



## User Guide

Customer View Add On  
V21.1.0200

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

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# 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

<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>	PrintStream.Support@EFI.com
<b>Web Site</b>	<a href="http://customer.efi.com/support">http://customer.efi.com/support</a>

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

<b>US Phone:</b>	651.365.5321
<b>US FAX:</b>	651.365.5334
<b>E-Mail:</b>	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.

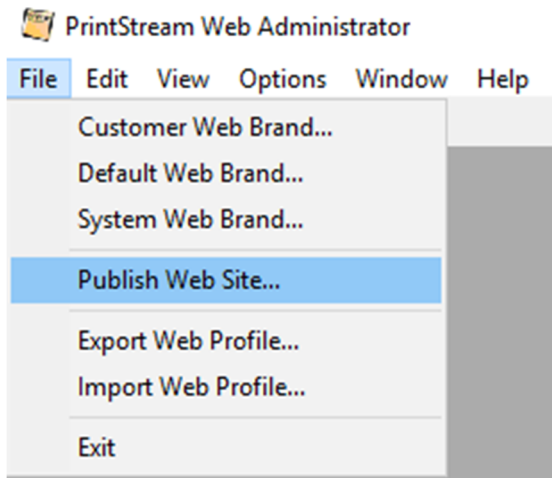
## Publishing the Web Style

### To publish the Web Style

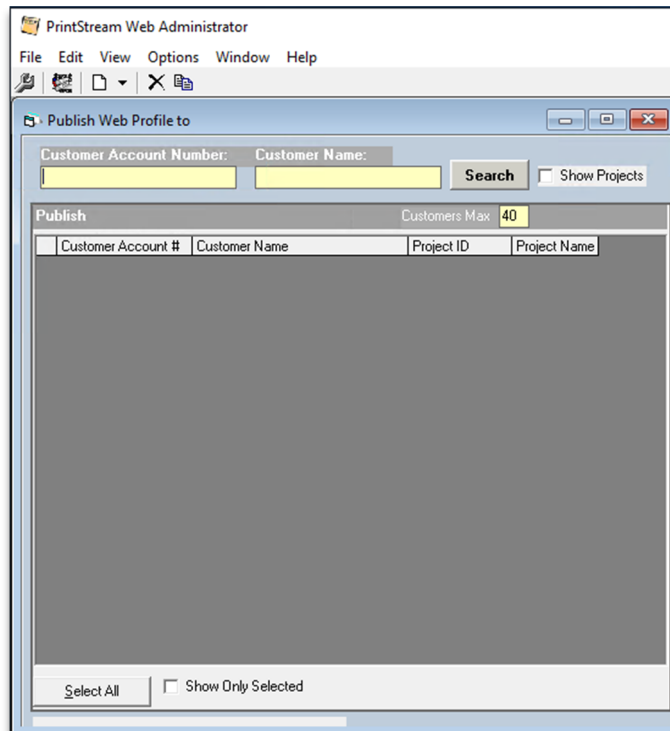
1. Open **Web Style** from the PrintStream main menu.



