MarcomCentral Distribution User Guide

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MarcomCentral Distribution User Guide

Tutorial for using Distribution in MarcomCentral Admin

PTI Marketing Technologies, Inc.

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Preface

MarcomCentral® is an online, on demand marketing assets management (MAM) solution. Integrating marketing communications systems and marketing resource management software (MRM) through the customizable MarcomCentral online marketing portal. MarcomCentral enables strategic marketing communication, marketing collateral management and marketing collateral distribution. This enterprise marketing management system is a marketing automation solution, brand management tool and marketing campaign management solution. And as a marketing operations management (MOM) tool, MarcomCentral® allows for marketing content management, distributed marketing and franchise marketing. Integrate online ordering, personalization, production and fulfillment with a multi-channel web services solution that automates these processes for print service providers (PSP) and their end users.

Distribution Overview

Distribution is the area in MarcomCentral where orders placed in a Portal get distributed for production, fulfillment, shipping and/or invoicing. An Account must have one, or more, Supplier associated to send orders for Distribution. A Supplier is referred to as a Print Service Provider (PSP) or Marketing Service Provider (MSP). They manage the production or fulfillment of the Products ordered. Suppliers are assigned to each Product when Pricing is created, which allows Distribution to show Price or Cost relevant to each Account User. Account Users can be created with Roles filtering visibility of the Distribution Tiles and which Portals to process Orders/Products for. All Products on an Orders are bound by an Order Number in Distribution. The typical first action in Distribution is for each Product on the Order to get Job or Pick Tickets; followed by Packing Slips for shipping the items by Order or individually; and finally getting Invoiced or Settled for payment.

Distribution Tiles

- Search
- Job Tickets
- Packing Slips
- Invoices
- Settlement
- Refill Order Approval
- Reports

Search

The Search section is a summary of **All Orders** or **Line Items** on an Order. From the Search results Products can be processed by Order or individually by Line Item through each Distribution action. In addition, any existing tickets can be viewed for each completed actions.

Job Ticketing

The Job Ticketing action (Pick Ticketing for inventory items) provides the details and instructions for production activity needed for each Product.The Job Ticket tile manages ticketing for Orders or Line Items, and Imposition Sets for composing outputs of Versioned Products.

Packing Slips

Packing Slips are created to summarize the details of the items being Shipped and is often enclosed with the shipment. This action is significant in the overall process for two reasons: 1) it triggers the Shipment Notification email sent to the customer that placed the Order; and 2) an item must be "Shipped" to settle the Order for credit card payment.

Invoicing

The Invoicing action creates a summary for how much is owed for the Products purchased . Invoices are usually generated over a particular billing cycle, but may also be generated on a per order basis.

Settlement

The Settlement action accepts payment for Orders paid by credit card. Each credit card payment goes through a verification process in the Portal, providing an authorized amount for payment for the Order. Settling transfers the authorized amount to the seller of the ordered goods.

Refill Order Approval

This action is only needed when SKUs with inventory have the ReOrder Approval field set to "Account Approval." When the Quantity for Sale dips below the Minimum Inventory Quantity, the Refill Order Approval allows Account Users to review and approve/deny the inventory refill.

Reports

Information available for each Order and/or Distribution action, can be generated into a variety of Reports. Customized queries for specific data columns or date ranges, are defined to capture precise information. Reports can be exported to a number of useful formats.

Search

Click the "blue" Search tile to display **All Orders**. The Search results grid can be filtered by date range, by entering value(s) into the column header(s) and/or sorting by Order Date. All Orders provides an overview page to View Orders/Line Items, Print Orders/Line Items, and to create any tickets respective of the Distribution needs.

Orders Search Options:

- View Orders
- View Line Items

View Orders

The Search grid results display by Order, only showing a high level general summary, with default filter of the most recent.

1. Search for the Order to be viewed:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.

NOTE: From this grid list of Orders every Distribution action can be completed without ever leaving this page. Each available action will have a Create link that respective column. If a number or other value displays, clicking it will show that respective ticket.

View Existing Order

View Order allows for all the details as displayed to and defined by the customer that ordered it.

2. Click the value listed in the Order Number column for the Order to be viewed.
3. The View Order window displays the following details:
    - Order Date
    - User Details
    - Payment Information
    - Requisition Details (if applicable)
    - Shipping & Billing Addresses
    - Products Ordered
    - Price and/or Cost (respective of the Role privileges)
4. Click the "X" to close the modal window.

Print Order(s)

Often a folder is created to accompany Orders through the production stages, printing the Order may be part of that procedure.

5. From the Search results, select the row for the Order to get printed. Multiple Orders can be selected and printed at the same time, if desired; each selected row will highlight in orange.

6. Click the “Print Order(s)” button near the upper right to open the printer friendly display of the Order.
7. Click Ctrl + P to open the print menu.
8. Define any print settings.
9. Click the "Ok/Print" button.

NOTE: Printing an Order opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each ticket can be printed. If multiple Orders are selected for print, they will each appear together in the print display.

View Line Items

The Search grid results display the individual Products (Line Items), only showing a high level general summary, with default filter of the most recent.

1. Search for the Product/Line Item to be viewed:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.

NOTE: From this grid list of Line Items every Distribution action can be completed without ever leaving this page. Each available action will have a Create link that respective column. If a number or other value displays, clicking it will show that respective ticket.

Print Line Item(s)

Often a folder is created to accompany Products through the production stages, printing the Line Item details may be part of that procedure.

1. From the Search results, select the row for the Line Item to get printed. Multiple Line Items can be selected and printed at the same time, if desired; each selected row will highlight in orange.
2. Click the “Print Line Item(s)” button near the upper right to open the printer friendly display of the Product detail for each Line Item selected.
3. Click Ctrl + P to open the print menu.
4. Define any print settings.
5. Click the "Ok/Print" button.

