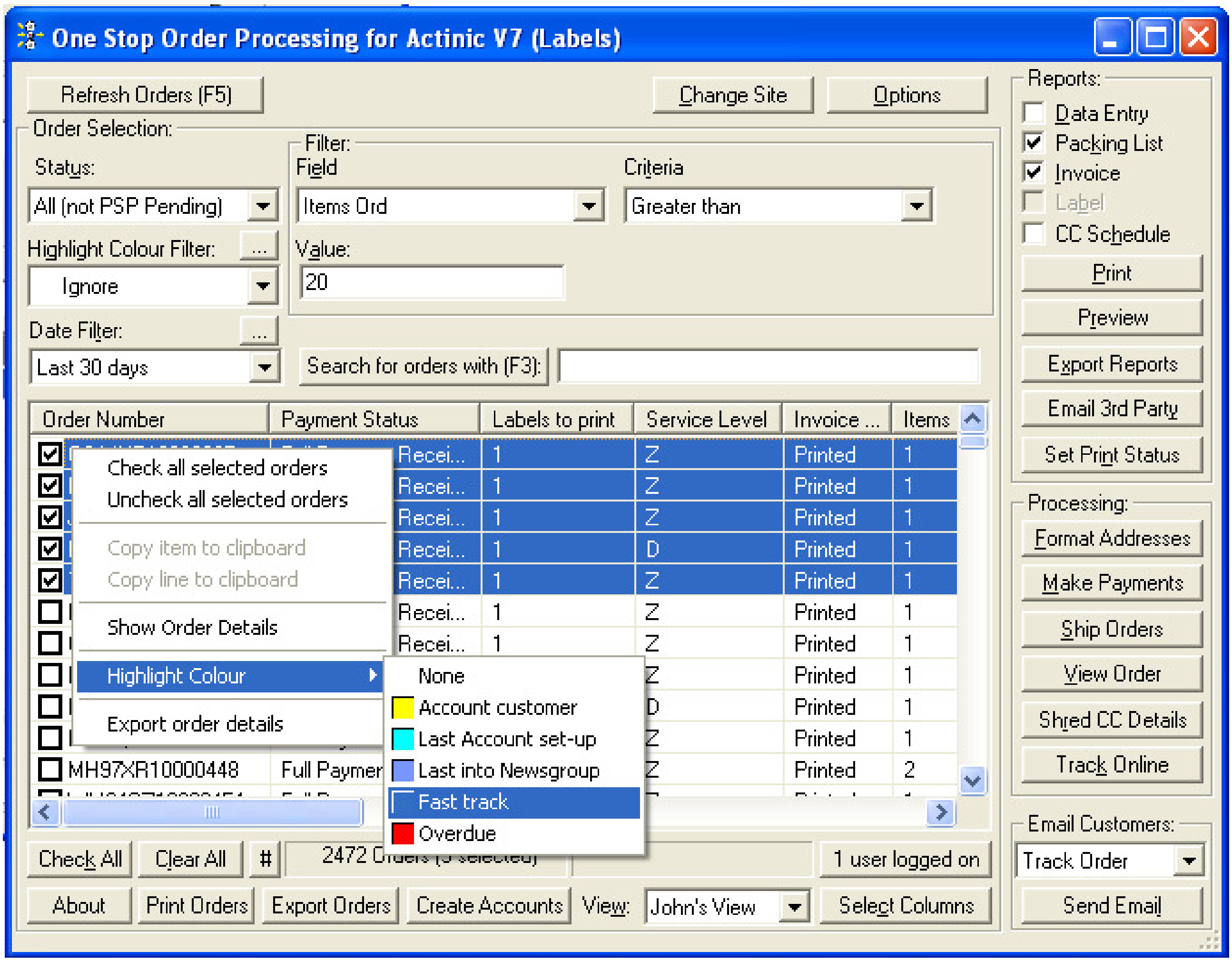
One Stop Order Processing for Actinic

Index

Introduction

With One Stop Order Processing for Actinic you can select multiple orders, using your selection criteria, quickly and easily take them through to completion. You can easily integrate Actinic with other 3rd party systems using the Export Orders features.



For each selected order you can print, preview, email or export the Data Entry, Packing List, Invoice, Label and Credit Card Schedule. All the selected orders can also be marked as shipped and marked as payment made or the order addresses formatted. You can easily allow your orders to be tracked online. This can be done by using the built-in order tracking (hosted on your Actinic site) or linked to your couriers site (e.g. CityLink or Business Post).

You can quickly and easily view orders from any Actinic site (on the same PC or anywhere on your network).

You can communicate with your customers by sending them emails to tell them what stage their order is at. Several default templates are supplied. You can amend these or create your own. Emails can be sent as HTML or plain text.

NOTE: Html emails can not be sent if you are using a MAPI client (e.g. Outlook). You should use an SMTP server for this. See the *Setup Email* for more information on how to do this.

Order selection

You can select all the outstanding orders or a selection of orders based upon your search criteria.

Status

This can be either:
. *All Pending*
. *Pending & Not Shipped*
. *Pending & Shipped*
. *Completed*
. *PSP Pending*
. *All (not PSP Pending)*
. *All* orders.

Filter

A filter is based upon one of the *Selected Columns*. To create a filter do the following:
1. Choose a *Field* type, for example, *Date Ordered*.
2. Select the *Criteria*, for example *Between*.
3. Enter values for the chosen criteria, for example 9am on the 10th July 2005 and 5pm on the 30th July 2005.
4. Press the *Refresh Orders* button.

NOTE: You can also refresh orders by pressing the F5 button.

Once the list of orders has been displayed you select the orders to process by checking (ticking) the order to the left of the order.

You can only use filters on the Custom values that allow values to be entered. Filtering will be done on the values entered for that particular field (not including the default value).

Advanced filtering

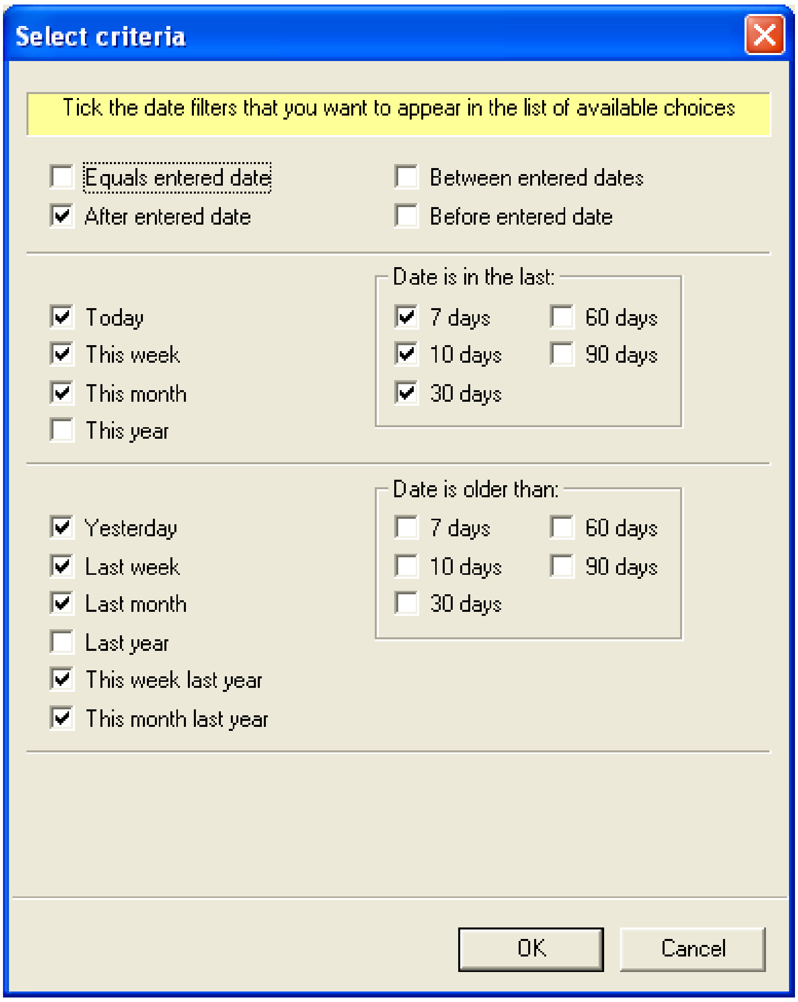
There are several useful filtering fetures that can make searching for groups of items very easy. You can use 1 of 2 methods:

1. When searching for text items (e.g. *Customer*), you can select the *Criteria Is one of*. You can then type in a list of name separated by a comma (e.g. *Brown,Smith,Jones*). This will then produce a list of all the named people (in this case *Brown, Smith and Jones*).

2. Get the filtering values from a file. If you type in !! followed by a filename (for example, `!!C:\temp\filtervals.txt`) the filter uses the value in the file. This can either be a single word, number etc. or it can use a list of values (as described in method 1).

Setting the available criteria choices

If you are using a date as a filter, for example, Date ordered you can change the list of available dates to select by. To do this click on the  button to the right of the *Criteria* area. The following dialog is displayed:



The dates are split into 3 distinct areas:

1. The first set of date choices is where you enter a specific (or dates).
2. The second set of date choices is orders from now to a defined time in the past. This is useful to view orders that have arrived today, this week or in the last 30 days.
3. The third set of dates are for view orders in the past. This can be used to view orders from last week, last month or for seeing which orders haven't been shipped (or paid for) after a defined time period (for example, 30 days).

Tick the choices that you want to appear in the criteria list and press OK.

Finding Orders

You can easily find orders that contain certain text. If you enter text into the *Search for orders with (F3)* button all fields of all the currently displayed orders are searched. This can be very useful if someone telephones you and says their name or company but you don't know which field they entered the values into. Every time you search for text it searches from the currently selected line. If the end of the orders list is passed the start of the orders list is searched. If no orders are found that contain the text a message is displayed. When an order is found that matches your text is automatically checked.

NOTE: After entering your text you can also press F3 to find the text.

Advanced searching

You can get the value to find from a file. If you type in !! followed by a filename (for example, `!!C:\temp\findval.txt`) the filter uses the value in the file. This can either be a single word, number etc..

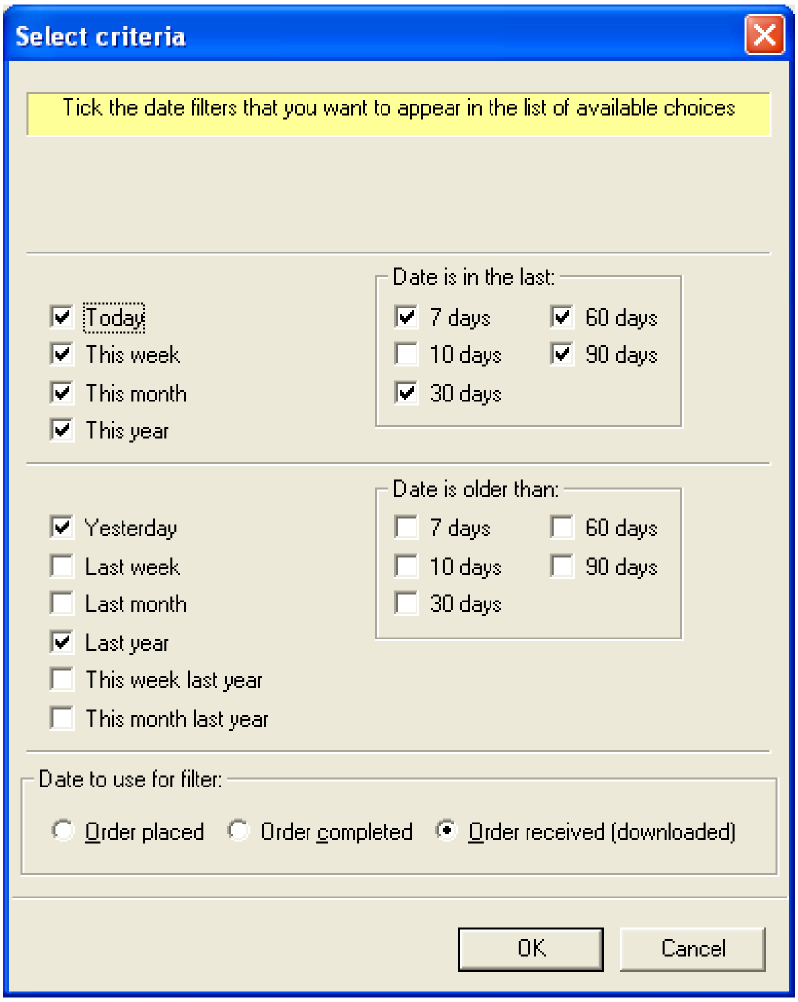
Highlight Colour Filter (minimum Actinic V7 required)

In addition to the main filter you can create your own custom filters. One Stop Order Processing (and Actinic) allows you to assign colours to specific orders. You can then choose to only show orders with a certain colour assigned to it. Each colour can be assigned a specific task (or order state) to fit in with how you run a shop. For example, if 3 different people process orders, each order handled by that person can be assigned their colour. Each user, on a different system can choose to only display their orders. For example, you may also choose to use the colour red to signify an order from an important customer or to validate the customer's delivery address (if a PO Box has been entered as the delivery address).

NOTE: You can create up to 26 different colours, each having their own name. To do this, press the button to the right of the *Highlight Colour Filter*. You will need to install the Highlight Colour Manager to change colours.

Date Filter

You can use a master date filter to only show orders from a certain date range. The date range here can be used in addition to the main filtering. This selection is also independent of which view you are using. This can be very useful for when you have a large number of orders. You can set this to show only the last 30 (or 60 or 90) days orders. You can also change the available date periods to show orders from by pressing the  button to the right of the *Date Filter* area. This displays the following dialog:



You can also choose which date to use for the master filtering.

Order placed
The date that the customer placed the order

Order completed
The date that the order was shipped, printed and paid for.

Order received (downloaded)
The date that the order was downloaded from the website.

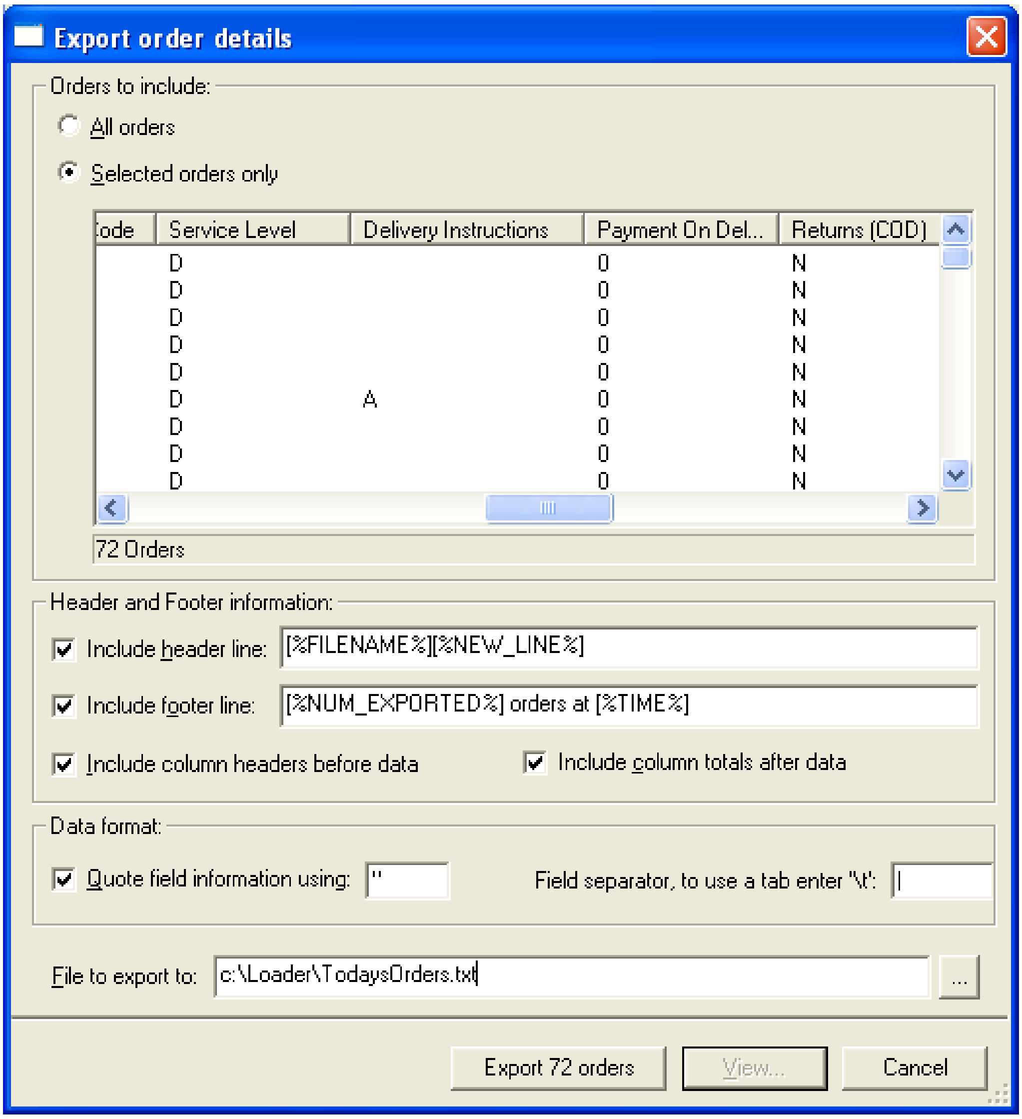
Views
A view is a defined set of fields to display the order information by. There are several pre-defined views, each displaying the appropriate fields for a given task. You can modify these views or create additional ones by pressing the *Select Columns* button.

Several views are installed. These include Courier views (that allow your order details to easily be imported into external Courier systems) and a Profit view. If you use the Profit and Pricing Tool you can use these values in your One Stop Order Processing displayed information.

Displaying the orders grid
You can turn the displaying of a grid around the orders by pressing the # button.

Exporting order details
One Stop Order Processing allows any view to be exported. To allow easy data conversion to the target system you can also define your own values. These can either contain a single value for all orders, or a different value for each order. These values can be defaulted from any other field and can include calculations based on other fields. See the '*Selecting order information fields* to use for filter' section for more information on setting up views.

To export all the orders (or selected orders) click on the *Export Orders* button. The following dialog is displayed:



You can define how you want to export the information displayed on the screen. Only the fields (columns of data) that are marked for export are exported. The columns shown in the Export order details dialog are those that will be exported.

Orders to include
You can either export all the orders displayed shown in the main window or those that you have ticked.

Include header line
If you require information at the start of the file add any text here.

Include footer line
If you require information at the end of the file add any text here.

The header and footer lines can include the following macros. These are replaced when the information is exported.

[%TIME%]	The current date and time.
[%FILENAME%]	The filename exported to.
[%NUM_EXPORTED%]	Number of orders exported
[%NEW_LINE%]	Start a new line. This can be used to put several blank lines (with or without data in) at the start or end of the export file.
[%BATCH_NUMBER%]	A number that can be used in file names for certain feeds.

Include column headers before data
Some 3rd party products want the names of the fields that the information relates to. You can change the names of the columns in the *Select fields* dialog.

Include column totals after data
You can include the totals of any columns defined in the view as totals required.

Quote field information
If you are using the separator in your main text you may want to use quoted fields. For example, some applications (e.g. Microsoft Excel) allow the comma separator to be used as field text as long as all the fields are quoted. You can use any character(s) to put around the export field information.

Field separator, to use a tab enter \t
This is the character (or characters) to use between each value. If you need a Tab Separated file (tsv) type in \t.

File to export to
This is the file that will be used to save the information to. This file will be overwritten each time an export is done.

Creating customer accounts (Actinic Business or Above required)

One Stop Order Processing allows you to create customer accounts from any of your orders. This would normally be set-up in your shop 1 of 2 ways, described below:

1. After customers have placed an order you would create an account, giving them a discount the next time that they shop with you.

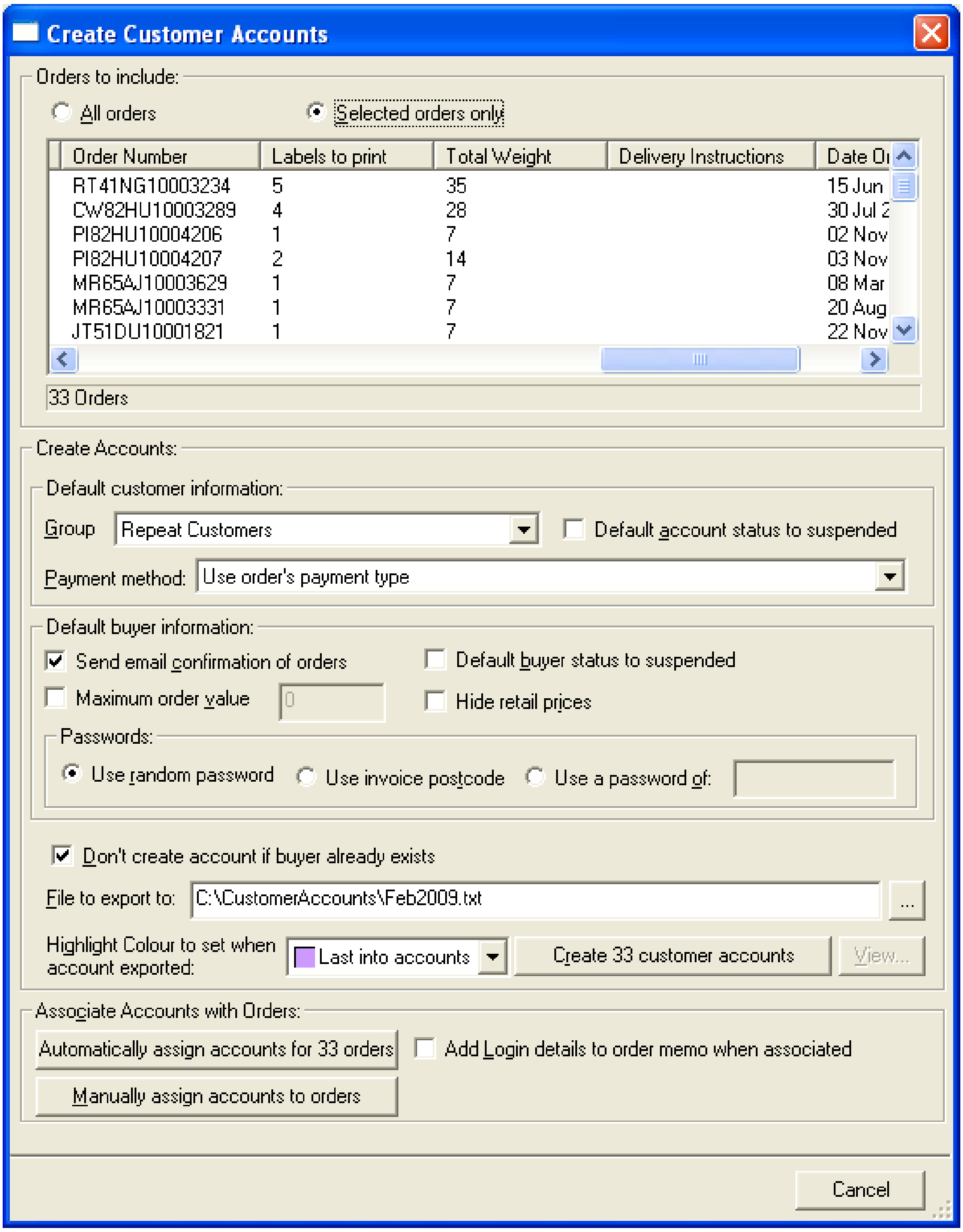
2. Create a free product in your shop that allows someone to apply for a customer account. This can be the only product that is shown to retail customers (i.e. non logged in customers).

