User Guide

Customer View Add On
V21.1.0200

EFI Enterprise Commercial Print Suite | V21.1.0200 *Customer View Add On*

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

Customer View is designed to give your customers an insight via web access to their Invoices, Postage, Job Tracking, Inventory, and Reports.

Begin by setting up your Web and Business Rules server based on the technical documents provided in the Master Migration Templates located on our documentation website.

Once the hardware requirements are in place, start by publishing your company's default Web Style. This will give all your customers a standard website for viewing their customer-specific information.

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
Web Site	http://customer.efi.com/support

EFI Support is available to assist clients in resolving general issues and defects, answer how-to questions, and distribute new releases and patches. The Service Desk is available Monday – Friday.

Note For problems involving infrastructure (i.e., workstations, networks, operating systems, backup software, printers, third-party software, etc.), contact the appropriate vendor. EFI cannot be responsible for supporting these types of issues.

EFI Professional Services

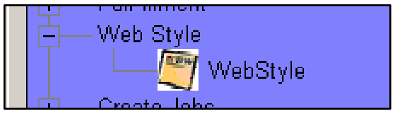
US Phone:	651.365.5321
US FAX:	651.365.5334
E-Mail:	ProfessionalServicesOperations@efi.com

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

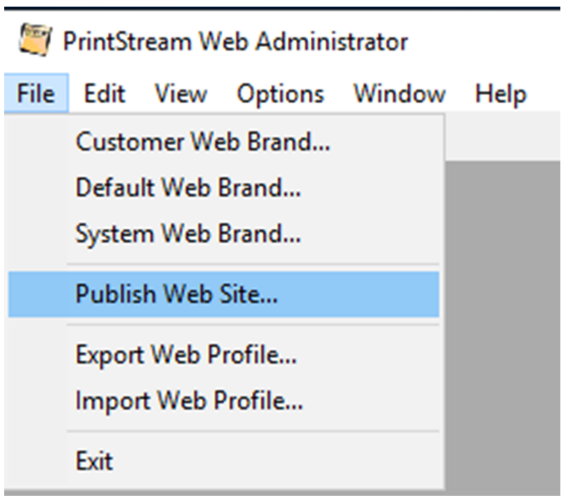
Publishing the Web Style

To publish the Web Style

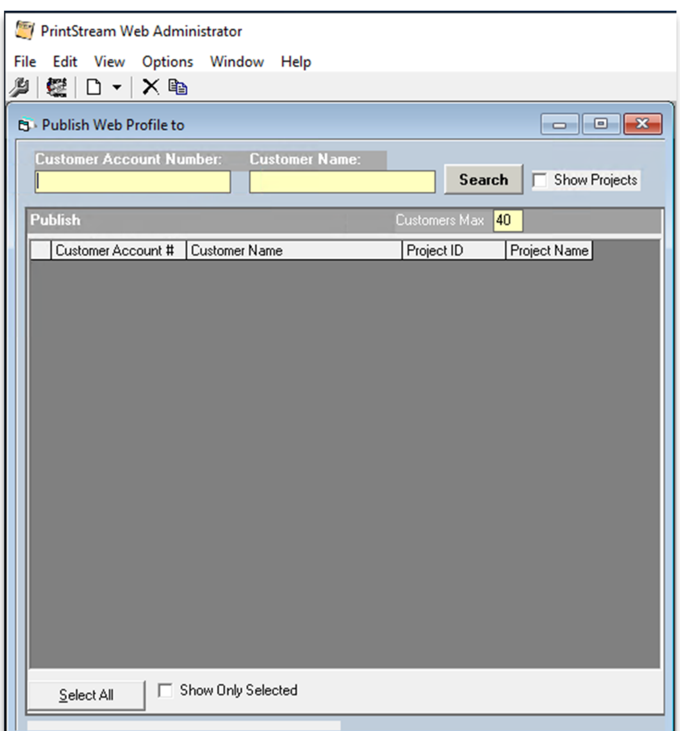
1. Open **Web Style** from the PrintStream main menu.



2. Click **File** and select **Publish Web Site**.

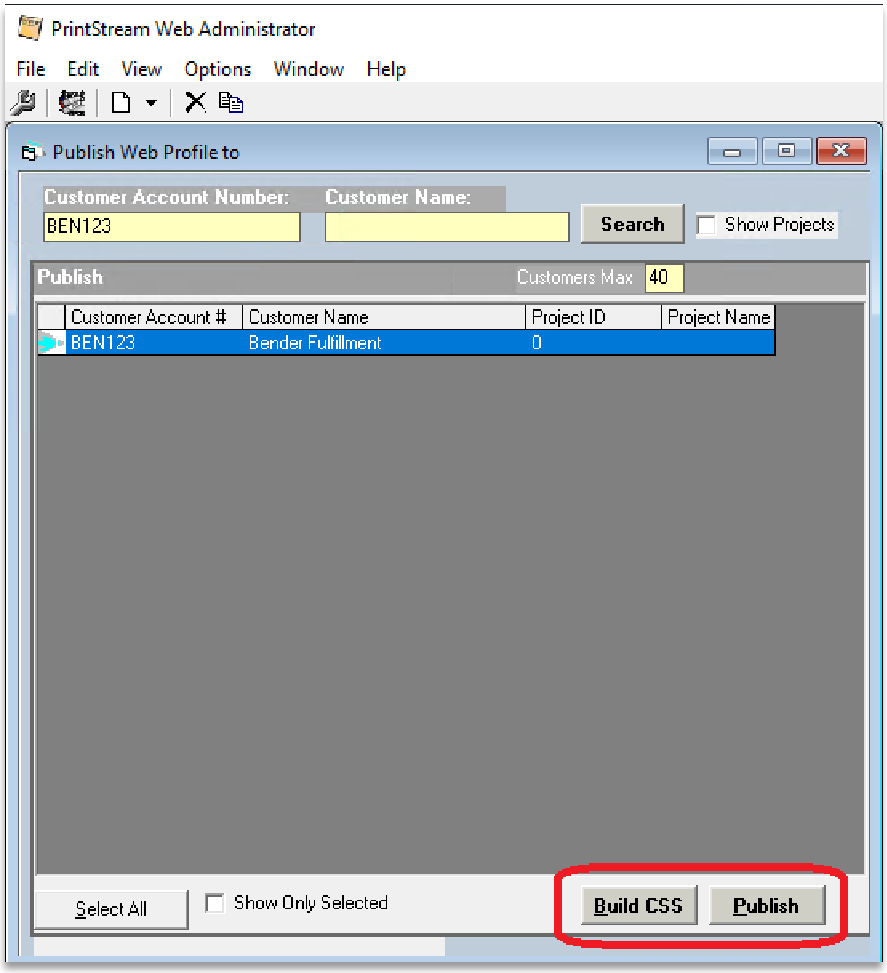


3. In the **Publish** screen, enter the **Customer Account Number** that is set up for your company in Master Files Customer and click the **Search** button.



4. Click the line with **Project 0** to highlight it.

   You will ALWAYS only publish at the Project 0 level for Customer View.



5. Click **Build CSS** in the bottom right of the screen.

   This action will build the pages quickly.

6. Once the web pages are built, click the **Publish** button.

   PrintStream will notify you when the publishing process is complete.

