Novitex Online Ordering System — User Manual

1. Introduction

The Novitex Online Ordering System is a web-based tool designed to make placing, tracking and viewing orders with Novitex Enterprise Solutions as quick and easy as possible. This is the full reference documentation covering all aspects of the Novitex Online Ordering System. Please note that there may be some minor inconsistencies in language (*e.g.* button labels, link descriptions) between this document and the website itself. If you have any questions or comments about this system or your account, please do not hesitate to contact your Novitex sales representative.

2. System Requirements

Before using the Novitex Online Ordering System, please ensure your web browser meets the following conditions:

1. It must be a relatively recent version. On a Windows computer, this includes at least Internet Explorer 6, Mozilla Firefox, or Opera 6. On a Macintosh, this includes at least Safari, Mozilla Firefox, or Opera 5. Other browsers may be compatible but are not supported.

2. It must have JavaScript and cookies enabled. Please consult your browser's preferences or options settings to determine how to enable these features.

3. Logging In

To use the Novitex Online Ordering System, you must have a username and password, which will be provided to you by either a Novitex employee or a supervisor in your organization. Complete the login form on the Novitex home page, or reach the login page from any page in the Novitex website by clicking the Client login link in the top right hand corner. If your login is successful, your customized **Dashboard** page will be displayed.

Dashboard

The Dashboard is your Online Ordering System home page. On the left side, the logo and (optionally) some descriptive text of your currently active organization appears. If you belong to only one organization, this is set for your automatically. If you belong to more than one, you will need to select it manually first, by clicking Select/switch org in the top right corner and choosing one from the dropdown. Certain sections of the Online Ordering System will not work without an active organization set. On the right side, the most recent Orders and Files appear.

Lost Passwords or Incorrect Login

If you have lost your password, click the lost your password link on the login page. This will direct you to the **Reset Your Password** page. You will be directed to this page automatically if your login attempt is not successful. Simply enter your email address and click `Reset my password`. A new password will be generated for you and emailed to that address. You can change your password after successfully logging in (see "Changing Your Password" below).

Please note that a Novitex employee cannot access or reset your password for you. However, if you have lost your *username*, please contact your Novitex sales representative or the supervisor in your organization who initially provided it to you.

Your settings

You may change change various settings for your account by clicking the Your settings link in the top right corner of the page.

You may change your password to something more memorable to you at any point. Enter your old password, and the new one of your choosing (twice, to guard against typos) and click `Change my password`. You will remain logged in to the system, and your new password will take effect the next time you log in.

You may also set some organization-specific settings. If a current organization is selected, you may enter additional contact information, as well as set various preferences for the behaviour of the site.

Length of Login Session

You remain logged in to the Novitex Online Ordering System until you click the Logout link or until you close your web browser. To prevent any unwanted usage of your account, please ensure you logout or close your browser upon completing your activity.

4. Page Layout

Most pages of the Novitex Online Ordering System can be divided into the following sections.

Header: The Novitex logo appears in the upper left corner, and login information appears in the upper right.

Navigation bar: This area contains navigation links to all sections of the Online Ordering System accessible to you.

Main content: This area is where the primary page information will appear.

Side bar: On the right of the screen, this area may have additional information and buttons pertaining to the page you are currently viewing.

5. Address Book

The primary purpose of your Address Book is to store contact information for those people or companies that you ship orders to on a regular basis. The contents of your address book will appear in a dropdown menu in the ordering procedure, thus saving you having to re-type that information each time you order.

The address book has two primary views: a "business card" view and a "table" view. Click the two icons above the table to select a view; your choice will be remembered. The business card view shows the most pertinent information for each contact; click the show/hide icon to toggle viewing the rest. The table view shows similar information in a tabular form which takes up less space; click the “i” icon to pop open a contact's full details.

You may search for an address by entering a term in the search box in the upper right. The search indexes the first name, last name, and company fields only. To return to your full address book after viewing search results, simply click the Address book tab in the navigation bar.

To add a new contact to your address book, click Add a new address. Fill in the appropriate information and click `Save address`. The different fields for an address are as follows:

First Name	Required.
Last Name	Required.
Title	Optional.
Company	Optional. This is a required field if the address is not residential.
Address	Required.
City	Required.
Province/State	Required.
Postal/Zip Code	Required.
Country	Required.
Phone	Required.
Cell	Optional.
Fax	Optional.
Email Address	Optional. This will allow us to provide tracking and other information if available.

Residential address? If this is an individual’s home, check the Yes box. This information is used when shipping; some couriers’ delivery policies vary depending on whether or not the recipient is an individual or a company.

To edit a contact in your address book while viewing the main address list, click its edit icon. Change the information in the appropriate fields, and click `Save address`.

To delete a contact in your address book while viewing the main address list, click the delete icon. You will be given an opportunity to confirm this action. You may also undo a deleted address, but *only immediately after deleting it*. If you refresh the page or navigate to another page, the ability to undo an address deletion is lost.