Once you have downloaded the relevant orders you simply select the required orders (using filters or ticking the required orders) and clicking on the *Create Account* button; the use of the *Create Customer Account* dialog is described further in this section.

Creating Customer Account information

Click on the *Create Accounts* button (in the bottom left hand corner of the main window).

The following dialog will be displayed:



<u>Orders to include</u>
You can either set-up accounts for all the orders displayed in the main window or those that you have ticked (*Selected orders only*).

<u>Default customer information</u>
When account details are created you can the following information:

Group
The customer group to add the order customer to. You should set these up in the Actinic Customer Groups.

Payment method
When your account customers enter a future oder (having logged in) they can have a default payment type selected. You can either use the payment type they chose for their order or use a fixed payment type (e.g. Paypal).

Default account status to suspended
When the account is created orders will not be able to be created using it.

<u>Default buyer information</u>

Send email confirmation of orders
Do you want the buyer to receive an email when they place an order.

Default buyer status to suspended
If you only want to create a buyer, but not let them login (yet) tick this box.

Maximum order value
You can limit how much the buyer can spend by entering the value in this field.

Hide retail prices
You can hide the retail prices when the buyer logs in and only show their specific prices.

Passwords
When accounts are created the login name is automatically set to the login name. You can choose the password scheme to adopt when creating accounts. There are 3 types.

1. *Use random password*
   The created password is based upon all the user's details and can be from 5 to 9 characters of mixed case.

2. *Use a password of*
   You can specify a fixed password for all created accounts.

3. Use invoice postcode
   This uses the order's invoice postcode. This can be very useful if you want the customer to easily remember their password.

Don't create account if buyer already exists
If you use this option you don't have to worry about re-creating customers accounts. Using this option you can simply select a group of orders and know that an account (import) file will only contain new accounts.

Highlight Colour to set when account exported (Actinic V7 onwards only)
When you create an account you will probably want to send the customer an email. What you can do is assign a colour to the order and then select only those orders to send emails to.

When you want to create the customer accounts simply select the *Export n customers* (where n is the number of orders to create customer accounts for). The accounts are created from the orders in newest to oldest date order. So if a customer has ordered more than once from the selected orders only their current information will be used.

Accounts will only be created once for the same Company name or Invoice email address (used as the login name). This is a requirement of an Actinic account.

It is not a requirement to assign customer accounts to orders as One Stop Order Processing automatically finds the customer account details when sending emails. This is based upon the order's invoice email address. When sending emails you can default account information (if displayed in the email) if an account does not exist and optionally not send the email if a valid customer can not be found (you can then resolve the account issue and resend the email).

Assigning customer accounts to orders

Once the customer accounts have been imported into Actinic you may want to associate them with their original order (or orders). There are 2 approaches to doing this, automatically or manually.

<u>Automatically assign accounts to orders</u>

This will look at all the selected orders and if a buyer is found with a login name the same as the invoice email address it will associate that customer account with that order. If you want to view or amend these later you can use the manual approach (described below).

<u>Manually assign accounts to orders</u>

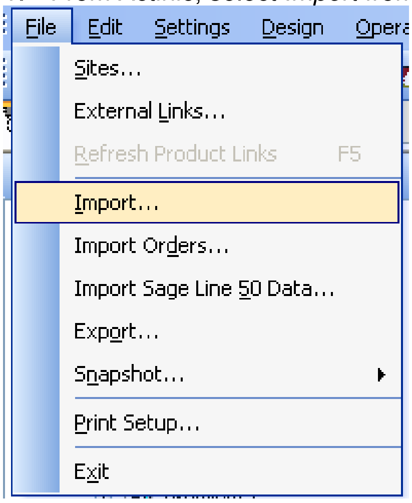
This will launch the Order Customer and Buyer Assignment product. If you do not have this installed you will be prompted to download and install it. You should refer to this product's help for more information.

Add Login details to order memo when associated

When the customers account is created you can add their login name and password to their order memo. This can be useful if the customer phones up and needs to know their login details.

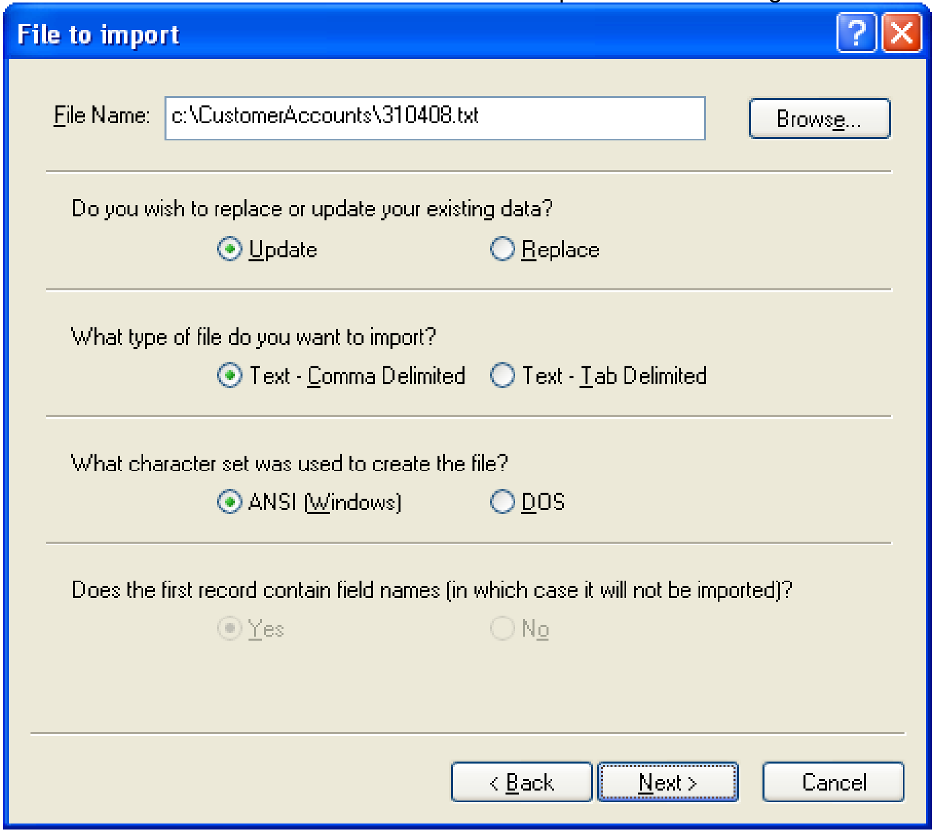
Once the account information import file has been created, it can be imported into any site (or any version) of Actinic. This is explained below:

1. From Actinic, select *Import* from the *File* menu

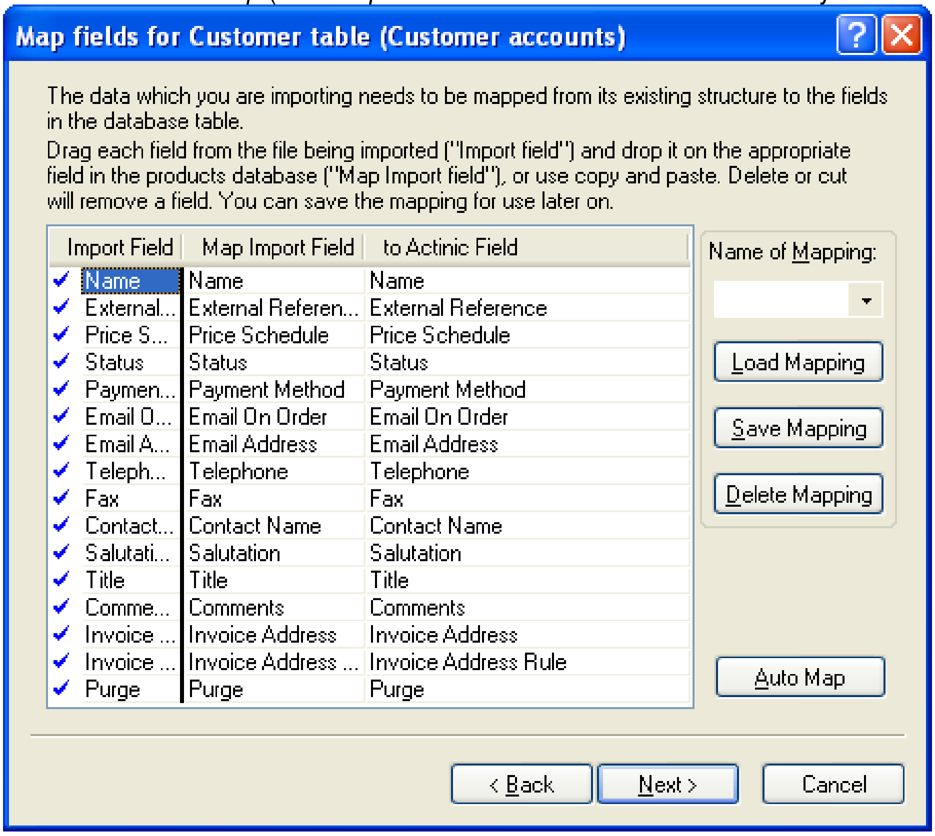


2. Select *Hierarchical Import* and click *Next*.

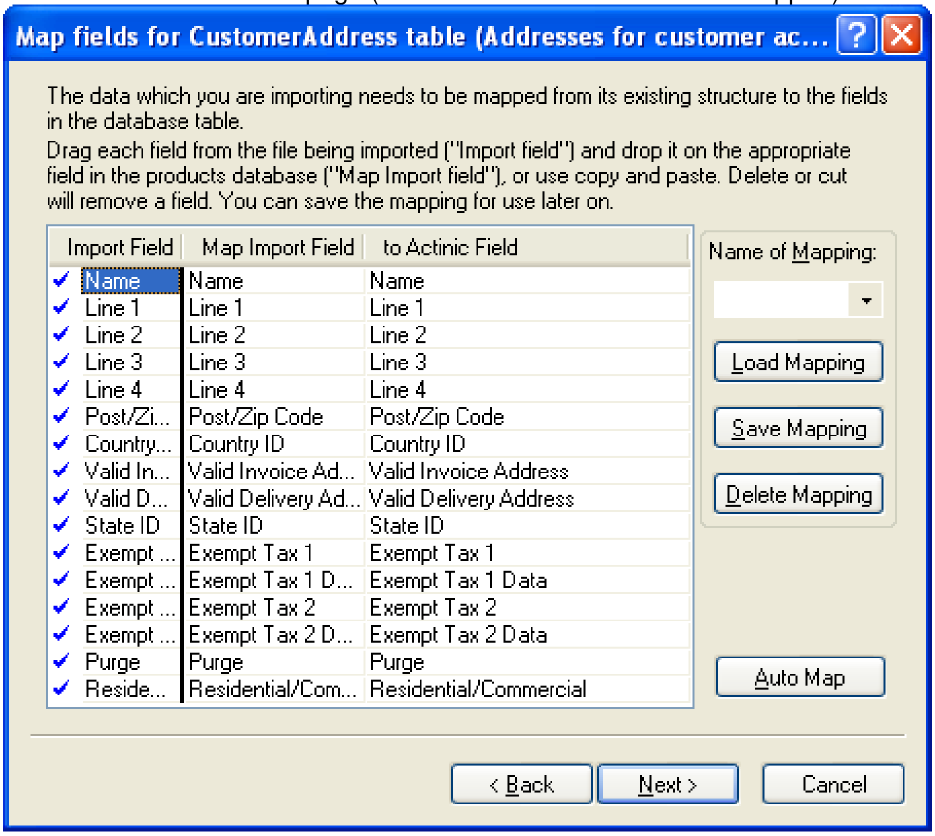
3. Select the file that was created with One Stop Order Processing and select *Next*.



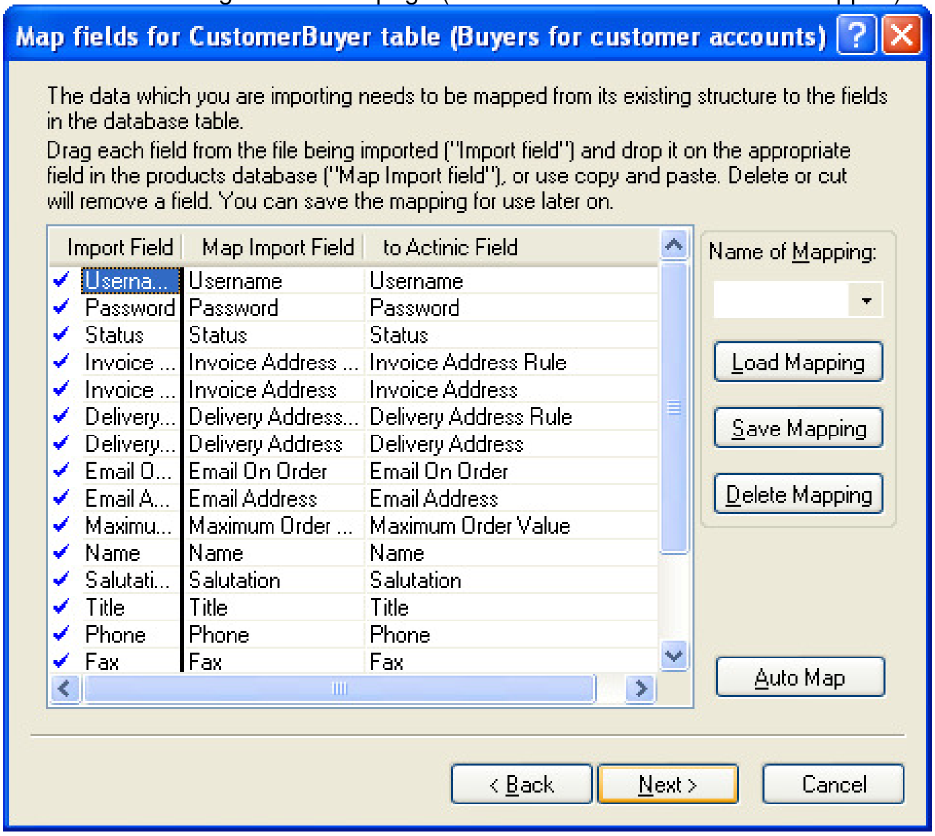
4. Click on *Auto Map* (if the *Import Field* column does not have ticks by each item) and select *Next*.



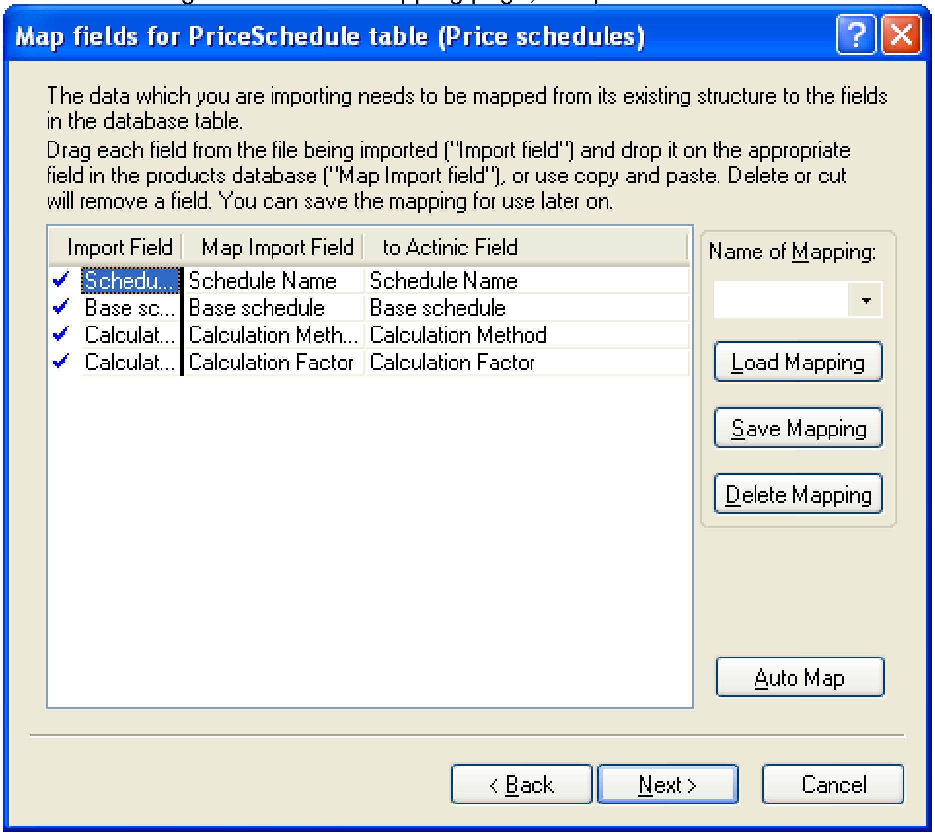
5. Do the same with this page (i.e. make sure all the fields are mapped) and select *Next*.



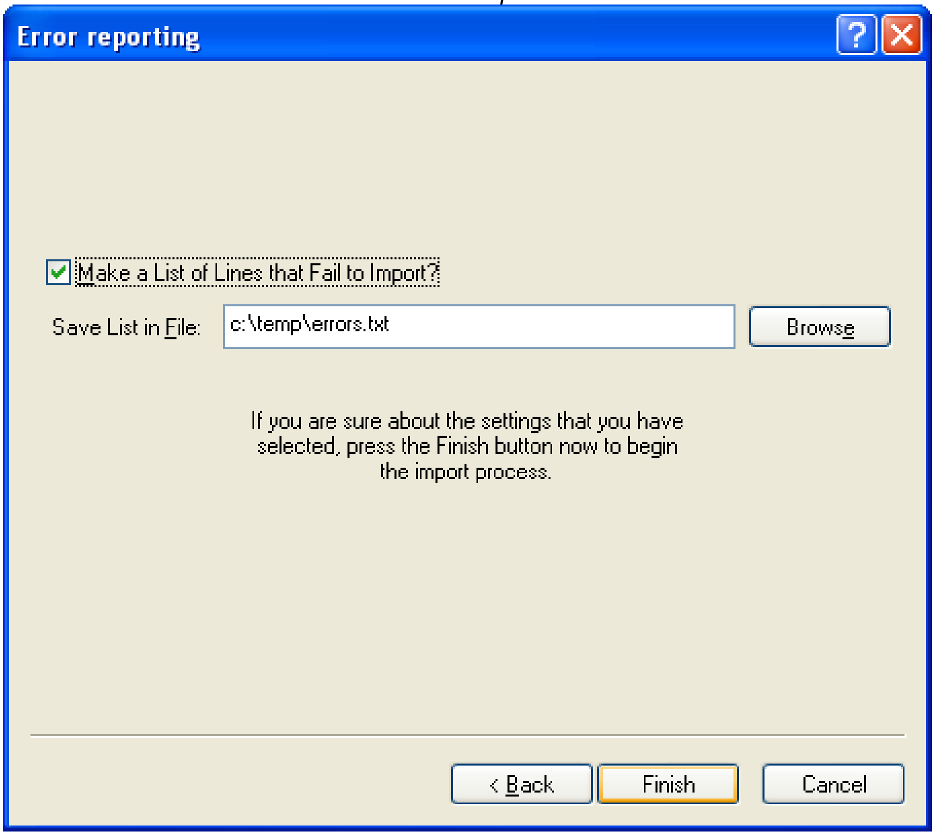
6. Do the same again with this page (i.e. make sire all the fields are mapped) and select *Next*.



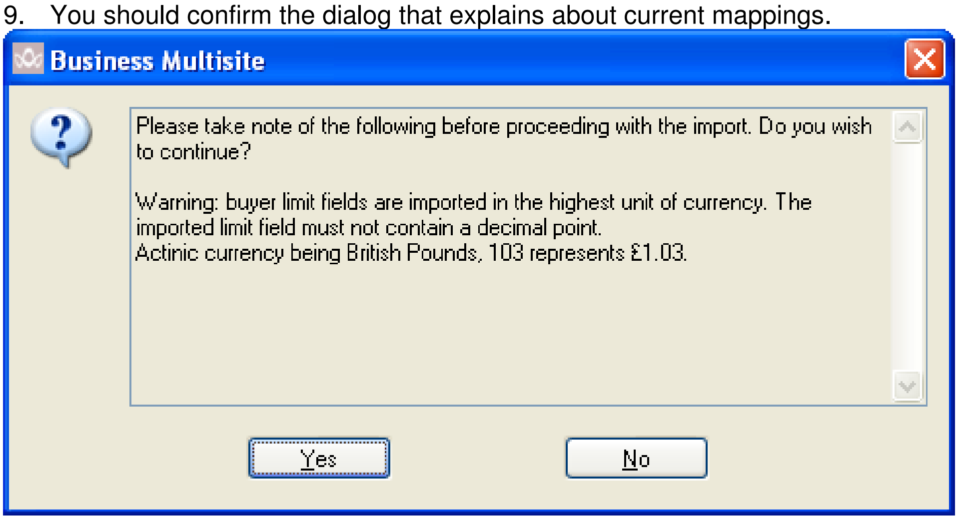
7. And once again on the last mapping page, and press *Next*.