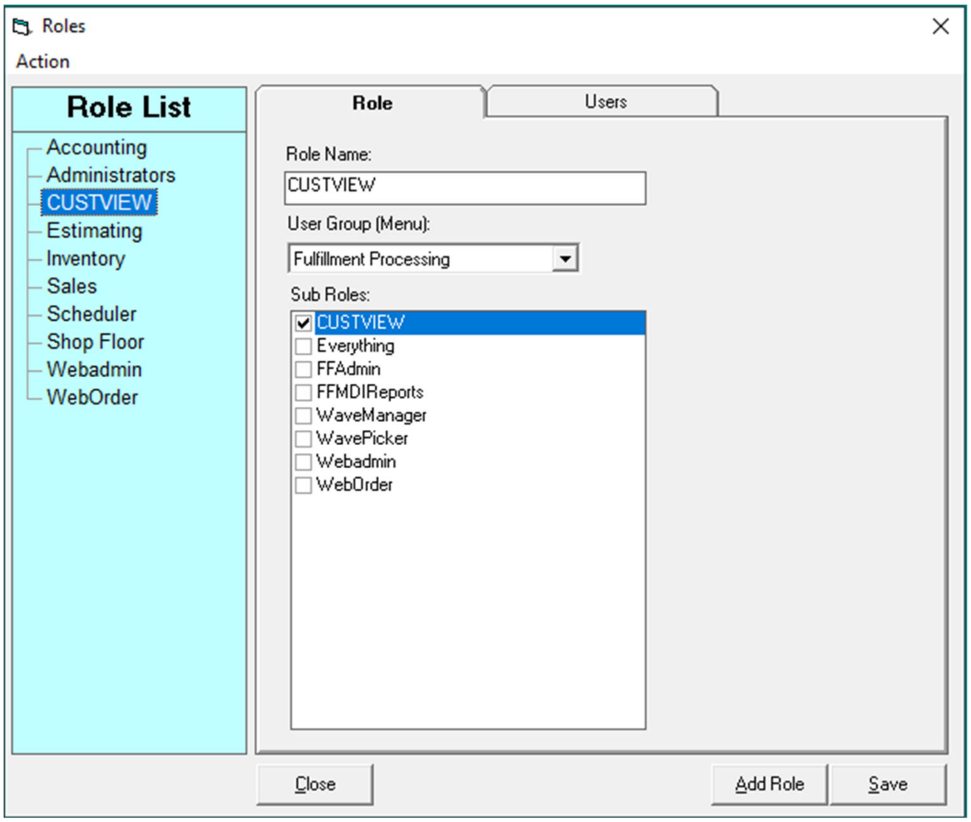
7. Exit **Web Styles**.

Creating the Role and Sub Roles

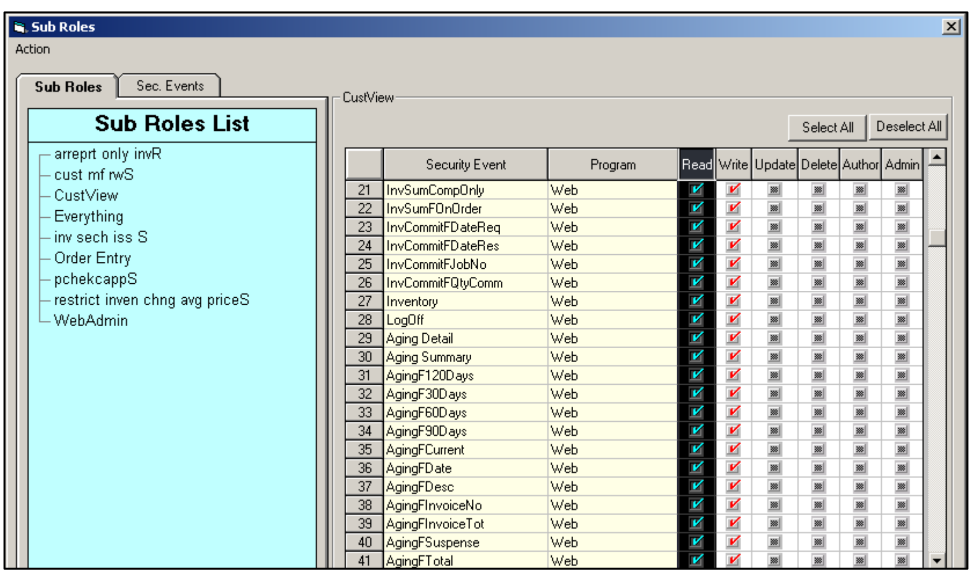
To create the role and sub roles

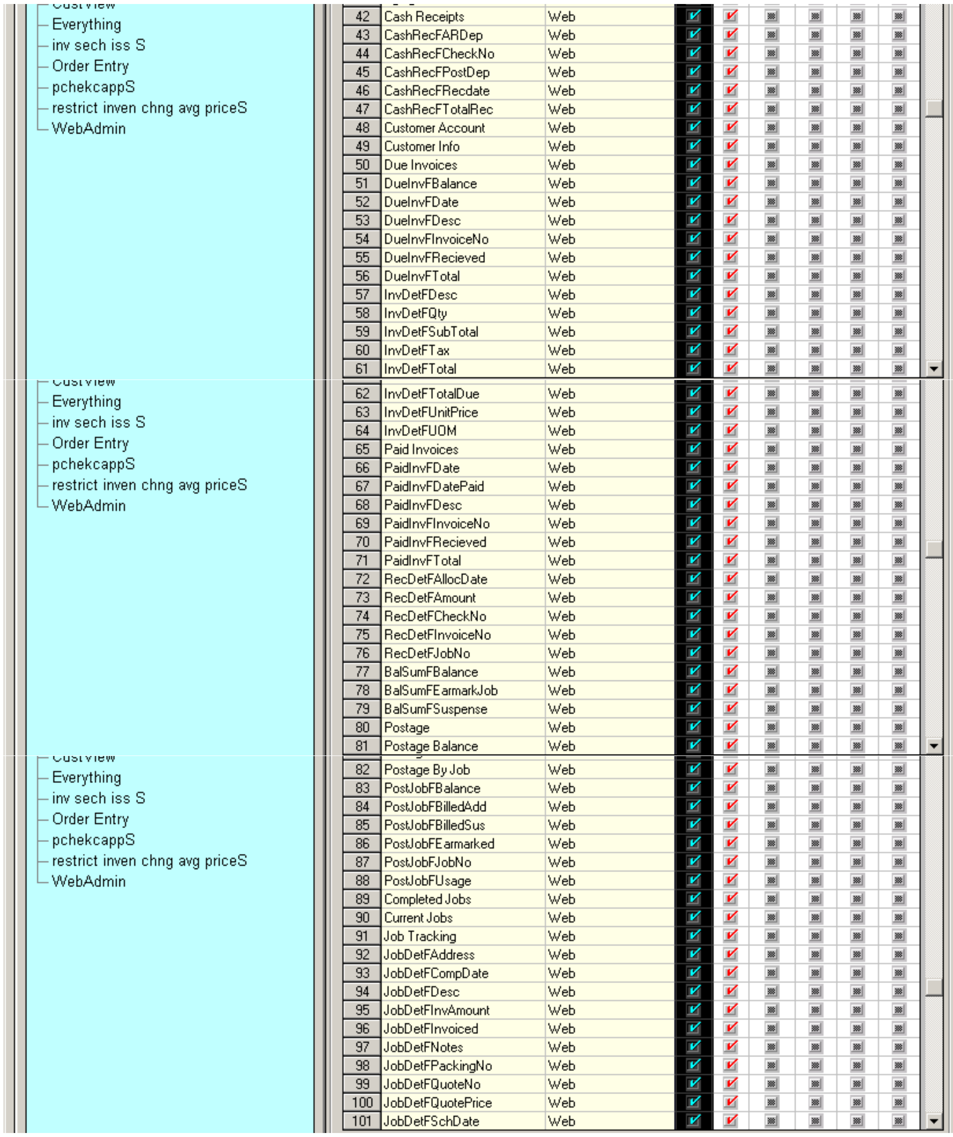
1. In **Menus and Users**, set up a **CUSTVIEW** role to enable your customers to have logins to your customer view.

   Roles



Sub Roles – These will have only the Fulfillment items shown below for enabling Customer View.