NOTE: Printing a Line Item opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each ticket can be printed. If multiple items are selected for print, they will each appear together in the print display.

Distributing Orders or Items

Distribution allows for tickets to be created for each internal action or step in the process for printing or fulfilling each item on an Order. The Search section provides an at a glance view of what has been done and/or what needs to be done. Each ticket step is outlined in detail to follow, this section just show how to start the process.

Job Ticketing

Creates the production or fulfillment ticket(s) for an Order or item.

6. Click Create in the Job Ticket column of the View Orders grid display.
7. This will open the Job/Pick Ticket window.

NOTE: For a complete outline of how to Job Ticket an Order or Line Item, review that respective section to follow.

Packing Slip

Ships an Order or item, creating a slip to place in the package.

8. Click Create in the Packing Slip column of the View Orders grid display.
9. This will open the Packing Slip window.

NOTE: For a complete outline of how to ship an Order or Line Item, review the Packing Slip section to follow.

Invoicing

An Invoice is used for billing the customer for the Order or item.

10. Click Create in the Invoice column of the View Orders grid display.
11. This will open the Invoice window.

NOTE: For a complete outline of how to Invoice an Order or Line Item, review that respective section to follow.

Settlement

Settling an Order or item transfers the authorized funds to the Account managing Distribution.

12. Click Settle in the Settlement column of the View Orders grid display.
13. This will open the Settle Order window.

NOTE: For a complete outline of how to Settle an Order or Line Item, review that respective section to follow.

Job Tickets

Each Product ordered will usually get Job or Pick Ticketed. Job Tickets provide the details for completing production of the Product for the Supplier; while a Pick Ticket provides the details for inventory to be fulfilled. Products are typically ticketed individually, although they can be ticketed by Order. In addition to Job Ticketing, Versioned or Variable Products may go through the Imposition process for defining the printer's layout of the item. Each of these actions will be outlined in the sections to follow.

Job Ticket Search Parameters:

- Job Ticket Orders
- Job Ticket Line Items
- View Existing Job Tickets
- Impose Line Items
- Impose Job Tickets
- View Existing Impositions

Job Ticket Orders

Job Tickets Order displays all orders in the set date range. From the results, an order can be selected allowing each Product to be Job or Pick Ticketed through a series of steps. Even though the process for ticketing happens through one work flow, only like Products or inventory based items can be placed on the same ticket; all others will be ticketed separately. The default search result will show all Orders that need to be Job Ticketed; however the search can be narrowed by date range for the results.

1. Search for the Order to be ticketed:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for the Order to get ticketed; each selected row will highlight in orange. Multiple Orders can be selected and ticketed at the same time, if desired.
3. Click the "Create Job Ticket(s)" button near the upper right to open the Job/Pick Ticket window to walk through creating tickets for each Product on the Order.

NOTE: For Orders with multiple Products, the Job Ticket window will indicate the number of items at the top left corner; e.g. for an Order with 3 items, it will display as: Job Ticket 1 of 3.

4. Enter the Job Ticket Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Job/Pick Tickets, this number will automatically be generated after the ticket is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Enter an Alternate Job Ticket Number, if applicable.

NOTE: Alternate Job Tickets Numbers are typically used when a Supplier is manually creating Job Tickets in Distribution and they have their own system with their own Job Ticket Number that can be added for reference on the Distribution Job Ticket.

6. Edit the Required Date, if applicable.

NOTE: The Required Date is based on the Lead Time defined when the Product Pricing is created. Using business days, this date is calculated from the day after the order placed to when it should be ready to ship. If this field is blank, no Lead Time was defined for the Product in Pricing.

7. Enter an Email to send the Job Ticket to, if desired.
8. Indicate the Language the Job Ticket should be sent in, if other than English.
9. Manage the Line Items and Instructions as needed; see information below.
10. Select the Impose settings as needed; see information below.
11. Click the "Save/Save and Next" button to continue to the next Product on the order, if applicable. If necessary, click the "Previous" button when ticketing multiple items to return to the previous Product.

NOTE: If one of the items being ticketed is being imposed (Versioned and Variable only), after each Job Ticket is created, there will be an Imposition Set step. See the "Imposing Versioned and Variable Products" below.

Line Items Tab

This tab displays the Product(s) to provide information for the Job Ticket being created. The only action available on this tab is to remove Products to specify what does not belong on the Job Ticket. To remove a Product while creating a Job Ticket follow the steps below.

12. Select the Product(s) in the Line Items list; each selected row will highlight in orange.
13. Click the "Remove Item(s)" button.

NOTE: If there is more than one like Product on the same Order, the Job Ticket will display more than one line item for those like Products. Removing a Product from the Line Items list is done when placing Products on their own Job Ticket is preferred. If there is only one Product and it is removed, the next Product on the order will display for ticketing.

Imposing Versioned or Variable Products

An imposition is the printer's layout for a Product. Impositions define the sheet size an item will be printed on, with an impression of each item placed in rows and columns, to maximize the space on the press sheet and to provide crop marks for trimming. Imposing a Product can take place while creating the Job Ticket (Line Items tab) or that action can be skipped, allowing it to be ganged up (grouped) with other like Products using the Impose Job Ticket or Line Item options. Products do not have to be imposed, there is an option to receive a 1-up individual file as an alternative.