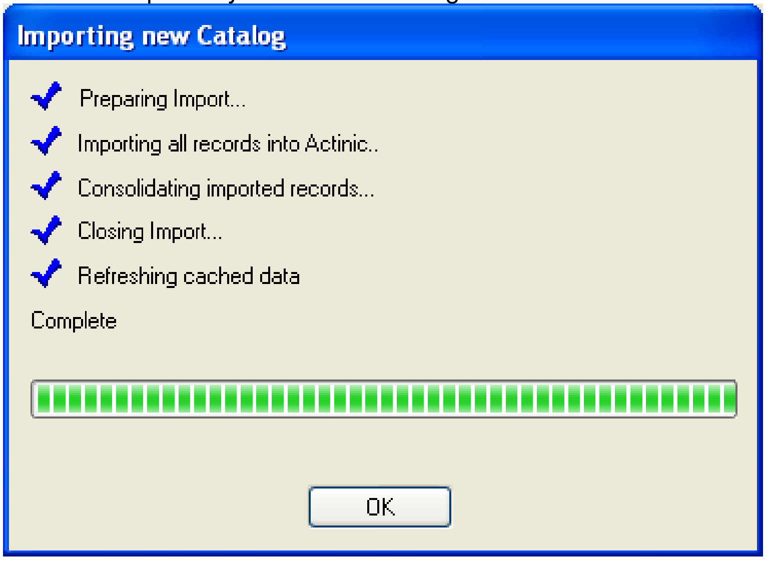
8. Tick *Make a list of Lines that Fail To Import* and enter a suitable filename and select *Finish*.



9. You should confirm the dialog that explains about current mappings.



10. Once imported you will see a dialog similar to the one shown below:



11. If any errors are shown this is normally because there were errors in the customers details. The most common problem is an invalid email address. You should correct the reported information and re-create the customers accounts.

You can now notify people of their login details. You can create an email template and reference their login details using the `[%BUYER_NAME%]` and `[%BUYER_PASSWORD%]` macros. For more information see the **Email Customers** section.

Order Tracking

Once order tracking has been set-up (see the Track Online options for more information) you can select any of your orders and upload their tracking information to your website. Customers can be sent an email which will automatically include a link to their order tracking information (on your website) and/or they can use an order tracking box on your website, where they type in their Actinic order number. You can then update (and upload) their tracking details to notify your customers of the order process.

You can change the information to display in the online tracking form. You can include details about the order and include up to 15 additional custom values specific to your business. This can include fields for you to add in comments or batch numbers or courier tracking, who packed by etc..

Additional order handling

If you right click (on the mouse) while on an order an additional menu is displayed. This provides the following features:

Auto totaling
If the field contains a numeric value (e.g. order total) all of the currently displayed orders' values will be added up and displayed.

Copying information to the clipboard
If you want to easily export information to another application (e.g. Microsoft Word) you can right click (on the mouse) on an order and either copy the current item or the entire line to the clipboard. This can then be pasted into any other application.

NOTE: This option is only available if a single order has been selected

Checking and Unchecking selected orders
If you select more than 1 order you can choose to check or uncheck all of the selected orders.

Show and amend order details
The order details for the currently selected item are shown. See the *Display order details* section for more details.

Assigning a highlight colour to the selected orders (minimum Actinic V7 required)
If a colour is selected all of the currently selected orders are assigned that colour. This colour can then be used to indicate something specific to you and additional information to filter orders on.

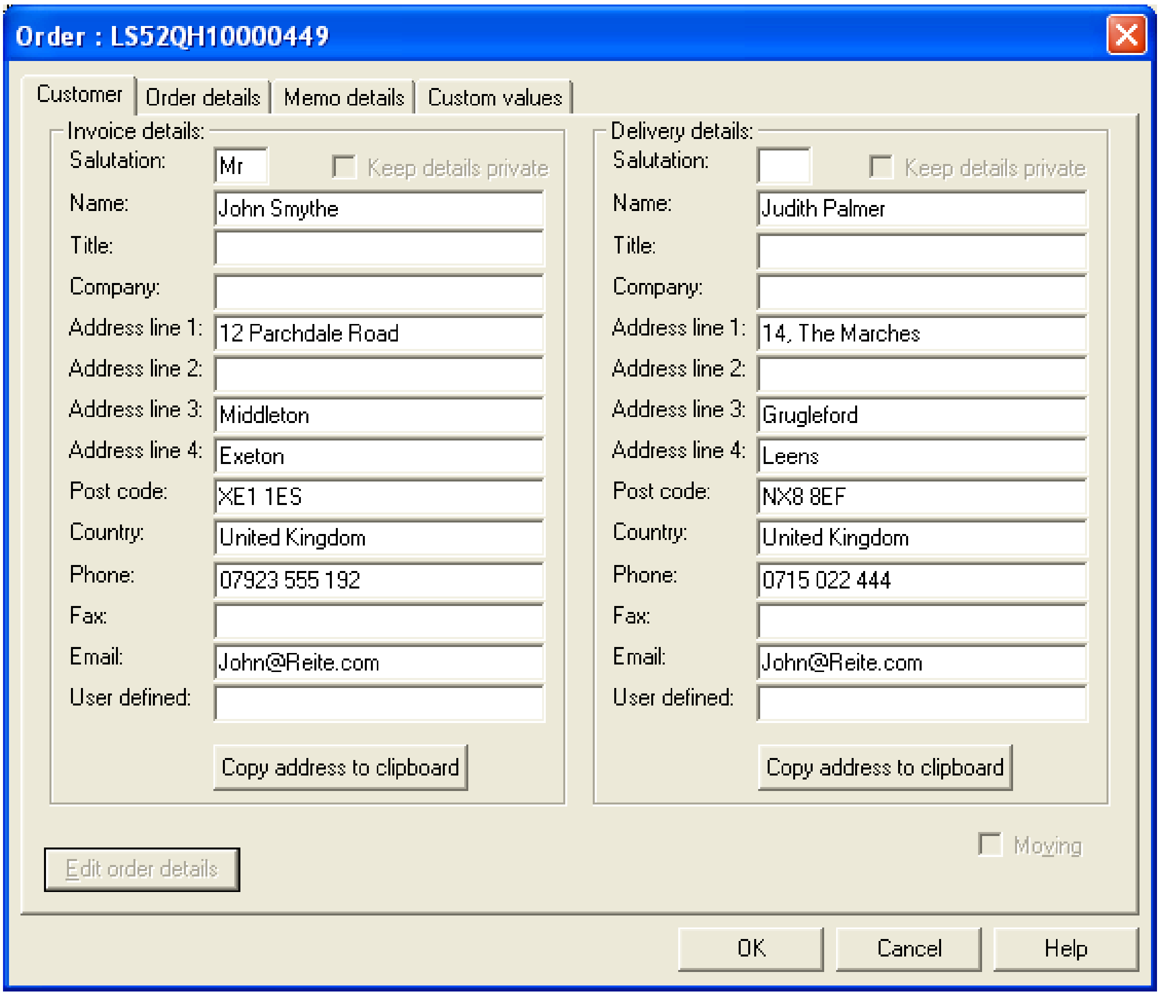
Displaying order details

You can display the current order details in any of the following ways:

1. Double clicking the mouse on an order.
2. Selecting an order and pressing the *View Order* button.
3. Select an order and right click (on the mouse) and select the *Show Order Details* option.

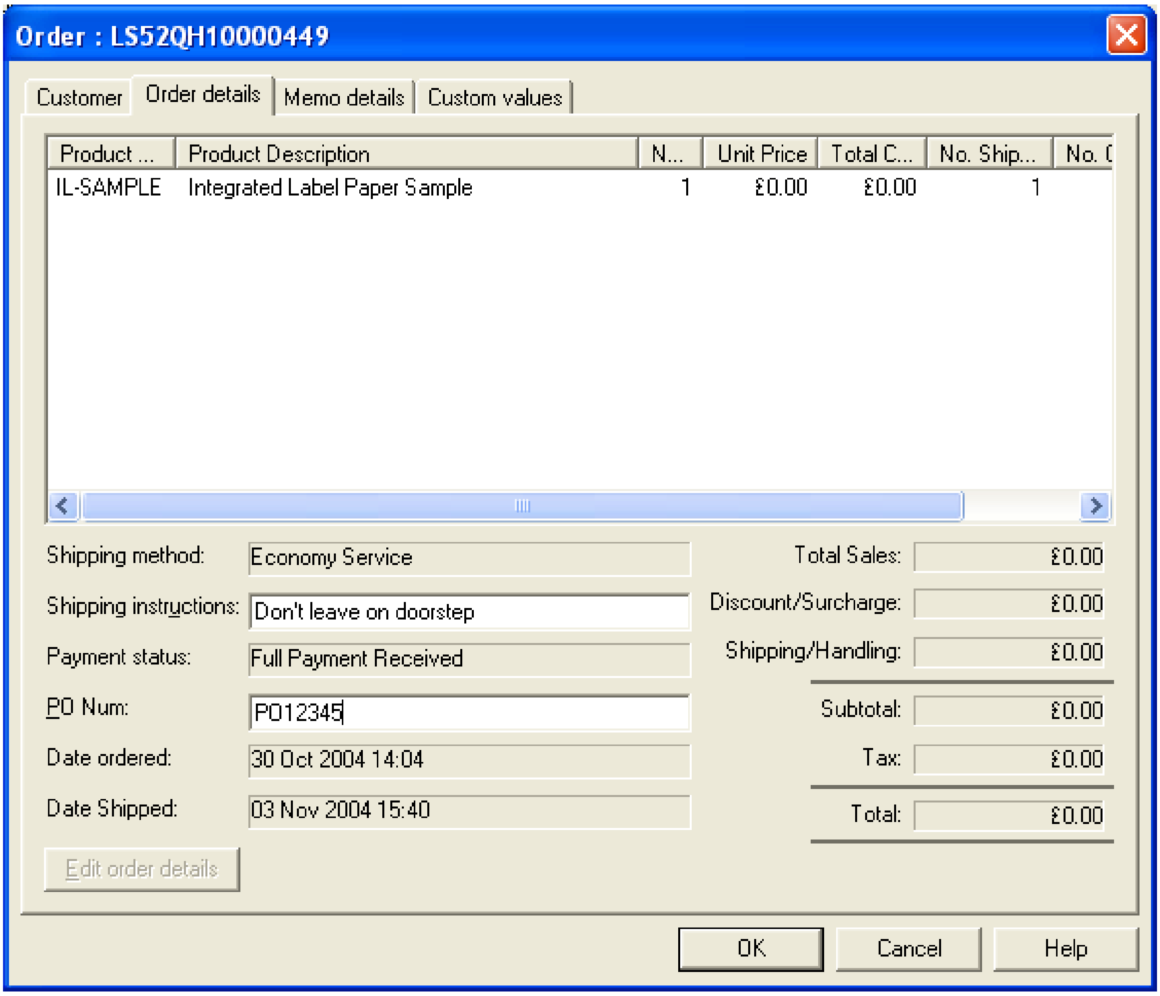
NOTE: Only 1 person can edit an order at a time. While an order is being edited it can still be viewed by other users. You are prevented from editing an order if someone else is editing the order. If you have the '*Allow locked orders to be changed*' option enabled (in the *Setup available features* dialog) you can override the other person editing an order. However, this will then prevent the other from saving their changes. In practice, if this situation arises you should either talk to the person or send them a message (using the logged on users dialog from the main dialog).

Customer details page



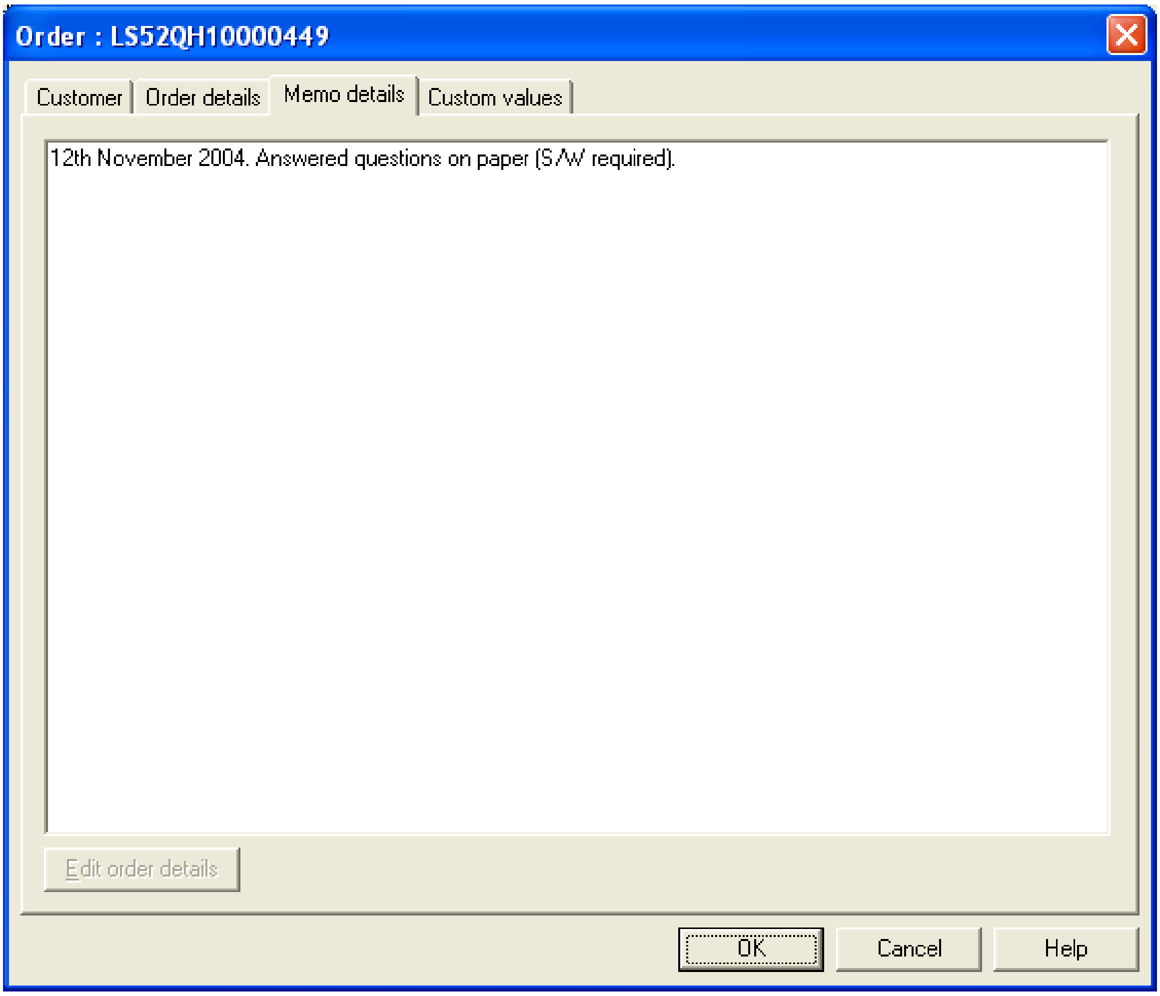
The customer details for the invoice and delivery address are shown for the order. If you want to copy with the Invoice details or Delivery details to another application use the Copy address to clipboard option. These can then be pasted into any other application. To edit the order details press the *Edit order details* button.

Order details page



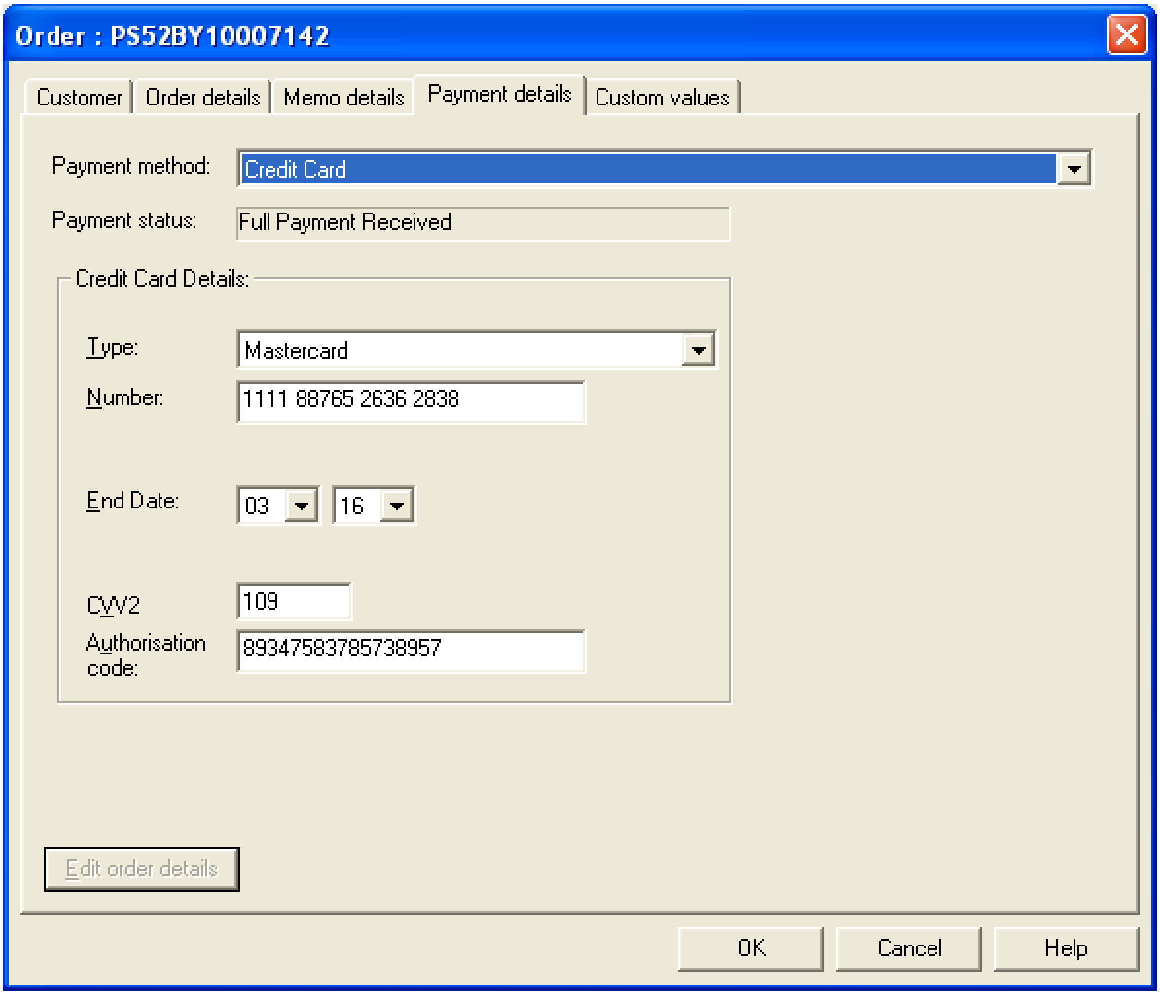
The key order information is displayed. This can be used to quickly check the status of the order. To edit the *Shipping instructions* and *PO Number* press the *Edit order details* button.

Memo page



Any information entered can be shown. To amend or add notes to the order press the *Edit order details* button. Information can automatically be added into the memo details when sending customer emails.

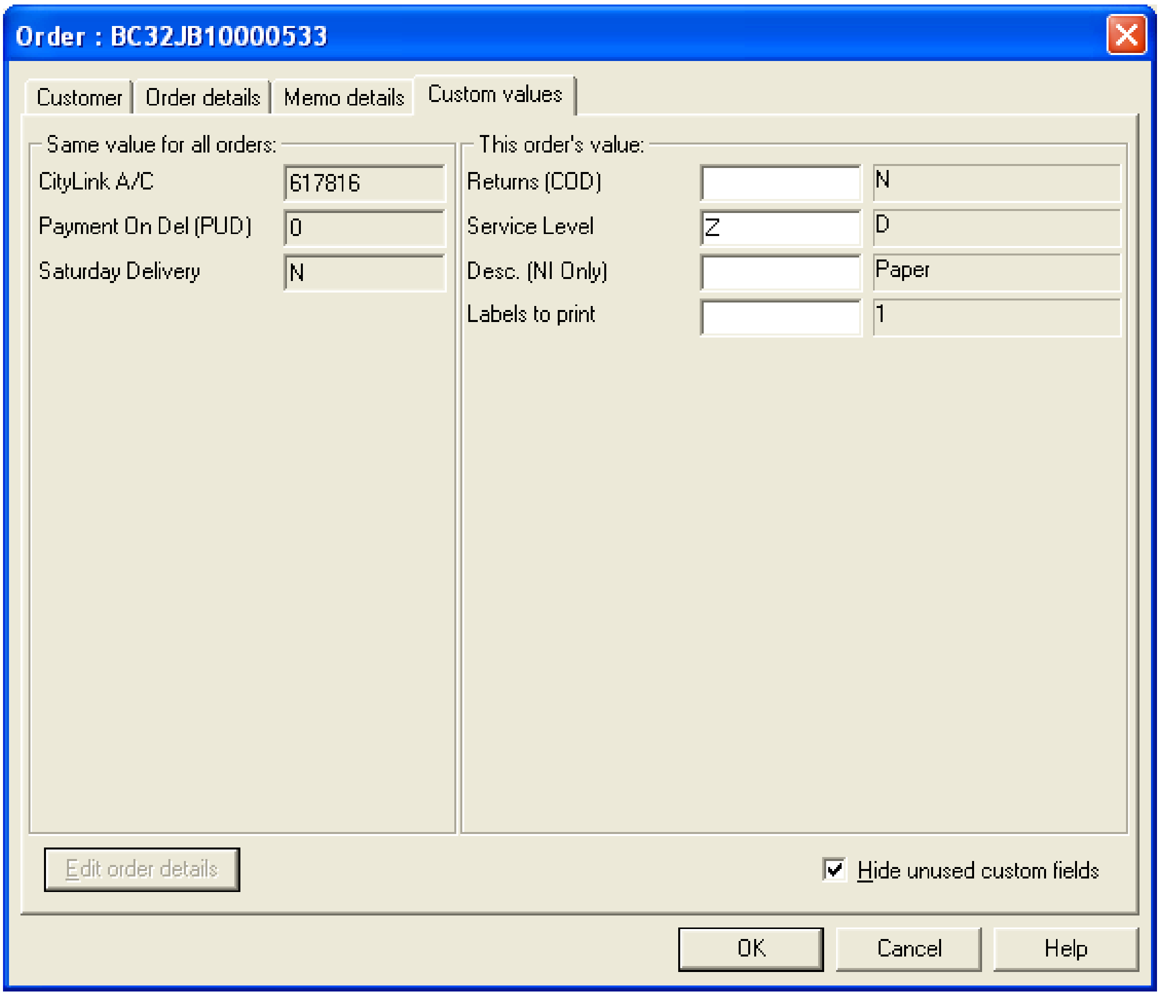
Payment details page



The existing payment details can be shown. If you collect credit card details from your website, these will be shown. You can also add the details in later for manual processing. To amend or add payment details to the order press the *Edit order details* button.

NOTE: If using Credit Card Encryption (in Actinic V8 or later) you can not amend the card details. However, you can view the details as long as you have entered your Login name and password into the Login Options page.

Custom values page



If you are using custom values you can enter any relevant values here.