Everything
inv sech iss S
Order Entry
pchekcappS
restrict inven chng avg priceS
WebAdmin
42 Cash Receipts Web
43 CashRecFARDep Web
44 CashRecFCheckNo Web
45 CashRecFPostDep Web
46 CashRecFRecdate Web
47 CashRecFTotalRec Web
48 Customer Account Web
49 Customer Info Web
50 Due Invoices Web
51 DueInvFBalance Web
52 DueInvFDate Web
53 DueInvFDesc Web
54 DueInvFInvoiceNo Web
55 DueInvFRecieved Web
56 DueInvFTotal Web
57 InvDetFDesc Web
58 InvDetFQty Web
59 InvDetFSubTotal Web
60 InvDetFTax Web
61 InvDetFTotal Web
Everything
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Order Entry
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restrict inven chng avg priceS
WebAdmin
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67 PaidInvFDatePaid Web
68 PaidInvFDesc Web
69 PaidInvFInvoiceNo Web
70 PaidInvFRecieved Web
71 PaidInvFTotal Web
72 RecDetFAllocDate Web
73 RecDetFAmount Web
74 RecDetFCheckNo Web
75 RecDetFInvoiceNo Web
76 RecDetFJobNo Web
77 BalSumFBalance Web
78 BalSumFEarmarkJob Web
79 BalSumFSuspense Web
80 Postage Web
81 Postage Balance Web
Everything
inv sech iss S
Order Entry
pchekcappS
restrict inven chng avg priceS
WebAdmin
82 Postage By Job Web
83 PostJobFBalance Web
84 PostJobFBilledAdd Web
85 PostJobFBilledSus Web
86 PostJobFEarmarked Web
87 PostJobFJobNo Web
88 PostJobFUsage Web
89 Completed Jobs Web
90 Current Jobs Web
91 Job Tracking Web
92 JobDetFAddress Web
93 JobDetFCompDate Web
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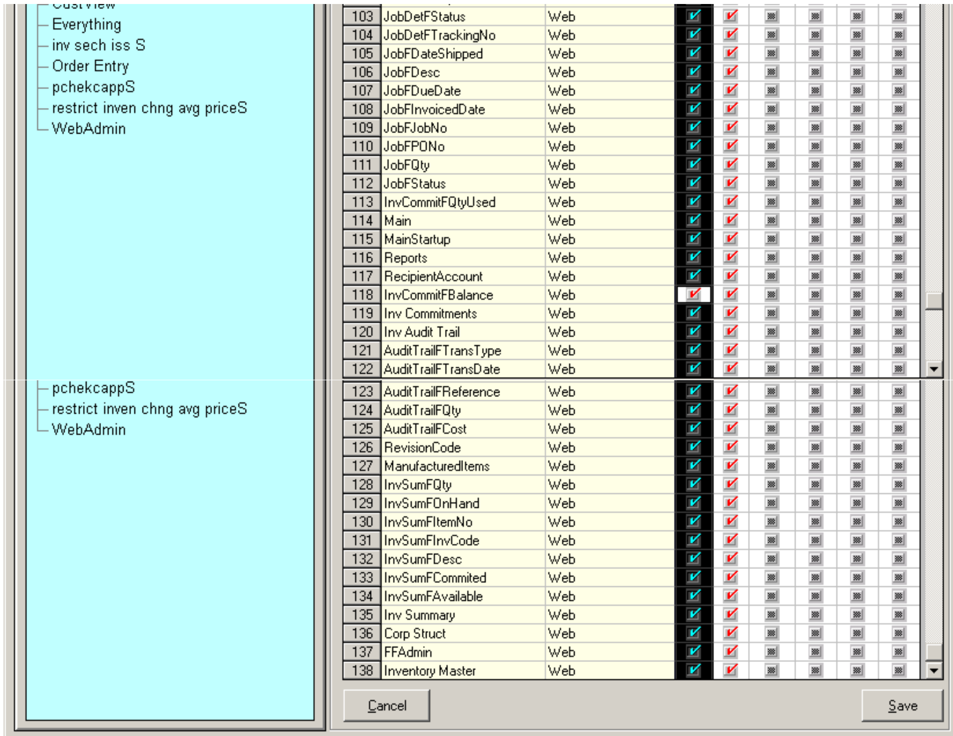
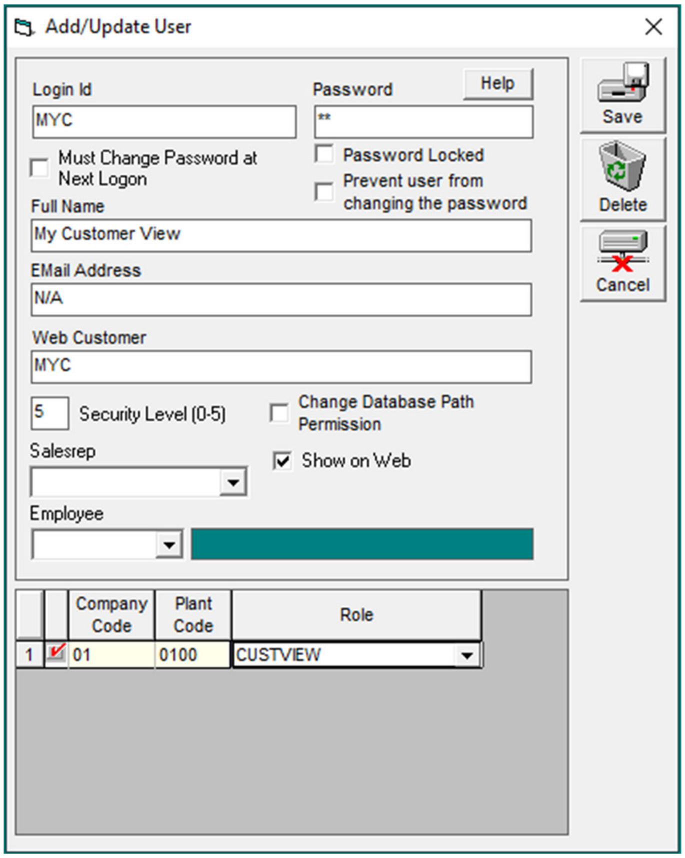

Everything
inv sech iss S
Order Entry
pchekcappS
restrict inven chng avg priceS
WebAdmin
103 JobDetFStatus Web
104 JobDetFTrackingNo Web
105 JobFDateShipped Web
106 JobFDesc Web
107 JobFDueDate Web
108 JobFInvoicedDate Web
109 JobFJobNo Web
110 JobFPONo Web
111 JobFQty Web
112 JobFStatus Web
113 InvCommitFQtyUsed Web
114 Main Web
115 MainStartup Web
116 Reports Web
117 RecipientAccount Web
118 InvCommitFBalance Web
119 Inv Commitments Web
120 Inv Audit Trail Web
121 AuditTrailFTransType Web
122 AuditTrailFTransDate Web
pchekcappS
restrict inven chng avg priceS
WebAdmin
123 AuditTrailFReference Web
124 AuditTrailFQty Web
125 AuditTrailFCost Web
126 RevisionCode Web
127 ManufacturedItems Web
128 InvSumFQty Web
129 InvSumFOnHand Web
130 InvSumFItemNo Web
131 InvSumFInvCode Web
132 InvSumFDesc Web
133 InvSumFCommited Web
134 InvSumFAvailable Web
135 Inv Summary Web
136 Corp Struct Web
137 FFAdmin Web
138 Inventory Master Web
Cancel
Save

Creating Customer Access to Customer View

To create the Customer's access to the Customer View

1. You can create a very generic log in for your customer by…
   a. Creating a new **User**.
   b. Setting the user login to the customer account number or name.
   c. Setting a password.
   d. Entering their Master File Customer account number into the Web Customer box.



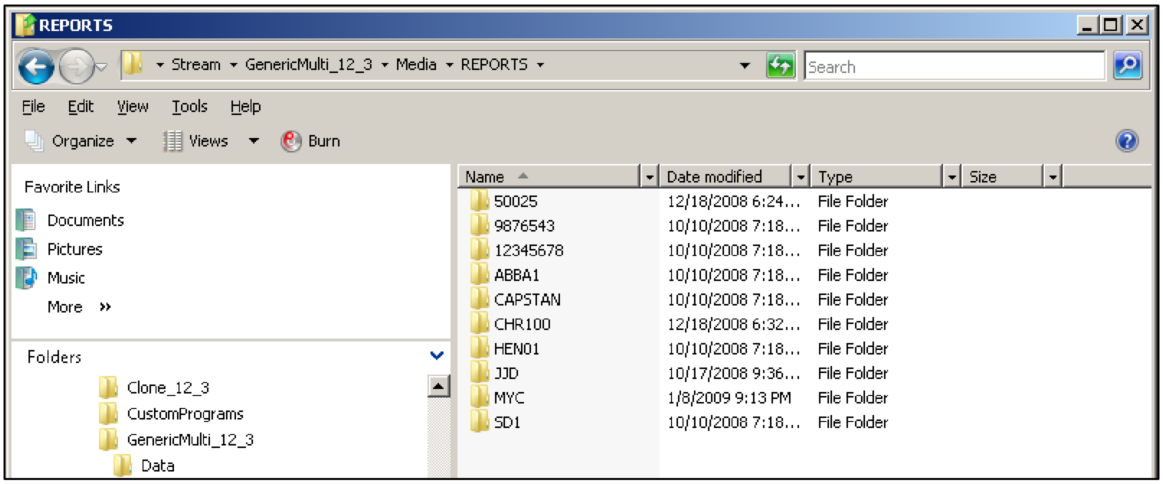
2. Click **Show on Web** and link them to the CUSTVIEW role you have created.

