
LIZ34-192c	Lunch Menu	17	0	17	0	0	0	-17				
LIZ54-311e	Place Mats	20	0	20	0	0	0	-20				
LIZ44-262j	Ads	25	0	25	0	0	0	-25				
LIZ72-268i	Dinner Menu	40	0	40	0	0	0	-40				
LIZ24-215k	Dress Code Sign	46	0	46	0	0	0	-46				
LIZ44-192d	All Day Menu	50	0	50	0	0	0	-50				
			0	854	0	0	0	-854				

Campaign Items

Drag a column header here to group by that column

	Inventory Code	Campaign Code	Order Quantity	Planned Distribution Qty	Overs Quantity	Total Quantity	MIS Job #	MIS Sub Job #	PrintStream Sales Order #	Sales Order LineID	FW Set	FW Ship	POG Code
<input checked="" type="checkbox"/>	LIZ84-109m	050621	1		0	1		0	0	0	0 34		POG4
<input checked="" type="checkbox"/>	LIZ44-262j	050621	25		0	25		0	0	0	0 35		POG1
<input checked="" type="checkbox"/>	LIZ24-215k	050621	46		0	46		0	0	0	0 23		POG4
<input checked="" type="checkbox"/>	LIZ19-277j	050621	100		0	100		0	0	0	0 33		POG1
<input checked="" type="checkbox"/>	LIZ72-268i	050621	40		0	40		0	0	0	0 35		POG3
<input checked="" type="checkbox"/>	LIZ67-267h	050621	50		0	50		0	0	0	0 28		POG2
<input checked="" type="checkbox"/>	LIZ37-185g	050621	55		0	55		0	0	0	0 35		POG1
				0	0	854							

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.

Campaign Job Processing

Load Campaign Items Save Grid Changes Create Job Orders Select All Clear All Preview Grid Printing

Campaign Selection

Campaign Customer: BEN123 Bender Fulfillment

Select Customer Campaigns: 050621

☐ Load Processed Items ☐ Show POD Items Only POG Code: (Select)

Sales Order

Sales Order Customer: BEN123 Bender Fulfillment

Project: Bender Pulf Recipient: BEN123

Inventory Summary

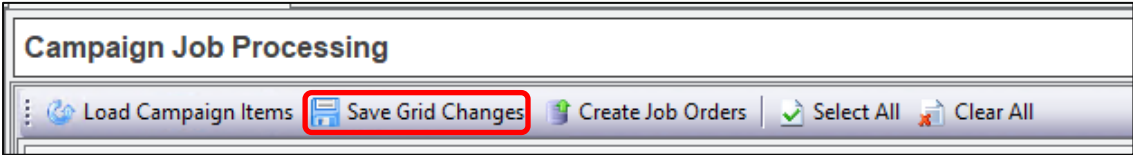
Inventory Code	Inventory Description	Total Ord...	Total Over...	Total...	On Hand	On Order	Committed...	Balance	Group	Family	Category	Status Message
LIZ84-109m	Coupons	1	2	3	0	0	0	-3				
LIZ34-192c	Lunch Menu	17	0	17	0	0	0	-17				
LIZ54-311e	Place Mats	20	0	20	0	0	0	-20				
LIZ44-262j	Ads	25	0	25	0	0	0	-25				
LIZ72-268i	Dinner Menu	40	0	40	0	0	0	-40				
LIZ24-215k	Dress Code Sign	46	0	46	0	0	0	-46				
LIZ44-192d	All Day Menu	50	0	50	0	0	0	-50				
			2	856	0	0	0	-856				