The area to the left contains values for reference only. These are the '*Same value for all orders'* values. This is used mainly for exporting data. For example, exporting data to Citylink (using CLAN) must have your account number on each line of the order. You can define a fixed value for this to be automatically displayed on every order line (in your chosen view).

The area to the right contains values that can be changed for each order. However, they can also have default values. These are used if a value has not been defined. For example, using Citylink you can have a default Service of D. This means that if a value is not entered D will be used. If you want to override this for a specific order, enter a different value. In the example, Z is used.

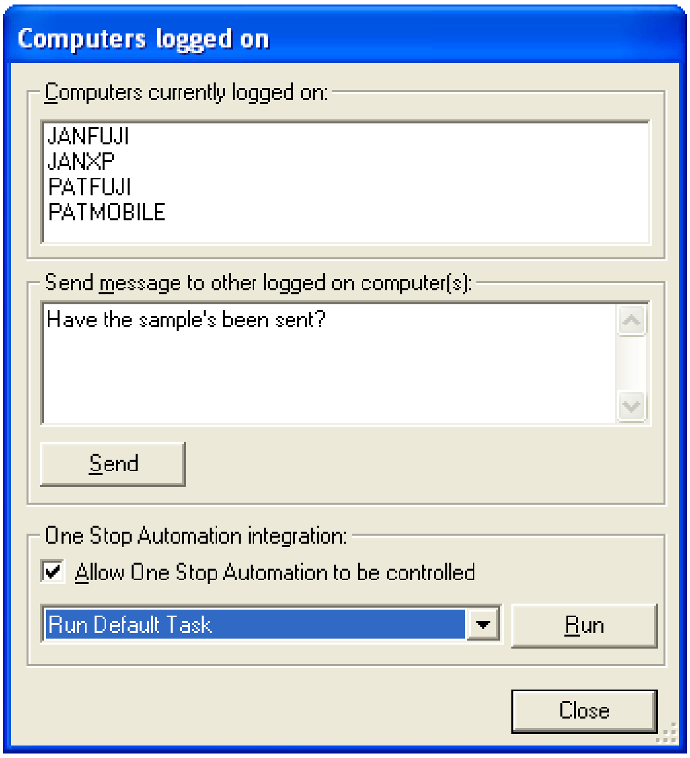
If you only want to show custom values that are being used tick the *Hide unused custom fields* box. This will hide any Custom values that have not had their name changed.

You can create 50 fixed value and 50 variable value custom fields. However, only the first 15 values (of each) are displayed on this page. You should make sure that if you require any information to be entered by the user you should use 1 of the first 15.

For a detailed explanation of how to set-up and use custom values see the '*Selecting order information fields to use for filter'* section.

NOTE: The Citylink example is installed in the same directory as the main One Stop Order Processing program (called Citylink.mev). To use this view it should be imported (see the '*Selecting order information fields to use for filter'* section) for more information.

Users information



The current number of users logged onto the Actinic computer is shown. If you want to see which computers are logged on click on this box. You can also send a message to any other user currently logged on the same Actinic PC. This can be used to pass on information to someone who has an order locked that you need to work on.

If you also have One Stop Automation installed on your main Actinic PC you can control when the default task and start and stop the scheduler. If you have one task to handle all of your processing you can use this to run that task as and when required. The main information area shows what is currently happening on the main Actinic machine (in One Stop Automation). You know when the next download is happening and if the scheduler is running.

You can also select a specific Actinic Site. For more information on selecting the remote site refer to the *Actinic Site selection* section

Printing order details

If you want to print the current orders shown press the *Print Orders* button at the bottom of the orders area. If you have specific orders selected you will be prompted to see if you only want those orders printed or all the orders matching the current filter.

When you print the current orders, the current column widths and columns selected are used to print the report. If you want a report to contain certain information you should add that column to the current view (or create a specific view to print the order details).

If the orders printed are too large to fit onto a single page they are split over more than 1 page. When the report is printed the page number and its location in the report is printed on each page. For example, if a report is too wide for a single page and fits onto 2 pages and there are 2 pages of orders, the page details are printed as:

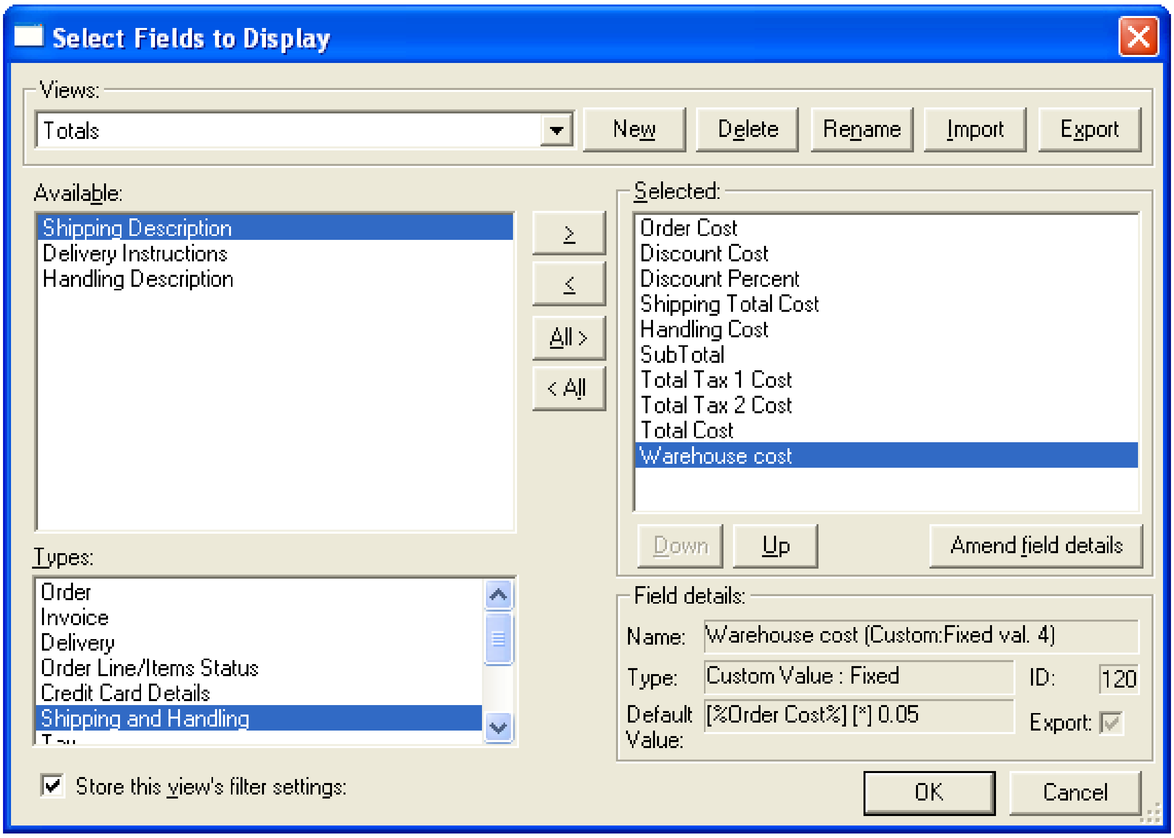
. Page 1 (Row 1 Column 1)
. Page 2 (Row 1 Column 2)
. Page 3 (Row 2 Column 1)
. Page 4 (Row 2 Column 2)

Using this information you can assemble the report as a single page.

When you print a report of the current orders any fields that contain numbers or numbers will be automatically added up and a total printed at the end of the report.

Changing the order details shown

To change how the information is displayed or available to use for filters press the *Select Columns* button.



Views

You can define up to 20 views, each having your own choice of fields. You can quickly and easily move between views. Several pre-defined views are created during the installation. These can be amended or new views created from them.

You can also share views with other users by exporting your own.

When you change views the current filter settings are saved. This means that each filter can have their own pre-configured filters. If you don't want this feature untick the *Store this view's filter settings option*. This will mean that when you change views the current filter will be applied to the orders within the new view (unless that field is not available in the new view).

New
You can create a new view. You can choose which view to copy the fields from.

Delete
Any view can be deleted. You must always have at least 1 view defined.

Rename
The name of any view can be changed.

Import
Several sample views are provided. These are installed in the same directory as the main One Stop Order Processing software.

NOTE: When you import view information this will overwrite any individual definitions for custom values that you have defined. Your individual views will not be affected.

Export
This will prompt you for a filename to save the information to. If you want to share information with other users save the view onto a main server and then import to the machine(s).

Adding fields to a view

Selected
The right hand pane shows the current fields that are displayed in the order browser. To change the order of fields use the *Up* and *Down* buttons. If you want to remove any fields from the *Selected* list press the < button (or double click the item). To remove all items press the *<All* button.

Amend field details
You can also change the displayed name of any field. This is the name that is displayed for the column heading and the field to filter by. In the rename dialog you can also revert to using the default name.

The details about the existing field are displayed:

ID This is the unique ID for this field.

Field name The name to display for the column heading. If you want to use the original name click on the *Use Original name* button.

Field name The name used is also the name used for the column heading in any exported file (if a header is chosen to be included).

Field value This contains the default value to use for the field if it is blank. The default value can refer to any field. For example, delivery instructions.

Include in Exported Information If you are going to export information you may not want to include all the information displayed. This may be because the information is used for data filtering, for example, *Date ordered* or it is used as part of the calculation for other fields. For example, the export format must only show 80% of the order cost. The *total order* cost is displayed, but *Include in Exported information* is not ticked for it. The *warehouse cost* is calculated as 80% of the displayed order cost and *Include in Exported information* is ticked.

Include field When this field is exported you can include the total of the column data in the information exported

total in export . You must also tick the *Include column totals after data* option when exporting the data.

<u>Using default values</u>
Using default values in fields allows you to create your own analysis of your data and also extend the information displayed (or exported).

There are two main uses for defaulting a value. You can use a default value if a field is blank. This applies to any field, an Actinic field or custom field. For example, delivery instructions.

The more common use of default values is when using custom fields (described in more detail later in this section). There are two types: the same value for all orders or a different value for each order.

You can default a value from 1 (or more) of the other fields displayed in your view. You can **only** use the fields displayed in your view. You can also perform calculations on items in the default value. You can use the following operators.

`[+]` The two values either side are added up.

`[-]` The value to the right is taken away from the value on the left.

`[/]` The value on the left is divided by the value on the right.

`[*]` The two values are multiplied together.

`[<]` Compares the value and if it is less than the value given value show the first value otherwise show the second value.

For example, to show Parcel Force for orders less than £100 and CityLink for orders over and including £100 use:
`[%Total Cost%] [<] 100 [Parcel Force] [CityLink]`

`[>]` Compares the value and if it is greater than the value given value show the first value otherwise show the second value.

For example, to alert someone (by adding text into a certain field) to check all orders over £200 use:
`[%Total Cost%] [>] 200 [Check Order]`

`[=]` Compares the value and if it equals value given value show the first value otherwise show the second value. This can include text aswell as numeric values.

For example, to change the drop shipper depending upon a certain product use:
`[%Product Ref%] [=] IL42 [SmartShipper][We Ship]`

`[U]` Make the field UPPERCASE. You should put the opertaor after the field value. This can be useful for making certain fields more visible.

For example, to make the Delivery company name UPPERCASE use:
`[%Delivery Company%] [U]`

`[l]` Make the field lowercase. You should put the opertaor after the field value.This can be useful for making certain fields more readable when joined with other fields.

For example, to make the built up sentence (which is itself made up from other fields) more readable use:
`[%Text Words%][l]`

[$] Display a portion of a field. The 2 values following the operator are the position to start in the text followed by the number of characters to use. This can be useful when values have to be a fixed length for certain export functions or using certain characters in a value as a code to another system.

For example, to use the first 3 characters of a product code as a warehouse location (or dropshipper) use the following. You can then base other fields on tests on this field.

`[%Product Ref%] [$][1][3]`

You can also use numbers in calculations. For example, 4 or 512.6 or £3.1415926.

The example shown above is `[%Order Cost%] [*] 0.05`. This shows all values in the Warehouse cost field as 5% of the Total order cost. When you use calculations if either of the numbers uses your currency symbol (e.g. £) this will be used in the value displayed.

You can also perform calculations on fields which have other calculations performed on them. For example, another field, Warehouse VAT, maybe defined as `[%Warehouse cost%] [*] 0.175`. This will perform the calculation for the Warehouse cost before the WareHouse VAT. It does not matter the order that they appear in the view.

If you want the users of One Stop Order Processing to be able to enter a different value for each order use a *Custom Value: Entered for each order*. They will enter the value in the Custom order details page.

<u>More ways to use fields</u>

If you want users to be able to enter different calculations for each order set the default value to include `[+] 0`. This tells once stop Order Processing that any value entered may include calculations. If values aren't entered the default value will be 0. You can set the default value to any number as long as it includes a sum (using `[+]`, `[-]`, `[/]` or `[*]`).

If you want the user to be able to enter other fields (from the view), for each order set the default value as a field. For example, `[%Order Cost%]`. If you are using this approach note that no validation is carried out and if the wrong field is entered a blank value is used.

If you are exporting to a 3rd party system and you require the exported file to have a number of empty fields set the default value for a custom value to contain the required number of empty items. For example, if the exported format requires a 255 values per line Comma Separated Value (CSV) file where the Actinic fields only occupy the first 120 values; create a default value for one of the custom values to be ,,,. When exported the commas (,,,,,,,,,, …) will be put onto the end of the existing output values.

Field Types
The field *Types* are the Actinic tables that the information is taken from. When you select the Type the list of *Available* fields changes in the *Available* pane.

If you want to show the details of each order line you should select entries from the Order Line/Item Status. This will then show 1 line in the display for each line of the order. For example, of an order has 5 items there are 5 lines shown for that item. When you come to perform an action on that order (e.g. Print an Invoice), however many items within the particular order are selected it will only print (or whatever action) that order once.

There are 2 additional field types:

<u>Custom Value: Fixed</u>

This allows you to enter up to 50 additional columns to your views all having the same value. This value can be based upon another field (or fields) and can include calculations. (Refer to the *Amend field details* for more information on for more information on setting up these values.). This field can be very useful for adding in required values for an export file, where Actinic does not provide the relevant information.

The first 15 of these values are shown on the Custom values order detail page, but can't be changed on that page. If you require the information to be shown in the order details you should make sure that the information is stored in one of the first 15 values.

<u>Custom Value: Entered for each order</u>

This type of field allows you to have a default value (described in the previous *Amend field details* section) that can be overridden, if required. You can create up to 50 of these values. If you require the details to be amended on the custom values order details page you should use one of the first 15 values. If you require more than 50 Fixed values you can use these custom fields in the same way as the Fixed Custom values.

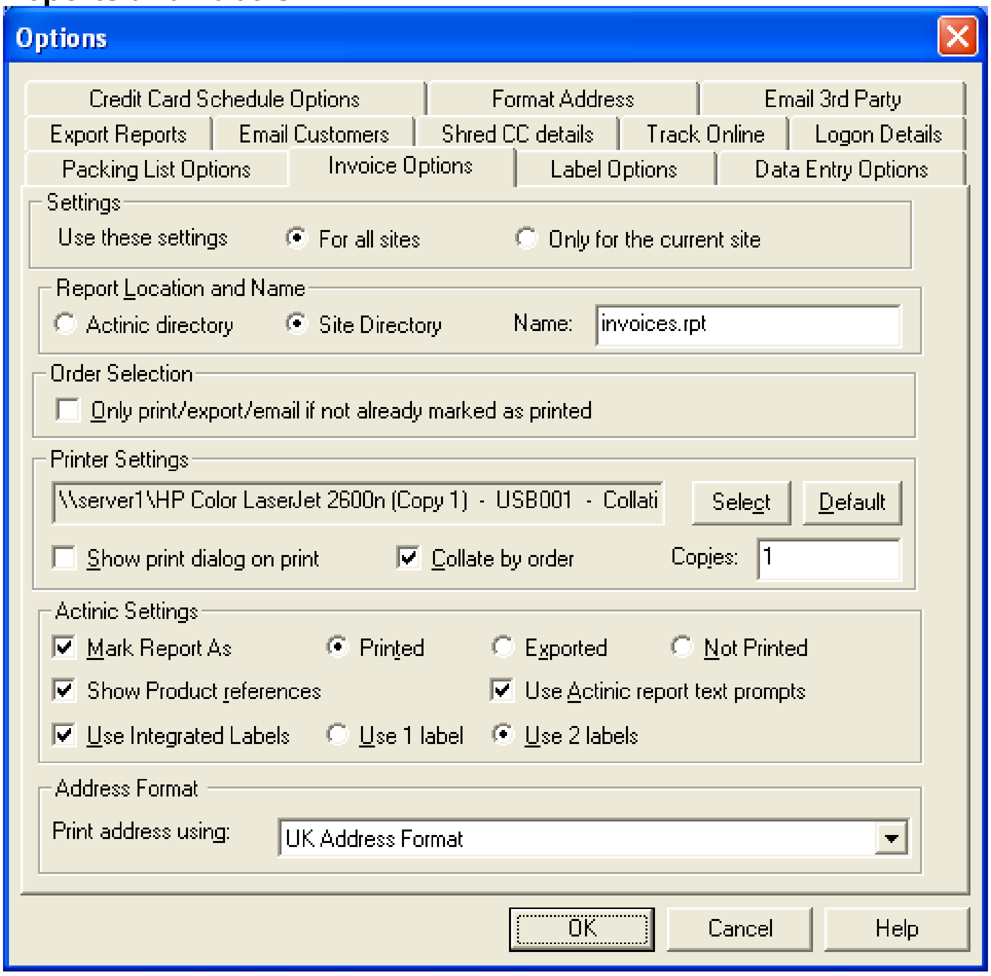
Field details
When you select a field on either the Available or Selected lists the field's details are shown. This information is used to quickly identify the characteristics of a particular field. The following information provided is shown below.

Name	The actual name used and its default name.
Type	The Actinic type the field comes from (e.g. Order information).
Default Value	The default value applied to the field.
ID	The unique ID for the item.
Export	Will this be included in the exported information?

Options

To change the options for the main functions click on the Options button.

Reports and Labels



There are certain options related to each report type. These are:

Settings
You can use specific settings for all sites or the current site. If you set these up for the current site you need to close the options change site and re-open the options.

Report Location and Name
You can decide to use the reports as located in the Actinic directory or the Site Directory. If using this option you should place the required report file in the site directory for each site (for example, C:\Program Files\Actinic Ecommerce v7\Sites\Site1). This allows you to have a different report for each site (e.g. each with a different company logo)

Order Selection
You can choose to only print/export or email the report if has not been marked as printed.

Printer Settings
Each report can be sent to a different printer. For example, labels would normally be sent to a specialist printer or a different printer paper tray. If you tick Collate by order and you print invoices and packing lists they are printed together (pre-sorted).

Actinic Settings
When the report is printed you can choose how to set the Actinic status flag for the report. This can either be marked as *Printed*, *Exported* or *Not Printed*. Actinic Settings can not be set for Labels or Credit Card schedules.

You can also choose to show product references and use Actinic report text prompts.

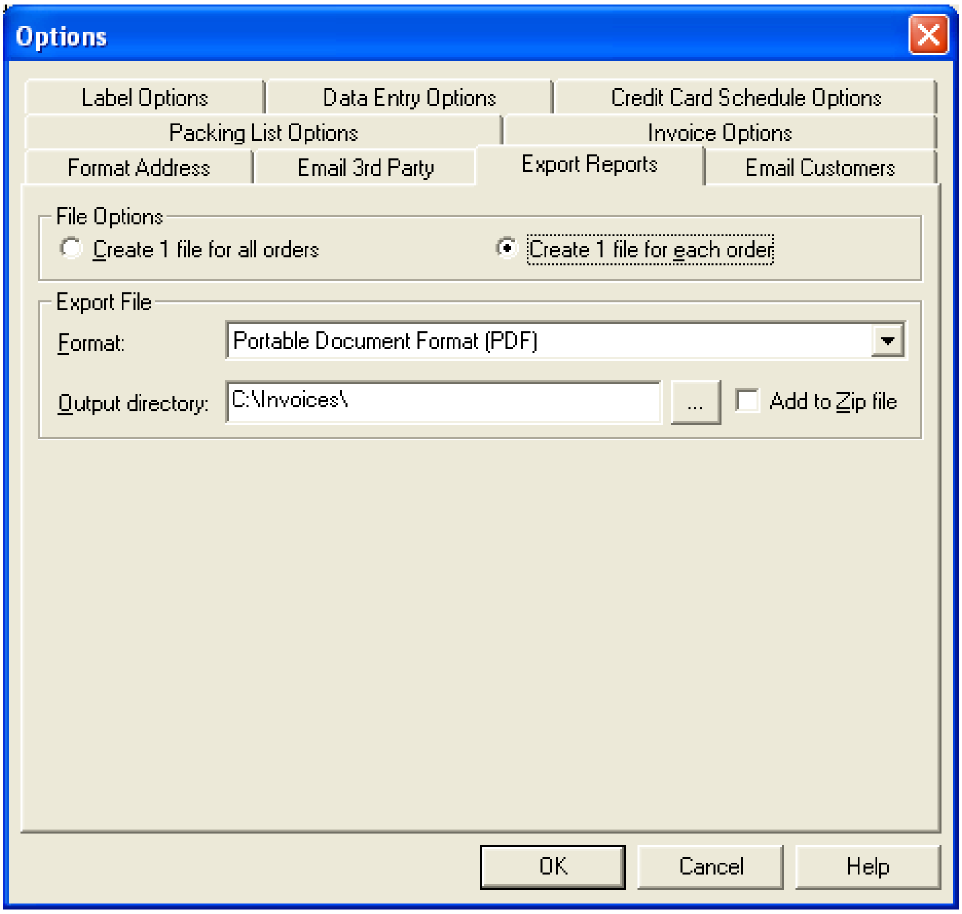
If you are using the Invoice and using Actinic V8 or above you can also choose to print labels onto your invoice using the 'Use Integrated Labels' option. The paper can be purchased at the following website:

http://www.integratedlabels.co.uk

Address Format
Addresses can also be printed in UK or US format.

Export Reports

The Export Reports option allows you to create PDF, RTF or XML versions of the reports. The RTF (and XML) versions of the reports can be amended using various applications, for example, Microsoft Word. You can also choose to *Show Product references* in the reports produced.



File Options
You can decide whether to create a single file for each order, for each report type or 1 file containing all the order details for each report type (from the selected report types).

