



## 3-On-A-Page

### Overview

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#### Introduction

3-On-A-Page checks are one of the most popular manual checks that Safeguard offers. When ordering a 3-On-A-Page check, you will need to reference your price pages for all of the possible options available – to include accessories.

Chargeable options can be selected in the design form and, when the design form is saved, the option codes and charges will pre-populate in the order entry screen.

Reference your price pages for specific customer imprint information guidelines.

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#### 3-On-A-Page Check Design Form

This is an example of the 3-On-A-Page Check design form:

The screenshot shows a software interface for designing a 3-On-A-Page check. The title bar reads "3UP Single Stub Design Form - (tpss001) [NEW]". The form is divided into several sections:

- Order Information:** Fields for Order #, Line # (0), Qty (300), Order Date (03/30/2009), Status (R), Cust #, Dist #, Plate #, Product (3UPSS1), and Start #.
- Design Style:** A tabbed interface with "Standard" selected. Other tabs include ArtWork, Standard (cont), Window /Stub (F3), Signature (F5), Bank Info (F6), and Spec. Inst. (F8).
- Options:** Includes a "Rush?" checkbox, a "Check Style" dropdown menu, and a "Customized Check Style" checkbox. Under "Customized Check Style", there are radio buttons for "Hard Copy Mailed", "Emailed (File Name)", and "Previous Job #".
- Ink and Color:** Fields for "Standard Ink Color" (Black Mag), "1st Add Ink", "2nd Add Ink", and "Color Separation".
- Buttons:** "Save", "Save as Draft", "D-Net", "FTP", and "Cancel".



## 3-On-A-Page, cont.

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**3-On-A-Page** Follow these steps to order the 3-On-A-Page checks.


| Step | Action   |
|------|--|
| 1    | Navigate to <b>Contacts</b> from the <b>File</b> menu in CMS by clicking on the Sub-menu title <b>Contacts</b> .   |
| 2    | Using the mouse, <b>Click</b> on the method by which you will be searching for a contact to place an order.<br><br>NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <u>Long Name</u> , or <u>Customer Number</u> .  |
| 3    | Type the information you're looking for (example: Phone number –area code not required). Press <b>Enter</b>  |
| 4    | Once the customer is highlighted in the customer list, press <b>Enter</b> .  |
| 5    | <b>Enter</b> the product number in the first field of the first line.<br><br><i>Note:</i> If you do not know the product number, enter the first few letters of the product code and press <b>Enter</b> to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press <b>Enter</b> .<br><br>Use the <b>Tab</b> key to navigate through the following fields. |
| 6    | In the next field enter an <b>N</b> for new customers only, <b>R</b> for repeat, or an <b>A</b> for an add-on sale.  |
| 7    | In the <b>Quantity</b> field type in the amount if different from the default <which is the smallest quantity>.  |
| 8    | Enter the <b>STK</b> <this field is required on check orders>.<br><br>NOTE: If you attempt to Tab passed the STK field, a pop-up box will appear for you to select a valid "Stock Color" option available for the product.   |

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### 3-On-A-Page, cont.

| Step | Action   |
|------|--|
| 9    | Enter the <b>Start #</b> <this field is required on check orders>.   |
| 10   | <p><b>OVR</b>, use this field to over ride the set price or to use special or value pricing.</p> <p>Select from the option available by product line in the pop-up by entering the corresponding letter or number. When selecting Flex Pricing, you will also be required to enter a percentage amount for the discount. [e.g. 5 – 25% would be a sample range to select from]</p> |
| 11   | <p>The % &lt;Percentage&gt; field is used to give an additional discount for the item.</p> <p>NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.</p>   |
| 12   | Add recall date, REP, and any comments in the last three fields.   |
| 13   | Once in the Comments field, press <b>F9</b> to access the Design Form screens.   |
| 14   | If this is an Add order, a pop-up will appear asking if you want to copy previous design form history. Click either the <b>YES</b> or <b>NO</b> button to continue. If YES is selected, choose an order or plate # from the Select Design Form screen and click OK. The new design form will populate with as much information as possible from the previous design form.          |
| 15   | <p>The 3-On-A-Page Design Form screen will appear. To work through the screen, use the mouse to click on the Screen Tabs. This is an example of those tabs:</p>    |