Note The customer account info you enter in to the **Web Customer** box will drive this user to which customer they have access to view.

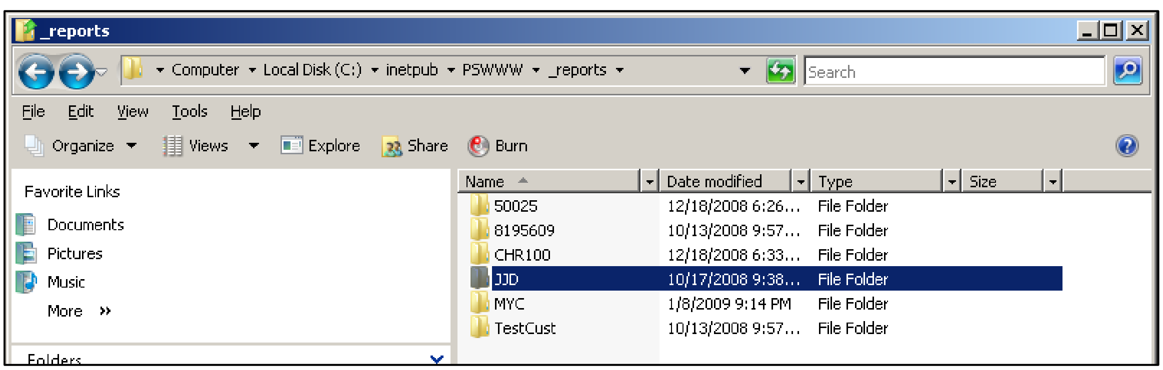
Report Folder Structure

Finally, you will need to set up the Report folder structure. There are several reports in Inventory that will have the **Push to Web** check box. If your report has this box, it will automatically populate to one set of folders necessary for Customer View. For any other report, you can export and manually place it in the folder structure. You will need to have two report folders setup for each customer that will be using Customer View.

The first folder will be in the Stream directory, Live Db, Media, Reports folder. Name the folder with the same customer account number from Master Files Customer. This is the folder that will automatically populate when you use the **Push to Web** feature in reports. Remember, you can also manually place additional reports in this folder for your Customer View.



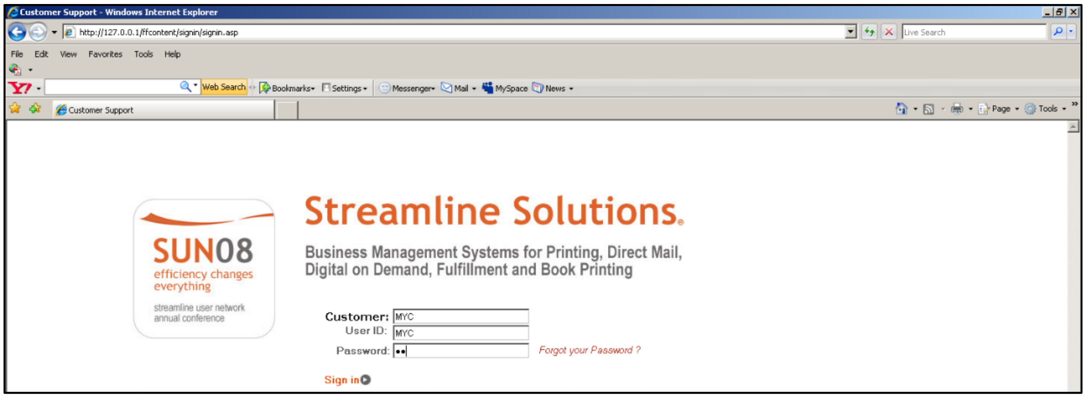
The second folder you will need to ensure exists will be on your Web Server. Go to the **Inetpub > PSWWW > _reports** folder. There, you will need to create another customer folder with the same naming convention as the previous folder setup. At this point, you will need to copy all reports from the first folder, into the second folder so that correct Customer View will be available. At this time, there is no automated process in PrintStream to ensure this copy happens. Your IT department should be able to assist you with a timed copy event that would ensure this second folder populates with reports from the first folder.



At this point, you should have all your setup complete for Customer View and you are now ready to go to the webpage you created when you published in the first steps. Your IT department will help you determine the appropriate path for this webpage. A generic log in screen will open.

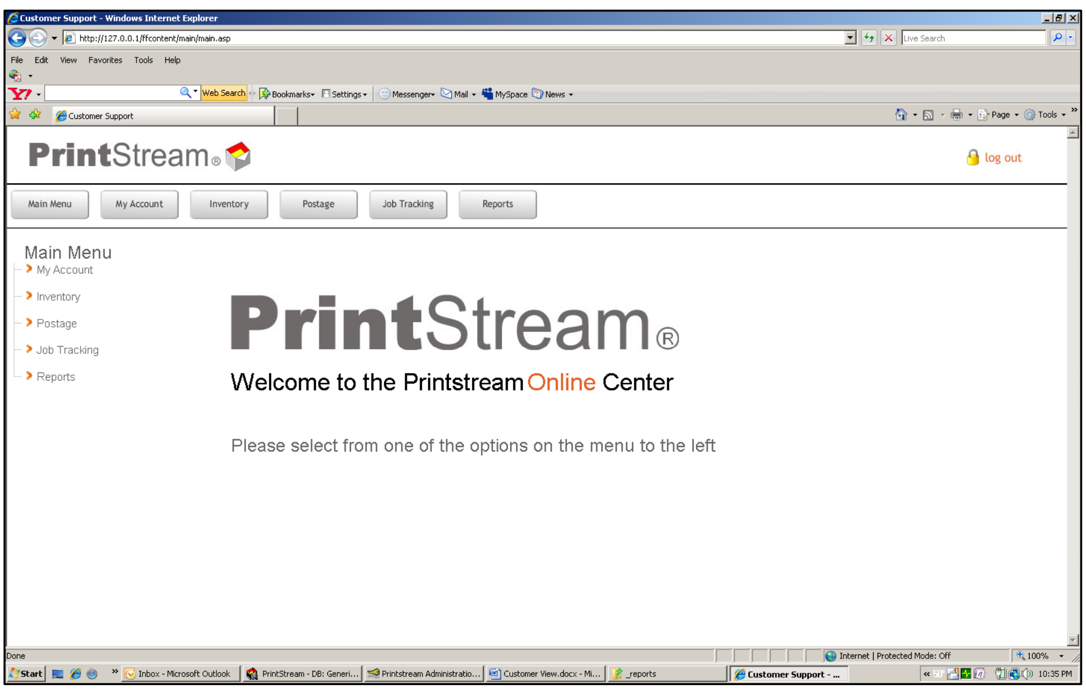
To test

1. Enter your customer's account number, their **Login** and **Password** created in **Menus and Users**, and then click **Sign In**.

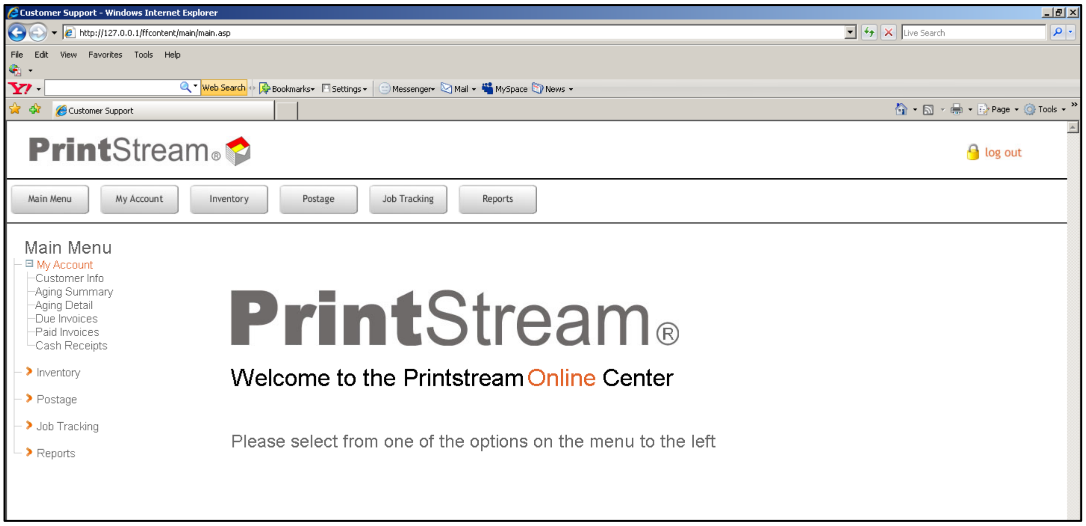


   You should then be directed to the Customer View page.

