efi PrintStream®

User Guide

Stand Alone FF Web Reporter
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

This user guide contains details on general navigation, compiling information, and generating reports utilizing the FF Web Reporter.

User Setup

To log in to the site, you will need the following information and recipient setup.

1. Customer code for the client – This will be the "Customer:" required in the log in process on the website

    This can be found in the Fulfillment Module
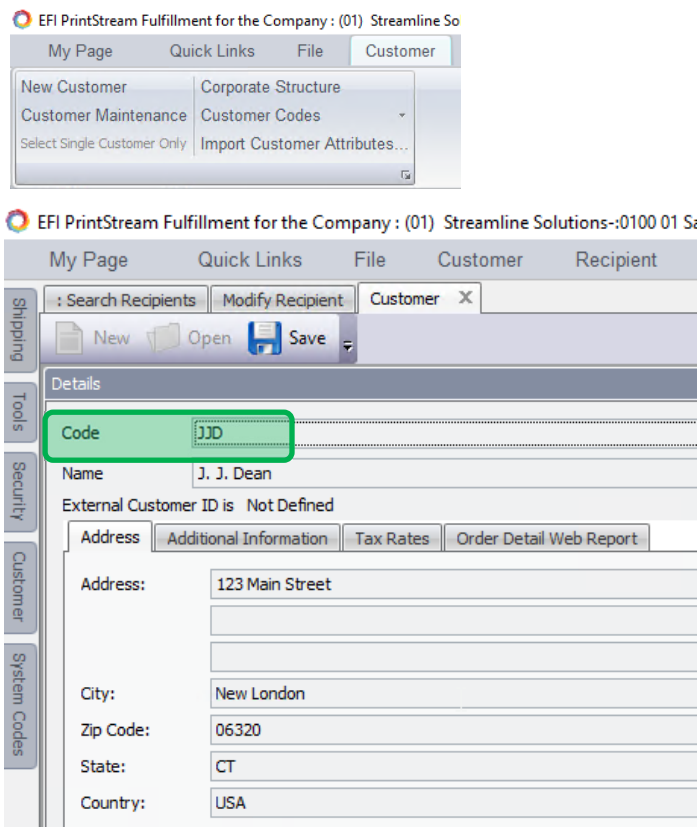
2. Recipient ID – This will be the "User:" utilized in the log in process on the website. Recipient maintained in the Fulfillment program
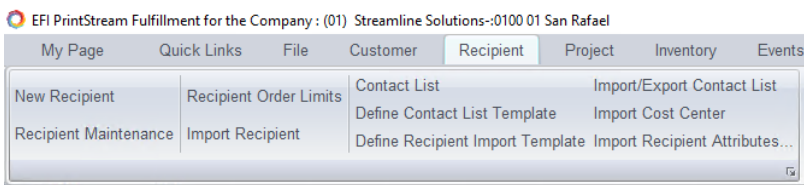
3. User security and Password set for the recipient that is maintained within the Recipient Maintenance "Additional Information" tab. The password is encrypted once saved.
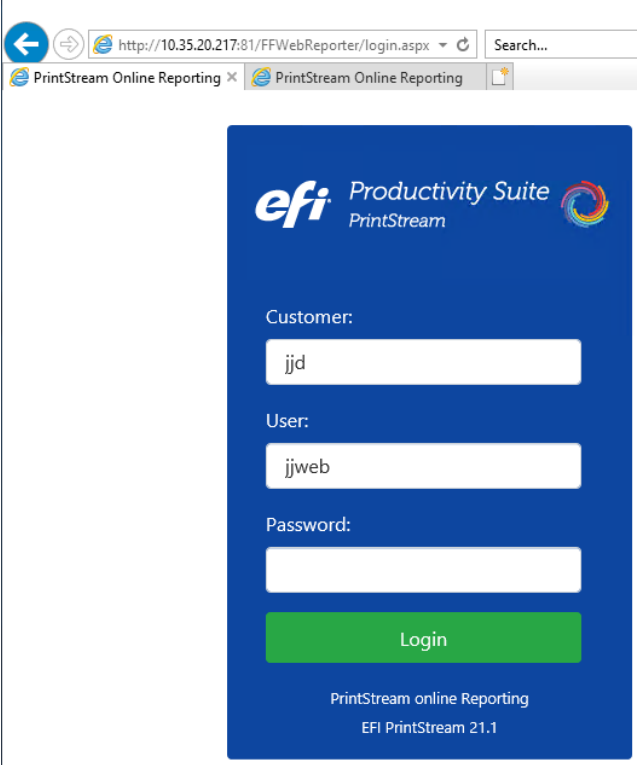
Note that the security user should have access to any project that you want to run sales order reports for and that even for inventory reports, security to at least one project is required
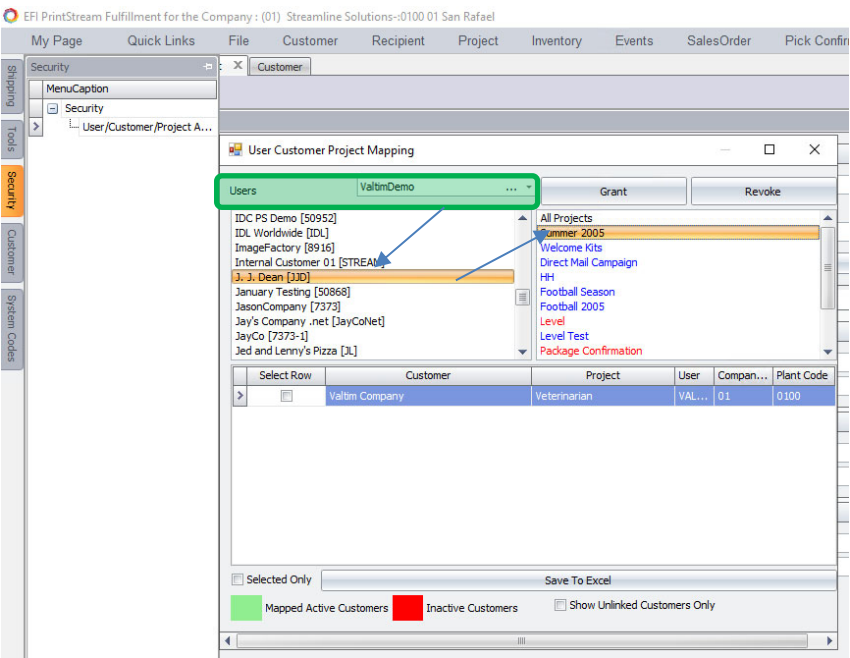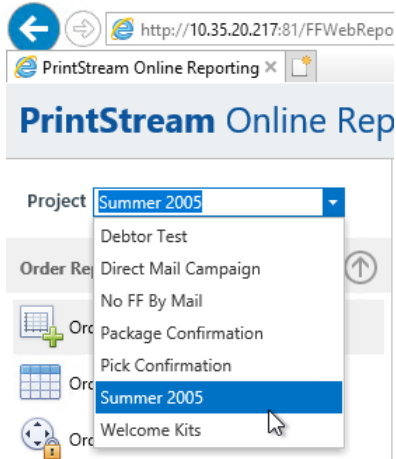