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### 3-On-A-Page, cont.

| Step | Action  |
|------|---|
| 16   | <p><u>Standard screen:</u></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Rush</b> – Use the mouse to place a √ in the field to select a rush. (NOTE: When selected, the rush option code and charge will pre-populate in the order entry screen after you save the Design Form.)</li> <li>➤ <b>Customized Check Style</b> – Click in this field if this order will have a custom check style. Additionally, click in the field next to the option for how you will send the copy of the custom check style. <ul style="list-style-type: none"> <li><u>Hard Copy Mailed</u> – a hard copy of the custom check style is being mailed.</li> <li><u>Emailed – File Name</u> – the custom check style is being emailed. Enter the file name in the field that appears.</li> <li><u>Previous Job</u> – use this option to reference a previous job that used this custom check style. Enter the previous plate or order # in the Previous Job # field.</li> </ul> </li> <li>➤ <b>Check Style</b> – Click on the drop down arrow to view options and select one by clicking on that option.</li> <li>➤ <b>Standard Ink Color</b> – Default is Black Mag.</li> <li>➤ <b>1<sup>st</sup> Ink Color</b> – Click on the drop-down arrow to select from the standard options OR select the last option “Other PMS #” to select a PMS match and enter the PMS # in the field that opens.</li> <li>➤ <b>2<sup>nd</sup> Ink Color</b> – Same as above.</li> <li>➤ <b>Color Separation</b> – This field is used to specify how color separation needs to be for two color jobs. (NOTE: Character limit is 75.)</li> </ul> |
| 17   | <p><u>Artwork screen:</u></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Logo Required</b> – Use the mouse to place a √ in the field to select logo if applicable. Then select from the drop down option for logo type. NOTE: A message will pop up telling you that if black is part of the logo, then you must select additional black ink on the Standard screen. Black Mag cannot be used in the logo.</li> </ul>   |

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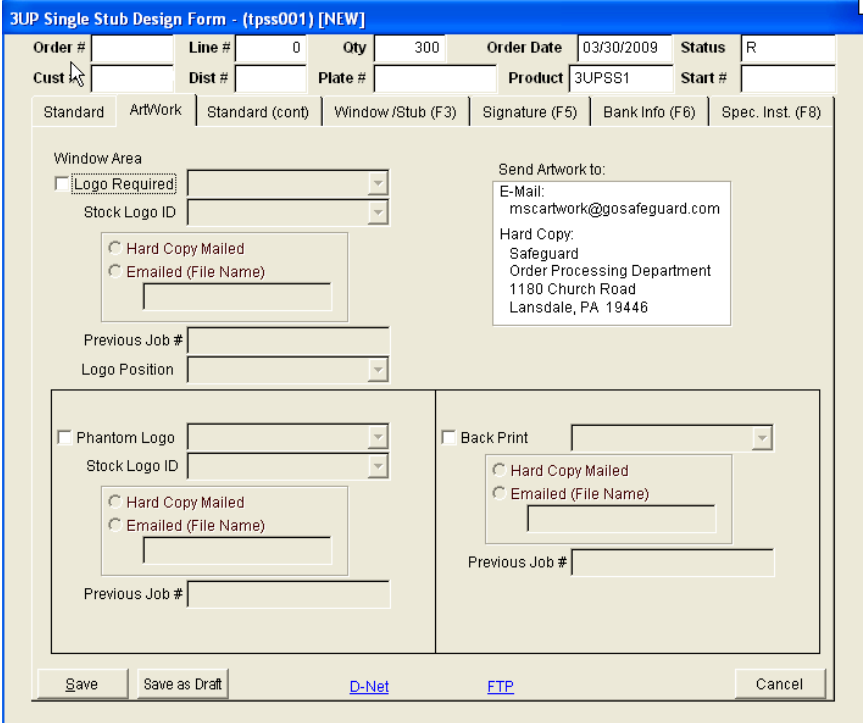
### 3-On-A-Page, cont.