Campaign Items

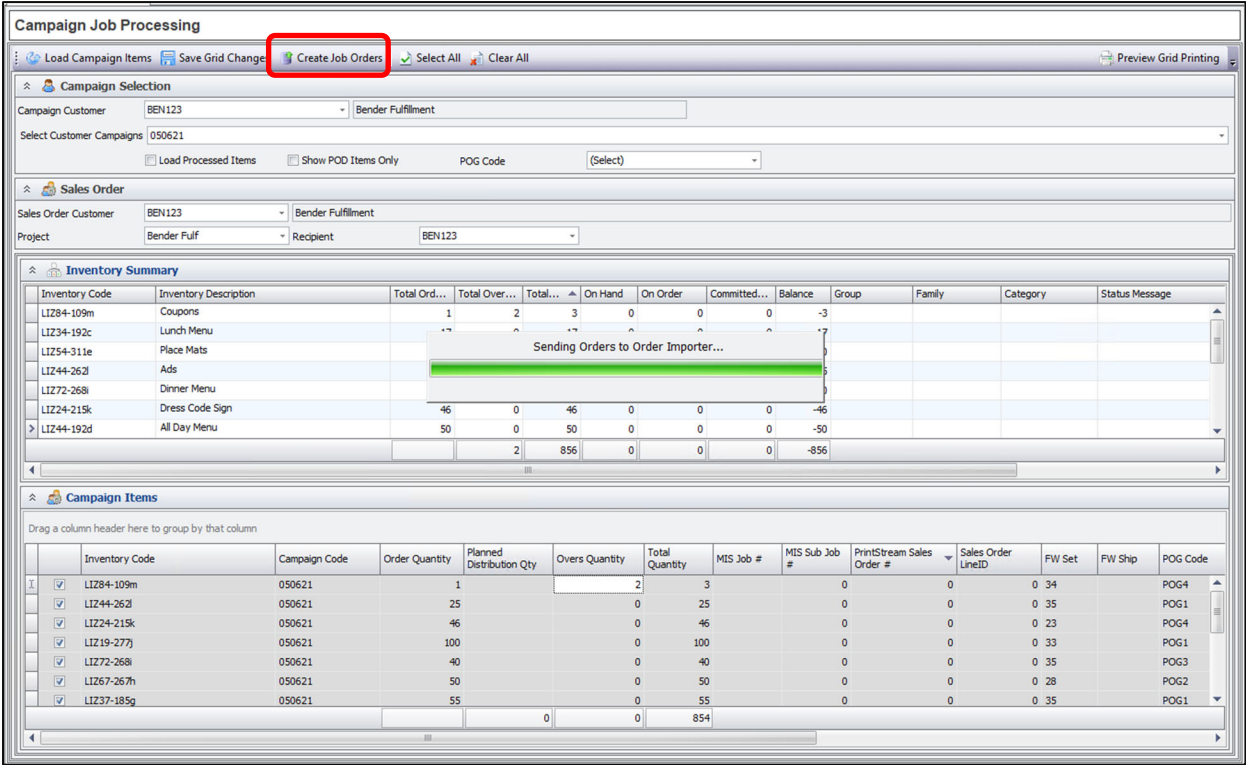
Drag a column header here to group by that column

	Inventory Code	Campaign Code	Order Quantity	Planned Distribution Qty	Overs Quantity	Total Quantity	MIS Job #	MIS Sub Job #	PrintStream Sales Order #	Sales Order LineID	FW Set	FW Ship	POG Code
<input checked="" type="checkbox"/>	LIZ84-109m	050621	1		2	3		0	0	0	0 34		POG4
<input checked="" type="checkbox"/>	LIZ44-262j	050621	25		0	25		0	0	0	0 35		POG1
<input checked="" type="checkbox"/>	LIZ24-215k	050621	46		0	46		0	0	0	0 23		POG4
<input checked="" type="checkbox"/>	LIZ19-277j	050621	100		0	100		0	0	0	0 33		POG1
<input checked="" type="checkbox"/>	LIZ72-268i	050621	40		0	40		0	0	0	0 35		POG3
<input checked="" type="checkbox"/>	LIZ67-267h	050621	50		0	50		0	0	0	0 28		POG2
<input checked="" type="checkbox"/>	LIZ37-185g	050621	55		0	55		0	0	0	0 35		POG1
				0	0	854							

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.