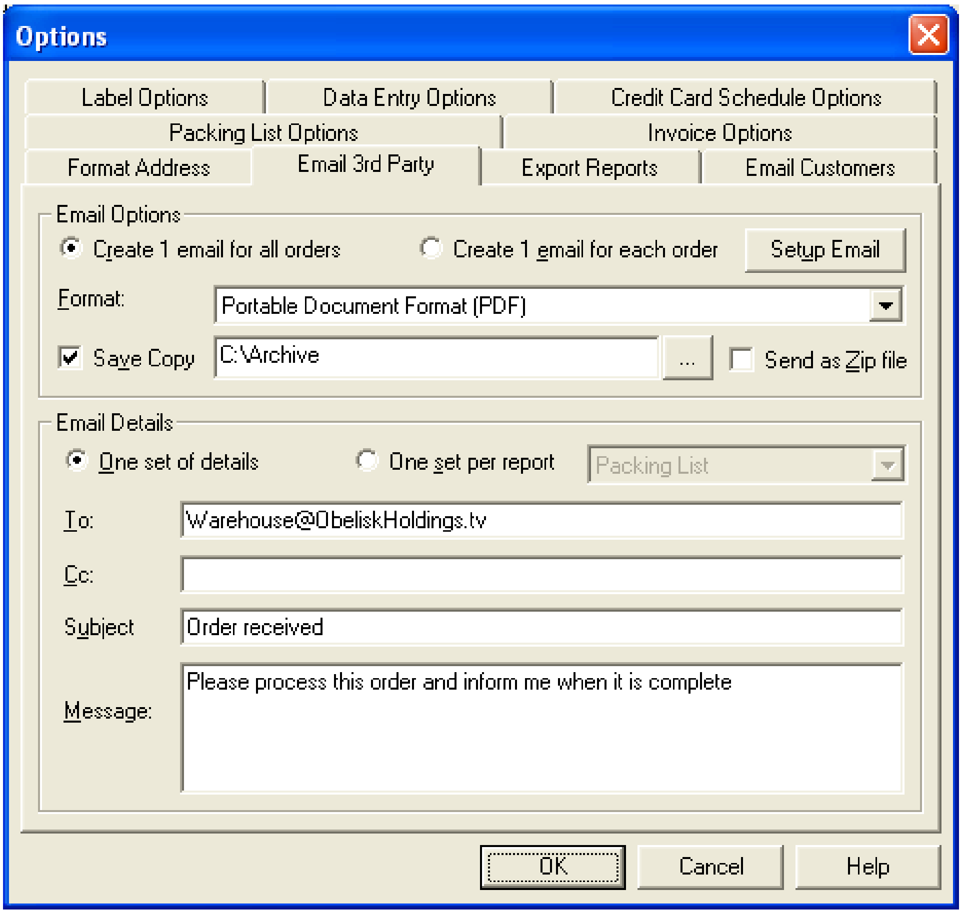
Export File
The reports exported into the directory specified in *Output directory* in the format specified in *Format*.
If the reports are generated as 1 report for each order the following format is used:
Packing List file is created in the form {Order number}_PL.{format}.
For example, `AS64XJ10000060_PL.PDF`
Invoice file is created in the form {Order number}_INV.{format}.
For example, `AS64XJ10000060_INV.RTF`
Data Entry file is created in the form {Order number}_DE{format}.
For example, `AS64XJ10000060_DE.RTF`

If the reports are generated as 1 report for all orders the following format is used:
Packing List file is created in the form Orders{unique number}_PL.{format}.
For example, `Orders9283928_PL.PDF`
Invoice file is created in the form Orders{unique number}_INV.{format}.
For example, `Orders9283931_INV.RTF`
Invoice file is created in the form Orders{unique number}_DE{format}.
For example, `Orders9283938_DE.RTF`

The exported file can also be stored as a zip file. This will reduce the amount of space when stored.

Email Reports

The Export Reports options allow you to email PDF, RTF or XML versions of the reports. The RTF (and XML) versions of the reports can be amended using various applications, for example, Microsoft Word.



Email Options

You can decide whether to create a single file for each report type for each order or 1 file for each report type containing all the orders details. For example, if you get 30 orders and send them as 1 report for each order you will send 30 emails to the addresses entered in the Email Options. If you want to use your custom report text you should select the *Use Actinic report text prompts* option.

Format

The format of the report to send is specified in *Format*. When the reports are emailed they are attached to the email.

If the reports are generated as 1 report for each order the following format is used:
Packing List file is created in the form {Order number}_PL.{format}.
For example, `AS64XJ10000060_PL.PDF`
Invoice file is created in the form {Order number}_INV.{format}.
For example, `AS64XJ10000060_INV.RTF`

If the reports are generated as 1 report for all orders the following format is used:
Packing List file is created in the form Orders{unique number}_PL.{format}.
For example, `Orders9283928_PL.PDF`
Invoice file is created in the form Orders{unique number}_INV.{format}.
For example, `Orders9283931_INV.RTF`

You can also decide to save a copy of the report before being emailed. To do this check the *Save Copy* box and specify a directory to put the files in.

If you save a copy of the report you can also choose to send the Invoice or Packing List, in the required format as a zip file. A zip file is a more generally acceptable file type to send over the internet.

You can set-up how to send email by clicking on the *Setup Email* button. See Setup Email for more details.

Email Details

You can decide to specify 1 set of email addresses to use for all report types (Packing List and Invoice) or different email addresses for each report type.

The Subject and Message that you enter will appear on each email that is sent by the Order Processor. The report will be sent as an email attachment. If you are using an SMTP server to send your email you can send an HTML email.

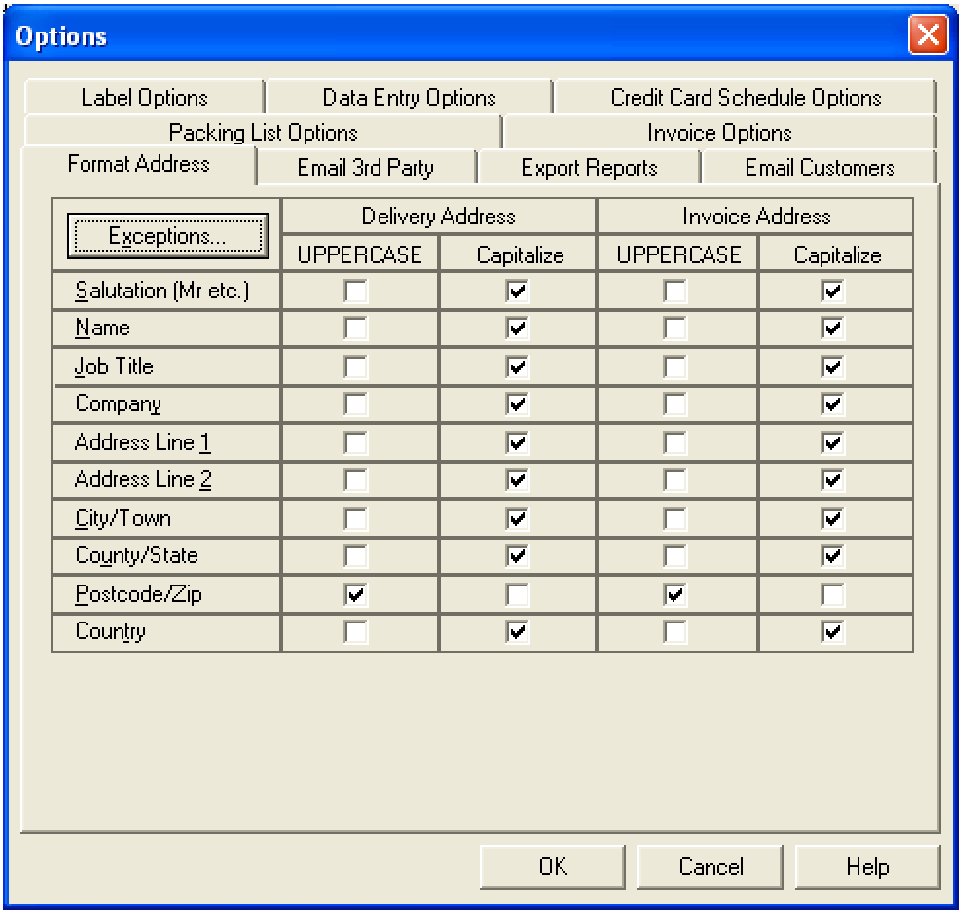
Format Address

You can choose to format the customer delivery and invoice addresses from any orders that have been received. This can be very useful if you are using label reports. You can choose to use the following formatting methods on each of the 10 (optional) lines that the user can enter for his address on the website.

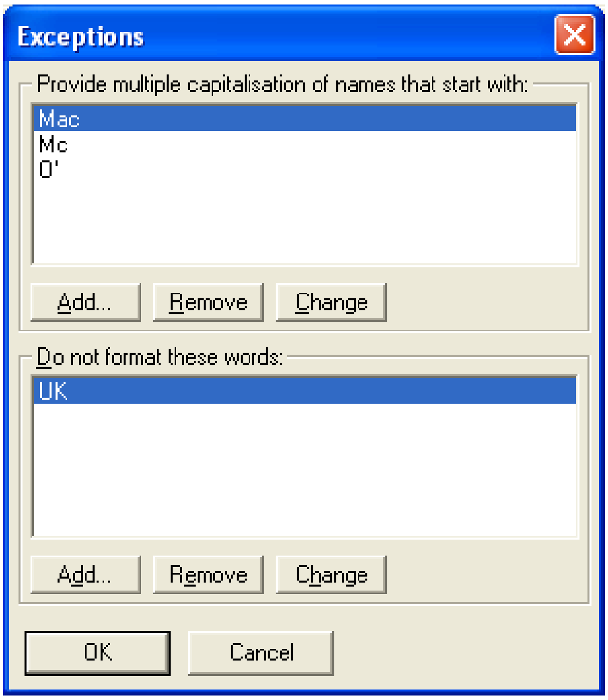
Capitalize
The first character at the start of each word is turned into uppercase. For example, if someone enters *melrose road*, this would be changed to *Melrose Road*.

UPPERCASE
All the text in the line is changed to uppercase. For example, if the postcode is entered as *sw19 2tt*, this would be changed to *SW19 2TT*.

To have no formatting on an address line untick both boxes.



If you would like to change the formatting on specific names or words press the *Exceptions* button.



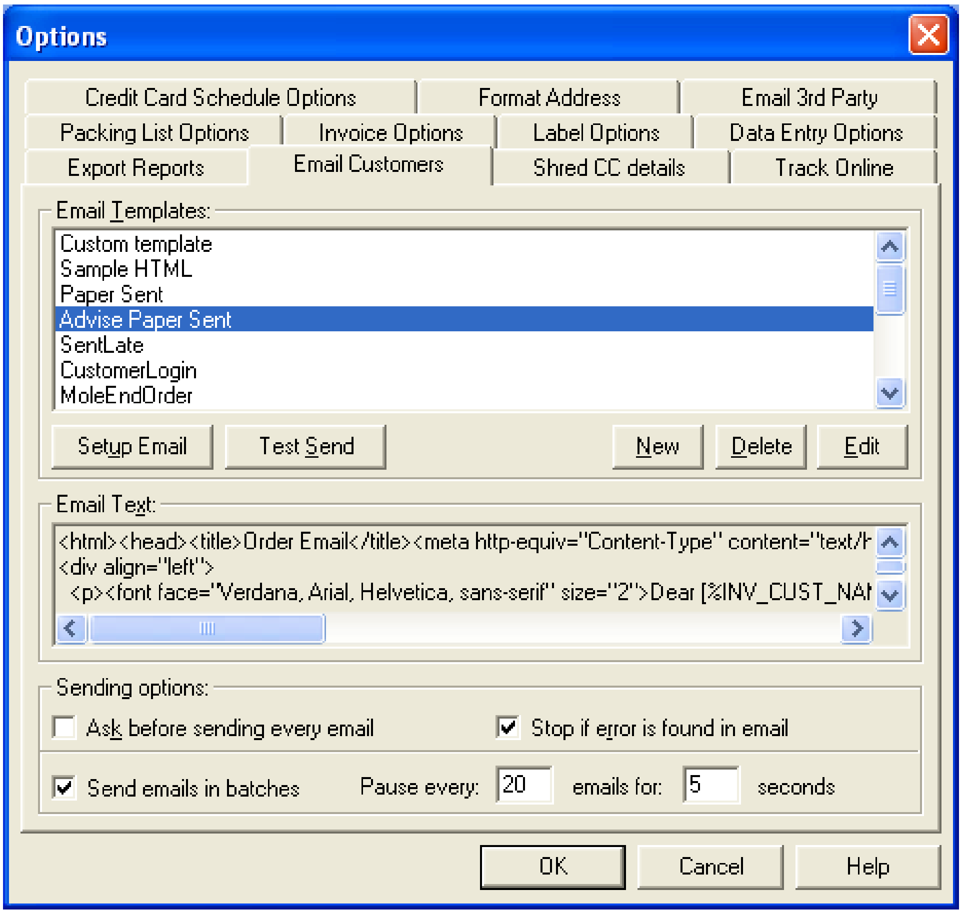
The top box lists all the possible starting letters for names which have multiple capitalizations. The default words entered handle the surnames *MacDonald*, *McDonald* and *O'Leary* or any surname starting with *Mac* or *Mc* or *O'*.

The lower box can be used to add words that do not require any formatting on them. The default is the word UK.

NOTE: If you are using Actinic V5 or V6 the Delivery Country address formatting will be overwritten if you go into the order address details tab, this is because Actinic resets this to your location settings when you go into this tab. To correct formatting in this case go to Advanced Locations and change the country text to the format you require.

Send email to customers

You can send information to your customers based upon the selected orders. There are several templates supplied with One Stop Order Processing. These can inform your customers that the order has been received, payment has been received, order has been shipped and order has been delayed. These can be amended or new ones created.



Email Templates

When each template is selected the email text is shown in the *Email Text* area. It can be amended by pressing the *Edit* button. You can delete a template by pressing the *Delete* button. To create a new, blank, template press the *New* button.

To configure how the email will be sent click on the *Setup Email* button. For more information refer to the Setting up Email section.

Once you are happy with your template you can send to a test email to a specific email address. This would normally be your email address. The order details are filled in with example data.

By default, you are asked before every email is sent. If you want to turn this feature off you should un-tick *Ask before sending every email*.

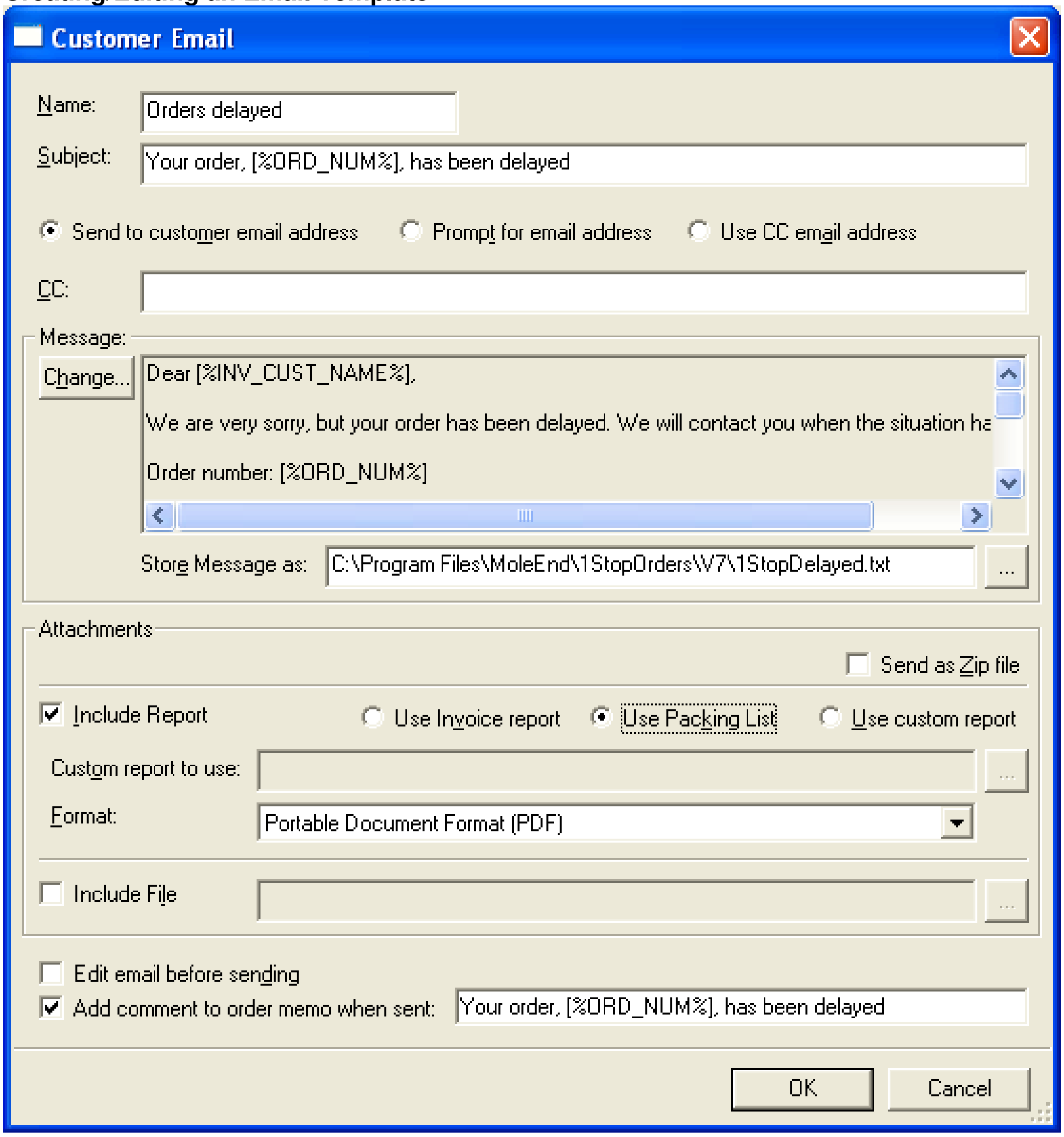
NOTE: You should make sure that you have selected the right customers and correct template before sending any email. If you are unsure tick *Ask before sending every email.*

If you are sending peoples' customer accounts details you may want to display an error if an account can't be found. This can allow you to create an account (or see why wan't created). To do this tick *Stop of error is found in email*.

Sending emails in batches

If you have any problems with your email server (or ISP) when you send a large number of emails at once, you can limit the amount of emails sent at once. Tick the *Send emails in batches* option and select the number of emails to send at once and how long to wait between sending that number of emails. Normally a 5 second delay is sufficient to resolve any sending issues.

Creating/Editing an Email Template



Name
The template name is your own name that is used to identify the template to use to send emails. This name is not sent as part of the email.

Subject
The subject that is displayed in the email. You can use order specific information by using certain words. These are explained in the Message section (below).

Who to send email to
When you send a customer email you can choose who to send it to:

Send to customer email address
The customer invoice address from the order is used.
Prompt for email address
A dialog is displayed before the email is sent prompting you for an email address.
Use CC email address
The email address entered into the CC field is used.

CC

You can also send the email to a 3rd party. This can be used to notify other areas of your company of the order. If you want to send the email to more than 1 email address you can separate the emails with a semi-colon (;). For example, *WareHouse@ObeliskHoldings.tv*; *Accounts@ObeliskHoldings.tv*.

Message
The message to send in the email. When you enter a new name to store the email text (in the *Store message as* control) and press the *Change* button you are asked if you want a default HTML or plain text email. This is created with all available order specific words available. The ones not required can be removed. These are described below. When you amend your email text you can choose the editor to use. Notepad is generally satisfactory for plain text emails. If you are creating html emails you can use your desired editor (e.g. Dreamweaver).

The available order information codes are shown below. When the email is sent they are replaced with the information specific to the order. If you want to send more detailed information to the customer you can attach their Invoice or Packing List.

[%ORD_NUM%] Order number.
[%ORD_VAL%] Order value.
[%ORD_VAL_SIMPLE%] Order value (with no currency)
[%DEL_ADD%] Delivery address.
[%INV_ADD%] Invoice address.
[%INV_CUST_NAME%] Customer name.
[%DEL_CUST_NAME%] Customer name.
[%ITEMS_ORDERED%] Items ordered
[%INV_USER_DEFINED%] Invoice user defined value
[%DEL_USER_DEFINED%] Delivery user defined value
[%ORD_DATE%] Order date
[%COMPLETED_DATE%] Order completed date
[%PO_NUMBER%] Purchase order number
[%DELIVERY_INSTRUCTIONS%] Delivery instructions
[%INV_COMPANY%] Invoice company
[%INV_ADD_LINE1%] Invoice Address line 1
[%INV_ADD_LINE2%] Invoice Address line 2
[%INV_ADD_LINE3%] Invoice Address line 3
[%INV_ADD_LINE4%] Invoice Address line 4
[%INV_POSTCODE%] Invoice postcode/zip
[%INV_COUNTRY%] Invoice country
[%INV_EMAIL%] Invoice email address
[%DEL_COMPANY%] Delivery company
[%DEL_ADD_LINE1%] Delivery Address line 1
[%DEL_ADD_LINE2%] Delivery Address line 2
[%DEL_ADD_LINE3%] Delivery Address line 3
[%DEL_ADD_LINE4%] Delivery Address line 4
[%DEL_POSTCODE%] Delivery postcode/zip
[%DEL_COUNTRY%] Delivery country
[%DEL_EMAIL%] Delivery email address
[%CUSTOM_ENTERED1%] Custom entered value 1
[%CUSTOM_ENTERED2%] Custom entered value 2
[%CUSTOM_ENTERED3%] Custom entered value 3
[%CUSTOM_ENTERED4%] Custom entered value 4
[%CUSTOM_ENTERED5%] Custom entered value 5
[%CUSTOM_ENTERED6%] Custom entered value 6
[%CUSTOM_ENTERED7%] Custom entered value 7
[%CUSTOM_ENTERED8%] Custom entered value 8
[%CUSTOM_ENTERED9%] Custom entered value 9
[%CUSTOM_ENTERED10%] Custom entered value 10
[%CUSTOM_ENTERED11%] Custom entered value 11
[%CUSTOM_ENTERED12%] Custom entered value 12
[%CUSTOM_ENTERED13%] Custom entered value 13

[%CUSTOM_ENTERED14%] Custom entered value 14
[%CUSTOM_ENTERED15%] Custom entered value 15

You can also add in any of the 50 fixed value custom fields using
[%CUSTOM_FIXED1%] up to [%CUSTOM_FIXED50%]. These values are defined in the Select Columns dialog.