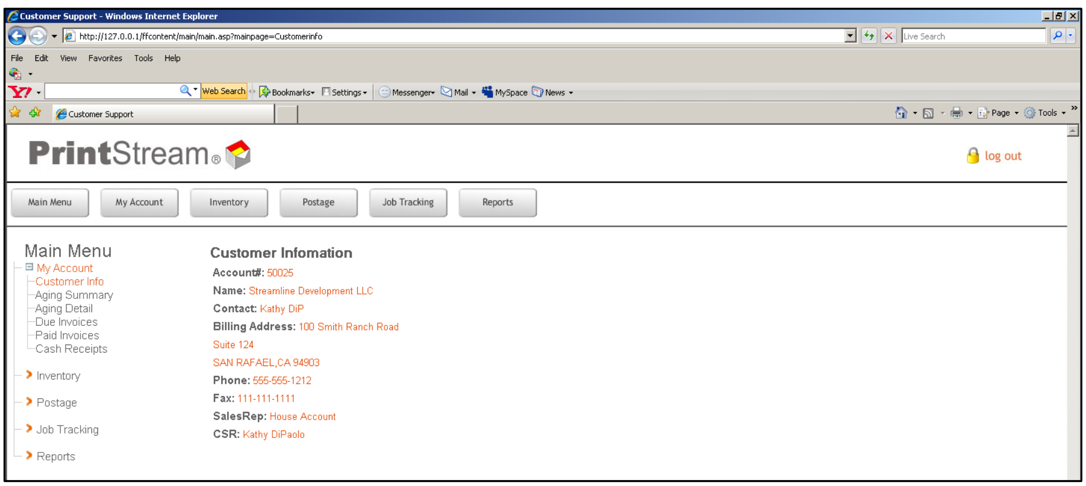
2. At the main menu, you will have the options for **My Account**, **Inventory**, **Postage**, **Job Tracking**, and **Reports**.



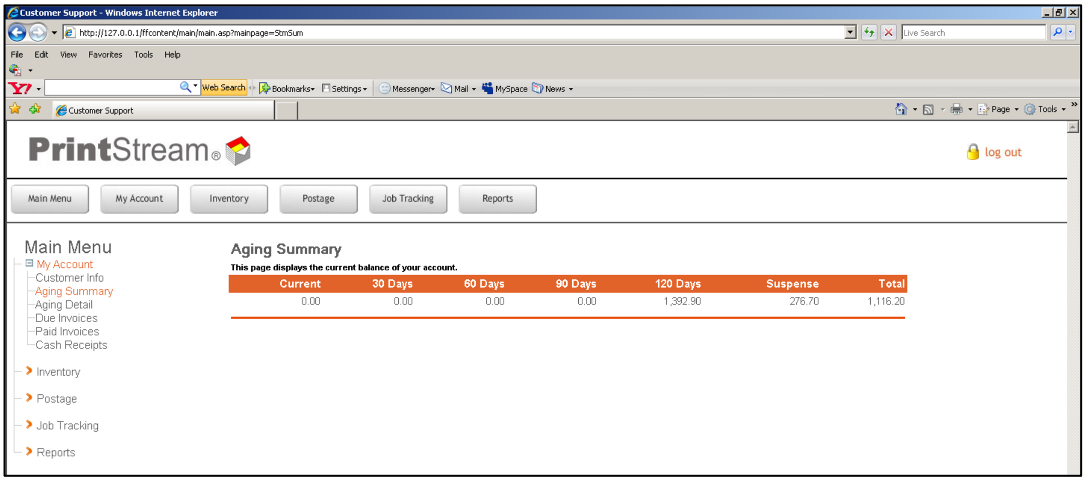
3. Under **My Account**, you will see **Customer Info**, **Aging Summary**, **Aging Detail**, **Due Invoices**, and **Cash Receipts**.



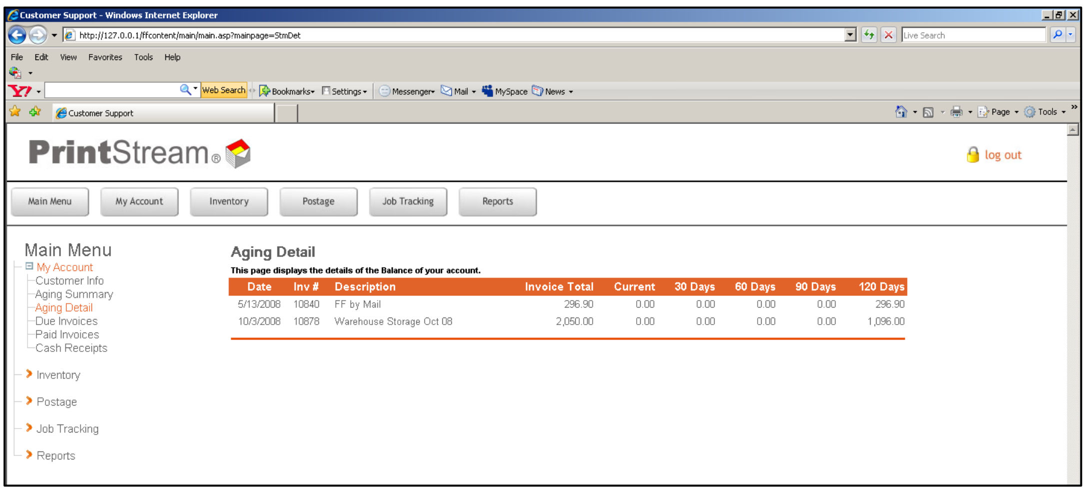
4. By clicking **Customer Info**, you will get the Master Files Customer info for the customer that is logged into the system.



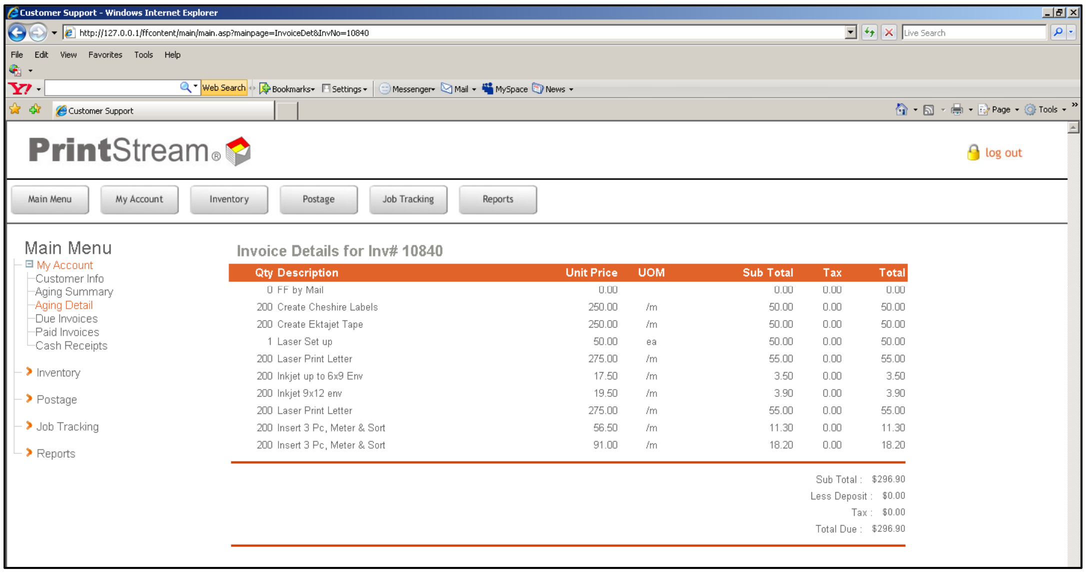
5. At **Aging Summary**, you will see a display summary of invoices due.