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

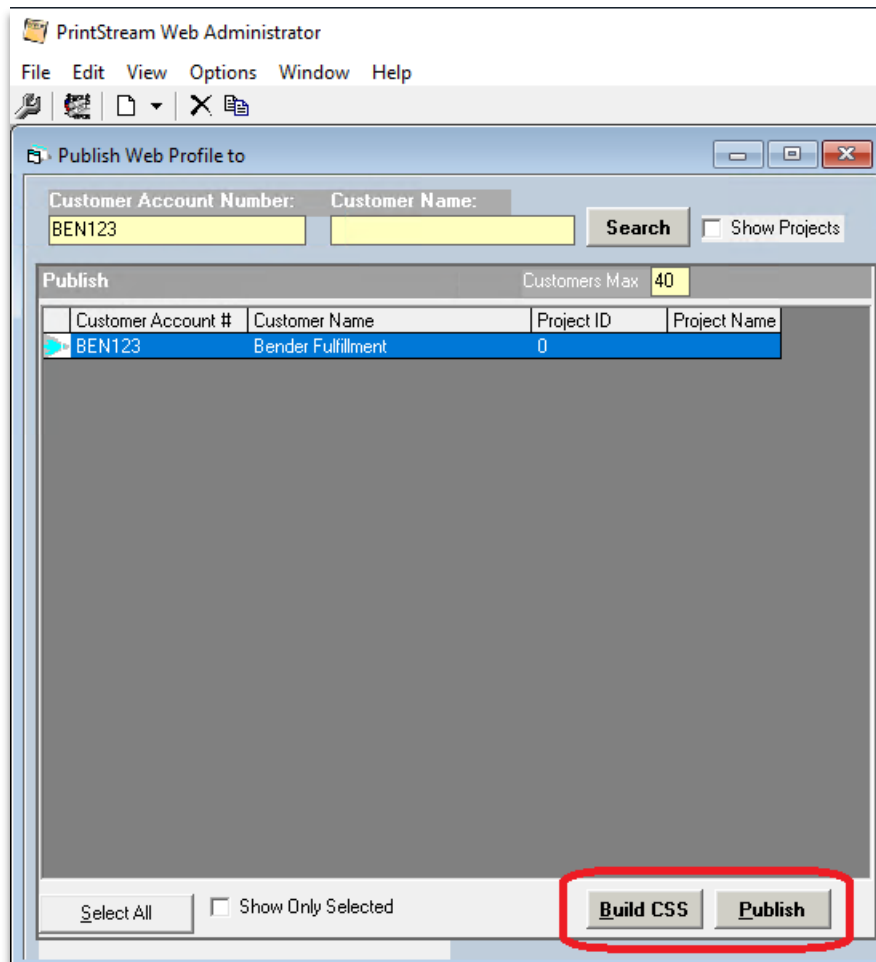


3. In the **Publish** screen, enter the **Customer Account Number** that is set up for your company in Master Files Customer and click the **Search** button.



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

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



- Click **Build CSS** in the bottom right of the screen.  
This action will build the pages quickly.
- Once the web pages are built, click the **Publish** button.  
PrintStream will notify you when the publishing process is complete.
- 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

**Roles**

Action

**Role List**

- Accounting
- Administrators
- CUSTVIEW**
- Estimating
- Inventory
- Sales
- Scheduler
- Shop Floor
- Webadmin
- WebOrder

**Role**

Role Name: CUSTVIEW

User Group (Menu): Fulfillment Processing

Sub Roles:

- ☒ CUSTVIEW
- ☐ Everything
- ☐ FFAdmin
- ☐ FFMDIRReports
- ☐ WaveManager
- ☐ WavePicker
- ☐ Webadmin
- ☐ WebOrder

Close Add Role Save

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

**Sub Roles**

Action

**Sub Roles** Sec. Events

**Sub Roles List**

- arreprt only invR
- cust mf rwS
- CustView
- Everything
- inv sech iss S
- Order Entry
- pcheckcappS
- restrict inven chng avg priceS
- WebAdmin

**Sub Roles**

CustView

Select All Deselect All

	Security Event	Program	Read	Write	Update	Delete	Author	Admin
21	InvSumCompOnly	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
22	InvSumFOnOrder	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
23	InvCommitFDateReq	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
24	InvCommitFDateRes	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
25	InvCommitFJobNo	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
26	InvCommitFQtyComm	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
27	Inventory	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
28	LogOff	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
29	Aging Detail	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
30	Aging Summary	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
31	AgingF120Days	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
32	AgingF300ays	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
33	AgingF600ays	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
34	AgingF900ays	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
35	AgingFCurrent	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
36	AgingFDate	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
37	AgingFDesc	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
38	AgingFInvoiceNo	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
39	AgingFInvoiceTot	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
40	AgingFSuspense	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
41	AgingFTotal	Web	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[illegible]



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## 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.

**Add/Update User**

Login Id: MYC Password: \*\* Help

☐ Must Change Password at Next Logon ☐ Password Locked

Full Name: My Customer View ☐ Prevent user from changing the password

EMail Address: N/A

Web Customer: MYC

5 Security Level (0-5) ☐ Change Database Path Permission

Salesrep:  ☒ Show on Web

Employee:

	Company Code	Plant Code	Role
1	01	0100	CUSTVIEW

Buttons: Save, Delete, Cancel

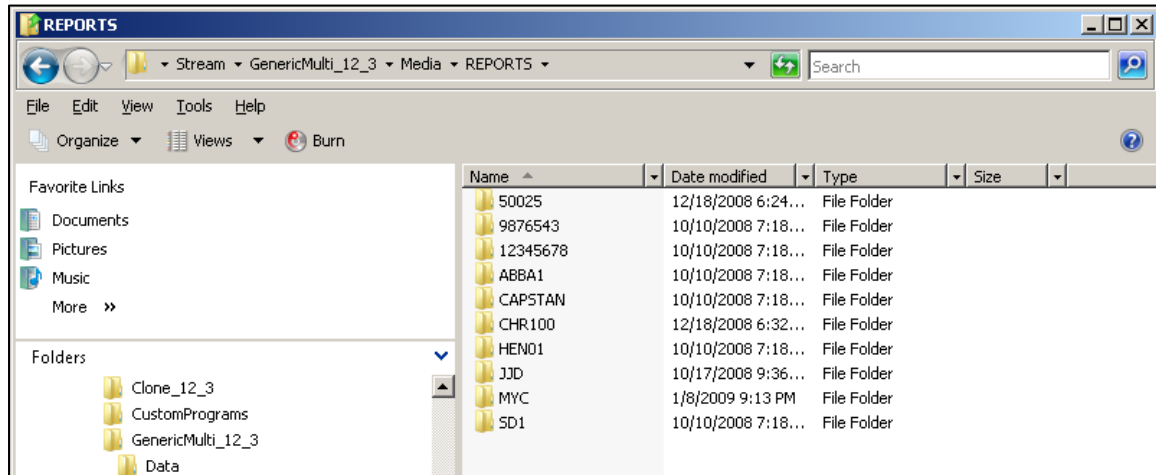
2. Click **Show on Web** and link them to the CUSTVIEW role you have created.

**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.

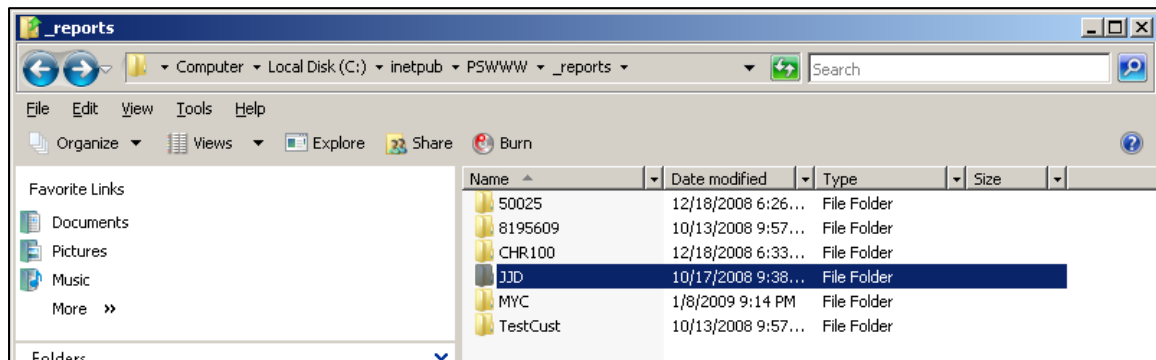
## Report Folder Structure

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.



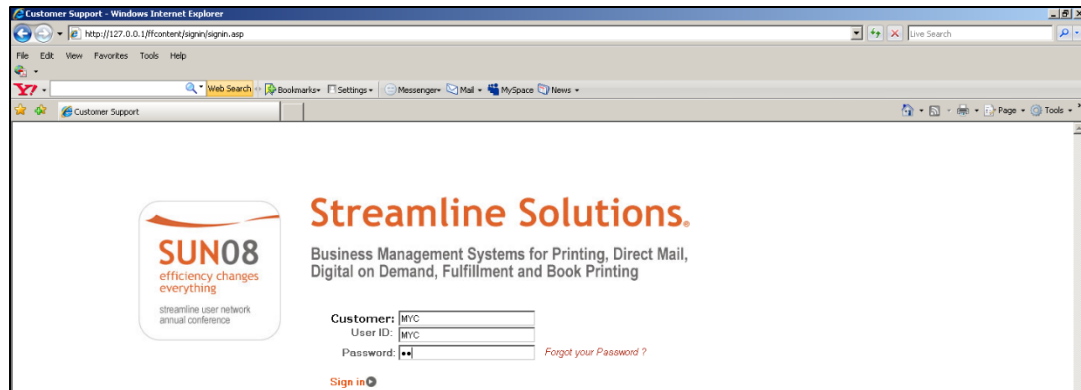
The second folder you will need to ensure exists will be on your Web Server. Go to the **Inetpub > PSWWW > \_reports** folder. There, you will need to create another customer folder with the same naming convention as the previous folder setup. At this point, you will need to copy all reports from the 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.