[%BUYER_NAME%] The account name for this person (if any)
[%BUYER_PASSWORD%] The account password for this person (if any)

NOTE: If you are using the Buyer information fields (**[%BUYER_NAME%]** and **[%BUYER_PASSWORD%])** this will look for an associated buyer based on the invoice email address. If one exists this information will be replaced in the email. If a buyer account does not exist the code will be replaced with nothing (blank). There is also an advanced feature to use with these fields. If a buyer does not exist you can use default values. This can be very useful if you want to have a generic login for most people and specific accounts for other people. You should place the default value directly after the buyer code within **[%** and **%]**.
An example of this feature being used is shown below:

Username:[%BUYER_NAME%][%DefLgn%]
Password:[%BUYER_PASSWORD%][%DefPw%]

What this will do is use the customers buyer name and password, if they exist. If they do not have an account set-up it will use DefLgn as the Username and DefPw as the Password in the email.

Custom entered fields can be used to add you own information to each order. These values can be entered on the Custom values tab on each order.

Attachments
You can also attach other information to the email. These can be sent as they are or in a zip file. You can either select the customer's invoice or packing list (as a PDF, XML or RTF file) or another report.

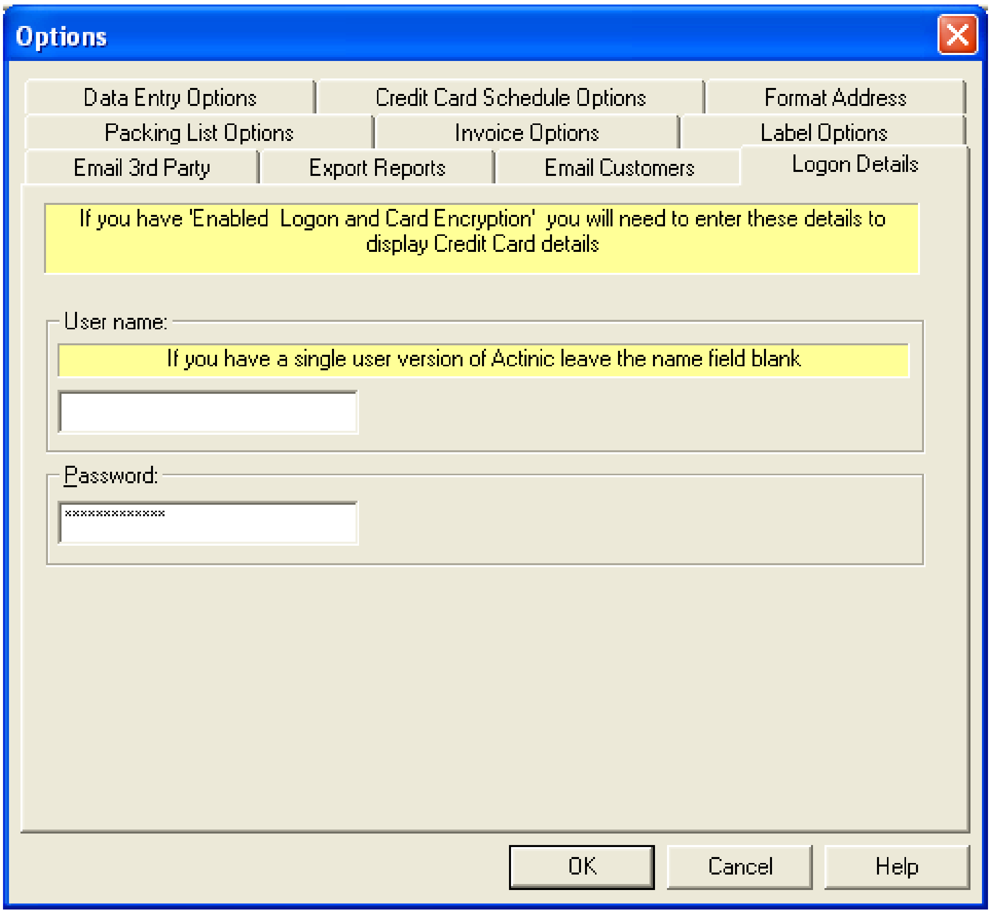
You can also attach other files. These can be used to include other information specific to your company (e.g. Terms and Conditions). If you want to send more than 1 additional file you simply separate the files to send by a semi-colon (;). For example, *C:\Admin\TAndC.txt; Offers.html*. You can send up to 19 attachments in this way.

Edit email before sending
If you want to verify or edit an email before it is sent tick this option. You can select your desired editor for the email.

Add comment to order memo when sent
When the email is sent the comment is added to the memo field in the order. This can be viewed from the order details memo page. The time and date when sent are also added. You can use any fields used in the message. The comment defaults to the email subject.

Logon Details

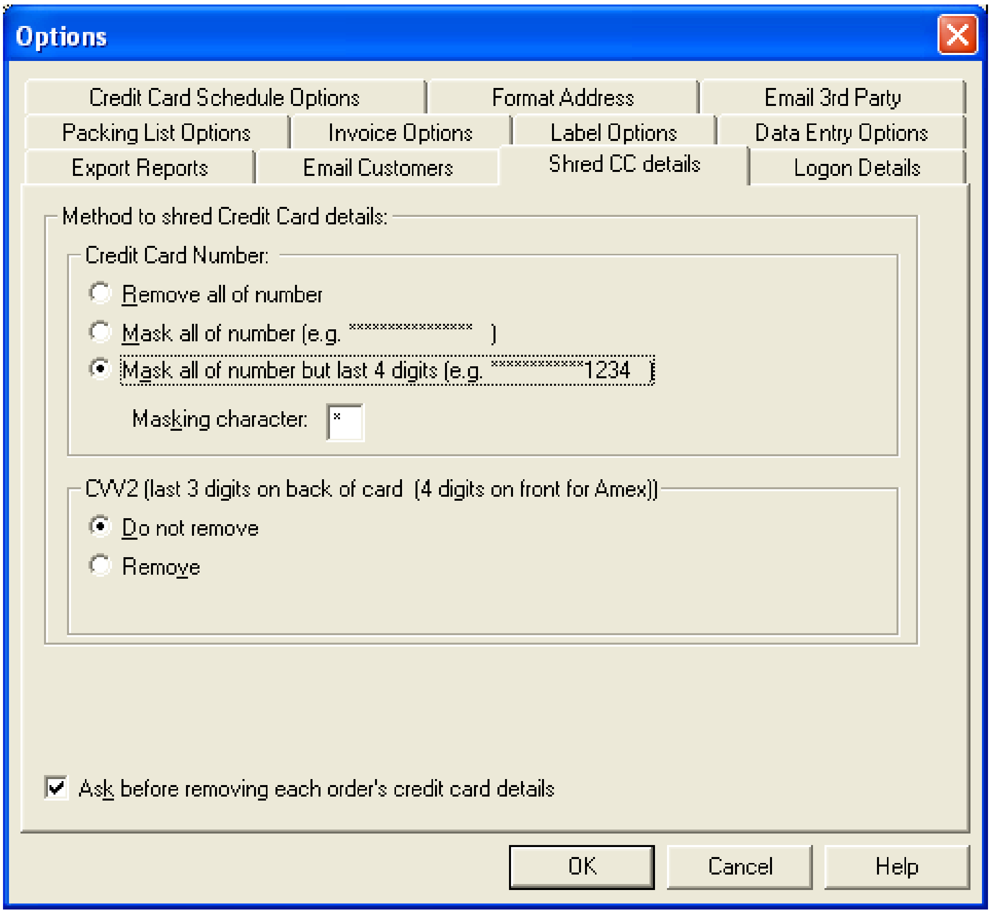
If you use Credit Card Encryption (in Actinic V8) and you wish to print or export the data entry report you must enter your login name and password.



If you are using Actinic V8 on a single machine you don't have to enter a username.

Shred CC details

If you keep credit card details in your Actinic order details (normally entered by the customer on your website, downloaded and entered into a terminal) and want to remove them after being used you can remove them.



When details are removed from the order's credit card details you can remove the details in the following ways:

<u>Credit Card Number</u>
You can simply remove all details, replace all the numbers with * or replace all but the last 4 digits.

If you want to use a different character to replace the numbers and dates with you can enter your own choice in *Masking character*.

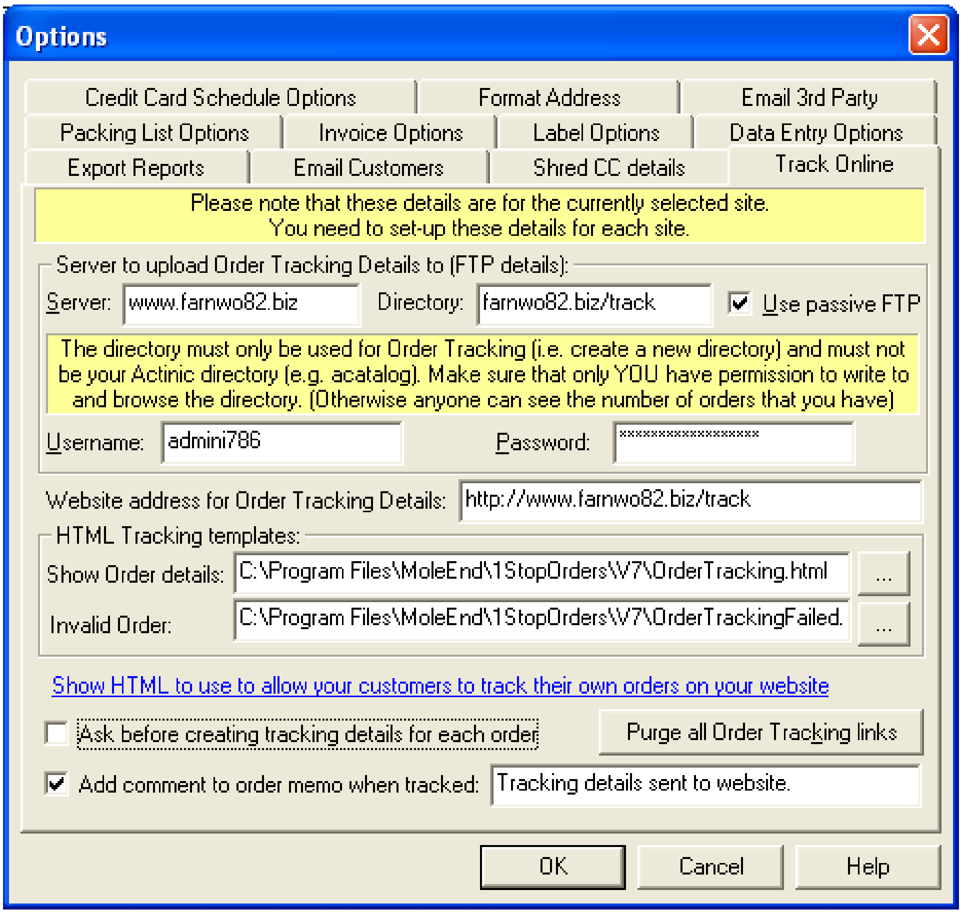
<u>CVV2</u>
You can choose to remove the CVV2 value.

You can choose to ask for confirmation for each credit card number that you shred. This is advisable if you just starting to use this feature. To do this tick *Ask before removing each order's credit card details*.

Additionally if you do not want this feaure being used you can disable it in the **Available Features**.

Track online details

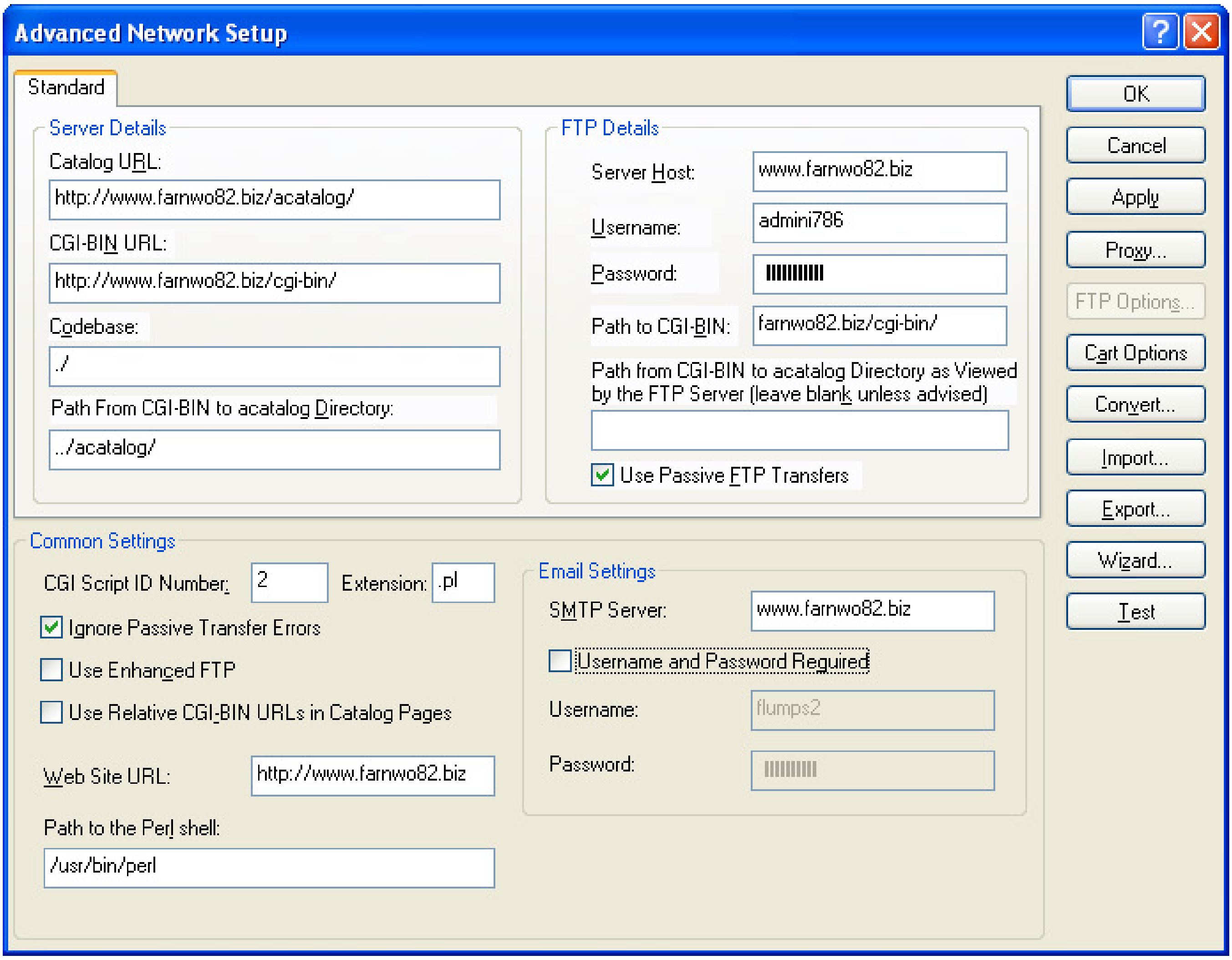
Once set-up you can easily upload the selected orders' tracking details to your website. The information given can be used for customers to track their own orders from your website and also for you to include a link in you despratch emails.



Server to upload Order Tracking Details to (FTP details):

NOTE: Normally you would host the tracking details on your *Actinic* server. However, you can put them onto any server as there are no links to any of your existing Actinic files or locations.

If you are using your *Actinic* server to host your tracking information you can copy this information from your *Actinic Network settings*, example shown below:



The *Server* can be taken from the *Server Host* (in *FTP Details*).
The *Directory* is a directory to go to once login in. This is a combination of *Actinic's Path to CGI-BIN* and *Path from CGI-BIN to acatalog directory* (*CGI-BIN to acatalog directory as viewed by the FTP server* if this is filled in).

For example, if your *Path to CGI-BIN* is `farnwo82/cgi-bin/` and your *path from CGI-BIN to acatalog directory* is `../acatalog/` and you created a directory called `track` in the root of your website, the *Directory* would be `farnwo82/cgi-bin/../acatalog/../track` which is **`farnwo82/track`**.

The Username and Password are the same values as used by Actinic in the Username and Password fields.

Website address for Order tracing Details
This will normally be very similar to your FTP details. You must put http:// in front of your website details and include the directory where the files will be uploaded to.

HTML Tracking templates
You need to select an HTML template to show with the order information and another when the entered order number is invalid (used when customers use your webiste's tracking page).

The *Show Order details* default template shows the *order number*, *order date*, *shipment date* and a *custom field*. You can add the following fields in to the order details.

NOTE: It is not recommended to give any more information than is necessary in the template as it possible that anyone who can guess an order number can view the information.

You can change the template to use any of the following values:

[%ORD_NUM%] Order number.
[%ORD_DATE%] Order date
[%COMPLETED_DATE%] Order completed date
[%PO_NUMBER%] Purchase order number
[%DEL_VERY_INSTRUCTIONS%] Delivery instructions
[%INV_COMPANY%] Invoice company
[%INV_POSTCODE%] Invoice postcode/zip
[%INV_COUNTRY%] Invoice country
[%DEL_COMPANY%] Delivery company
[%DEL_POSTCODE%] Delivery postcode/zip
[%DEL_COUNTRY%] Delivery country
[%ITEMS_ORDERED%] Items ordered
[%CUSTOM_ENTERED1%] Custom entered value 1
[%CUSTOM_ENTERED2%] Custom entered value 2
[%CUSTOM_ENTERED3%] Custom entered value 3
[%CUSTOM_ENTERED4%] Custom entered value 4
[%CUSTOM_ENTERED5%] Custom entered value 5
[%CUSTOM_ENTERED6%] Custom entered value 6
[%CUSTOM_ENTERED7%] Custom entered value 7
[%CUSTOM_ENTERED8%] Custom entered value 8
[%CUSTOM_ENTERED9%] Custom entered value 9
[%CUSTOM_ENTERED10%] Custom entered value 10
[%CUSTOM_ENTERED11%] Custom entered value 11
[%CUSTOM_ENTERED12%] Custom entered value 12
[%CUSTOM_ENTERED13%] Custom entered value 13
[%CUSTOM_ENTERED14%] Custom entered value 14
[%CUSTOM_ENTERED15%] Custom entered value 15

You can also add in any of the 50 fixed value custom fields using
[%CUSTOM_FIXED1%] up to [%CUSTOM_FIXED50%]. These values are defined in the Select Columns dialog.

The custom fields can be used to enter your own specific values. You can add the values by amending any order and using the Custom values tab. For example, these fields can contain a tracking number for another website, who is handling the order transport or your own packing process text.

The *Invalid order* template is simply an HTML page that is displayed when the order can not be found on your website. The default page can be amended if you wanto to include additional information, for example, your telephone number.

Show HTML to use to allow your customers to track their own orders on your website
If you click on the link a page will be displayed with the HTML that can be copied directly into one of your existing pages or your Actinic templates. An example of the produced HTML is shown below:

```
<script type="text/javascript">
function ME_Track()
{
        var xmlHttp;
        try
        {
                xmlHttp=new XMLHttpRequest();
        }
        catch (e)
        {
                try
                {
                        xmlHttp=new ActiveXObject("Msxml2.XMLHTTP");
                }
                catch (e)
                {
                        try
                        {
                                xmlHttp=new ActiveXObject("Microsoft.XMLHTTP");
                        }
                        catch (e)
                        {
                                alert("Please update your browser to a newer version");
                                return false;
                        }
                }
        }
        sAdd =
"http://www.farnwo82.biz/track/"+"_ME_"+document.getElementById("ME_OrdNum").value+".html";
        xmlHttp.open("HEAD", sAdd, true);
        xmlHttp.onreadystatechange=function()
        {
                if(xmlHttp.readyState == 4)
                {
                        var value;
                        if (xmlHttp.status != 200)
                        {
                                sAdd = "http://www.farnwo82.biz/track/OrderTrackingFailed.html";
                        }
                        var
WinTest=open(sAdd,"","width=600,height=400,toolbar=yes,menubar=no,scrollbars=yes");
                        if (! WinTest){alert("A popup blocker was detected. Please\ndisable popup blocker
to open window.");};
                }
        }
        xmlHttp.send(null);
}
</script>
<p>Enter your order number:<br>
  <input id="ME_OrdNum" type="text" size="20" name="text"/>
  <br>
  <input type="button" value=" Track" onclick="ME_Track()"/>
</p>
```

If required you can amend this template to suit your specific needs.

Ask before creating tracking details for each order
When you first use this feature you may want to confirm each order that is having tracking details uploaded.

Purge all Order Tracking links
To clear down any order details that have been uploaded to your website click on this button.

NOTE: This option will remove all files that are in the filter: _ME_*.html (in the specified *Directory*).

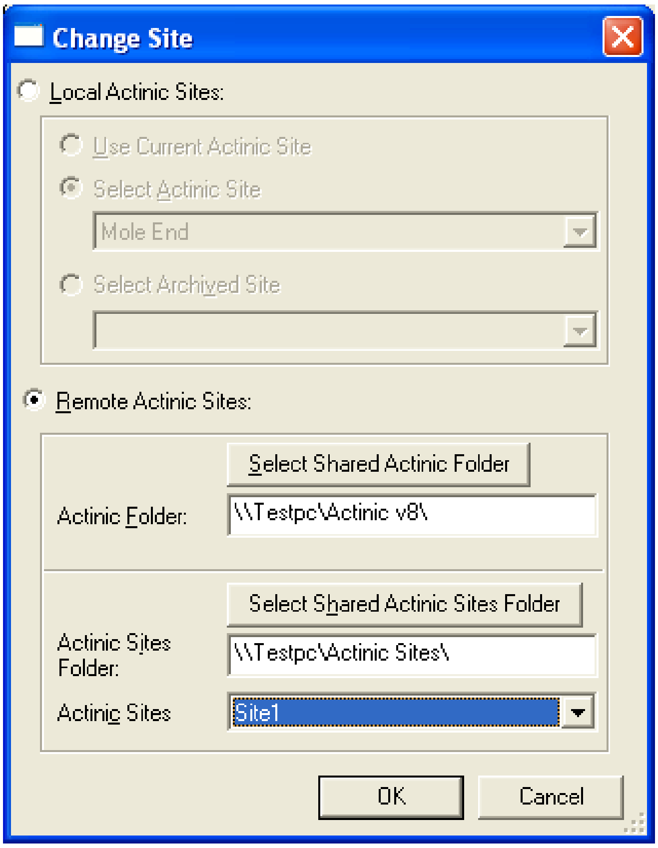
Add comment to order memo when tracked.

You can add a line to the order’s memo field when the details are uploaded. This can be used to provide confirmation that the information has been uploaded.

Additionally if you do not want this feaure being used you can disable it in the **Available Features**.

Selecting an Actinic site

You can process orders from more than 1 Actinic site by changing the current site being processed. Click on the *Change Site* button.



If using a local site you can select either the current Actinic site or specify a specific site. You can also choose to view order on an archived site.

If you want to access an Actinic site on another computer you should select the Remote Actinic site option. To be able to do this you must have access to a shared drive on the remote Actinic computer. To share a drive from the Actinic computer you should use explorer, select the drive (or directory) that Actinic is in (for example, C:\Program Files\Actinic v7) and select the share option. You will need to give full access to the remote drive.