| Step        | Action   |
|-------------|--|
| 17<br>cont. | <p><u>Artwork screen (cont.):</u><br/>           Complete the following fields as necessary:</p> <p><b>Options:</b><br/> <u>Stock Logo ID</u> – Enter the stock number from the cut book in the appropriate field.<br/> <u>Custom to Follow</u> – use this option if you will send either an electronic or hardcopy logo. Check off either Hard copy mailed or Emailed (File Name)<br/> <u>Previous Job</u> – Enter the previous job # in the appropriate field.</p> <p><b>Artwork Sent:</b><br/> <u>Hard Copy Mailed</u> – Select this option and send to the address listed on the screen when mailing artwork.<br/> <u>Emailed – File Name</u> – Select this option if emailing digital artwork and enter the artwork file name (Example: basketball.eps)</p> <ul style="list-style-type: none"> <li>➤ <b>Logo Position</b> – Click on the drop-down arrow to select the appropriate option.</li> <li>➤ <b>Phantom Logo</b> – click in the box next to this field. Then select the appropriate option from the drop-down listing.</li> </ul> <p><b>Options:</b><br/> <u>Stock Logo ID</u> - Enter the stock number from the cut book in the appropriate field<br/> <u>Custom to Follow</u> – use this option if you will send either an electronic or hardcopy logo. Use the following section to specify how the custom logo will be sent.<br/> <u>Previous Job</u> – Enter the previous job # in the appropriate field.</p> <p><b>Artwork Sent:</b><br/> <u>Hard Copy Mailed</u> – Select this option and send to the address listed on the screen when mailing artwork.<br/> <u>Emailed – File Name</u> – Select this option if emailing digital artwork and enter the artwork file name (Example: basketball.eps)</p> |

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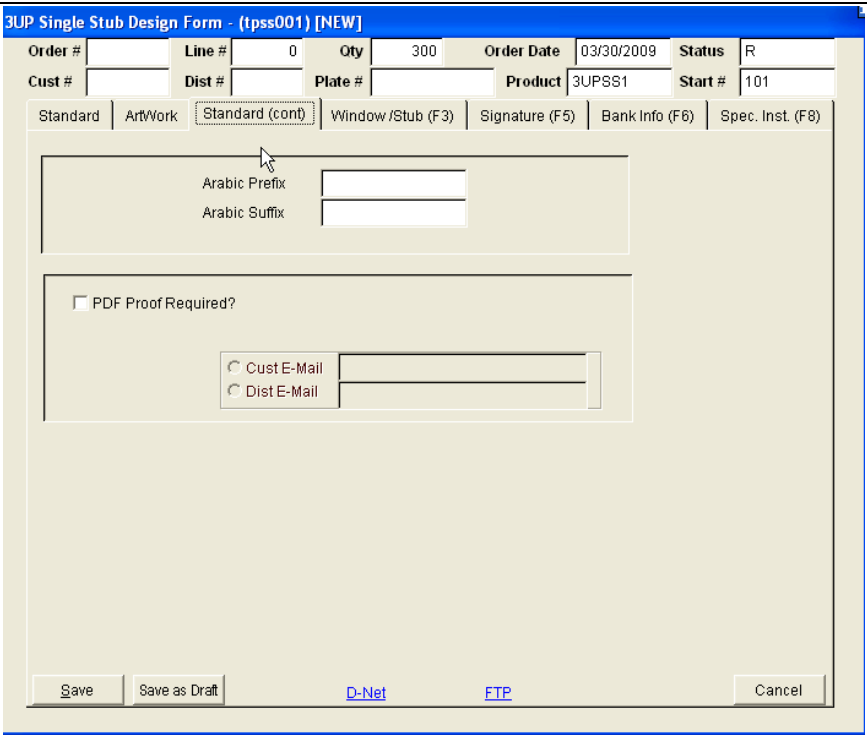
### 3-On-A-Page, cont.

| Step        | Action   |
|-------------|--|
| 17<br>cont. | <p data-bbox="597 447 862 478"><u>Artwork screen (cont.):</u></p> <p data-bbox="695 506 1446 575">➤ <b>Back Print</b> - click in the box next to this field. Then select the appropriate option from the drop-down listing.</p> <p data-bbox="695 579 802 611"><b>Options:</b></p> <p data-bbox="740 615 1430 720"><u>Custom to Follow</u> – use this option if you will send either an electronic or hardcopy logo. Use the following section to specify how the custom logo will be sent.</p> <p data-bbox="740 724 1409 793"><u>Previous Job</u> – Enter the previous job # in the appropriate field.</p> <p data-bbox="695 798 862 829"><b>Artwork Sent:</b></p> <p data-bbox="740 833 1468 903"><u>Hard Copy Mailed</u> – Select this option and send to the address listed on the screen when mailing artwork.</p> <p data-bbox="740 907 1414 1012"><u>Emailed – File Name</u> – Select this option if emailing digital artwork and enter the artwork file name (Example: basketball.eps)</p> <div data-bbox="597 1052 1455 1770"></div> |