6. Product List

This page contains a list of all products that are available for ordering. The page is divided into at least one but possibly several Categories. Each category has a grey title header at the top and can be collapsed by clicking the appropriate arrow icon next to the name. You can also change the sorting of the columns within each category by clicking a column header. This will toggle between sorting alphabetically and reverse-alphabetically. Additionally, you may set the categories to default to being all open or closed, depending on your preference; visit the Your settings page to make that selection.

The products inside each category will be displayed with several columns. At a minimum, there is a column for the document's title, description, and the quantity to order. There may also be additional columns, such as a current inventory amount, part number, or some other customized information. Each document may also have a preview image associated with it, so you can confirm visually what the item looks like; if this is the case, the document's title will be a link which you can click to open a new window for viewing. To return to the **Product List** when viewing a preview, hit `Esc` or click Close.

You may search for a product by entering a term in the search box in the upper right. The search indexes the product name and description fields only. To return to your full address book after viewing search results, simply click the Products list in the navigation bar.

7. Orders

This page will show a table of current orders that you have placed and their current status. If you are a manager, it will display *all* orders placed by members of the active organization. Note that orders older than two weeks are not displayed.

Each order has a status associated with it. Orders flagged "Active" are currently in production. Orders flagged "Completed" have finished production and have been shipped or made available for pickup. Orders flagged "Pending Approval" require manual approval from a manager before they are placed into production. Novitex takes *no* action on these entire orders, including any other items that do not require approval, until they are approved.

To view details for an individual order, click the order number.

To approve an order (if you are a manager), check the select box associated with the order and click `Approve selected order(s)`. The status changes from Pending Approval to Active.

8. How to Place an Order

Below is a step-by-step guide to placing an order.

1. Log in. If you belong to more than one organization, click "Select org" in the top right corner and select the appropriate organization from the dropdown menu.

2. If the person or company you wish to ship your order to has not yet been entered in your Address Book, add it now. This is not mandatory, but ensures that your recipient's address will be saved for future use.

3. Click the Products tab in the navigation bar. This presents a list of items you have available to order.

4. Choose a quantity of the item you wish to order. There may be one of several ways to specify a quantity:

- An empty text box: Enter any quantity you require.

- A dropdown menu: There may be one or several fixed quantities to choose from.
- An empty text box with a specific minimum: If there is text beside the input box like [Min: 5], you must order at least this amount.

You may specify quantities for more than one item if you wish to order several at once. Note that products with an [AR] beside the quantity box require manager approval before the order is placed into production. Click `Continue`.

5. If you have ordered a variable data document (*e.g.* a business card) you must supply additional information for the item before proceeding. You will be directed to the **Input Required** page where you can do so. Enter your information into the fields provided exactly as you need it to appear on the document. Note that not all fields may be required; those that are will have bold labels. Note also that some automatic formatting may take place to meet with corporate consistency requirements (*e.g.* text may be converted to all capitals, or brackets may be added around the area code in a phone number). Click `Continue` when you are finished. A live preview of your document will be generated (please be patient as this process may take a moment) and you will arrive at the **Product Preview** page. You may inspect either the preview in the browser itself, or right-click the preview image and choose "Save as..." from the menu (language will vary depending on your browser version) to download a PDF document. Note that depending on your browser configuration, a *left*-click might launch Adobe Acrobat Reader in your window, which you will need to close to return to the **Product Preview** page. *Please ensure the document is accurate before proceeding. Novitex cannot be held responsible for inaccurate information on variable documents.* If your information does not fit on your document (*e.g.,* an extremely long email address that flows off the edge of a business card) please contact your Novitex sales representative. If you need to make adjustments, click `Modify` and enter the information again; otherwise click `Continue`.

6. The **Your Order** page is displayed. The top of the page shows a summary of the items you have ordered so far. If you need to change the quantity of an item, click the change link next to the item, enter the new value, and click `Update`. If you wish to remove an item from your order, click the appropriate `Delete` icon. If you wish to add additional items, click the Add more items button; you will return to the **Product List** (*i.e.,* back to step 3 above). If you wish to cancel the order, click Cancel this order in the action area. Click `Continue` when you are ready to proceed.

7. The **Shipping** page is displayed. You must provide a shipping address for your order. You may choose one from your Address Book, or enter one manually. If you enter an address manually, you may optionally check the box to save to your Address Book for future use.

8. The **Additional info** page is displayed, allowing you to enter any additional information regarding your order.

i) You must provide a due date. This is the date by which you need to have your order arrive to you. Enter one either manually (in *yyyy-mm-dd* format) or by clicking the calendar icon which will allow you to select a date.
ii) Enter any additional info. This field is optional. If there is any extra information that Novitex needs to process your order (*e.g.* a PO number, unique shipping requirements, etc.) enter it here.
iii) Enter any notes. This field is optional, and can be used to record information about your order for your records. This information will be saved with your order and will be viewable in order detail pages and reports.
iv) Enter email addresses to CC confirmation to. These addresses will receive an email confirmation when the order is finalized. You may enter more than one; separate them by

commas.
Click `Continue` when you are ready to proceed.