NOTE: You don't have to share the entire PC drive. You only need to share the Actinic directory (e.g. C:\Program Files\Actinic v7). One Stop Order Processing will find the Actinic sites in whichever drive you specify.

Once you have selected the shared Actinic folder (using the *Select Shared Actinic Folder* button) One Stop Order Processing will attempt to find all the Actinic sites within that drive. For security you may only want to share the Actinic Ecommerce v6 directory (for V6). This is fine as One Stop Order processing will look for all sites within the shared directory. Once the Actinic directory has been found, the available sites will be shown the Actinic sites directory. Select the site to use and press OK.

Using with Actinic V8 (or above)

If you using Actinic V8 (or above) and using a Remote site you need to share and connect to 2 Actinic folders. This is because Actinic now stores the Actinic sites in a different location to the main program. One Stop Order Processing requires access to both.

From the Actinic PC you need to share the following 2 folders:

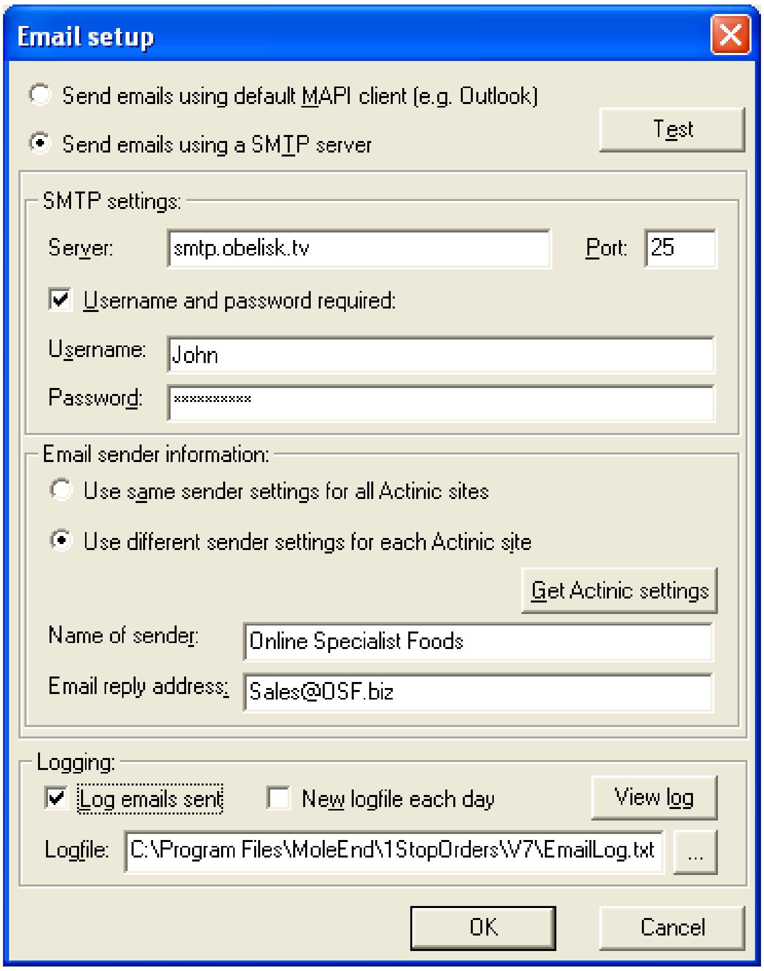
`C:\Program Files\Actinic V8`

The location that you specify for the sites when installaing Actinic. For example, `C:\Users\Public\Documents\Actinic V8` (for Windows Vista).

Setting up email

You can configure how email is sent. You can choose whether to use your MAPI client, for example, Microsoft Outlook, Outlook Express or Eudora, or an SMTP server.

Using an SMTP server allows faster email sending and gives you the choice of sending HTML or plain text emails



If you choose to use your MAPI email client you don't need to configure any options as these are set by your email software. If you allow your MAPI client to send your emails it may not send them unless the email client is running.

SMTP settings

If you choose an SMTP server you need to enter certain information depending upon your host (or ISP). These settings can normally be copied from your existing email client. The settings to copy are those specified in your Outgoing mail server (SMTP). Some ISPs, for example, Freeserve, only allow you to send email from their SMTP server. Some SMTP servers may not use the default port (of 25). Also they may require you to use your given name and password. Below are some examples of values to use for different ISPs.

Freeserve - smtp.freeserve.com
Yahoo - smtp.mail.yahoo.co.uk
Orange - smtp.orange.net
BT - mail.btinternet.com
O2 - smtp.o2.co.uk
Tiscali - smtp.tiscali.co.uk

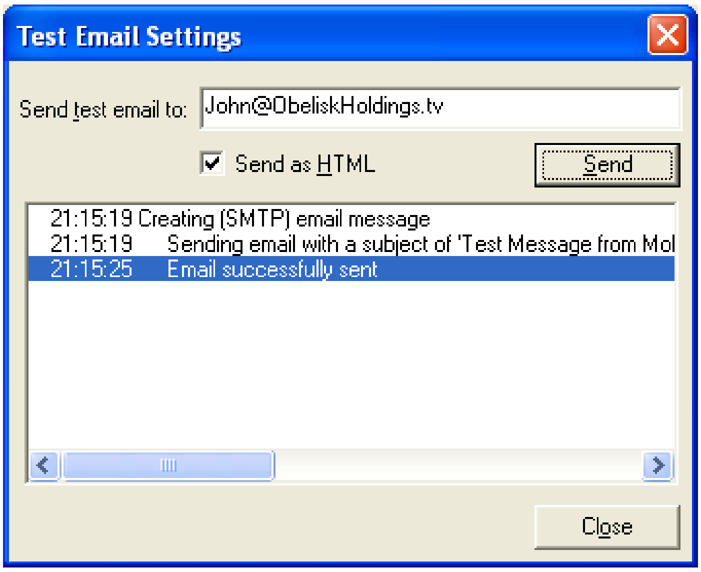
Email sender information

When you send an email you need to identify who the mail is from and a reply address. You can specify the same settings for all Actinic sites or provide different details for each site (that email is sent from). If you are using a different email address for each Actinic site you can retrieve the existing settings by clicking the *Get Actinic settings* button.

Logging

You can choose to log details of all emails sent along with any errors found. You can specify a new log for each day or a single combined log with all email information. To view the log click on the *View log* button. You are given the choice of editor to use for viewing the log information.

When you have entered the details you can test the email settings by clicking the *Test* button.



You can enter an email to send a test message to. If you are using an SMTP server to send email you can choose to send the test message as HTML or plain text. The results from the test are displayed.

Multi-User Access

You can install One Stop Order Processing on a different computer from your Actinic PC. Up to 6 PCs can have remote access to your Actinic database at the same time.

NOTE: Each different PC used to connect to the same Actinic computer will need a separate license.

There are certain requirements (and limitations). These are described below:

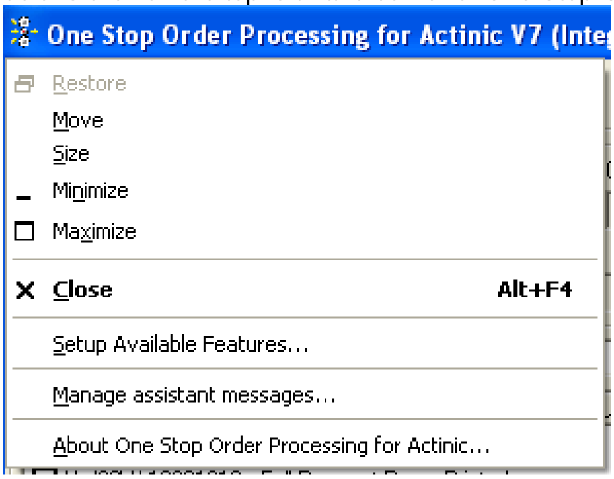
1. All PCs must have the relevant security access to the Actinic PC. If you do not have the required access a message will be displayed by One Stop Order Processing when selecting the remote site. You should consult your System Administrator if you do not have remote access to the Actinic PCs Actinic directory.
2. Ideally you should divide the orders to process across the remote machines. If more than 1 person processes the same order changes made by one user may overwrite changes from another.

Once the remote site has been selected One Stop Order Processing will continue to use the selected site (i.e. you won't need to re-select the site each time that you start One Stop Order Processing).

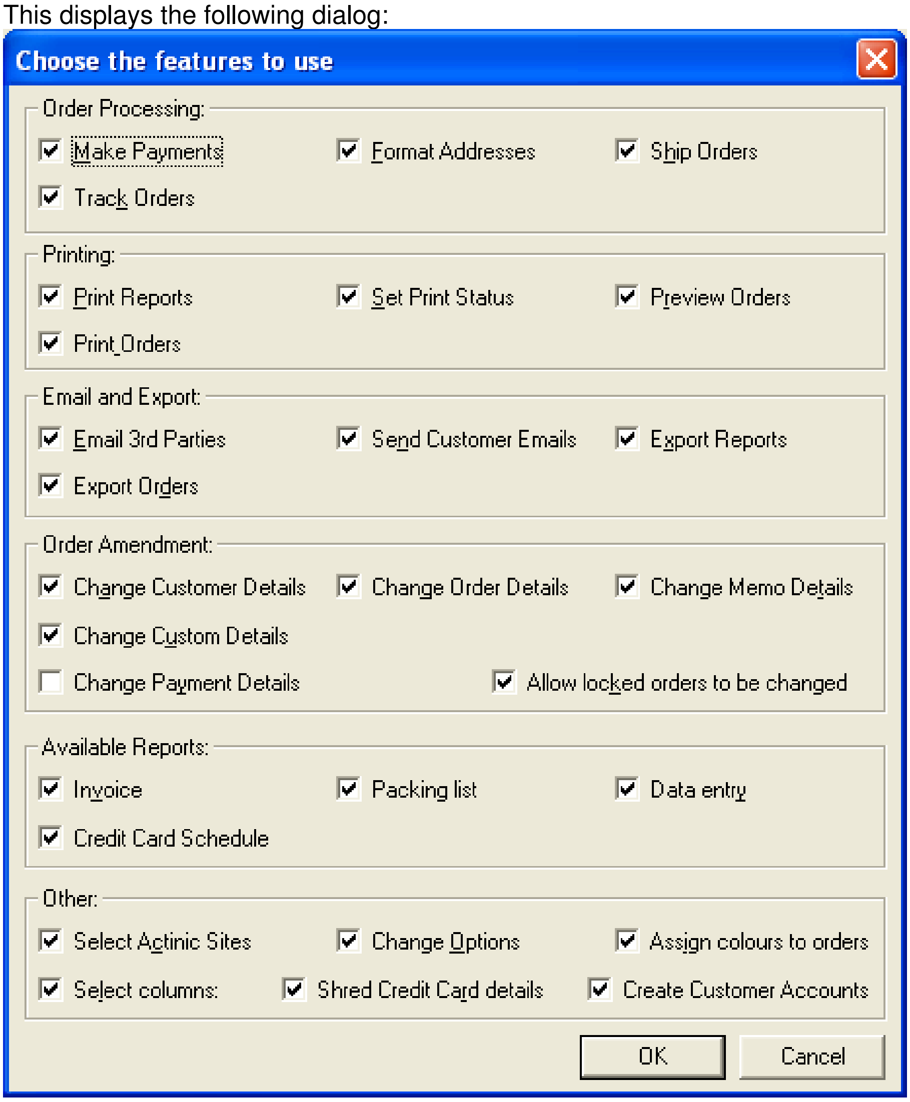
For more information on selecting the remote site refer to the Selecting an Actinic site section.

Restricting access to certain features

You can restrict the available options for the current user by selecting the features dialog from the menu bar. To do this click on the top left hand corner of One Stop Order Processing, shown below:



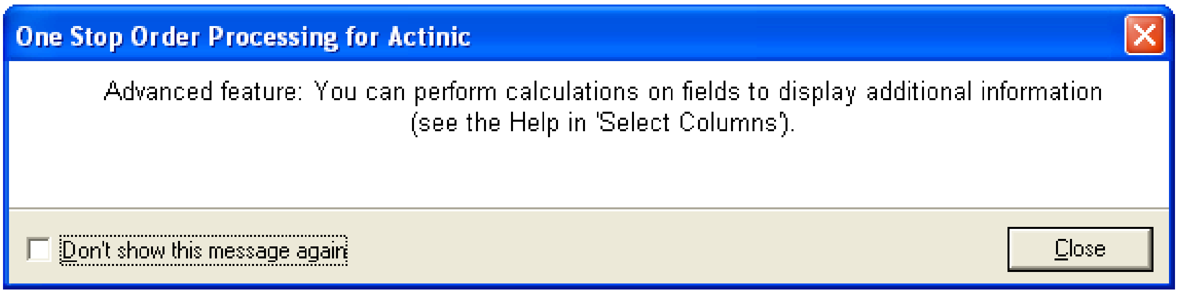
This displays the following dialog:



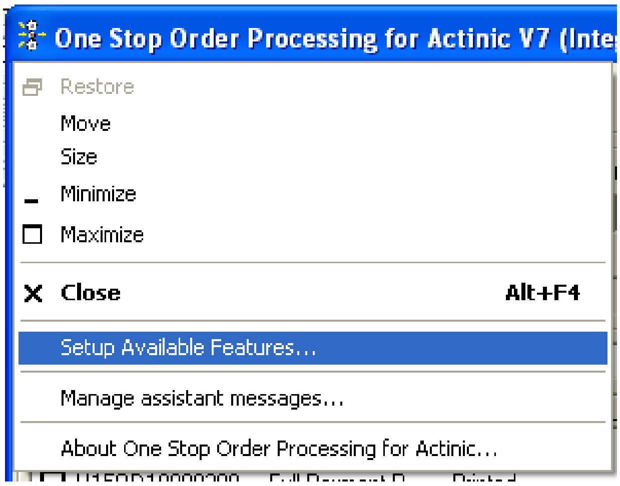
This can be used to allow users to perform certain functions. For example, the payment processing can be restricted to a single machine. This can also be used to allow a user to only view orders without changing any order information.

Manage Assistant Messages

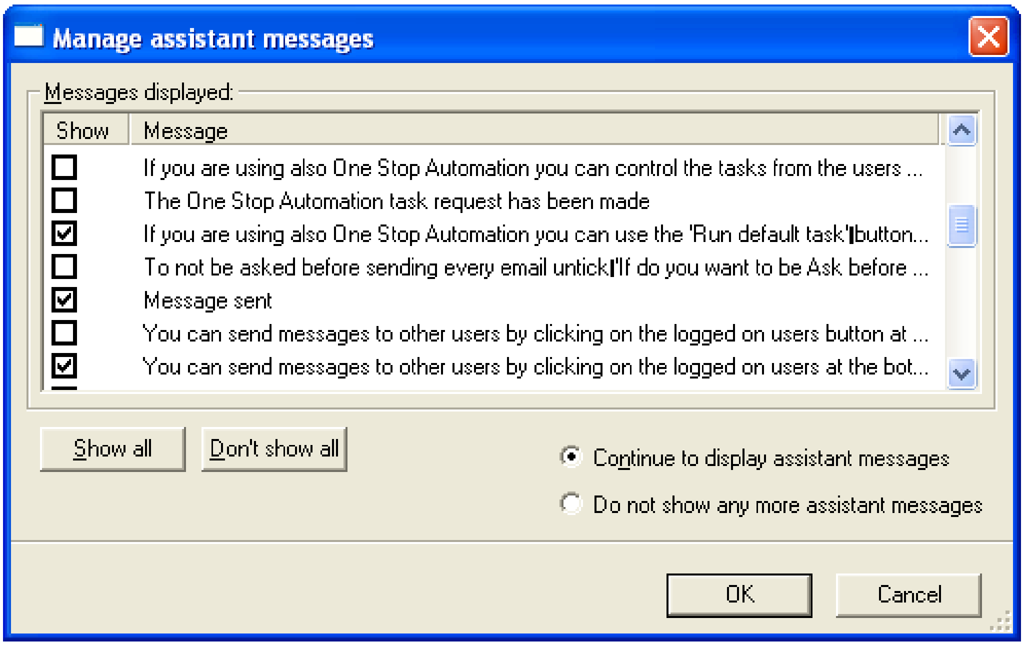
To help understand the features in One Stop Order processing information dialogs are shown when using the product. These can be dismissed and displayed next time that task is performed or, by ticking a box, not shown again.



If you want to re-show certain messages, show them all or not show any, use the *Manage assistant messages* dialog. To do this select the *Manage assistant messages* menu option when clicking on the top left hand corner of the main window.



This shows you all the messages that have currently been available to show. If you want to turn off all assistant messages select the *Do not show any more assistant messages* option. If you want to start again and show all available messages select the *Continue to display assistant messages* option and click on the *Show all* button.

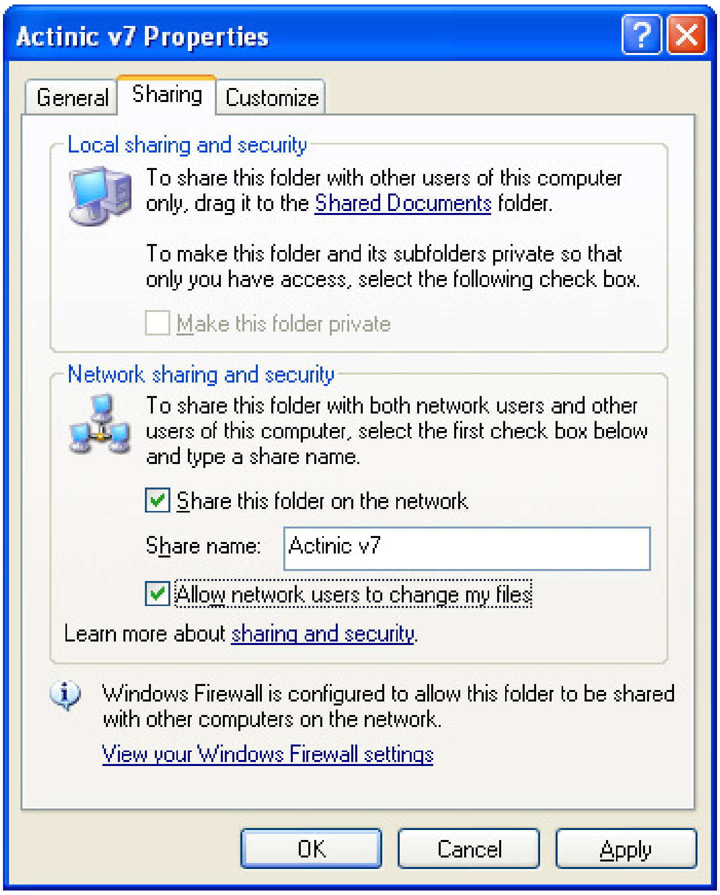

Manage assistant messages
Messages displayed:
Show
Message
If you are using also One Stop Automation you can control the tasks from the users ...
The One Stop Automation task request has been made
If you are using also One Stop Automation you can use the 'Run default task' button...
To not be asked before sending every email untick 'If do you want to be Ask before ...
Message sent
You can send messages to other users by clicking on the logged on users button at ...
You can send messages to other users by clicking on the logged on users at the bot...
Show all
Don't show all
Continue to display assistant messages
Do not show any more assistant messages
OK
Cancel

TroubleShooting

If you are having problems accessing the remote location or opening the remote Actinic database refer to the following:

Connecting to the remote computer

1. Make sure that you have given full access to the remote computer. On Windows XP you should make sure that the *Allow network users to change my files* option is checked. This is shown below:

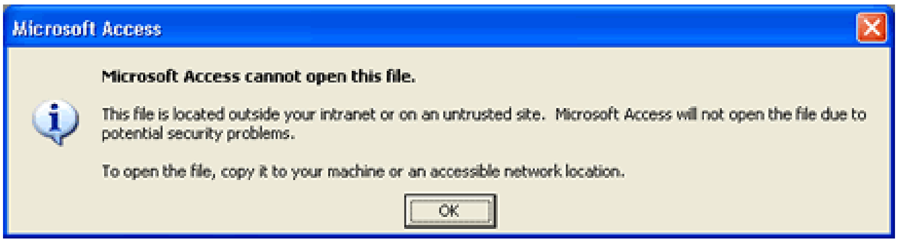


2. If you can't see your drive you should type in the exact path to your Actinic installation in the *Actinic Location* field. When this is correct this will then fill in the *Actinic Sites* field with the available sites.

Accessing the remote database

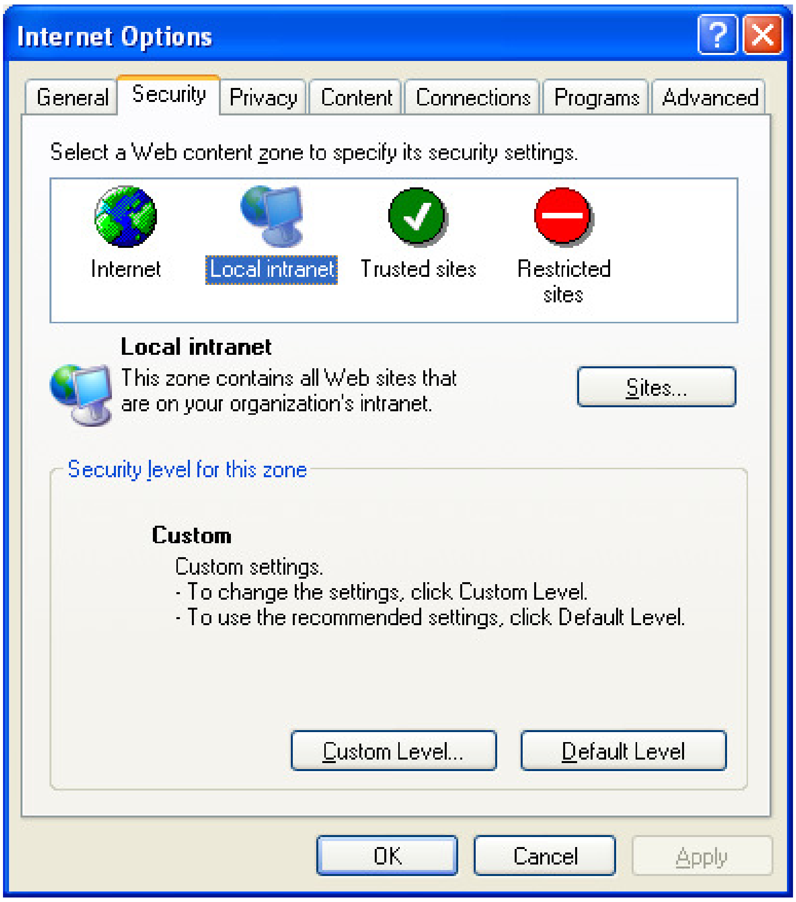
1 Are the computers both in the same domain or workgroup? If they are in the same workgroup do the accounts on both machines with the same name and password. If using a domain does the user have local administrative rights on both machines?