14. Select the desired option from the Impose drop-down:
    - **No (1-up Only)** - The file provided will be an individual file, reflecting the input provided by the user, using the 'Press Settings' defined in Template Setup.
    - **Yes (FPI)** - Allows for the selection of an uploaded FPI (FusionPro Imposition) file for imposing the Product. This will also activate the 'Output File Type' selection to follow. This also activates the Imposition Set step, review that section below.
    - **Yes (Use Default FPI)** - Applies the default FPI file, assigned in the 'Press Settings' at Template Setup, for imposing the Product.
15. If "Yes (FPI)" was selected, choose the appropriate Output File Type:
    - **PDF)** - Portable Document Format
    - **EPS** - Encapsulated Postscript
    - **Postscript**

16. Check the box to Gang by like Quantities:
    - **Unchecked** - Each Product will be imposed independent of each other.
    - **Checked** - Each Product on this Job Ticket with matching Quantities will be imposed together.

NOTE: This setting will only affect the imposition when like Products are on the same Job Ticket.

17. Click the "Save/Save and Next" button, to move to the next Product to be ticketed or to define the Imposition Set.

NOTE: If 'Yes (FPI)' was selected from the Impose drop-down and "Cancel" is clicked, the Job Ticket will still be created, but the Imposition will not. In order to impose the item, use the Impose Line Items or Impose Job Tickets sections. If either of the other Impose options are selected and "Cancel" is clicked, that respective output selected will still be created.

Instructions Tab

This tab allows for a Supplier to define details for production, supplies and costs, that will appear on the Job Ticket. Job Ticket instructions can be defined manually each time, saved as default or in advance via Bulk Operations for the Portal and Product.

Job Ticket Instruction Fields:

- General Description
- Paper Description
- Prepress Description/Instructions
- Press Instructions
- Bindery Instructions
- Shipping Instructions
- Paper Cost
- Prepress Cost
- Press Cost
- Bindery Cost
- Shipping Cost

19. Enter or edit the descriptions/instructions/costs as needed.
20. To save the descriptions/instructions/costs; check the box to 'Save as Default Job Ticket Instructions for this Product', if applicable.

NOTE: When 'Save as Default...' is checked, all information will repopulate the fields on future orders of the Product; however, any of the descriptions/instructions/costs values can be edited from ticket to ticket, as needed. Inventory Products (Pick and Static w/ Att.) only have one open field: "Pick Ticket Instructions."

Imposition Set

This step is only available for items with "Yes (FPI)" selected as the Impose option..

21. Choose the Imposition Template to be used from the drop-down list of FPI files.

NOTE: FPI files must be uploaded to the Impositions section under the Template Assets tile. Review that chapter for more information about working with FPI files.

22. Click the "Save/Save and Next" button to view the Imposition preview.
23. Set the Optimization direction, if applicable:
    - **Horizontal** - Adds each impression starting at the top row, from left to right.
    - **Vertical** - Adds each impression starting at the far left column, from top to bottom.

  - **None** - Will only place one single impression of each Product being imposed.

NOTE: Optimization is most relevant when multiple Products are being Imposed together, allowing for position/placement control; left to right or top to bottom.

24. Review the preview of the Imposition for accuracy.
25. Click the "Save" button to complete the Imposition Set.

NOTE: The preview displayed only shows the order details for each Product. The actual Imposition is not composed until process is complete.

Job Ticket Line Items

Job Ticketing by line item functions much the same way as the by order process outlined above. The main difference is in the search results where individual Products are listed; the ticket creation process is consistent.

1. Search for the Product(s) to be ticketed:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Product to get ticketed; each selected row will highlight in orange. Multiple Products can be selected and ticketed at the same time, if desired.

NOTE: When multiple Products are selected that are not like Products, the Job Ticket window will indicate the number of items at the top left corner, where individual tickets are created for each item, not one ticket for all items. Only like Products or any inventory items from the same order can be grouped onto the same Job/Pick Ticket.

3. Click the "Create Job Ticket(s)" button near the upper right to open the Job/Pick Ticket window to walk through creating tickets for each line item.
4. Enter the Job Ticket Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Job/Pick Tickets, this number will automatically be generated after the ticket is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Enter an Alternate Job Ticket Number, if applicable.

NOTE: Alternate Job Tickets Numbers are typically used when a Supplier is manually creating Job Tickets in Distribution and they have their own system with their own Job Ticket Number that can be added for reference on the Distribution Job Ticket.

6. Edit the Required Date, if applicable.

NOTE: The Required Date is based on the Lead Time defined when the Product Pricing is created. Using business days, this date is calculated from the day after the order placed to when it should be ready to ship. If this field is blank, no Lead Time was defined for the Product in Pricing.

7. Enter an Email to send the Job Ticket to, if desired.
8. Indicate the Language the Job Ticket should be sent in, if other than English.
9. Manage the Line Items tab settings.
10. Select the Impose settings as needed; only available for Versioned & Variable Products.
11. Define the Instructions tab as needed.
12. Click the "Save and Next" button to continue to the next Product on the order, if applicable.

Imposing Versioned or Variable Products

13. Select the desired option from the Impose drop-down:
    - **No (1-up Only)** - The file provided will be an individual file, reflecting the input provided by the user, using the 'Press Settings' defined in Template Setup.
    - **Yes (FPI)** - Allows for the selection of an uploaded FPI (FusionPro Imposition) file for imposing the Product. This will also activate the 'Output File Type' selection to follow. This also activates the Imposition Set step, review that section below.
    - **Yes (Use Default FPI)** - Applies the default FPI file, assigned in the 'Press Settings' at Template Setup, for imposing the Product.
14. If "Yes (FPI)" was selected, choose the appropriate Output File Type:
    - **PDF** - Portable Document Format
    - **EPS** - Encapsulated Postscript
    - **Postscript**
15. Check the box to Gang by like Quantities:
    - **Unchecked** - Each Product will be imposed independent of each other.
    - **Checked** - Each Product on this Job Ticket with matching Quantities will be imposed together.

NOTE: This setting will only affect the imposition when like Products are on the same Job Ticket.