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### 3-On-A-Page, cont.

| Step | Action  |
|------|---|
| 18   | <p data-bbox="597 447 873 478"><u>Standard (cont) screen:</u></p> <p data-bbox="597 506 1101 537">Complete the following fields as necessary:</p> <ul data-bbox="695 541 1458 758" style="list-style-type: none"><li data-bbox="695 541 1458 611">➤ <b>Arabic Prefix</b> - If a Prefix is required, enter the data in this field (up to 4 characters allowed)</li><li data-bbox="695 615 1458 684">➤ <b>Arabic Suffix</b> - If a 1-character Suffix is required, enter the data in this field.</li><li data-bbox="695 688 1458 758">➤ <b>PDF Proof</b> – Use the mouse to place a <math>\surd</math> in the field to select if a pdf proof is required.</li></ul> <p data-bbox="792 762 906 793"><b>Options:</b></p> <p data-bbox="792 798 1458 867"><u>Cust Email:</u> - Click the box to select this option and enter the email address.</p> <p data-bbox="792 871 1458 940"><u>Dist Email:</u> - Click the box to select this option and enter the email address.</p> <div data-bbox="597 972 1458 1703"></div> |

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### 3-On-A-Page, cont.

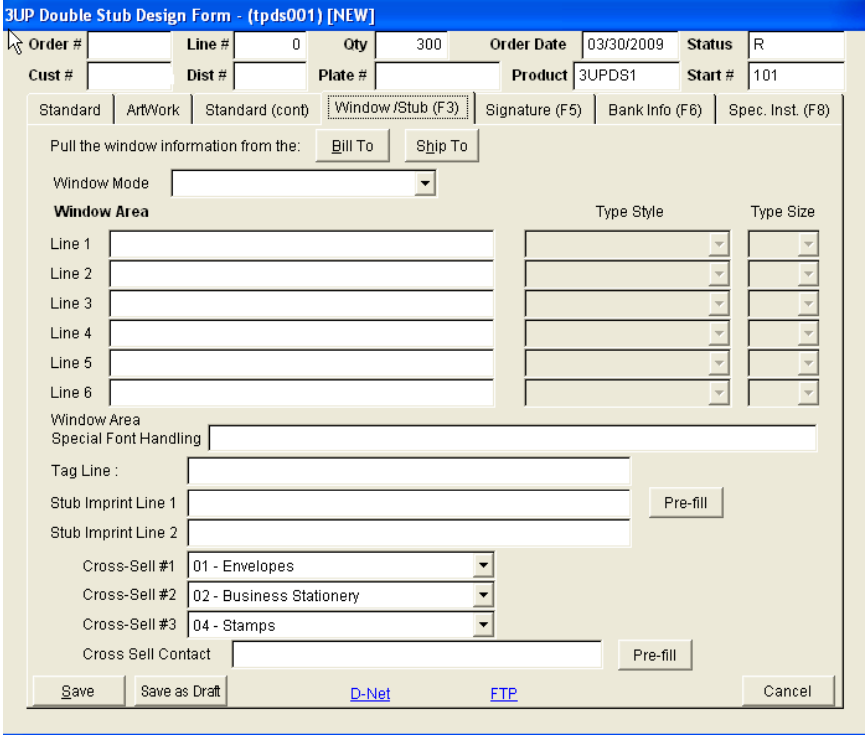
| Step | Action  |
|------|---|
| 19   | <p><u>Window/Stub [F3] screen:</u></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Pull the window information from the</b> – click either the Bill To or Ship To button to pre-fill the window area.</li> <li>➤ <b>Window Mode</b> (This is a required field) – Click on the drop-down arrow to select Center, Left or Right. (This specifies justification for Window imprint)</li> <li>➤ <b>Window Area (Line 1 thru 6)</b> – Enter imprint information required. Up to 6 lines available. <ul style="list-style-type: none"> <li>- Right click in the window area and the Special Characters box will pop up.</li> <li>- If you need an accent mark, highlight the letter that requires the accent mark and then right click to select the mark.</li> </ul> </li> <li>➤ <b>Style/Size</b> – Click on the drop-down arrow to select from the available options.</li> <li>➤ <b>Window Area Special Font Handling</b> – provide a brief instructions for additions or adjustments to the copy entered in the Window Area.</li> <li>➤ <b>Tag Line</b> – Enter the information that is to be printed below the “Amount in Words” line as the customer’s tag line. Universe typestyle up to 35 characters (NOTE: Reference the April 8, 2005 release for details.)</li> <li>➤ <b>Stub Imprint Line 1</b> – For double stub check styles only. This line can be pre-filled with the information in Line 1 of the window area.</li> <li>➤ <b>Stub Imprint Line 2</b> - For double stub check styles only.</li> <li>➤ <b>Cross Sell #1</b> – Click on the drop-down arrow to select a Cross Sell option.</li> <li>➤ <b>Cross Sell #2</b> – Same as above.</li> <li>➤ <b>Cross Sell #3</b> – Same as above.</li> <li>➤ <b>Cross Sell Contact</b> – This pre-fills based on line 1 of the Window Area section.</li> </ul> |