2 The computers should be in the same intranet. If they aren't (or you have a firewall in place) you may see an error similar to:

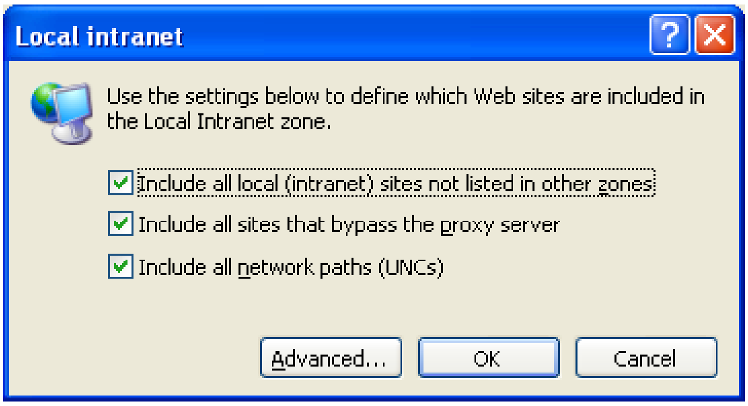


You should allow access to the remote computer by adding either the IP address or name of the remote machine into the trusted remote connections by doing the following:

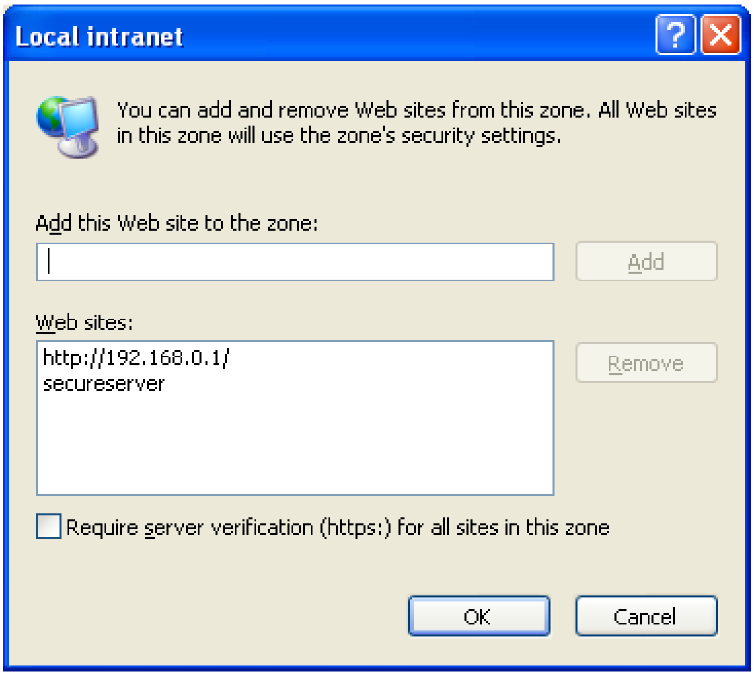
a. Open *Internet Explorer* and open the *Options* (using *Tools->Options*). Select the *Security* tab.



b. Select the *Local Intranet* zone and press the *Sites* button.



c. Click on the *Advanced* button



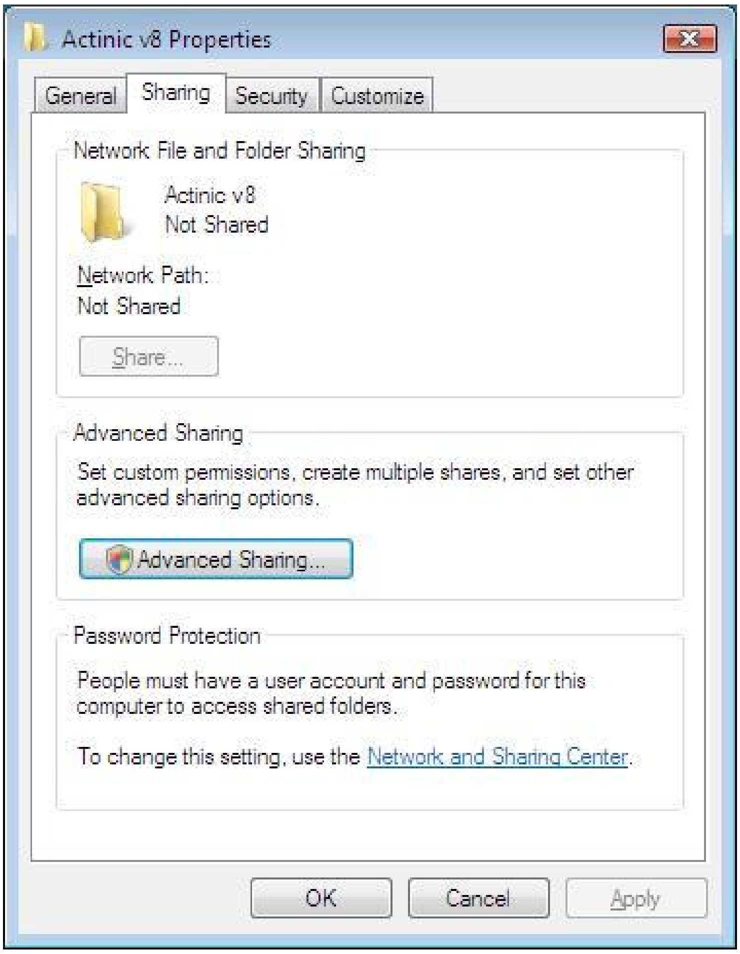
d. Type in the IP address or computer name that you want to be treated as if it were in your local intranet.

If you are using a firewall you should make sure that the address of both machines is listed (and trusted) either side of the firewall (i.e. on each computer).

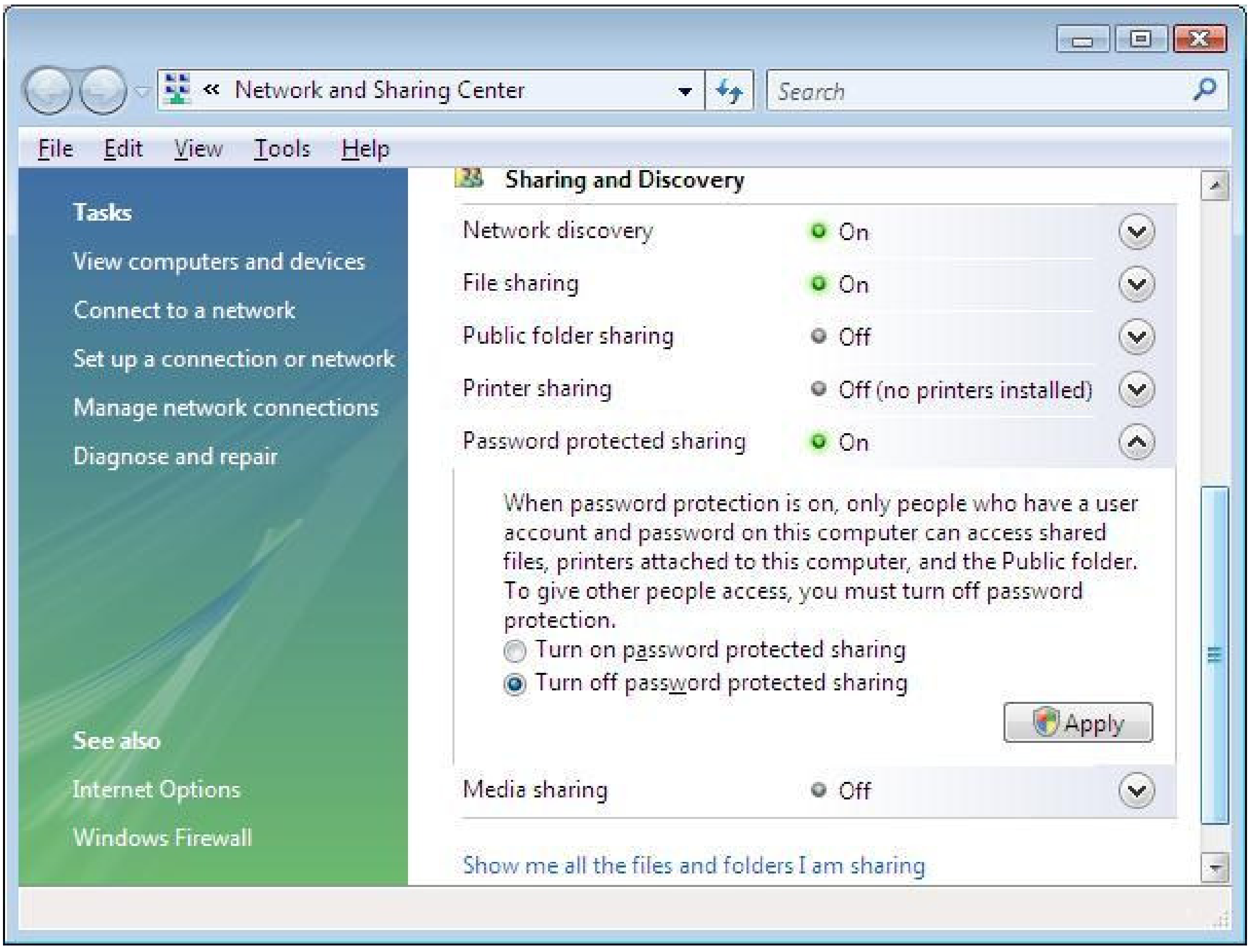
Using remote access with One Stop Order Processing on Windows Vista

By default, Windows Vista restricts remote access to the data folders. You should use the following instructions as a guide. This will anyone who is on your local area network (LAN) to access your Actinic data. If you require only cetain users to be able to access the Actinic data you should consuly with your network Administrator (and replace the Everyone group access with the specific users).

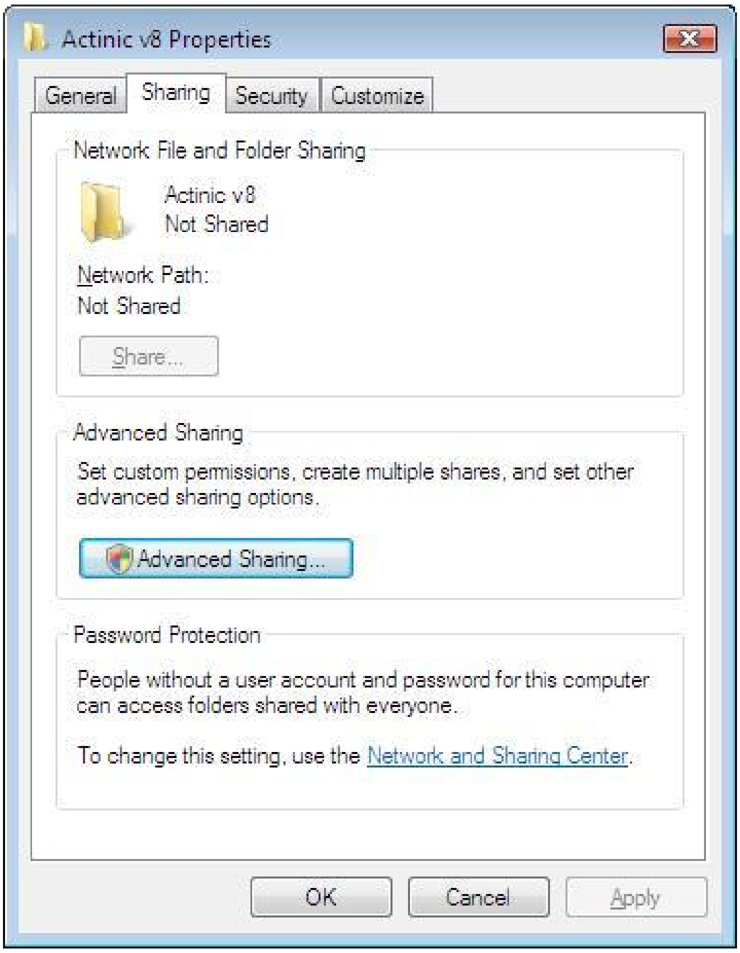
1 Display the properties of the folder to share (e.g. C:\Program Files\Actinic v8), by right clicking the folder and selecting properties



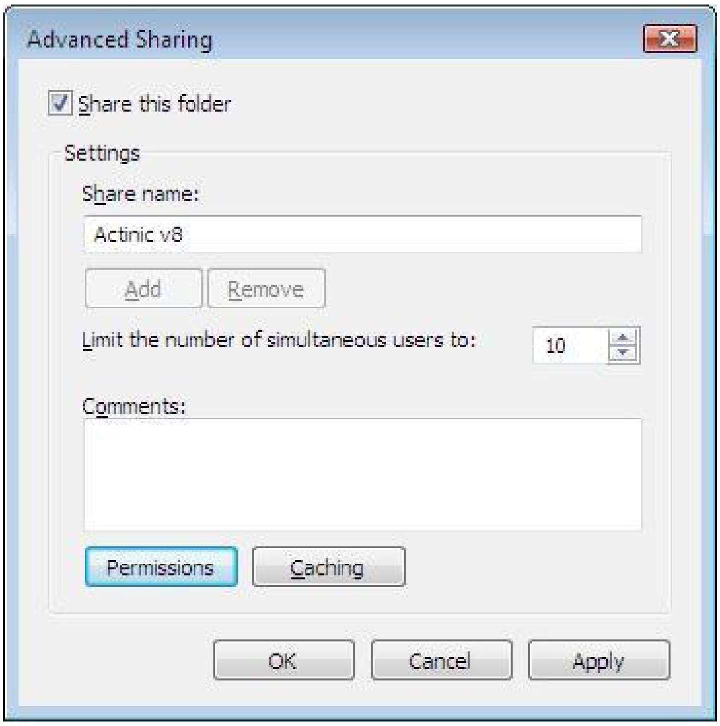
2 To allow access of the remote drive without additional password user security you should click on the Network and Sharing Center link (in the Password Protection section). This will display the following dialog. You should click on the Password protected sharing down arrow and select Turn off password protected sharing (and click the Apply button).



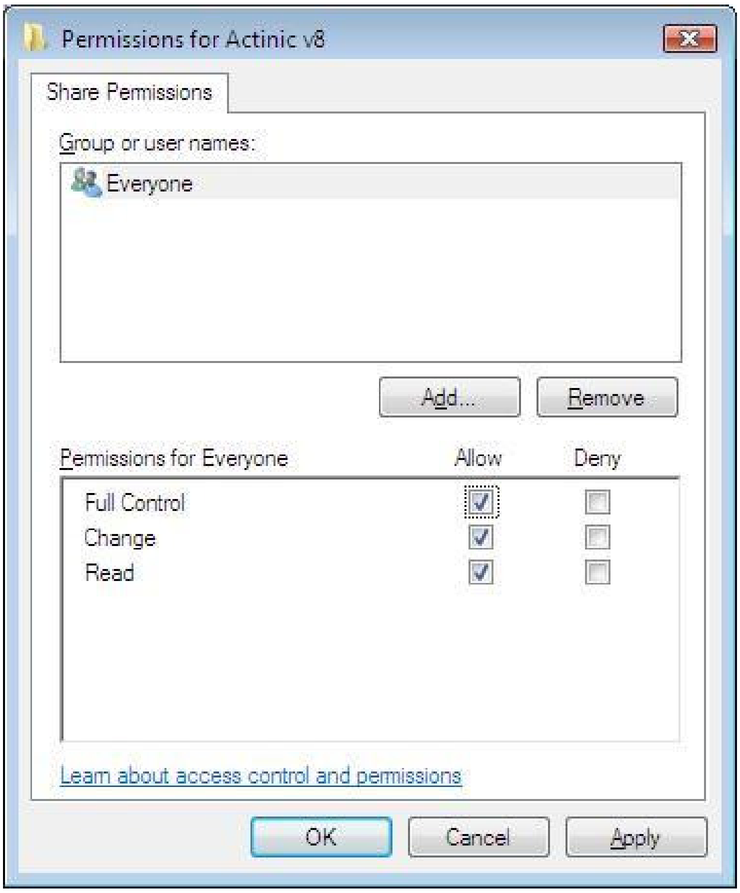
3 You now need to share this folder. Click on the Advanced Sharing button.



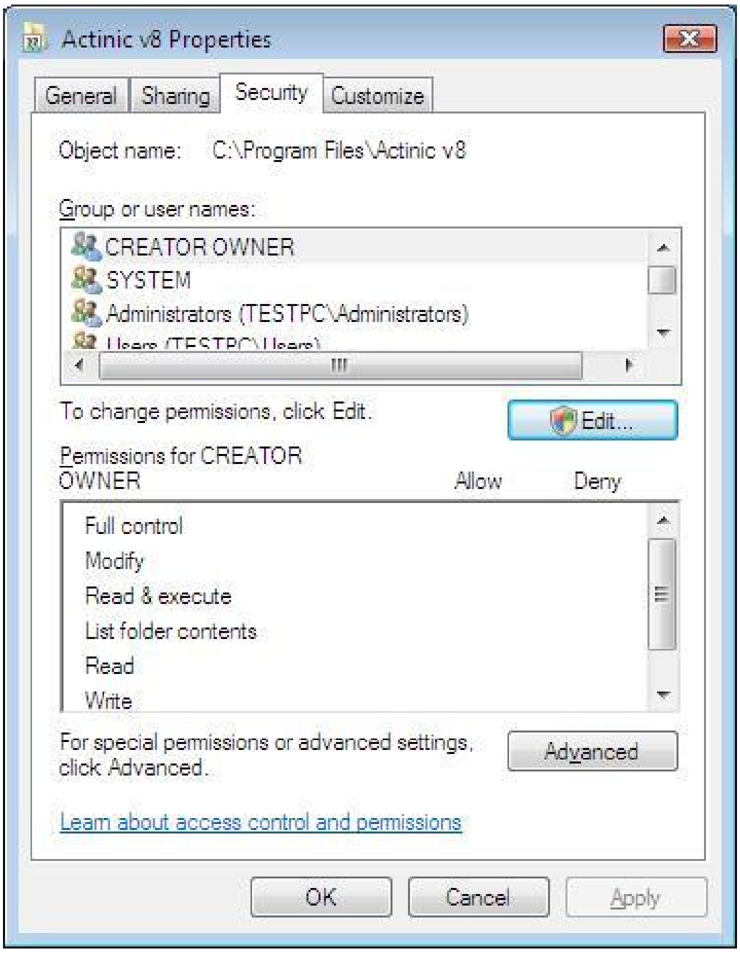
4 Tick the Share this folder option and click on the Permissions button



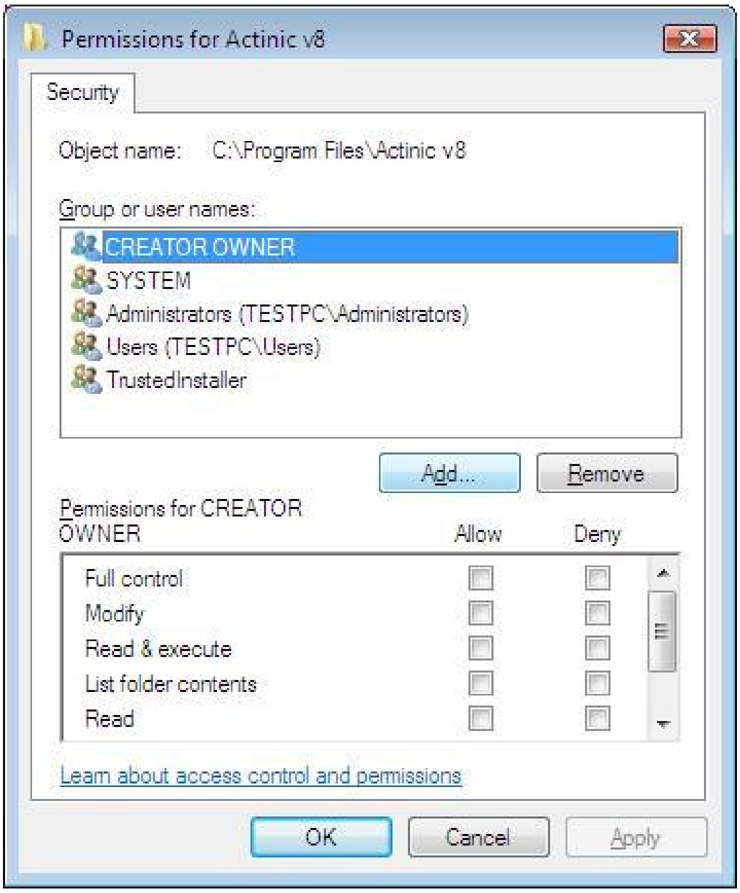
5 Tick the Full Control box under the Allow option for the Everyone group. Press OK.



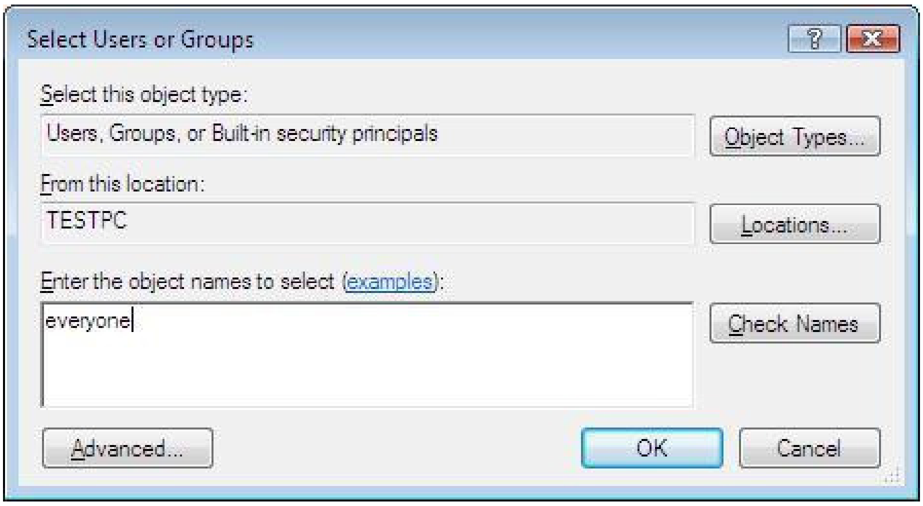
6 Then click on the Security tab on the folders properties. Click on the Edit button.



7 Click on the Add button.



8 Type in everyone and click on the OK button.



9 Select the Everyone group and click on Full control under Allow. Then click OK and then OK the following dialog (to save and dismiss the properties dialog).