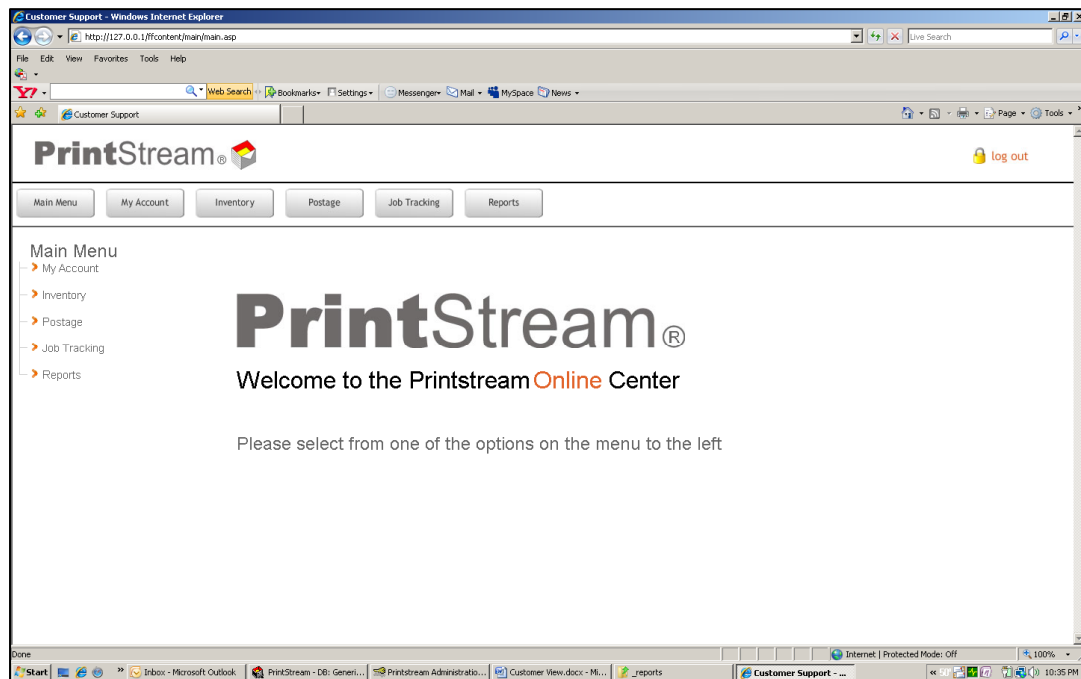
### To test

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

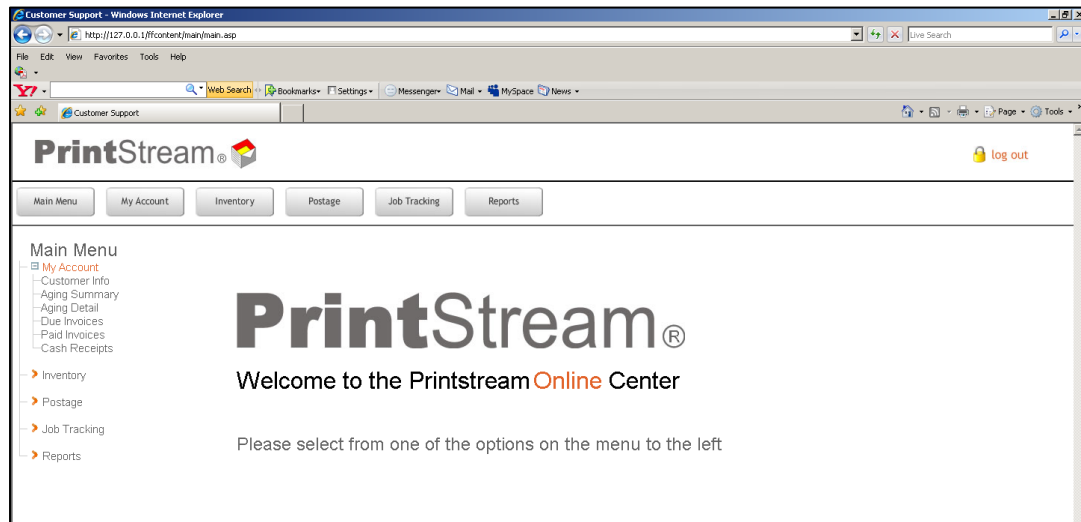


You should then be directed to the Customer View page.