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### 3-On-A-Page, cont.

| Step        | Action   |
|-------------|--|
| 19<br>cont. | <p><u>Window/Stub [F3] screen (cont.)</u></p>   |
| 20          | <p><u>Signature [F5] screen:</u></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Number of Signature Lines</b> – Default is one. Select from the drop-down options for more than one. <ul style="list-style-type: none"> <li>- Right click in the window area and the Special Characters box will pop up.</li> <li>- If you need an accent mark, highlight the letter that requires the accent mark and then right click to select the mark.</li> </ul> </li> <li>➤ <b>Above Line 1</b> – Enter the information that is to be printed above the signature line. (NOTE: Reference Sig Options sheet – DSC#804213)</li> </ul> |

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### 3-On-A-Page, cont.

| Step        | Action  |
|-------------|---|
| 20<br>cont. | <p data-bbox="597 447 938 485"><u>Signature [F5] screen (cont.):</u></p> <p data-bbox="597 520 1101 558">Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li data-bbox="695 558 1474 663">➤ <b>Above Line 1B</b> - Enter the information that is to be printed above the signature line. (NOTE: Reference Sig Options sheet – DSC#804213)</li> <li data-bbox="695 663 1458 768">➤ <b>Below Line 1</b> – This defaults to Authorized Signature. Highlight, delete and enter different information that needs to be printed below line one.</li> <li data-bbox="695 768 1474 852">➤ <b>Mode</b> – Click the drop-down arrow to select justification for the signature imprint information.</li> </ul> <p data-bbox="597 884 1474 957">NOTE: If selecting additional lines and imprint, additional fields will appear. Enter the information as per the previous steps.</p> <div data-bbox="597 989 1474 1724" style="border: 1px solid black; padding: 5px;"> </div> |

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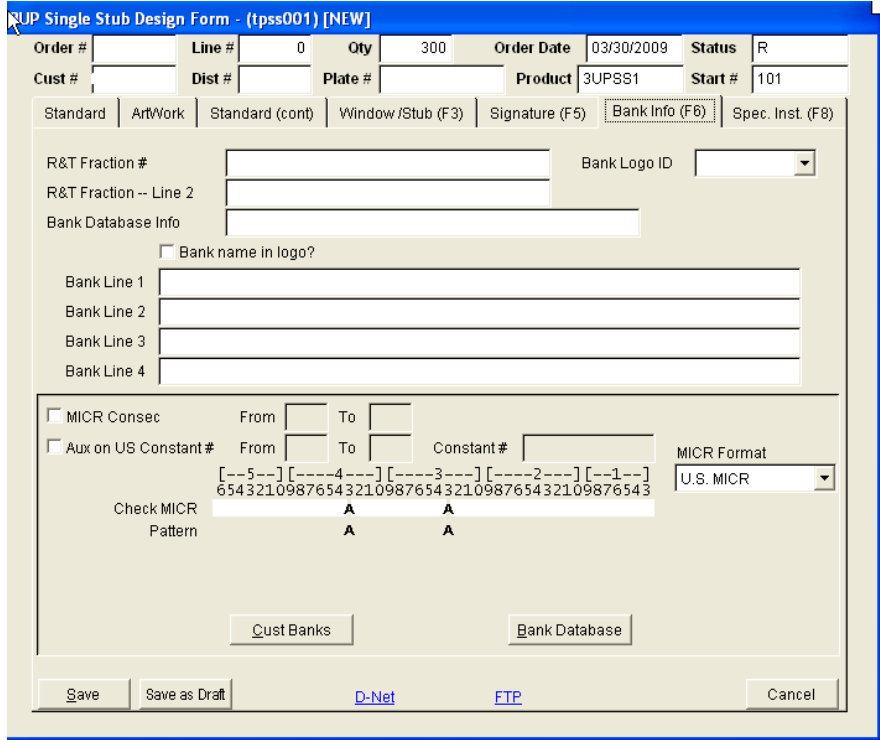
### 3-On-A-Page, cont.