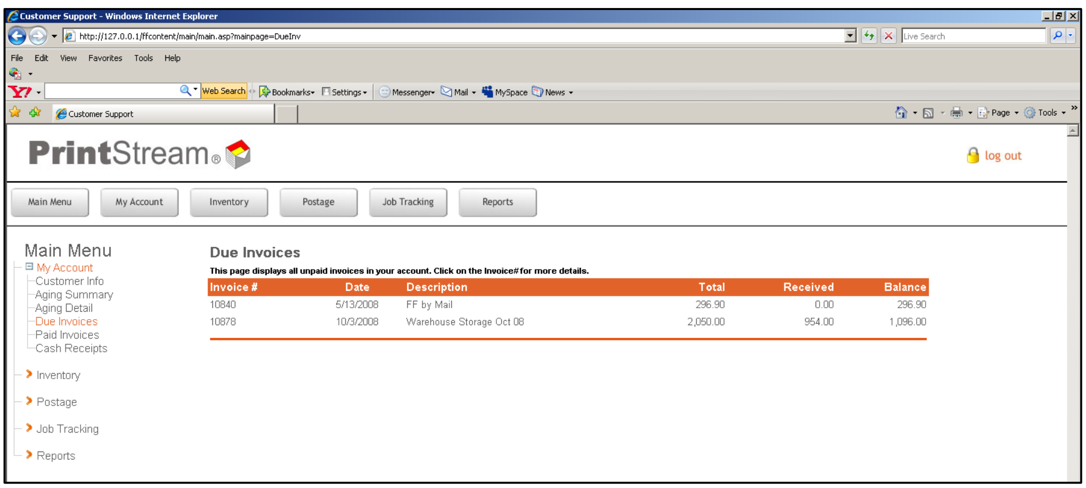
6. At **Aging Detail**, you will see a list of invoices by date. If you click the invoice number, you will get a detail of that invoice.



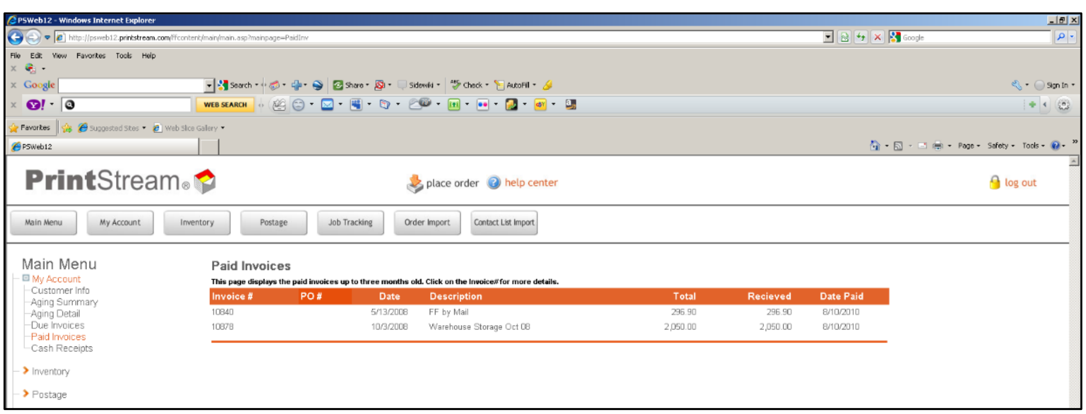
Invoice details



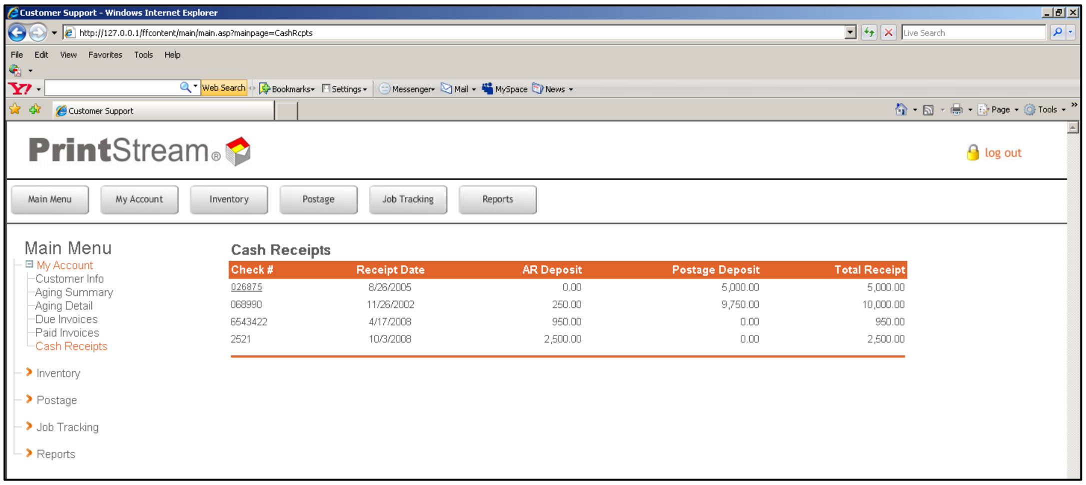
7. At **Due Invoices**, you can see any outstanding invoices that are due to the mail house.



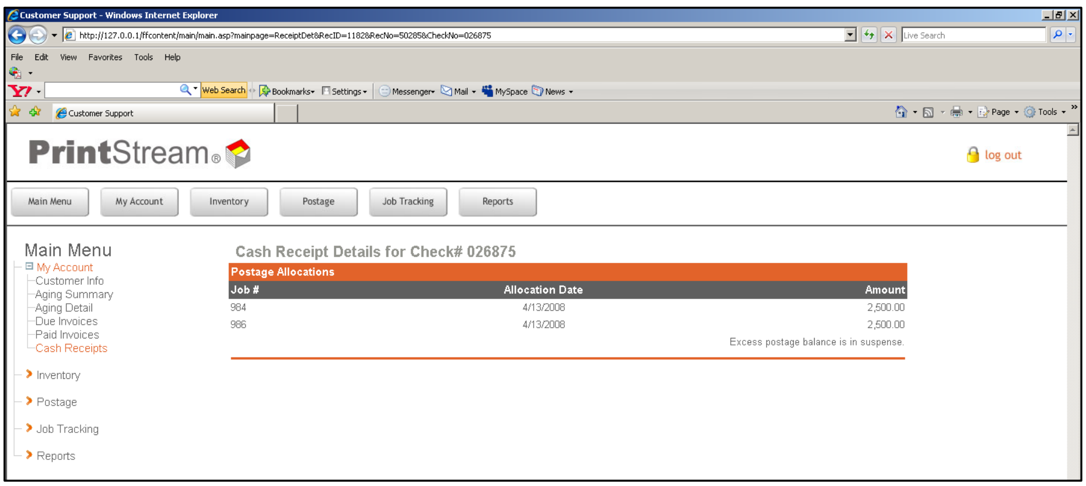
8. At **Paid Invoices**, you can see what invoices have been paid for the past three months.



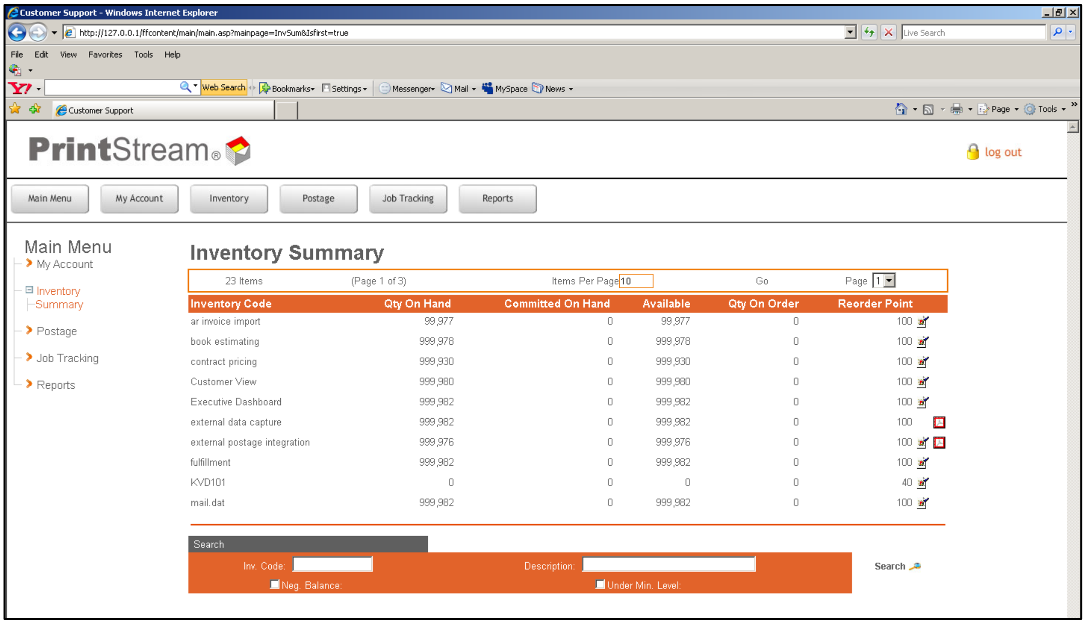
9. At **Cash Receipts**, you can see the receipts that have been received by the mail house.