9. The **Confirmation** page is displayed. This is the final step in the ordering procedure. The results of the previous three steps are displayed for your confirmation. If you need to make any adjustments, you can click the appropriate link to return to a previous page. If everything is accurate, click `Place this order`. This will send the order to Novitex, and an email notification to the appropriate manager if approval is required on any items you ordered. *This action cannot be undone, so please ensure your order is accurate.* You will be taken to a confirmation screen and sent a confirmation email, either of which is suitable for printing for your records if you desire. a

9. Files

The Files area contains a list of files that have been placed there by Novitex for you to download. These files are available to all members of the currently-selected organization. These may be proofs, customized documents, or additional resources. To download a file, right-click on the download icon and choose "Save as..." from the menu (language will vary depending on your browser version). You may have the ability to delete a file once you have downloaded it; simply click the red delete icon. You will have the opportunity to confirm this action. You may also undo a deleted file, but *only immediately after deleting it*. If you refresh the page or navigate to another page, the ability to undo a deleted file is lost. Note that deleting a file means other members of the current organization will not have access to it any longer, so please ensure no one else needs it before deleting.

10. Reporting Functions

Managers have the ability to create customized reports to display information about orders that have been placed in the Online Ordering System. Click Reports in the navigation bar to view the **Your Reports** page.

Creating / Viewing / Editing a Report

To create a new report, click Add a new report. This presents a form to enter various parameters you may use to determine which orders will be included in your report:

Report Name
If you are planning on saving this report so that you may view it again later without having to re-enter the parameters, enter a title. If you just wish to view the report without saving it, you may leave this field blank.

Narrow by Date
You must select one of the buttons to enter a date range to report on. This can be one of several choices:

- Monthly: Select either this month or the previous month's orders.
- Quarterly: Select either this quarter or the previous quarter's orders. If you choose a quarterly date range, you must specify which month your first quarter starts on for accurate date calculations.

- Fixed dates: Enter the start and end dates of the period you wish to report on, either manually (in *yyyy-mm-dd* format), or by clicking the calendar icon which will allow you to select a date.
- Fixed number of orders: You may display the last *n* number of orders, regardless of which date they were placed on.

If you do not select a date range, your entire ordering history will be searched.

Narrow by Organization
If you belong to more than one organization, your report may display only orders placed by members of a certain organization. To select one, check its select box from the list. If you do not select an organization, all will be included.

Narrow by User
Your report may display only orders placed by a certain set of users. To select one, select it from the menu (use Ctrl-click or Command-click to select more than one). If you do not select a user, all will be included.

Narrow by Product
Your report may display only orders that contain a certain set of products. To select one, select it from the menu (use Ctrl-click or Command-click to select more than one). If you do not select a product, all will be included.

To save this report, click `Save report`. This will return you to the **Your Reports** page, where the report you created will appear in the list of saved reports.

To view the results of this report, click `View report`. This will display a page with the resulting orders in a table. Note that the report is not saved.

Viewing / Editing / Deleting a Saved Report

To view the results of a saved report, click the name of the report from the list of saved reports on the **Your Reports** page.

To edit a saved report, click the appropriate edit icon; you will be returned to the form to specify the report parameters.

To delete a saved report, click the appropriate delete icon. You will be given an opportunity to confirm this action.

Downloading a Saved Report

If the built-in reporting feature of the Online Operating System is not featureful enough for your purposes, or you wish to have a local copy of that information, you can download the results of a report to a file. To download the results of a saved report, click the appropriate download icon from the list of saved reports on the **Your Reports** page. This will initiate the download of an unformatted CSV (comma-separated values) file suitable for importing into Microsoft Excel, OpenOffice, or another spreadsheet program. Note that the .csv file contains more information about the orders returned in your search than the online report pages do.

9. File Uploads

You may also use the Novitex site to upload files to us. This can be done either from the main site, or by clicking the link in the header when you are logged in. This will open a page where you can enter various information about your upload. You will see a progress meter detailing the time remaining for your upload to complete.

Note that you *must* leave the page open while the upload is in progress. When the upload is finished, a confirmation will appear.

There are some restrictions on file uploads to be aware of:

- Files can be a maximum size of 1GB and/or take up to one hour to upload. The speed of your transfer is determined primarily by your broadband connection's upload rate.
- Only files of a certain type may be uploaded, and you will be notified if your file is not the correct type. If this happens, compress your file (e.g., as .zip) and try again. Approved file extensions are:
  - Compressed files: .zip, .sit/sitx, .tar.gz/tgz, .gz/gzip
  - Image files: .gif, .jpg/jpeg, .tiff/tif, .bmp, .eps,
  - Microsoft formats: .doc, .ppt/pps, .xls/xld
  - Open formats: .pdf, .txt, .ps, .rtf

If you request so on the upload form, a Novitex representative will contact you regarding your upload as soon as possible.