Log In Screen

See Set Up portion for values for Customer User and Pass
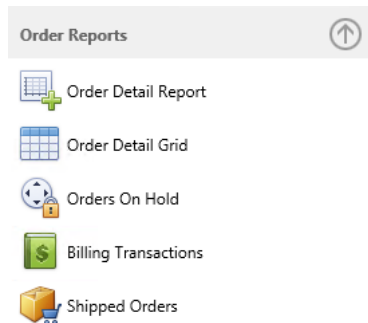
General Navigation

In order to run any report, you will need to 1st select a project in the "Project" drop down. Note that "Order level" reports will return data specific to the selected project while inventory reports will not be project specific.
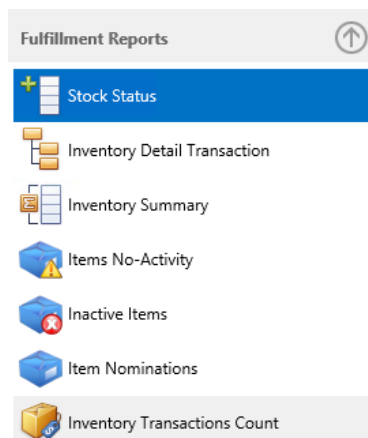

Report Types

Report types are broken into 2 categories

1) Order based reports that are project specific reports

2) Inventory based reports. These reports are not project specific and are customer level reports

Report Filter Criteria

Filter criteria will change based off of the type of report that is being initiated.