16. Click the "Save" button to define the Imposition Set.

NOTE: If 'Yes (FPI)' was selected from the Impose drop-down and "Cancel" is clicked, the Job Ticket will still be created, but the Imposition will not. In order to impose the item, use the Impose Line Items or Impose Job Tickets sections. If either of the other Impose options are selected and "Cancel" is clicked, that respective output selected will still be created.

Instructions Tab

This tab allows for a Supplier to define details for production, supplies and costs, that will appear on the Job Ticket. Job Ticket instructions can be defined manually each time, saved as default or in advance via Bulk Operations for the Portal and Product. Each Job Ticket Instruction field is listed in the previous Instructions Tab section.

17. Enter or edit the descriptions/instructions/costs as needed.
18. To save the descriptions/instructions/costs; check the box to 'Save as Default Job Ticket Instructions for this Product', if applicable.

NOTE: When 'Save as Default...' is checked, all information will repopulated the fields on future orders of the Product; however, any of the descriptions/instructions/costs values can be edited from ticket to ticket, as needed. Inventory Products (Pick and Static w/ Att.) only have one open field: "Pick Ticket Instructions."

Imposition Set

This step is only available for items with "Yes (FPI)" selected as the Impose option.

19. Choose the Imposition Template to be used from the drop-down list of FPI files.

NOTE: FPI files must be uploaded to the Impositions section under the Template Assets tile. Review that chapter for more information about working with FPI files.

20. Click the "Save/Save and Next" button to view the Imposition preview.
21. Set the Optimization direction, if applicable:
    - **Horizontal** - Adds each impression starting at the top row, from left to right.
    - **Vertical** - Adds each impression starting at the far left column, from top to bottom.
    - **None** - Will only place one single impression of each Product being imposed.

NOTE: Optimization is most relevant when multiple Products are being Imposed together, allowing for position/placement control; left to right or top to bottom.

22. Review the preview of the Imposition for accuracy.

NOTE: The preview displayed only shows the order details for each Product. The actual Imposition is not composed until process is complete.

23. Click the "Save" button to complete the Imposition Set.

View Existing Job Tickets

The only actions that can be completed in this section is to view, print tickets or remove line items from a ticket, if needed.

1. Search for the Job Ticket(s):
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. Click the Job/Pick Ticket number under the 'Job Ticket Number' column in the Search results to view that specific ticket.
3. Review the Line Items or the Instructions tabs.

NOTE: For Job Tickets with multiple Products, the Job Ticket window will indicate the number of items at the top left corner; e.g. for a ticket with 3 items, it will display as: Job Ticket 1 of 3.

4. Click the"Save and Next" button to view the next item on the ticket, if applicable.

Printing Job/Pick Tickets

5. From the Search results, select the row for each ticket to be printed.
6. Click the "Print Job Ticket(s)" button near the upper right to open the print display.

NOTE: Printing a Job/Pick Ticket opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each ticket can be printed. If multiple items are selected for print, they will each appear together in the print display.

Removing a Line Item

Other than viewing the details of a Job/Pick Ticket, one of the few actions available when viewing an existing ticket is to remove Products from it.

7. Select the Job Ticket to be modified from the Search results (as indicated above).
8. Select the Line Item/Product(s) to be removed, each selected row will highlight in orange.
9. Click the "Remove Item(s)" button.

NOTE: Removing a Product from a Job Ticket allows for that item to be ticketed and/or imposed again, if applicable

Impose - Line Items

This section will only display Products that have not completed the Imposition Set action during the Job Ticketing process. There is option to "Cancel" prior to completing the Imposition Set (outlined previously under Job Ticket Orders > Imposing Versioned or Variable Products), only these Products will be available in Impose - Line Items.

1. Search for the Product to be imposed:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Product to be imposed; each selected row will highlight in orange. Multiple Products can be selected and imposed at the same time, if desired.

NOTE: When multiple Products are selected that are not like Products, each will be forced onto individual impositions. Only like Products with the same or "gangable" quantities can be ganged up onto the same imposition.

3. Click the "Create Job Impositions(s)" button near the upper right to open the Imposition Set window to create the imposition.
4. Choose the Imposition Template to be used from the drop-down list of FPI files.

NOTE: FPI files must be uploaded to the Impositions section under the Template Assets tile. Review that chapter for more information about working with FPI files.

5. Check the box to Gang by like Quantities:
   - **Unchecked** - Each Product will be imposed independent of each other.
   - **Checked** - Each like Product with matching Quantities will be imposed together.

NOTE: This setting will only affect Imposition Sets with multiple Products for the same quantity.

6. Click the "Save" button to generate the Imposition Preview.

NOTE: To remove any item from the Imposition Set, select that Product in the list and click the "Remove Item(s)" button.

7. Set the Optimization direction, if applicable:
   - **Horizontal** - Adds each impression starting at the top row, from left to right.
   - **Vertical** - Adds each impression starting at the far left column, from top to bottom.
   - **None** - Will only place one single impression of each Product being imposed.

NOTE: Optimization is most relevant when multiple Products are being Imposed together, allowing for position/placement control; left to right or top to bottom.

8. Review the preview of the Imposition for accuracy.

NOTE: The preview displayed only shows the order details for each Product. The actual Imposition is not composed until process is complete.

9. Click the "Save" button to complete the Imposition Set.

NOTE: If multiple non like Products or non like Quantities have been chosen, a "Save and Next" button will appear. Proceed with defining each remaining Product Imposition Set. Composing the imposed output file may take a few minutes.

Impose - Job Tickets

Impose Job Tickets follows the same principles as the Impose Line Items. The search grid focus is on Job Tickets that include Products with pending impositions. There is the option to "Cancel" prior to completing the Imposition Set (outlined previously under Job Ticket Orders > Imposing Versioned or Variable Products), only these Products will be available in Impose - Job Tickets.