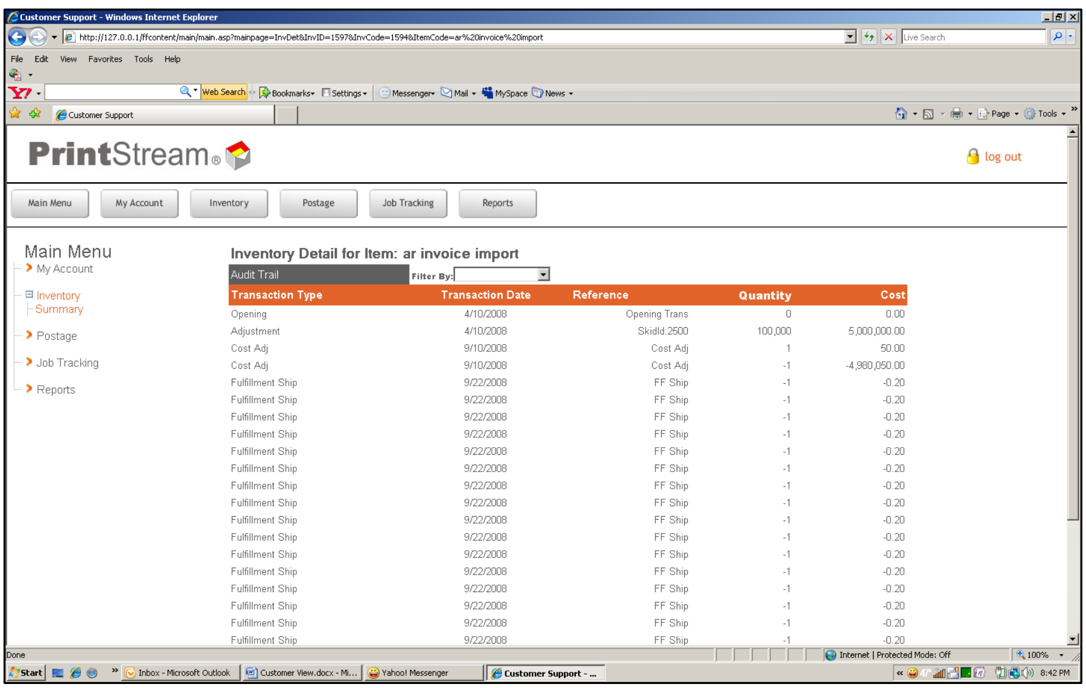
10. If you click the **check number**, it will give you the details of how that check was applied.



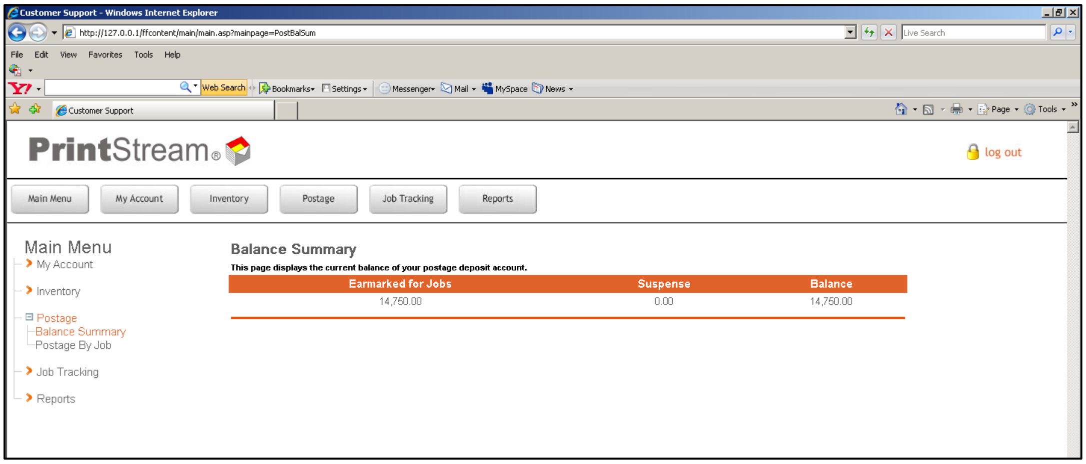
11. At **Inventory Summary**, you can see a list of items that have been marked to **Show on Web** in Master Files Inventory. If you click an inventory code, you can get audit trail details.



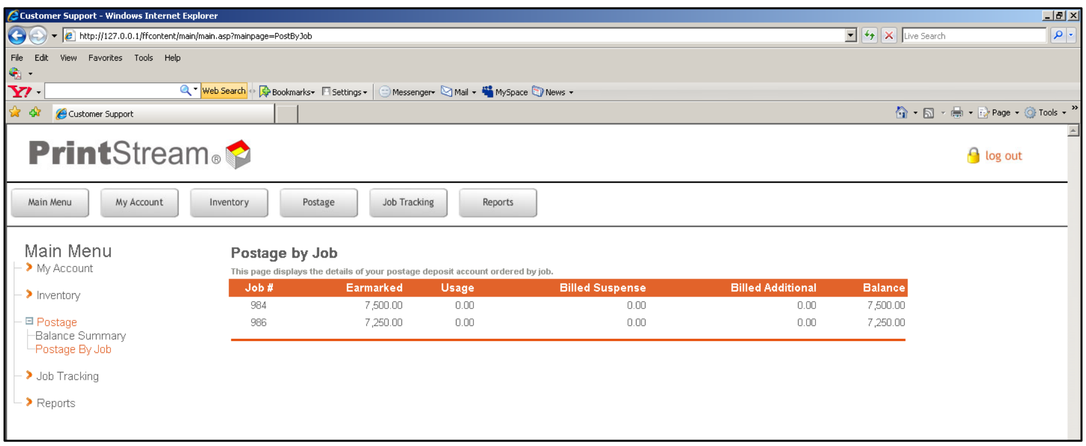
Audit trail details



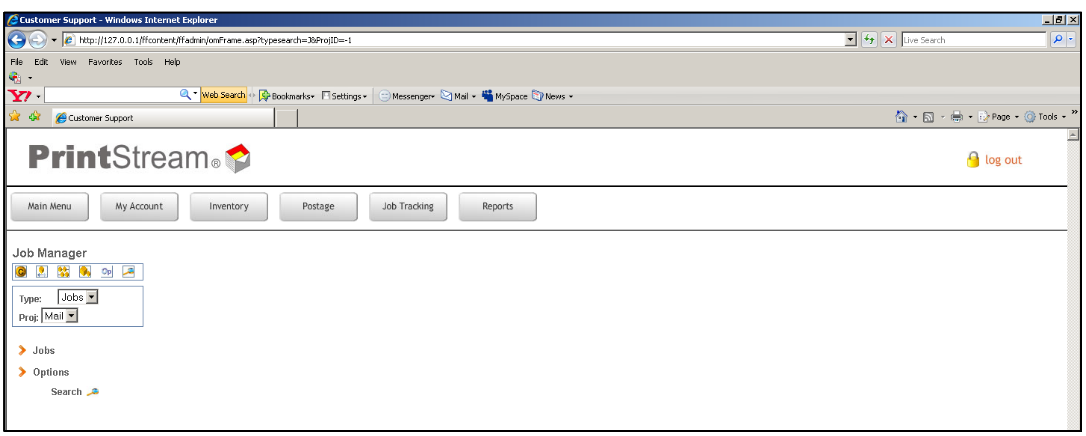
12. The **Postage** tab gives you information on **Balance Summary** and **Postage by Job**. At **Balance Summary**, you will see what is earmarked for jobs, suspense, and balance.