Inventory Summary

Report Layout
<Default>

View Report

Vs.

Order Detail Report
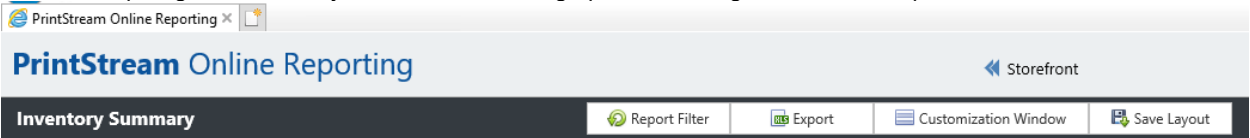
Status
(Select)

Item #

Start Date

End Date

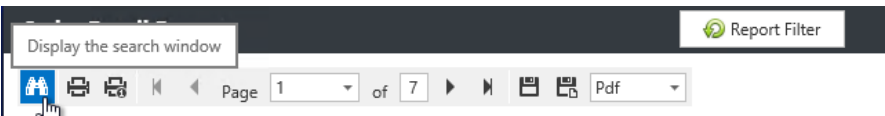☐ Group By Cost Center

☐ Format with Mapped Fields

View Grid

Report Grid Navigation

Once the report grid is loaded, you have the following options to navigate within the report:

PrintStream Online Reporting   ◀◀ Storefront

Inventory Summary   Report Filter   Export   Customization Window   Save Layout

Or

Display the search window   Report Filter

Page 1 ▼ of 7 ▶ ▶ Pdf ▼

Return to Storefront

For Customer View or storefront users, you may wish to navigate back to the main menu website via the Storefront button
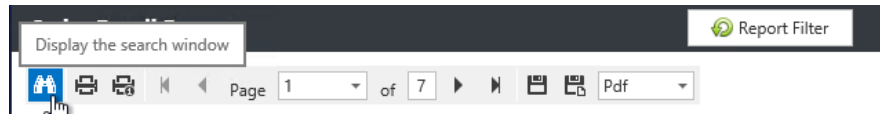
◀◀ Storefront
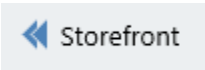
Return to FF Web Reporter main menu

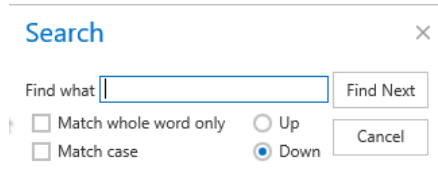To navigate back to the FF Web Reporter main menu, you can hit the "Back Button" in your window browser, or you can hit the Report Filter button

Report Filter

Display Search Window

Launches the search tool that allows searching for specific information within the search grid
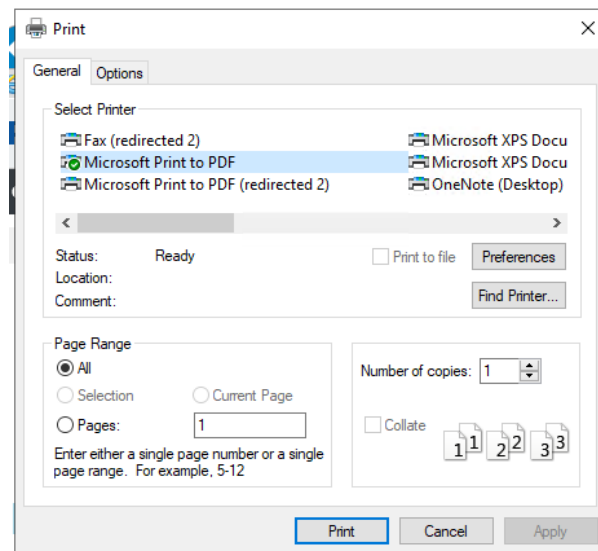