1. Search for the Job Ticket containing the Product to be imposed:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Product to be imposed; each selected row will highlight in orange. Multiple Products can be selected and imposed at the same time, if desired.

NOTE: When multiple Products appear on a Job Ticket or if multiple Products are selected, each non like Product will be forced onto an individual imposition. Only like Products with the same or "gangable" quantities can be ganged up onto the same imposition.

3. Click the "Create Job Impositions(s)" button near the upper right to open the Imposition Set window to create the imposition.
4. Choose the Imposition Template to be used from the drop-down list of FPI files.

NOTE: FPI files must be uploaded to the Impositions section under the Template Assets tile. Review that chapter for more information about working with FPI files.

5. Check the box to Gang by like Quantities:
    - **Unchecked** - Each Product will be imposed independent of each other.
    - **Checked** - Each like Product with matching Quantities will be imposed together.

NOTE: This setting will only affect Imposition Sets with multiple Products for the same quantity.

6. Click the "Save" button to generate the Imposition Preview.

NOTE: To remove any item from the Imposition Set, select that Product in the list and click the "Remove Item(s)" button.

7. Set the Optimization direction, if applicable:
    - **Horizontal** - Adds each impression starting at the top row, from left to right.
    - **Vertical** - Adds each impression starting at the far left column, from top to bottom.
    - **None** - Will only place one single impression of each Product being imposed.

NOTE: Optimization is most relevant when multiple Products are being Imposed together, allowing for position/placement control; left to right or top to bottom.

8. Review the preview of the Imposition for accuracy.

NOTE: The preview displayed only shows the order details for each Product. The actual Imposition is not composed until process is complete.

9. Click the "Save" button to complete the Imposition Set.

NOTE: If multiple non like Products or non like Quantities have been chosen, a "Save and Next" button will appear. Proceed with defining each remaining Product Imposition Set. Composing the imposed output file may take a few minutes.

View Existing Impositions

This section allows for any imposition previously created to be viewed and/or downloaded.

1. Search for the imposed Product:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, click the link for the Product ID to view the Imposition.

Accessing the Output File

To download the Imposed PDF, open the Imposition window as indicated above.

3. Click the hyper linked file name near the top left from the Imposition window.
4. Open or save the PDF as needed.

NOTE: Printing an Order opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each ticket can be printed. If multiple Orders are selected for print, they will each appear together in the print display.

Packing Slips

Packing Slips are created to summarize all of the details of the items being Shipped and is often enclosed with the actual shipment. Creation of a Packing Slip also triggers the Shipment Notification email sent to the customer that placed the Order.

Packing Slip Search Parameters:

- Ship Orders
- Ship Line Items
- View Existing Packing Slips

Ship Orders

The Search results using this option display by Order, with default filter of the most recent.

1. Search for the Order(s) to be shipped:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Order to be shipped; each selected row will highlight in orange. Multiple Orders can be selected and shipped at the same time, if desired.

NOTE: When Shipping multiple Orders, they must all have the same Ship To address to appear on the same Packing Slip. If not, individual Packing Slips will be created for each address.

3. Click the "Create Packing Slip(s)" button near the upper right to open the Packing Slip window.
4. Enter the Packing Slip Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Packing Slips, this number will automatically be generated after the Pack Slip is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Edit the Packing Slip details, as needed:
   - **Ship Date** - Defaults to the present date, but can be pre or post dated.
   - **Shipping Cost** - Defines the amount displayed on the Packing Slip only, this does not change the amount displayed on the Order.
   - **Shipping Carrier** - Indicates the tracking page for the respective Carrier, when a Tracking Number is provided.
   - **Tracking Number** - Used to provide Tracking info to the customer via the Portal or Shipment Notification email.

NOTE: If no value for Shipping Cost is defined on the Packing Slip, the amount provided on the Order will be used. Tracking info is only made available when a Tracking Number is defined.

Line Items Tab

This tab displays the Product(s) to provide information for the Packing Slip being created. The only action available on this tab is to remove Products from the Packing Slip. To remove a Product while creating a Packing Slip follow the steps below.

6. Select the Product(s) in the Line Items list; each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

Ship To Address Tab

This tab provides the address defined by the customer when the order was placed. If needed the Ship To Address can be modified at this point.

8. Edit the Ship To Address as needed.
9. Click the "Save" button.

NOTE: When multiple Orders have been selected and have different addresses, the button will show "Save and Next" to proceed with creating each subsequent Pack Slip.

Ship Line Items

The Search results using this option display individual Products.

1. Search for the Product(s) to be shipped:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Product to be shipped; each selected row will highlight in orange. Multiple Orders can be selected and shipped at the same time, if desired.

NOTE: When Shipping multiple Products, they must all have the same Ship To address to appear on the same Packing Slip. If not, individual Packing Slips will be created for each Product/address.

3. Click the "Create Packing Slip(s)" button near the upper right to open the Packing Slip window.
4. Enter the Packing Slip Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Packing Slips, this number will automatically be generated after the Pack Slip is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Edit the Packing Slip details, as needed:
   - **Ship Date** - Defaults to the present date, but can be pre or post dated.
   - **Shipping Cost** - Defines the amount displayed on the Packing Slip only, this does not change the amount displayed on the Order.
   - **Shipping Carrier** - Indicates the tracking page for the respective Carrier, when a Tracking Number is provided.
   - **Tracking Number** - Used to provide Tracking info to the customer via the Portal or Shipment Notification email.

NOTE: If no value for Shipping Cost is defined on the Packing Slip, the amount provided on the Order will be used. Tracking info is only made available when a Tracking Number is defined.