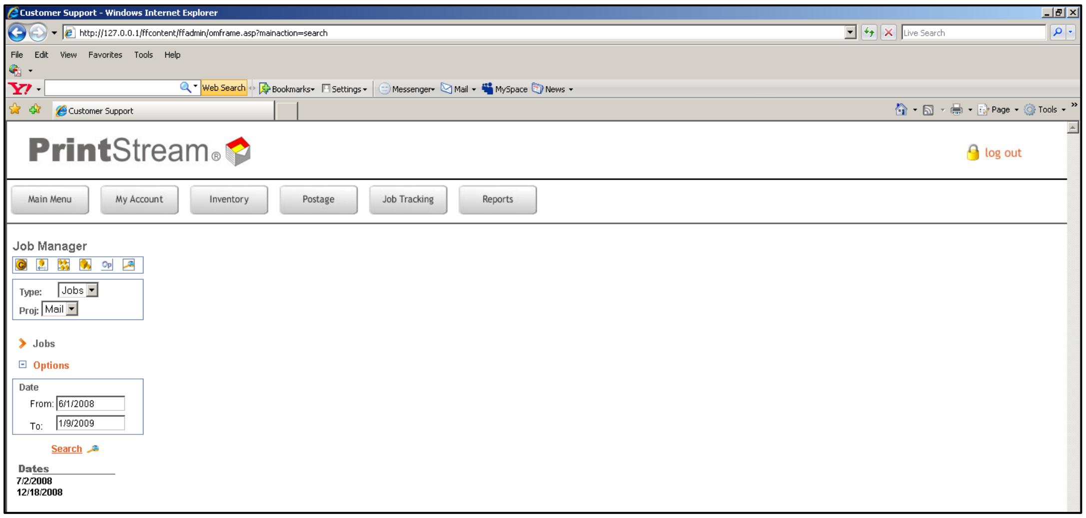
13. At **Postage by Job**, you can take the balance summary to a more detailed level down to what job it has been earmarked against, usage, suspense, billed amount, and balance.



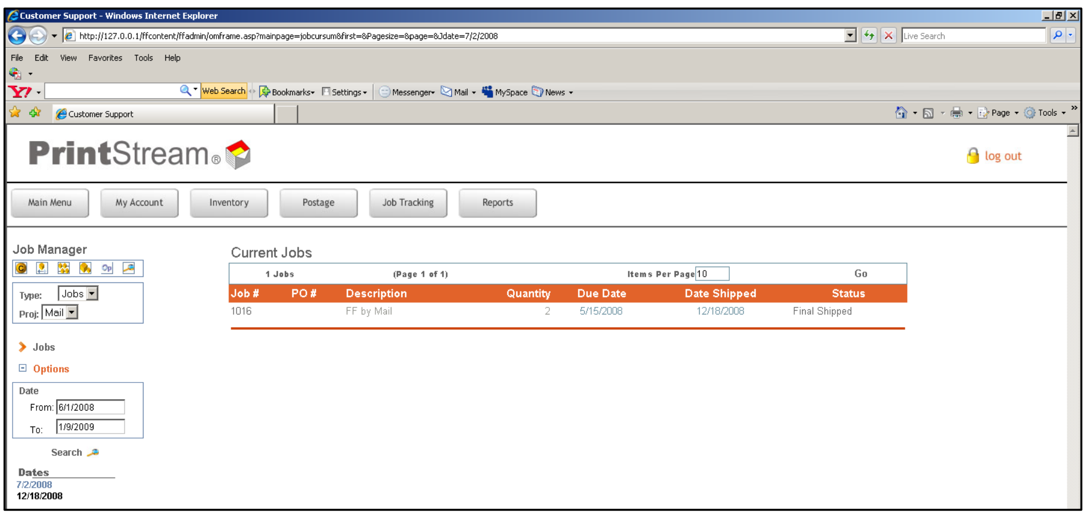
14. **Job Tracking** will allow you to search for jobs by date range.



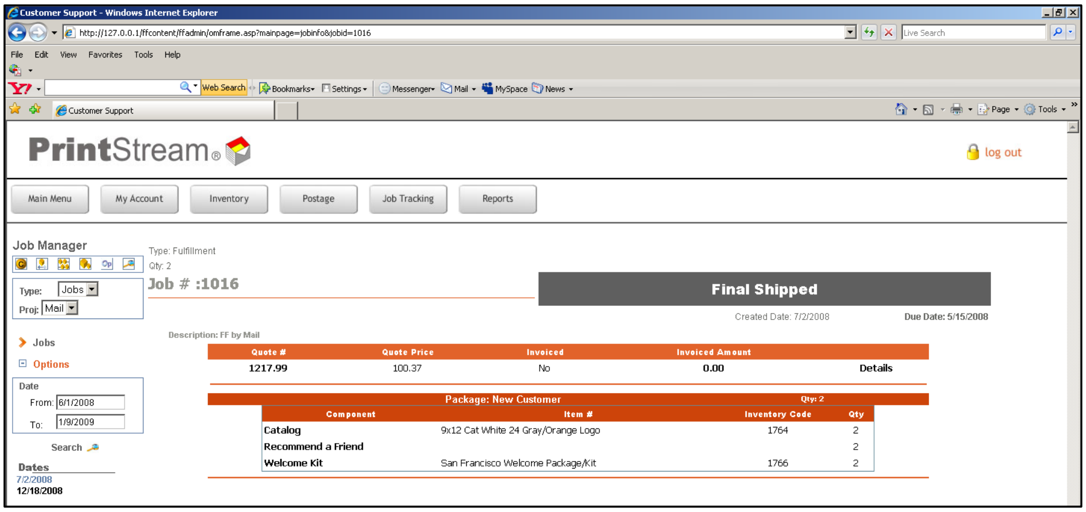
15. The **dates** will populate on the left side of the page. Click one of the dates to see the jobs for that date.



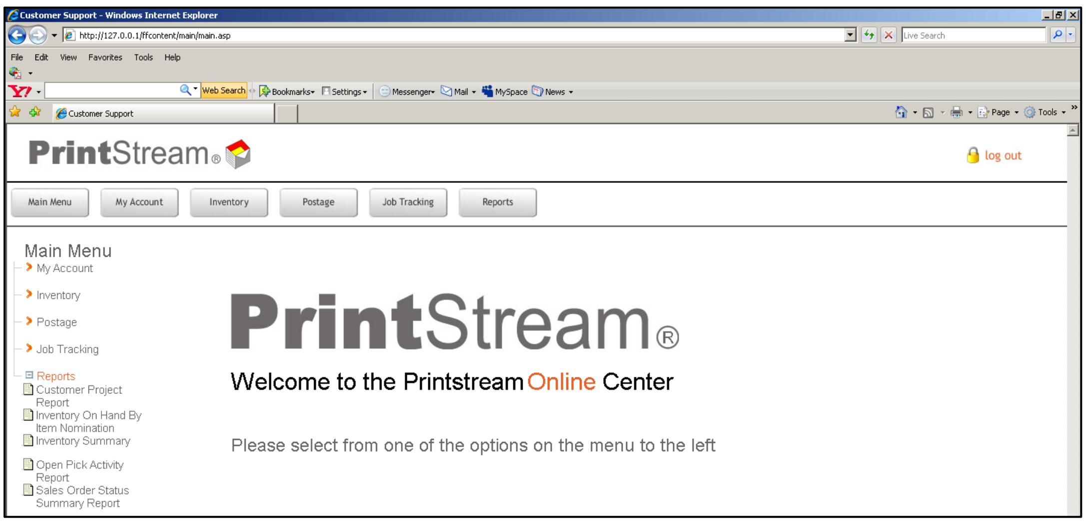
16. On the list of jobs, you can see a brief overview of the job status or you can click the job number and get more detailed information.



Job detail information



17. With **Reports**, you can see any of the reports that have been pushed to the Customer View. Each report will have its own heading.



18. When you click that report, each date that report was created will appear as a selection for you to view.