Print Report and Print Current Page options

   and

Both options will load the Print System print options

Page Navigation

Page navigation controls allow you to "flip" thru the pages in the report or to select a specific page
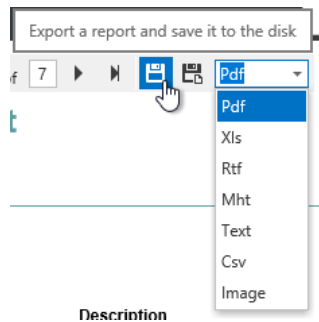
Exporting a report Grid

You have the option to export reports from the loaded report grid screen. Some reports Export to Excel only while other reports have file type selections
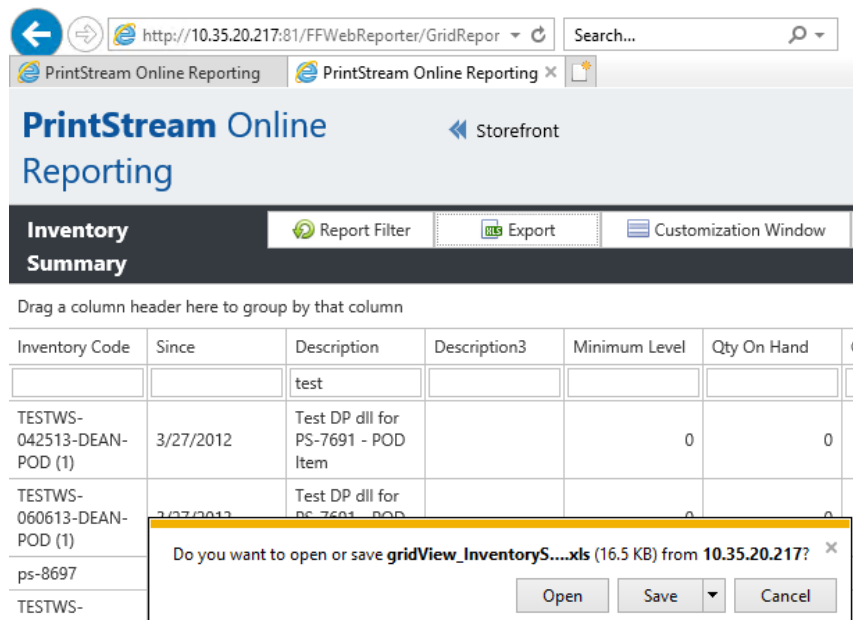
- To Export the grid into an Excel File

- To Export when you have file type options – You will be able to "Save to Disk" or "Save in New Window"
    - Save to Disk
        - Select output option

Your Browser provider will determine the next process for saving the file. Here is an example of Chrome:
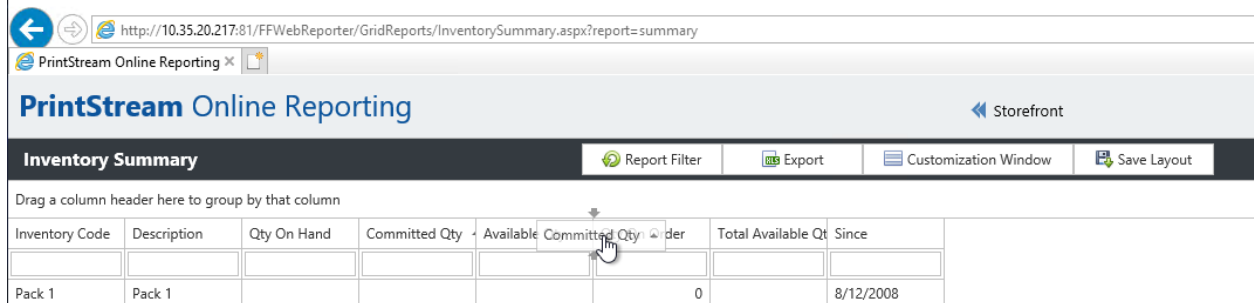
Customizing a report display

You have options to customize the columns in the report screens by

1) Moving column positions.

    You can choose the order or layout of existing visible columns by selecting the column header that you wish to move and Left Click/Hold Left Click(of the mouse), then drag the column to the desired position.

2) Adding and removing available columns from the report via column chooser.