Line Items Tab

This tab displays all of the selected Products for the Packing Slip being created. The only action available on this tab is to remove Products from the Packing Slip. To remove a Product while creating a Packing Slip follow the steps below.

6. Select the Product(s) in the Line Items list; each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

Ship To Address Tab

This tab provides the address defined by the customer when the order was placed. If needed the Ship To Address can be modified at this point.

8. Edit the Ship To Address as needed.
9. Click the "Save" button.

NOTE: When multiple Products have been selected and have different addresses, the button will show "Save and Next" to proceed with creating each subsequent Pack Slip.

View Existing Packing Slips

This section allows for any previously created Packing Slip to be viewed.

1. Search for the Packing Slip:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, click the link for the Packing Slip Number to view that slip.

NOTE: When a Tracking Number is provided on the Packing Slip, the list of Existing Packing Slips will show a hyper link to open the Carrier's tracking page.

Printing Packing Slips

3. From the Search results, select the row for each Pack Slip to be printed.
4. Click the "Print Packing Slip(s)" button near the upper right to open the print display.

NOTE: Printing a Packing Slip opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each slip can be printed. If multiple items are selected for print, they will each appear together in the print display.

Removing a Line Item

Other than viewing the details of a Packing Slip, the only action available when viewing an existing Packing Slip is to remove Products from it.

5. Select the Packing Slip to be modified from the Search results (as indicated above).
6. Select the Line Item/Product(s) to be removed, each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

NOTE: Removing a Product from a Packing Slip allows for that item to be shipped again, if applicable.

Invoices

Invoices are created to summarize the amount owed for the items purchased on Orders or over the each billing cycle. Invoices may be sent with the respective Order or may be submitted for payment at the end of the billing period.

Invoicing Search Parameters:

- Invoice Orders
- Invoice Line Items
- View Existing Invoices

Invoice Orders

The Search results using this option display by Order, with default filter of the most recent.

1. Search for the Order(s) to be invoiced:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Order to be invoiced; each selected row will highlight in orange. Multiple Orders can be selected and invoiced at the same time, if desired.

NOTE: When Invoicing multiple Orders, they must all have the same Payment Method and Bill To address to appear on the same Invoice. If not, individual Invoices will be created for each variation.

3. Click the "Create Invoice(s)" button near the upper right to open the Invoice window.
4. Enter the Invoice Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Invoices, this number will automatically be generated after the Invoice is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Edit the Invoice details, as needed:
    - **Purchase Order Number** - An optional field to be used to identify a customer or internal Purchase Order for the Invoice.
    - **Invoice Date** - Defaults to the present date, but can be pre or post dated.

Line Items Tab

This tab displays the Product(s) to provide information for the Invoice being created. The only action available on this tab is to remove Products from the Invoice. To remove a Product while creating a Invoice follow the steps below.

6. Select the Product(s) in the Line Items list; each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

Bill To Address Tab

This tab provides the address defined by the customer when the order was placed. If needed the Bill To Address can be modified at this point.

8. Edit the Bill To Address as needed.
9. Click the "Save" button.

NOTE: When multiple Orders have been selected and have different addresses, the button will show "Save and Next" to proceed with creating each subsequent Invoice.

Invoice Line Items

The Search results using this option display individual Products.

1. Search for the Product(s) to be invoiced:
   a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
   b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Product to be invoiced; each selected row will highlight in orange. Multiple items can be selected and invoiced at the same time, if desired.

NOTE: When Invoicing multiple Products, they must all have the same Payment Method and Bill To address to appear on the same Invoice. If not, individual Invoices will be created for each variation.

3. Click the "Create Invoice(s)" button near the upper right to open the Invoice window.
4. Enter the Invoice Number, when applicable.

NOTE: If the Account has Transaction Numbering setup for Invoices, this number will automatically be generated after the Invoice is created. Transaction Numbering must be defined by a MarcomCentral User that has access to administer Account Settings.

5. Edit the Invoice details, as needed:
   - **Purchase Order Number** - An optional field to be used to identify a customer or internal Purchase Order for the Invoice.
   - **Invoice Date** - Defaults to the present date, but can be pre or post dated.

Line Items Tab

This tab displays the Product(s) to provide information for the Invoice being created. The only action available on this tab is to remove Products from the Invoice. To remove a Product while creating a Invoice follow the steps below.

6. Select the Product(s) in the Line Items list; each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

Bill To Address Tab

This tab provides the address defined by the customer when the order was placed. If needed the Bill To Address can be modified at this point.

8. Edit the Bill To Address as needed.
9. Click the "Save" button.

NOTE: When multiple items have been selected and have different Bill To addresses, the button will show "Save and Next" to proceed with creating each subsequent Invoice.

View Existing Invoices

This section allows for any previously created Invoices to be viewed.

1. Search for the Invoice:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, click the link for the Invoice Number to view that Invoice.

Printing Invoices

3. From the Search results, select the row for each Invoice to be printed.
4. Click the "Print Invoice(s)" button near the upper right to open the print display.

NOTE: Printing an Invoice opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each Invoice can be printed. If multiple items are selected for print, they will each appear together in the print display.

Removing a Line Item

Other than viewing the details of an Invoice, the only action available when viewing an existing Invoice is to remove Products from it.

5. Select the Invoice to be modified from the Search results (as indicated above).
6. Select the Line Item/Product(s) to be removed, each selected row will highlight in orange.
7. Click the "Remove Item(s)" button.

NOTE: Removing a Product from an Invoice allows for that item to be invoiced again, if applicable.