Campaign Job Processing

Load Campaign Items Save Grid Changes Create Job Orders Select All Clear All Preview Grid Printing

Campaign Selection

Campaign Customer: BEN123 Bender Fulfillment

Select Customer Campaigns: 050621

☐ Load Processed Items ☐ Show POD Items Only POG Code: (Select)

Sales Order

Sales Order Customer: BEN123 Bender Fulfillment

Project: Bender Fulf Recipient: BEN123

Inventory Summary

Inventory Code	Inventory Description	Total Ord...	Total Over...	Total...	On Hand	On Order	Committed...	Balance	Group	Family	Category
LIZ55-184a	Holiday Menu	200	0	200	0	0	0	-200			
LIZ56-184b	Breakfast Menu	100	0	100	0	0	0	-100			
LIZ34-192c	Lunch Menu	17	0	17	0	0	0	-17			
LIZ44-192d	All Day Menu	50	0	50	0	0	0	-50			
LIZ44-311e	Place Mats	20	0	20	0	0	0	-20			
LIZ45-262f	Wall Menu	150	0	150	0	0	0	-150			
LIZ37-185g	Door Signs	55	0	55	0	0	0	-55			
			2	856	0	0	0	-856			

Campaign Items

Drag a column header here to group by that column

	Inventory Code	Campaign Code	Order Quantity	Planned Distribution Qty	Overs Quantity	Total Quantity	MIS Job #	MIS Sub #	PrintStream Sales Order #	Sales Order Line ID	FW Set	FW Ship	POG Code
<input checked="" type="checkbox"/>	LIZ84-109m	050621	1		2	3			0 1000269086	2549967	34		POG4
<input checked="" type="checkbox"/>	LIZ44-262f	050621	25		0	25			0 1000269086	2549966	35		POG1
<input checked="" type="checkbox"/>	LIZ24-215k	050621	46		0	46			0 1000269086	2549965	23		POG4
<input checked="" type="checkbox"/>	LIZ19-277f	050621	100		0	100			0 1000269086	2549964	33		POG1
<input checked="" type="checkbox"/>	LIZ72-268h	050621	40		0	40			0 1000269086	2549963	35		POG3
<input checked="" type="checkbox"/>	LIZ67-267h	050621	50		0	50			0 1000269086	2549962	28		POG2
<input checked="" type="checkbox"/>	LIZ37-185g	050621	55		0	55			0 1000269086	2549961	35		POG1
					0	2							

7. In Fulfillment, you will see the order.

Fulfillment Release Search Sales Order: Bender Fulfillment : Sales Order #: 1000269086***Project: Bender Fulf

Sales Order

Variable Info Items Get Items Zoom Order Inserts Item Properties Reprint WO Finance Credit Card Billing Detail Shipping Add Discounts Sel. Discounts Apply Credit Discount Estimated Shipping

Sales Order Header

Customer Batch ID: Input Batch ID: 8584 Customer SO#: Monthly SO#: 0

PO #: MIS Job#: Ship Profile: UPS Ground Ship Mode: U11 Ship Before Dates: Do Not Rel.: Source Code: Warehouse: Amarillo Product Type: Order By: LIZ Bender

Ship Timeline: Need Dates: Order Type: Cost Center: Commission:

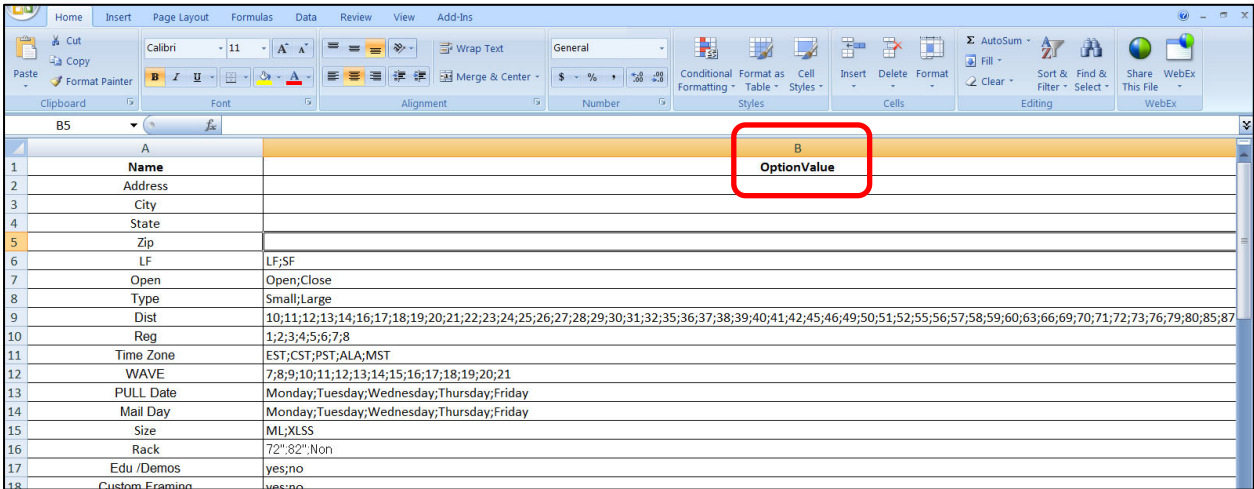
Inv Code	Item #	Rev Code	Item Desc	Weight	Min Qty	Max Qty	Avail Qty	Qty On Ord	Order Qty	Unit Price	Warehouse	Status	MIS Job #	Ship To	Profile Id	Ship Mode	Shipping Handling...	Do Not Release...	Use Extended
LIZ55-184a	210953		Holiday Menu	0	0	0	0	200	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ56-184b	210954		Breakfast Menu	0	0	0	0	100	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ34-192c	210955		Lunch Menu	0	0	0	0	17	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ44-192d	210956		All Day Menu	0	0	0	0	50	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ44-311e	210957		Place Mats	0	0	0	0	20	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ45-262f	210958		Wall Menu	0	0	0	0	150	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ37-185g	210959		Door Signs	0	0	0	0	55	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ67-267h	210960		Open Close sign	0	0	0	0	50	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ72-268h	210961		Dinner Menu	0	0	0	0	40	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ19-277f	210962		Register Sign	0	0	0	0	100	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ24-215k	210963		Dress Code Sign	0	0	0	0	46	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ44-262f	210964		Ads	0	0	0	0	25	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
LIZ84-109m	210965		Coupons	0	0	0	0	3	0	0	Amarillo	Comm	BEN123	UPS Ground	U11				
				0	0	0	0	0			Unprocessed						0		

Create Distribution Orders

Attributes Upload

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

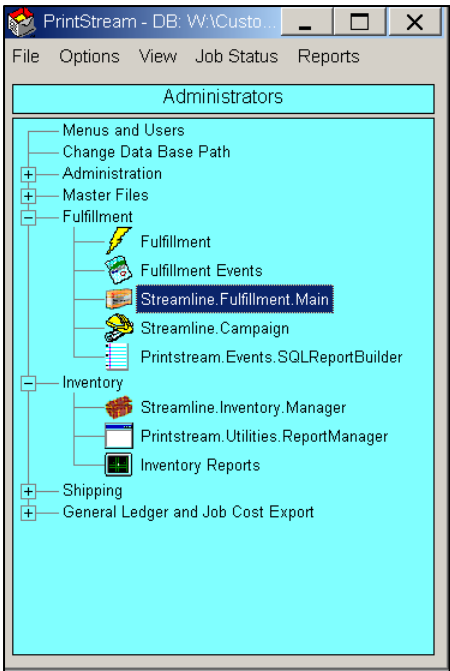
Note OptionValue has to be in column B header.