    Select the Customize Window option.

    a. To add columns, select the column header from the "Column Chooser" pop up box and Left Click/Hold Left Click(of the mouse), then drag the column to the desired position.

    b. To remove columns, select the column header from the display grid and Left Click/Hold Left Click(of the mouse), and drag the column to the "Column Chooser" pop up box.
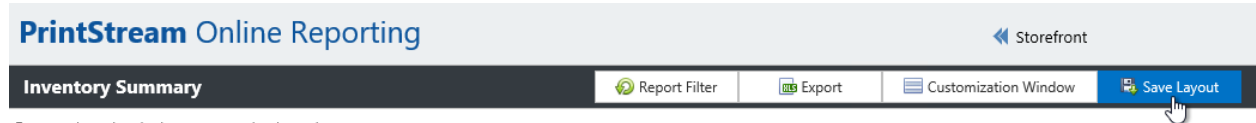
Saving a customized report display layout

You may choose to save your customized report layout

Select "Save Layout" button

Name your layout and save
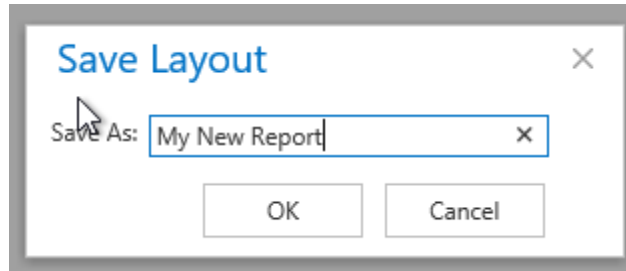
Filtering information in columns

You may filter report information by column headers.

NOTE – this filter is not a wildcard search and will load info based off of display order
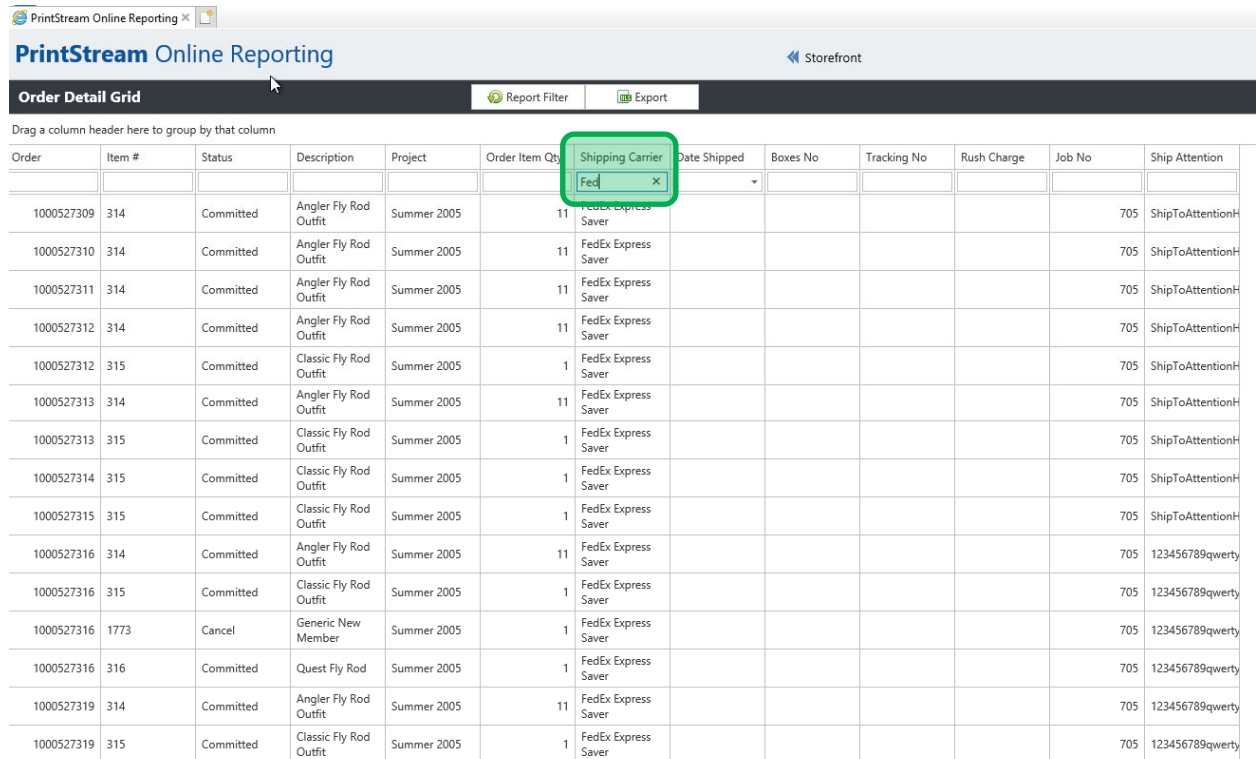
Order Reports

Order Detail Report and Order Detail Grid – These reports will provide detailed information for the orders presented. The items ordered, their statuses, the order by, ship to and bill to. This report provides a date range, customer and project selection and sales order status selection.