Settlement

Settlement is the act of accepting payment for Orders paid by credit card. For an Account to use credit card as a Payment Method, a merchant account must be setup with our e Commerce partner: Cybersource. Once created, each Portal may have credit cards added as a Payment Method via the Shipping and Checkout tile. During the secure checkout, credit card must be selected as the Payment Method at the Billing step, followed by defining the credit card information at the Confirm Order step, upon Order completion authorization takes place immediately. After the Order is fulfilled and shipped in Distribution, Settlement transfers the funds into the merchant account. Settlement must take place within 14 days after authorization.

Settlement Search Parameters:

- Settle Orders
- View Existing Settlement Receipts

Settle Orders

Only Orders with all Products having been shipped (Packing Slips) will be visible in the Settlement section search results, with default filter of the most recent.

1. Search for the Order(s) to be settled:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, select the row for each Order to be settled; each selected row will highlight in orange. Multiple Orders can be selected and settled at the same time, if desired.

NOTE: When settling multiple Orders, they will all appear on one have the same Settlement Reference Number.

3. Click the "Settle Order(s)" button near the upper right to open the Settlement window.
4. Enter the Settlement Reference Number.
5. Edit the Settled By value; the default value will be the name of the Account User.
6. Click the "Save" button.

View Settlement Receipts

Other than printing a Settlement Receipt, there are no actions that can be done to a settled Order.

1. Search for the Settlement Receipt:
    a. If applicable, define the Date From and Date To range on the upper right and click the "Apply" button.
    b. Enter any relevant information into the various header columns to filter the results.
2. From the Search results, click the link for the Settlement Number to view that receipt.

Printing Receipts

3. From the Search results, select the row for each receipt to be printed.
4. Click the "Print Receipt(s)" button near the upper right to open the print display.

NOTE: Printing an Settlement Receipt opens a print menu that strips all of the graphic interface, so a "printer friendly" version of each receipt can be printed. If multiple items are selected for print, they will each appear together in the print display.

Reports

Distribution Reports allow for different predefined report queries to be selected and modified as needed to pull the appropriate data. Users can select/deselect data points, filter by date and Portal; any customization can be saved to be re-run at a later point. Each report can be ran as Tabular Data or Summary format, which specify how the report can be exported; Excel or delimited data (Tabular) vs. PDF (Summary).

Defining Reports

Defining a report takes three steps.

I. Choose the report.
II. Modify the Columns of the report
III. Customize the report:
    i. Define the Date Range.
    ii. Select the Portal
    iii. Select the Format.

(1) Choose Report

The left section in the Reports menu identifies the report and corresponding data columns used generating the output query. Distribution has a list of predefined reports set with specific data columns active and available for customization.

1. Select the Report from either of the tabbed sections.
    - **Standard** - Predefined reports named based off of the data pulled for the report.
    - **Saved** - Reports that have been modified and saved will be listed to be reused.

NOTE: Once a report is selected the data columns in the "Modify Columns" section will reflect those available fields.

(2) Modify Columns

The center section in the Reports menu allows for the available data columns to be Active/Inactive, defining the data column used to sort the results by, and/or reordering the data columns.

Activating or Deactivating Data Columns

Each Report will have a preset number of data columns, with the most common ones already set to "Active".

2. Check/Uncheck each respective data column for the report.
3. Scroll down to adjust each column as needed.

Setting the Data Column to Sort By

Selecting a data column to Sort By, prioritizes the results based on that columns values.

4. Click the radio button for the data column to control the sort.

Reordering the Data Columns

Adjusting the order of the data columns allows for the report to display the data the desired sequence.

5. Click and hold over the data column to be moved in the center "Modify Columns" menu.
6. Drag that data column into the desired position in the list.

NOTE: the Name of the data column will follow the mouse as it is dragged into position.

7. Release the mouse button to drop the data column into position.
8. Continue until each data column is in the proper position.

(3) Customize

Filter the report by a date range, Portal or Supplier (if applicable) and select the report format.

9. Set the From date, to begin the report query.
10. Set the To date, to define the query range.

NOTE: Both date selections require the calendar to be used to define the To/From values.

11. Select the Portal.

NOTE: Reports may only run for all Portals or for an individual one.

12. Select the Supplier, if applicable.
13. Check the radio button to define the report Format:
    - **Tabular Data** - Displays an output inside of the Reports interface (Results tab) showing each data column in a table. This format can be exported as an XLS, XLSX or delimited file of choice (comma, pipe, or tab).
    - **Summary** - Displays the output data as a PDF.
14. Check the box to show Inactive/Expired Products in the report.
15. Run/Export or Save the Report.

Run, Export or Save Reports

After the report has been defined with the desired customized data set, view the results, export it or save that data set to be used again at a later point.

Run Reports

1. Click the "Run" button to generate the report in the specified Format.

NOTE: Tabular Data will generate a table displaying the report data inside the Reports area in Distribution. Summary will generate a PDF that should open in the browser's PDF viewer. In some instances the browser's pop-up blocker may not allow the report to open; add the appropriate exception. Once ran Reports can be exported out respective of the Format selected.

Export Reports

2. Click the "Export" button to export the report.
3. Define the Export settings (Tabular only):
    - *Excel* - Choose the desired version of Excel.
    - *CSV file delimited by* - Choose the delimiter: comma, pipe, or tab.

NOTE: Summary format will open in the browser's PDF viewer. To save do a File > Save/Save As.

4. Click the "Ok" button (Tabular only).
5. In the file menu, indicate the method of export:
    - **Open with** - Select the application to view the exported report; once open the report can be saved.
    - **Save File** - Identify where to save the report.
6. Click the "Ok/Save" button, dependent on the browser.

Save Report As

7. After completing the report setup, click the "Save As" button.
8. Define the Report Name.
9. Click the "Ok" button.

Run a Saved Report

For customized reports that are run regularly; save the report to re-run without having to customize the data set every time.

1. From the *(1) Choose Reports* section of the Reports menu, select the "Saved" tab.
2. Select the name of the saved report from the list.
3. Refine the data set as needed.