| Step | Action  |
|------|---|
| 21   | <p data-bbox="597 447 857 478"><u>Bank Info [F6] screen:</u></p> <p data-bbox="597 520 1312 552">There are two ways to complete the Bank Information screen.</p> <ul data-bbox="597 583 1458 720" style="list-style-type: none"><li>- Option 1: The first way would be to use either the Cust Banks or Bank Database buttons at the bottom of the screen. This allows you to pre-populate the fields automatically from the information that you have set up in your Cust Banks database and your Bank Database.</li></ul> <div data-bbox="743 747 1295 814" style="text-align: center;"></div> <ul data-bbox="646 863 1425 1115" style="list-style-type: none"><li>○ <b>Cust Banks and Bank Database buttons</b><ul data-bbox="743 905 1409 1041" style="list-style-type: none"><li>- Cust Banks – pulls bank data that is attached to the Customer.</li><li>- Bank Database – pulls the information from the Bank Database.</li></ul></li><li>- Option 2: The other way is to enter the information manually by following the instructions below.</li></ul> <p data-bbox="597 1157 1101 1188">Complete the following fields as necessary:</p> <ul data-bbox="695 1192 1458 1696" style="list-style-type: none"><li>➤ <b>R &amp; T Fraction #</b> - Enter the R &amp; T Fraction # required.</li><li>➤ <b>Bank Logo Id</b> – Reference the Bank Logo Cut Book to locate the correct logo # and key it here.</li><li>➤ <b>R &amp; T Fraction – Line 2</b> – Used for orders where a second line is required such as the account #.</li><li>➤ <b>Bank Database Info</b> – Not available (fills in when the Bank Database is used to complete this screen)</li><li>➤ <b>Bank Name in Logo</b> – If the Bank's name is located in the logo, use the mouse to check this box.</li><li>➤ <b>Bank Line 1 thru 4</b> – Use <b>1, 2, 3 &amp; 4</b> fields to specify what additional information is to be printed with the bank logo such as address if required by the bank</li><li>➤ <b>MICR Format</b> – Click the MICR Format drop down box to choose U.S. MICR, Non-US MICR or No MICR Required.</li></ul> |

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### 3-On-A-Page, cont.

| Step        | Action   |
|-------------|--|
| 21<br>cont. | <p><u>Bank Info [F6] screen (cont.):</u></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>MICR Consec</b> – If adding consecutive numbering, use the mouse to place a √ in the field. Tab and key in the number sequence for the Arabic placement in the MICR line. (NOTE: Standard is 52 to 45.)</li> <li>➤ <b>Auxiliary On US Constant</b> – If a constant number is required in the MICR line use the mouse to place a √ in the box next to “Auxiliary ON US Constant”. Specify placement and key in the Constant # information.</li> <li>➤ <b>Tab</b> to the MICR line and key in the Account Number to be printed.</li> </ul>  |
| 22          | Click the <b>Save</b> button to save the design form.  |

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### 3-On-A-Page, cont.

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| <b>Step</b> | <b>Action</b>   |
|-------------|---|
| 23          | Any options that were selected on the design form will be reflected as a line item on the order. Complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.] |
| 24          | Press <b>F10</b> to save the order and transmit.  |