Orders On Hold Report – Shows any orders that are in a current hold status for the project and date range selected

Billing Transaction report –This report will provide a listing by Batch ID for the, customers and projects selected, of the sales orders ready for invoicing.

Recipient ID	Recipient Name	Shipped Date	Pick ID	Inventory Code	Order ID	Line Item No	Unit Price	Order Qty	Total Item Cost	Item Description
JDL	Freight charges Inc.	9/21/2020	268821	315	1000526934	2	5.55	1	5.55	Classic Fly Rod Outfit
JDL	Freight charges Inc.	9/21/2020	268822	317	1000526934	4	9.95	5	49.75	Streamlight Fly Rod, Freshwater
JDL	Freight charges Inc.	10/6/2020	268826	314	1000526945	1	0	5	0	
JDL	Freight charges Inc.	11/25/2020	268833	315	1000526959	1	0	1	0	Classic Fly Rod Outfit
JDL	Freight charges Inc.	1/21/2021	268860	314	1000527031	1	5.55	11	61.05	Angler Fly Rod Outfit
JDL	Freight charges Inc.	1/21/2021	268860	315	1000527031	2	5.55	1	5.55	Classic Fly Rod Outfit
JDL	Freight charges Inc.	6/16/2021	268949	315	1000527260	3	0	5	0	Classic Fly Rod Outfit

Shipped Orders report – This report will provide a listing, by sales order, of the items shipped for the order, when it was shipped, how it was shipped and where it was shipped to. Invoicing data is also provided.

Ship Date	Package ID	Package Weight	Tracking No	Third Party Acct	Hours To Process	Billing Comments	Ship Mode Name	Shipper Name	Ship Mode Desc	Third Party Ship C	Third Party Bill Ch	Surcharge	Third Party Prepai	Pick Status	Pick ID	Order Creat
1/21/2021	76267	0			73		A09	Airborne	Airborne Express	0	0	0		20	268860	1/18/2021
1/21/2021	76267	0			73		A09	Airborne	Airborne Express	0	0	0		20	268860	1/18/2021
10/6/2020	76253	0	8675309		0		A09	Airborne	Airborne Express	0	0	0	8675309	20	268826	10/6/2020
6/16/2021	76312	0	8675309		0	sadf	U01	UPS	UPS NEXT DAY AIR	0	0	0	8675309	20	268949	6/16/2021
9/21/2020	76250	0	1-	12345	0		U11	UPS	UPS GROUND (PS)	0	0	0	12345	21	268822	9/21/2020
9/21/2020	76249	0	1-		0		F14	Fedex	FedEx Express Saver	0	0	0		21	268821	9/21/2020
11/25/2020	76256	1	1-1111	8675309	0		A09	Airborne	Airborne Express	0	10	0	3rd Party/Prepaid	21	268833	11/25/2020

Inventory Reports

Stock Status Report –This report provides information on the items status active/inactive, current counts and on order balances, date minimum reached (if below min), last physical count information, Avg Price, Declared Value, UoM, GFC, Default location, Expiry Date, External Item information, Last replenish date, and weight per piece

PrintStream Online Reporting · Storefront

Stock Status Report | Report Filter | Export | Customization Window | Save Layout