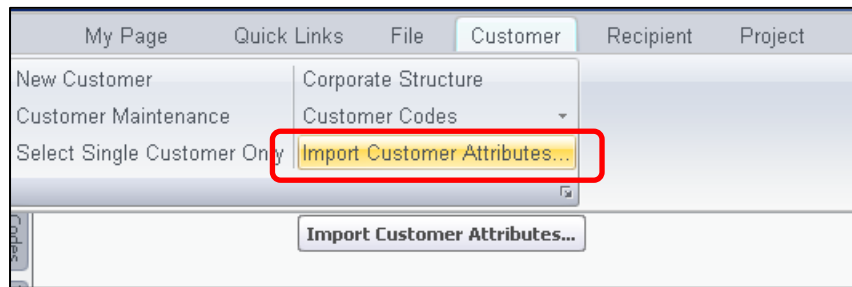
	A	B
1	Name	OptionValue
2	Address	
3	City	
4	State	
5	Zip	
6	LF	LF;SF
7	Open	Open;Close
8	Type	Small;Large
9	Dist	10;11;12;13;14;16;17;18;19;20;21;22;23;24;25;26;27;28;29;30;31;32;35;36;37;38;39;40;41;42;45;46;49;50;51;52;55;56;57;58;59;60;63;66;69;70;71;72;73;76;79;80;85;87
10	Reg	1;2;3;4;5;6;7;8
11	Time Zone	EST;CST;PST;ALA;MST
12	WAVE	7;8;9;10;11;12;13;14;15;16;17;18;19;20;21
13	PULL Date	Monday;Tuesday;Wednesday;Thursday;Friday
14	Mail Day	Monday;Tuesday;Wednesday;Thursday;Friday
15	Size	ML;XLSS
16	Rack	72";82";Non
17	Edu /Demos	yes;no
18	Custom Framing	yes;no

To upload attributes

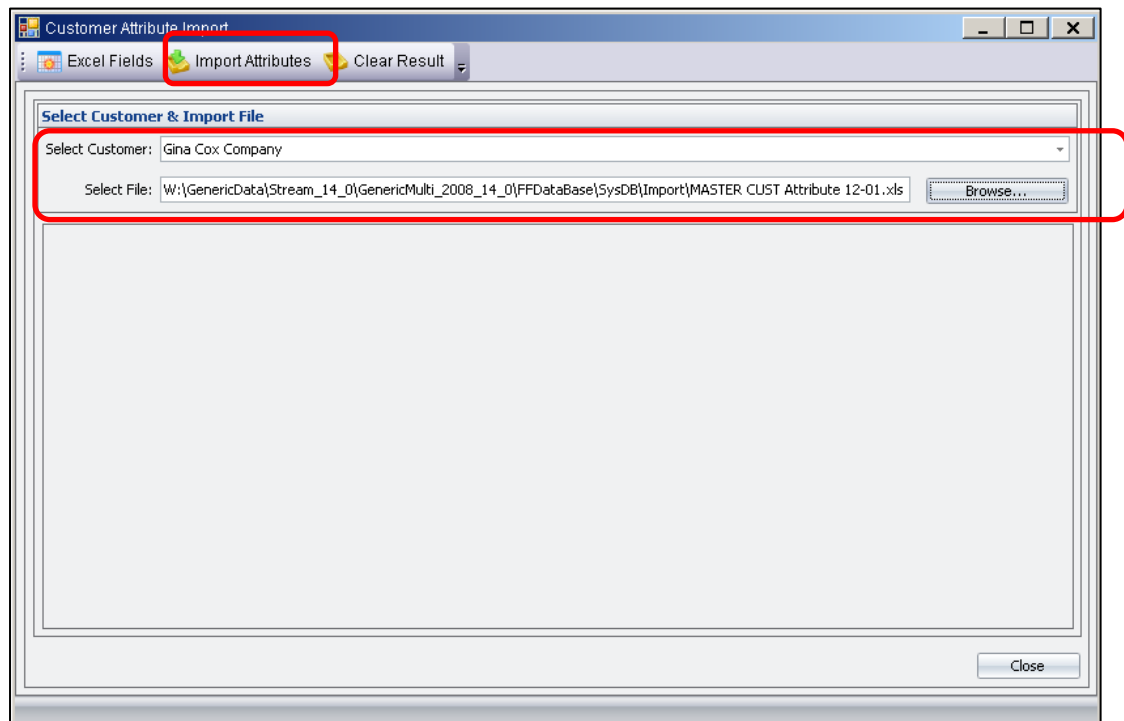
1. Open **Fulfillment > Streamline Fulfillment Main**.