NOTE: The date range will usually need to be redefined, as the saved report retains the date range from when the report was saved.

4. Run or Export the report as indicated above.

Glossary

A

Assign @Product (Shipping)

When a Shipping Method is Active for a Portal, this option for Custom or Carrier Shipping (in the Product setup) allows methods to be selected for use on a per Product Basis.

Auto Job Ticket

An automation of the Job or Pick Ticket process in Distribution. This action changes the status of the inclusive Product(s) to “Work In Progress”, defines the details for producing or fulfilling the item(s) and sends the ticket to a predefined email. AutoJob Ticket is required for all Email Products and any Variable Product setup for On-Demand Delivery.

B

Bulk Ops

A process by which a spreadsheet exported from MarcomCentral, allows for the addition of or editting of multiple records, for various content relating to Products, User and Portal setup.

C

Carrier Shipping

Carrier Shipping uses standard Carriers (Fed Ex, UPS &amp; USPS) to calculate the shipping cost; based on the weight, speed, carton and destination. Carrier Methods are created in Account Settings, then activated for the Portal, finally being activated at the Product.

Cartons

The physical vessel (box) that Products get shipped in; defined by height, length, width and weight.

Catalog

The area of the Portal which contains all the folders and Products available for the customer.

Cost Center

A department, division or billing code assigned to Products by the User, on the Billing step during checkout at the Portal.

Custom Shipping

Custom Shipping uses a flat shipping cost, per Product or per quantity, but no calculation is made for Shipping. Custom Methods can be created in Account Settings, then activated for the Portal, finally being activated at the Product. Alternatively, Custom Methods can be created for each quantity of a Product in Product setup.

D

Data Source

A list of data that provides the field names and sample values for testing when building templates. For Variable or Email Products, customers must upload or select a data source (e.g. address list) to populate designated VDP (variable) fields to order the Product at the Portal.

Default (Shipping)

An option when activating Custom or Carrier Ship Methods for a Portal, that automatically activates those methods when ‘Default’ is selected in the Product setup.

Distribution

The section in MarcomCentral for managing or distributing the content ordered at the Portal. Orders are received, allowing each Product get Job Tickets, Packing Slips, Invoices for production or fullfillment. Reports are also available to query any Portal activity.

F

FusionPro VDP Creator

PTI's variable data software used to create templates for MarcomCentral or for VDP compositions offline.

G

Groups

A managment tool required for all Users of a Portal. Groups control settings for Product visibility, Portal features, order process, approval procedures and default values.

I

Imposition

The arrangement of printed items on a designated press sheet to optimize the space available or to form a sequence of pages.

Intelligent Forms (iForms)

Intelligent Forms (iForms) uses specialized Bulk Ops spreadsheets to control forms in four specific use cases. 1) Changing Price for a Product based on a User's identity; 2) prefilling text fields or drop-downs for template Products based on a User's identity; 3) dynamic Pricing based on an a selection for a template Product; or 4) cascading logic in drop-down menus for template Products.

J

Job Ticket

A ticket generated via Distribution for all Products being printed or ones needing to be triggered for processing (Email or Variable using On-Demand Delivery). Job Tickets include the order details for completing the print production of a Product(s), changes the status of the inclusive Product(s) to “Work In Progress”, and (when applicable) signifies an Email Product can be sent or Variable item can be composed for download.

K

Kit

A select set of Products priced and ordered together as a group.

O

On-Demand Delivery

A file download option for Products. On Demand Delivery allows a downloadable file to be available on the ‘Order Summary’ page after the order has been placed; and/or triggering an email after the order has been placed, containing a link to the file for download.

P

Pick (Product Type)

A Product that is held in inventory, with a predefined format and content that CANNOT be customized. This Product Type requires a SKU to be defined, which includes the inventory.

Pick Ticket

A ticket generated via Distribution for Products held in inventory. Pick Tickets may include the warehouse information and location with respect to the inventory.

Prompt

The instructional field on the left half of a form, indicating what is expected of the User, in selecting or entering a value on the right side of the form.

Purchaser

A User Type with the ability place orders all non-Requisition Products and/or approve Requisitions (when authorized by their Group). s.

R

Requisition

The request for Products at the Portal, either made by a Requisitioner or when a Product is designated as Requisition Only. A Requisition must be reviewed and approved to become an order.

Requisitioner

A User Type that places a Requisition at the Portal. Requisitions require approval prior to becoming an order.

S

Senior Purchaser

A User Type with the ability place orders for all Products without any approval. In addition, when authorized by their Group, they can approve all Requisitions.

SKU

A predefined alpha/numeric sequence used to identify each version of a Static or Pick item; which is selected by the customer. SKU = Stock Keeping Unit.

SKU Prefix

A static value that precedes the fields used to dynamically generate the SKU. Products using a form have dynamic SKUs based on customer selections or input in a form.

Sort Order

A numerical method of ranking values listed on the same page or in a drop-down; where the lowest number in the sort will always appear at the top.

Static (Product Type)

A re-order/reprint or download Product with a predefined format and content that CANNOT be customized. This Product Type requires a SKU.

Static w/ Attributes (Product Type)

A Product held in inventory with multiple attributes that require the creation of a form allowing customers to select their desired options. The selections made are used to define a dynamic SKU and/or Description.

V

Variable (Product Type)

A Product requiring customers to upload or select a data source to populate designated VDP (variable) fields, but also defining the quantity based on the number of records in the list.

Versioned (Product Type)

A Product providing the customer with a form to enter, select and proof personalized information defined by the FusionPro template created for a Product.

W

Web Service

Process by which data can be extracted out of PTI and shared with other software solutions for managing production, customers, inventory or data.

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