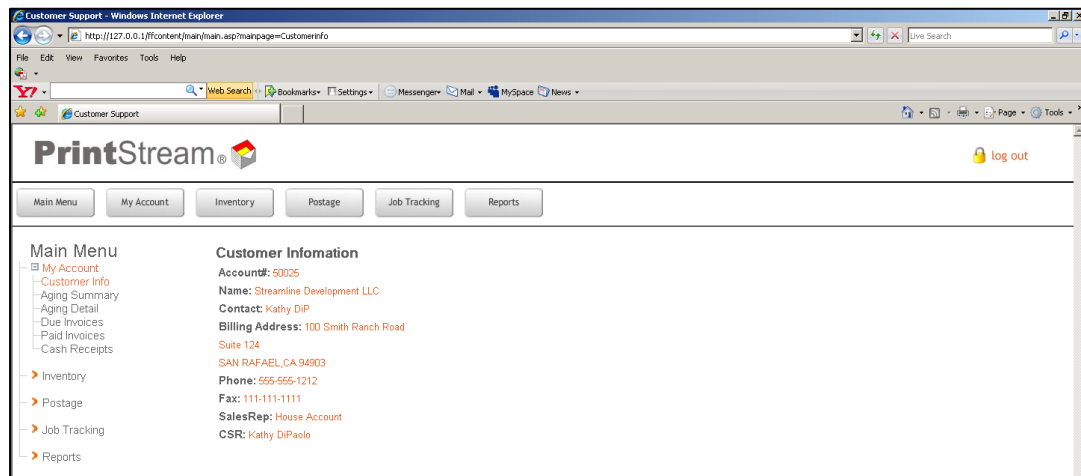
2. At the main menu, you will have the options for **My Account**, **Inventory**, **Postage**, **Job Tracking**, and **Reports**.



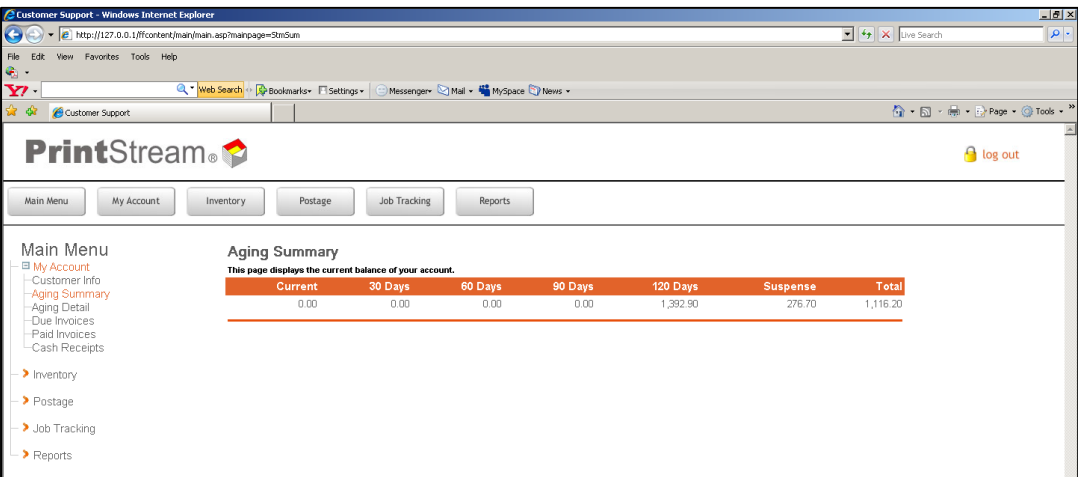
3. Under **My Account**, you will see **Customer Info**, **Aging Summary**, **Aging Detail**, **Due Invoices**, and **Cash Receipts**.