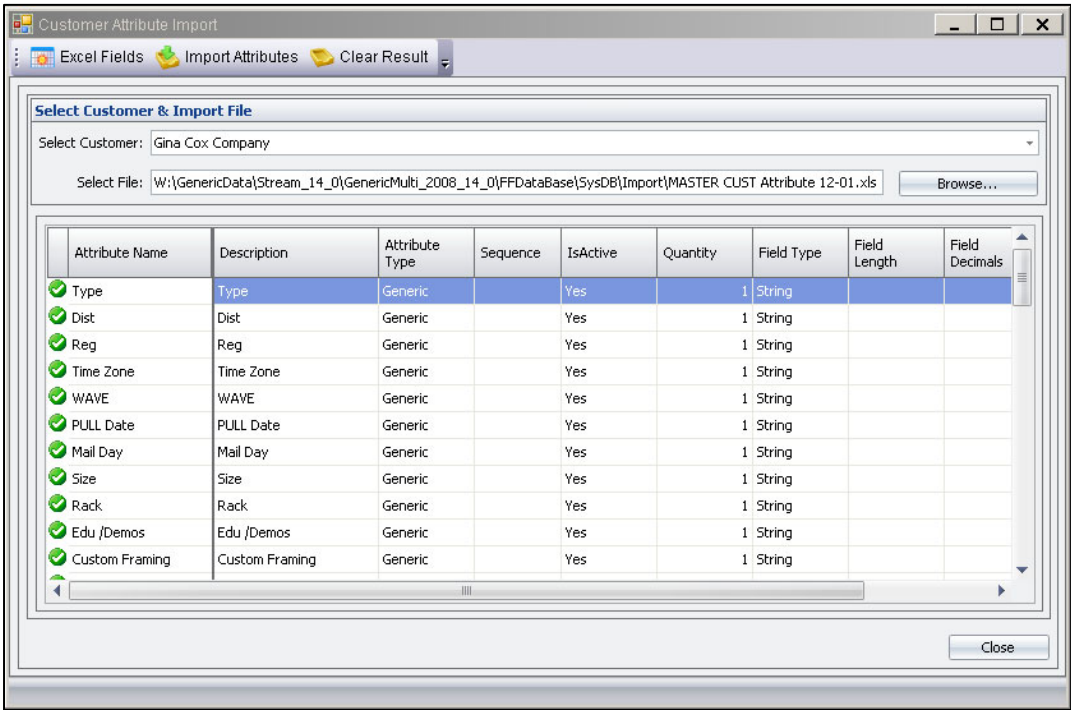
2. Select **Customer > Import Customer Attributes**.



3. Select the customer and the file and then click **Import Attributes**.

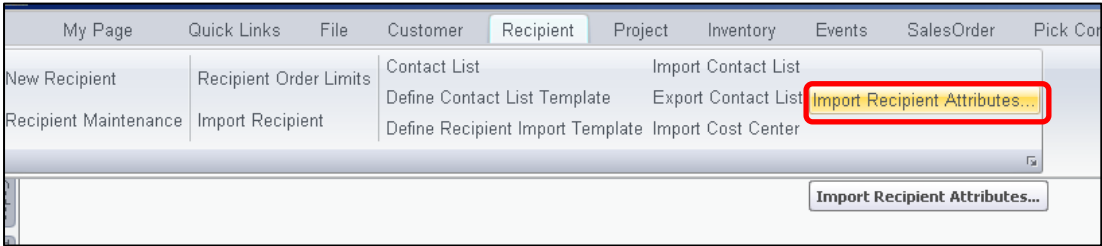


The results will display:

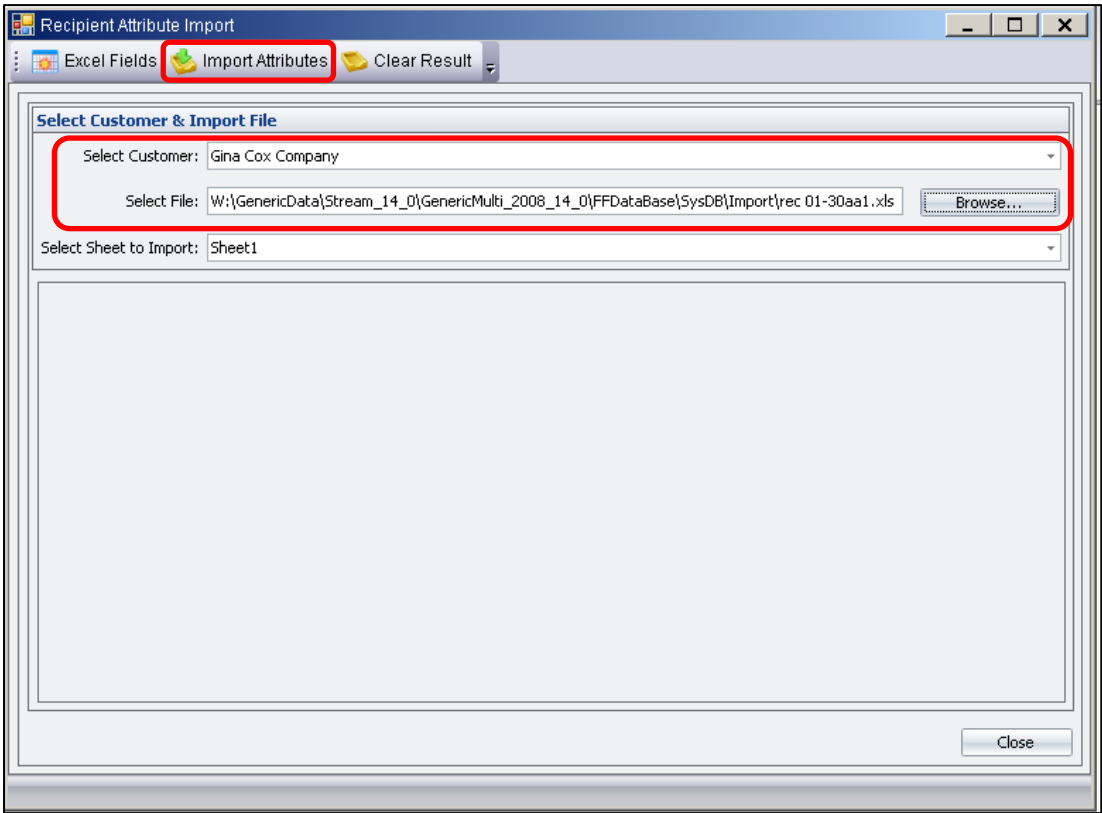


To update recipients

- 1. In **Streamline Fulfillment Main** select **Recipient > Import Recipient Attributes**.



- 2. Select the customer and file. Select **Import Attributes**.



The results will display:

The screenshot shows the 'Recipient Attribute Import' dialog box. The 'Select Customer & Import File' section is at the top, with 'Gina Cox Company' selected for the customer and a file path for 'rec 01-30aa1.xls' selected for the file. 'Sheet1' is selected for the sheet to import. Below this is a table with columns 'Cust. Recip ID', 'AttributeName', and 'OptionValue'. The table contains 8 rows of data for customer 0102. A 'Show Errors only' checkbox is at the bottom left. The status bar at the bottom says 'Data successfully imported...' and there is a 'Close' button.

Select Customer & Import File

Select Customer: Gina Cox Company

Select File: W:\GenericData\Stream_14_0\GenericMulti_2008_14_0\FFDataBase\SysDB\Import\rec 01-30aa1.xls Browse...

Select Sheet to Import: Sheet1

Drag a column header here to group by that column

Cust. Recip ID	AttributeName	OptionValue
0102	Mail Day	Wednesday
0102	PULL Date	Tuesday
0102	Edu /Demos	no
0102	Custom Framing	no
0102	Viking	no
0102	American Greetings	no
0102	Inspiration	yes
0102	IBN	no
0102	Lifestyle Encl Size	MM

☐ Show Errors only

Data successfully imported... Close