Endorsement Stamp Design Forms

Overview

Introduction

In this tutorial, you will learn how to enter an endorsement stamp design forms.

There are four options available for Endorsement Stamps. There are two "open format" and two endorsement options based on the requirements for imprint information.

ESI is the product code, however, the style options are:

→ *E-15-5* – Endorsement stamp with 6 lines of imprint available (smaller size available)
→ *E-15-6* – Open format stamp with 6 lines of imprint available (smaller size available)
→ *E-16-5* – Endorsement stamp with 6 lines of imprint available (larger size available)
→ *E-16-6* – Open format stamp with 6 lines of imprint available (larger size available)

Endorsement Stamp Design Form

This is an example of the Endorsement Stamp design form:

Endorsement Stamp Design Form, cont.

**Endorsement
Stamp Design
Form**

To enter a new Endorsement Stamp design form, follow the steps below.

Step	Action
1	Navigate to **Contacts** from the **File** menu in CMS by clicking on the Sub-menu title **Contacts**.
2	Using the mouse, **Click** on the method by which you will be searching for a contact to place an order. 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 **Enter**
4	Once the customer is highlighted in the customer list, press **Enter**.
5	**Enter** the product number in the first field of the first line. *Note*: If you do not know the product number, enter the first few letters of the product code and press **Enter** to bring up the product list. Using ↓↑ keys scroll through the list until the desired code is highlighted, and then press **Enter**. NOTE: If this is a repeat order, press **F3** to select from the Detailed Order History screen. Scroll through the orders using the ↓↑ keys. Highlight the item and press **Enter**.
6	In the next field enter an **N** for new [only available on the customer's first order], **R** for repeat, or an **A** for an add-on sale.
7	In the **Quantity** field type in the amount if different from the default [which is the smallest quantity] or use the pop-up menu and click on the desired quantity in the list to select it.

Endorsement Stamp Design Form, cont.

Step	Action
8	TAB past the **STK/Start #** [these fields are not required on these orders].
9	**OVR**, use this field to over ride the set price or to use special or value pricing. OVR Codes M – Sell Price Override L – Laser Variable Pricing C – Price Override U – Universal X – 20% Off Next Imprint Order 8 – 500 Free Computer Checks Select from the option available by product line in the pop-up by entering the corresponding letter. When selecting a value price option, 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]
10	The **%** <Percentage> field is used to give an additional discount for the item. NOTE: If using this field for additional discounting, it will reflect a full discount in your commissions as well.
11	The **Price** field will fill automatically (unless **M** is in the OVR field in that case the price must be manually entered).
12	Add a recall date, CSR code, and any comments in the last three fields. NOTE: It's recommended that when using the value pricing option in the OVR field, you also reflect the percentage in the comments field for access on future orders.
13	For orders that require a design form the **D** at the end of the product line field will change to a **T** when the design form is created.
14	Press **F9** to access the Design Form screens.
15	Select **New** in the **Order Type** field.
16	In the **Product Type** field, using the mouse, **Click** to select **Endorsement Stamp**. Once your product type is highlighted click the **Select** button.

Endorsement Stamp Design Form, cont.

Step	Action
17	Use the **Scrollbar** to select the **Style Code** required based on size and format. → *E-15-5* – Endorsement stamp with 6 lines of imprint available (smaller size available) → *E-15-6* – Open format stamp with 6 lines of imprint available (smaller size available) → *E-16-5* – Endorsement stamp with 6 lines of imprint available (larger size available) → *E-16-6* – Open format stamp with 6 lines of imprint available (larger size available) NOTE: Check the bottom of the design form screen for additional screen prompts or buttons that need to be completed. Example of additional screen prompts: `F5=Format Area F10=Save    ESC=Exit`
18	***Format Area Screen:*** Enter the information required in the fields below: E-15-5 and E-16-5 FORMAT AREA INFORMATION F10=SAVE ESC=CANCEL LINE 1: PAY TO THE ORDER OF BANK NAME: LINE 3: FOR DEPOSIT ONLY CUSTOMER NAME: LINE 5: LINE 6: ➢ ***Line 1*** – auto-populates with PAY TO THE ORDER OF ➢ ***Bank Name*** – Enter the bank name ➢ ***Line 3*** – auto-populates with FOR DEPOSIT ONLY ➢ ***Customer Name*** – Enter the customer's business name ➢ ***Line 5 and 6*** – Enter bank account number and any additional information required

Endorsement Stamp Design Form, cont.

Step	Action
18, cont.	*Format Area Screen, cont:* Enter the information required in the fields below: E-15-6 and E-16-6 FORMAT AREA INFORMATION F10=SAVE ESC=CANCEL 1: 2: 3: 4: 5: 6: ➤ ***Line 1, 2, 3, 4, 5 and 6*** –Enter any information required
19	Press **F10** to save the Format Area screen.
20	Press **F10** to save the design form.
21	Once back on the order screen, complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
22	Press **F10** to save the order and transmit.