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



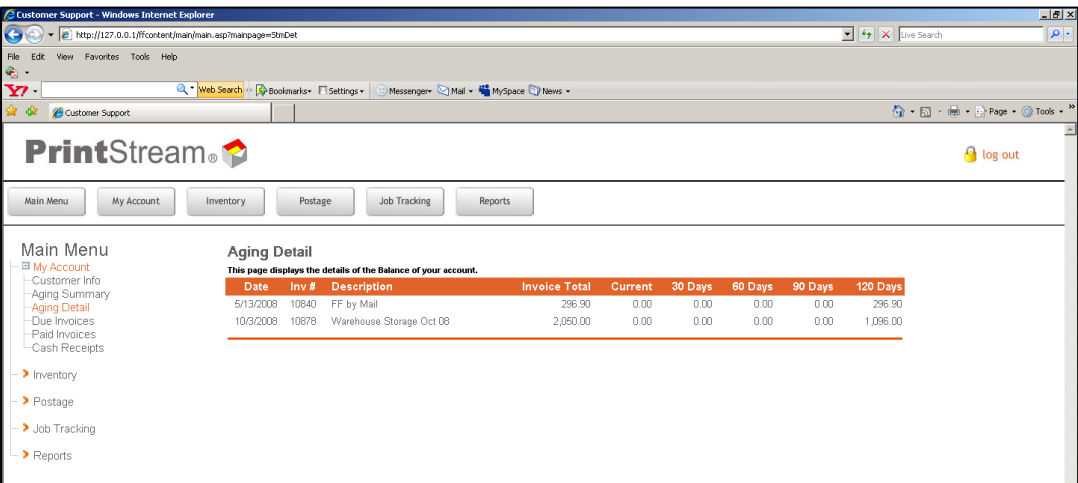
5. At **Aging Summary**, you will see a display summary of invoices due.



The screenshot shows the PrintStream Customer Support web application in a Windows Internet Explorer browser. The page title is "Customer Support - Windows Internet Explorer". The address bar shows the URL "http://127.0.0.1/ffcontent/main/main.asp?mainpage=StrSum". The page features a navigation bar with buttons for "Main Menu", "My Account", "Inventory", "Postage", "Job Tracking", and "Reports". A "log out" link is visible in the top right corner. The "Main Menu" is expanded, showing a list of links: "My Account", "Customer Info", "Aging Summary", "Aging Detail", "Due Invoices", "Paid Invoices", and "Cash Receipts". The "Aging Summary" page is displayed, showing a table of invoice balances. The table has columns for "Current", "30 Days", "60 Days", "90 Days", "120 Days", "Suspense", and "Total". The data shows a total balance of 1,116.20.

Current	30 Days	60 Days	90 Days	120 Days	Suspense	Total
0.00	0.00	0.00	0.00	1,392.90	276.70	1,116.20

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.



The screenshot shows the PrintStream Customer Support web application in a Windows Internet Explorer browser. The page title is "Customer Support - Windows Internet Explorer". The address bar shows the URL "http://127.0.0.1/ffcontent/main/main.asp?mainpage=StrDet". The page features a navigation bar with buttons for "Main Menu", "My Account", "Inventory", "Postage", "Job Tracking", and "Reports". A "log out" link is visible in the top right corner. The "Main Menu" is expanded, showing a list of links: "My Account", "Customer Info", "Aging Summary", "Aging Detail", "Due Invoices", "Paid Invoices", and "Cash Receipts". The "Aging Detail" page is displayed, showing a table of invoice details. The table has columns for "Date", "Inv #", "Description", "Invoice Total", "Current", "30 Days", "60 Days", "90 Days", and "120 Days". The data shows two invoices: one for 5/13/2008 with an invoice total of 296.90, and another for 10/3/2008 with an invoice total of 2,050.00.

Date	Inv #	Description	Invoice Total	Current	30 Days	60 Days	90 Days	120 Days
5/13/2008	10840	FF by Mail	296.90	0.00	0.00	0.00	0.00	296.90
10/3/2008	10878	Warehouse Storage Oct 08	2,050.00	0.00	0.00	0.00	0.00	1,096.00

## Invoice details

**PrintStream®** [log out](#)

Main Menu | My Account | Inventory | Postage | Job Tracking | Reports

**Main Menu**

- My Account
  - Customer Info
  - Aging Summary
  - Aging Detail
  - Due Invoices
  - Paid Invoices
  - Cash Receipts
- Inventory
- Postage
- Job Tracking
- Reports