Drag a column header here to group by that column

Item No	Inv Code	Rev Code	Description1	Description2	Description3	Active	Qty On Hand	Qty Committed	Qty Available	Back Order Qty	Total Available Qt	Qty On Order	Projected Qty Ava	Min Level	Min Level Alert	Reorder Qty
105907	0604-d1		dean test 1			Y	0	0	0	0	0	0	0	0	N	
105983	0604-dt2		dean test 2			Y	0	0	0	0	0	0	0	0	N	
105982	0604-jjd1		jjd1 test 1			Y	0	0	0	0	0	0	0	0	N	
10b380	060b-dt		dean test 2			N	0	0	0	0	0	0	0	0	N	
106379	0606-dt1		dean test 1			N	0	0	0	0	0	0	0	0	N	
106410	0607-dt1		dean test 0607			Y	0	0	0	0	0	0	0	0	N	
106415	0607-dt99		dean test 99			N	0	0	0	0	0	0	0	0	N	
458681	081615 Edit Web2PS	aa	Edit Item using tester	3		Y	7522	0	7522	0	7522	0	7522	0	N	
109935	109935 Lot Sell Price		FG item at Lot Sell Price			Y	70	0	70	0	70	0	70	0	N	
1702	11-21 test item		test			Y	425	425	0	0	-24576	0	0	0	N	
1703	11-21test item 2		test 2			Y	425	25410	-24985	24985	-24985	0	-24985	0	N	
1487	11689 test		11689 test			Y	0	0	0	0	0	0	0	0	N	
106384	1231231		123123123			N	0	0	0	0	0	0	0	0	N	
1386	12345678901234!		Kathy			Y	0	0	0	0	0	0	0	0	N	
1378	1378		New item			Y	999	1	998	0	998	0	998	1000	Y	

Inventory Detail Transaction Report – This report will show transactional data that occurs against a date range

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Inventory Detail Transaction Report | Report Filter | Export | Customization Window | Save Layout

Drag a column header here to group by that column

Trans Date	Inv Code	Trans Qty	Trans Cost	Trans Unit Cost	Trans Avg Price	Job No	Lot Number	MIS_Job Number	Trans Notes	Order No	Order Line No	Pick Slip No	Pick ID	Receipt No	Reference	Release Batch	Skid Number	Total Item Cost A
10/06/2020	314	-5	0	0	0	705	3			1000526945	1	320694	268826	0	PSShipping		648	0
11/25/2020	314	-5	0	0	0	705	3			1000526959	1	320699	268833	0	PSShipping		696	0
01/21/2021	314	-11	0	0	0	705	3			1000527031	1	320707	268860	0	PSShipping		648	0
09/21/2020	315	-1	0	0	0	705	10			1000526934	2	320689	268821	0	PSShipping		1969	0
01/21/2021	315	-1	0	0	0	705	10			1000527031	2	320707	268860	0	PSShipping		1969	0
06/16/2021	315	-5	0	0	0	705	10			1000527260	3	320771	268949	0	PSShipping		1969	0
09/21/2020	317	-5	0	0	0	705	363			1000526934	4	320690	268822	0	PSShipping		3986	0
06/25/2020	827495	0	0	0	0	0				0	0	0	0	0	Opening Trans		0	0
04/06/2020	BULK-SAV-1	-12	0	0	0	25	15578			0	0	0	0	0	Destroy		23775	0
01/20/2021	JIFFY1	100	1	10	0.010196	999999	0			4255	1	0	0	20868	Receipt #20868 SkidId:103567		68084	1
01/20/2021	JIFFY1	100	1	10	0.020371	999999	0			4255	1	0	0	20868	Receipt #20868 SkidId:103568		68085	2
01/20/2021	JIFFY1	100	1	10	0.030525	999999	0			4255	1	0	0	20870	Receipt #20870 SkidId:103569		68086	3
01/20/2021	JIFFY1	100	1	10	0.040658	999999	0			4255	1	0	0	20870	Receipt #20870 SkidId:103570		68087	4
01/20/2021	JIFFY1	100	1	10	0.050771	999999	0			4255	1	0	0	20870	Receipt #20870 SkidId:103571		68088	5
01/20/2021	JIFFY1	100	1	10	0.060864	999999	0			4255	1	0	0	20870	Receipt #20870 SkidId:103572		68089	6

Inventory Summary Report – This report will show real time count information for customer items

No Activity Report – This report will show items that have had no transactional data against them during a date range.

Inactive Item Report – This report will show any inactive items for the customer

Item Nomination Report – This report will show the nomination associated to the project and all items associated to the nomination

Inventory Transaction Count Report – This report will show the following transactional counts in a 30 day period