**Invoice Details for Inv# 10840**

Qty	Description	Unit Price	UOM	Sub Total	Tax	Total
0	FF by Mail	0.00		0.00	0.00	0.00
200	Create Cheshire Labels	250.00	/m	50.00	0.00	50.00
200	Create Ektajet Tape	250.00	/m	50.00	0.00	50.00
1	Laser Set up	50.00	ea	50.00	0.00	50.00
200	Laser Print Letter	275.00	/m	55.00	0.00	55.00
200	Inkjet up to 6x9 Env	17.50	/m	3.50	0.00	3.50
200	Inkjet 9x12 env	19.50	/m	3.90	0.00	3.90
200	Laser Print Letter	275.00	/m	55.00	0.00	55.00
200	Insert 3 Pc, Meter & Sort	56.50	/m	11.30	0.00	11.30
200	Insert 3 Pc, Meter & Sort	91.00	/m	18.20	0.00	18.20
				Sub Total :	\$296.90	
				Less Deposit :	\$0.00	
				Tax :	\$0.00	
				Total Due :	\$296.90	

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

**PrintStream®** [log out](#)

Main Menu | My Account | Inventory | Postage | Job Tracking | Reports

**Main Menu**

- My Account
  - Customer Info
  - Aging Summary
  - Aging Detail
  - Due Invoices
  - Paid Invoices
  - Cash Receipts
- Inventory
- Postage
- Job Tracking
- Reports

**Due Invoices**

This page displays all unpaid invoices in your account. Click on the Invoice# for more details.

Invoice #	Date	Description	Total	Received	Balance
10840	5/13/2008	FF by Mail	296.90	0.00	296.90
10878	10/9/2008	Warehouse Storage Oct 08	2,050.00	954.00	1,096.00

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

**PrintStream®** [place order](#) [help center](#) [log out](#)

Main Menu | My Account | Inventory | Postage | Job Tracking | Order Import | Contact List Import

**Main Menu**

- My Account
  - Customer Info
  - Aging Summary
  - Aging Detail
  - Due Invoices
  - Paid Invoices
  - Cash Receipts
- Inventory
- Postage

**Paid Invoices**

This page displays the paid invoices up to three months old. Click on the Invoice# for more details.

Invoice #	PO #	Date	Description	Total	Received	Date Paid
10840		5/13/2008	FF by Mail	296.90	296.90	6/10/2010
10878		10/9/2008	Warehouse Storage Oct 08	2,050.00	2,050.00	6/10/2010

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

Check #	Receipt Date	AR Deposit	Postage Deposit	Total Receipt
026875	8/26/2005	0.00	5,000.00	5,000.00
066990	11/26/2002	250.00	9,750.00	10,000.00
6543422	4/17/2008	950.00	0.00	950.00
2521	10/9/2008	2,500.00	0.00	2,500.00

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

Job #	Allocation Date	Amount
984	4/13/2008	2,500.00
986	4/13/2008	2,500.00

Excess postage balance is in suspense.



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.

Customer Support - Windows Internet Explorer

http://127.0.0.1/ffcontent/main.asp?mainpage=invSum&first=true

File Edit View Favorites Tools Help

Web Search Bookmarks Settings Messenger Mail MySpace News

Customer Support

# PrintStream®

log out

Main Menu My Account Inventory Postage Job Tracking Reports

## Main Menu

- My Account
- Inventory
- Postage
- Job Tracking
- Reports

## Inventory Summary

23 Items (Page 1 of 3) Items Per Page 10 Go Page 1

Inventory Code	Qty On Hand	Committed On Hand	Available	Qty On Order	Reorder Point
air invoice import	999,977	0	999,977	0	100
book estimating	999,978	0	999,978	0	100
contract pricing	999,930	0	999,930	0	100
Customer View	999,980	0	999,980	0	100
Executive Dashboard	999,982	0	999,982	0	100
external data capture	999,982	0	999,982	0	100
external postage integration	999,976	0	999,976	0	100
fulfillment	999,982	0	999,982	0	100
KVD101	0	0	0	40	100
mail.dat	999,982	0	999,982	0	100

Search

Inv. Code: [ ] Description: [ ] Search

☐ Neg. Balance ☐ Under Min. Level

### Audit trail details

[illegible]

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.

The screenshot shows the PrintStream Customer Support interface in a Windows Internet Explorer browser. The URL is <http://127.0.0.1/ffcontent/main.asp?mainpage=PostBalSum>. The interface includes a navigation bar with buttons for Main Menu, My Account, Inventory, Postage, Job Tracking, and Reports. A sidebar on the left contains a Main Menu with links to My Account, Inventory, Postage, Balance Summary, Postage By Job, Job Tracking, and Reports. The main content area is titled "Balance Summary" and states "This page displays the current balance of your postage deposit account." Below this is a table with three columns: Earmarked for Jobs, Suspense, and Balance.

Earmarked for Jobs	Suspense	Balance
14,750.00	0.00	14,750.00

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.

The screenshot shows the PrintStream Customer Support interface in a Windows Internet Explorer browser. The URL is <http://127.0.0.1/ffcontent/main.asp?mainpage=PostByJob>. The interface is similar to the previous screenshot, but the main content area is titled "Postage by Job" and states "This page displays the details of your postage deposit account ordered by job." Below this is a table with six columns: Job #, Earmarked, Usage, Billed Suspense, Billed Additional, and Balance.

Job #	Earmarked	Usage	Billed Suspense	Billed Additional	Balance
984	7,500.00	0.00	0.00	0.00	7,500.00
986	7,250.00	0.00	0.00	0.00	7,250.00

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

The screenshot shows the PrintStream Customer Support interface in a Windows Internet Explorer browser. The URL is <http://127.0.0.1/ffcontent/ffadmin/onFrame.asp?typesearch=3&ProjID=-1>. The interface includes a navigation bar with buttons for Main Menu, My Account, Inventory, Postage, Job Tracking, and Reports. A sidebar on the left contains a Main Menu with links to My Account, Inventory, Postage, Balance Summary, Postage By Job, Job Tracking, and Reports. The main content area is titled "Job Manager" and contains a search form with a "Type" dropdown set to "Jobs" and a "Proj" dropdown set to "Mail". Below the search form are links for Jobs, Options, and a Search button.

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

Customer Support - Windows Internet Explorer

http://127.0.0.1:ffcontent/ffadmin/online.asp?mainaction=search

PrintStream®

log out

Main Menu My Account Inventory Postage Job Tracking Reports

Job Manager

Type: Jobs  
Proj: Mail

Jobs  
Options

Date  
From: 6/1/2008  
To: 1/9/2009

Search

Dates  
7/2/2008  
12/18/2008

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.

Customer Support - Windows Internet Explorer

http://127.0.0.1:ffcontent/ffadmin/online.asp?mainpage=jobcursumfirst=6&pagesize=6&page=6&date=7/2/2008

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log out

Main Menu My Account Inventory Postage Job Tracking Reports

Job Manager

Type: Jobs  
Proj: Mail

Jobs  
Options

Date  
From: 6/1/2008  
To: 1/9/2009

Search

Dates  
7/2/2008  
12/18/2008

Current Jobs

1 Jobs (Page 1 of 1) Items Per Page: 10 Go

Job #	PO #	Description	Quantity	Due Date	Date Shipped	Status
1016	FF by Mail		2	5/15/2008	12/18/2008	Final Shipped

Job detail information

Customer Support - Windows Internet Explorer

http://127.0.0.1:ffcontent/ffadmin/onlineframe.asp?mainpage=jobinfo&jobid=1016

File Edit View Favorites Tools Help

Web Search Bookmarks Settings Messenger Mail MySpace News

Customer Support

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Main Menu My Account Inventory Postage Job Tracking Reports

Job Manager

Type: Fulfillment Qty: 2

Type: Jobs Proj: Mail

Jobs Options

Date From: 6/1/2008 To: 1/9/2009 Search

Dates 7/2/2008 12/18/2008

Job # :1016

Final Shipped

Created Date: 7/2/2008 Due Date: 5/15/2008

Description: FF by Mail

Quote #	Quote Price	Invoiced	Invoiced Amount	Details
1217.99	100.37	No	0.00	

Package: New Customer

Component	Item #	Inventory Code	Qty: 2	Qty
Catalog	9x12 Cat White 24 Gray/Orange Logo	1764		2
Recommend a Friend				2
Welcome Kit	San Francisco Welcome Package/kit	1766		2

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.

Customer Support - Windows Internet Explorer

http://127.0.0.1:ffcontent/main/main.asp

File Edit View Favorites Tools Help

Web Search Bookmarks Settings Messenger Mail MySpace News

Customer Support

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log out

Main Menu My Account Inventory Postage Job Tracking Reports

Main Menu

My Account

Inventory

Postage

Job Tracking

Reports

Customer Project Report

Inventory On Hand By Item Nomination

Inventory Summary

Open Pick Activity Report

Sales Order Status Summary Report

PrintStream®

Welcome to the PrintstreamOnline Center

Please select from one of the options on the menu to the left

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

