



## Holiday Cards/Calendar Design Forms

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**Introduction** Each design form type has distinct requirements based on the available features of the product itself. (For example: Some cards allow printing on two sides while others offer one side only. Some cards offer multiple ink colors and others are limited to one ink color.) Keep the following in mind when keying a design form for a Holiday Card and/or Calendar order:

(Note: Holiday Card/Calendar design forms are WYSIWYG – What you SEND is what you get!)

- ✓ The following instructions are for a basic offering. Screens and options will vary based on which item you select in the catalog.
  - ✓ Based on the item you select the Design Form screens may vary from the steps listed below.
  - ✓ Reference the catalog for features available when filling out the design form.
  - ✓ Product Codes for CMS are available in the catalog and various marketing pieces.
  - ✓ Flex pricing is available to satisfy competitive pricing challenges. Consult the product release and select the appropriate code in the OVR field to adjust the pricing.
  - ✓ Orders may not be saved or transmitted unless a design form is completed.
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## Holiday Card Design Forms

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### Adding a Design Form

To add a new Design Form for an order, follow the steps below. This design form is for a basic card. Remember to reference your catalog for specific features based on the desired product code selected.

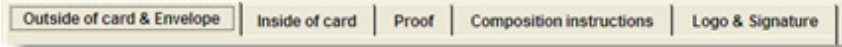
Step	Action
1	Navigate to <b>Contacts</b> from the <b>File</b> menu in CMS by clicking on the Sub-menu title <b>Contacts</b> .
2	Using the mouse, <b>Click</b> on the method by which you will be searching for a contact to place an order.  NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <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.  <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> .  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>.

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## Holiday Card Design Forms, cont.

Step	Action
8	<p><b>OVR</b>, use this field to over ride the set price.</p> <p>The <b>Price</b> field will fill automatically (unless <b>M</b> is in the OVR field in that case the price must be manually entered).</p>
9	Add recall date, CSR, and any comments in the last three fields.
10	Once in the Comments field, press <b>F9</b> to access the Design Form screens.
11	<p>The Holiday Card Design Form screen will appear. To work through the screen, use the mouse to click on the Screen Tabs.</p> <p>This is an example of those tabs:</p> 
12	<p><b><u>Outside of Card &amp; Envelope</u></b></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Foil/Ink Outside</b> – Click on the drop down arrow to view options and select one by clicking on that option.</li> <li>➤ <b>Outside Imprint</b> – Use the mouse to remove the √ in the field to indicate no outside imprint. (The Outside Imprint Lines 1-2 will gray out.)</li> <li>➤ <b>Outside Imprint Line 1 &amp; 2</b> – Key the imprint information required for each line that applies.</li> <li>➤ <b>Envelope Imprint</b> - Use the mouse to remove the √ in the field to indicate no Imprint for the envelope. (The Env. Imprint Lines 1-4 will gray out.)</li> <li>➤ <b>Env. Imprint Lines 1 thru 4</b> - Key the imprint information required for each line that applies.</li> <li>➤ <b>Peel N' Seel Envelopes</b> – Use the mouse to place a √ in the field to indicate Peel N' Seel Envelopes are required.</li> <li>➤ <b>Folding Service</b> - Use the mouse to place a √ in the field to indicate folding services are required.</li> <li>➤ <b>Holiday Seal Selection</b> - Click on the drop down arrow to view options and select one by clicking on that option.</li> </ul>

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## Holiday Card Design Forms, cont.

Step	Action
13	<p><b><u>Inside of Card</u></b></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Foil/Ink Inside</b> - Click on the drop down arrow to view options and select one by clicking on that option. (NOTE: Envelope foil/ink color is the same.)</li> <li>➤ <b>Inside Imprint</b> - Use the mouse to remove the √ in the field to indicate no imprint for the inside of the card is required. (The Inside Imprint Lines 1-5 will gray out.)</li> <li>➤ <b>Inside Imprint Line 1 thru 5</b> – Key the imprint information required for each line that applies.</li> <li>➤ <b>Verse</b> - Click on the drop down arrow to view options and select one by clicking on that option. (NOTE: These are Standard Verses that you can choose from located in the catalog.)</li> </ul>
14	<p><b><u>Proof</u></b></p> <p>Use the mouse to place a √ in the field to indicate a proof is required. Then click on the drop down arrow to view options and select one by clicking on that option.</p> <ul style="list-style-type: none"> <li>➤ <b>PDF</b> – Once selected, enter email addresses for the distributor and/or the customer or use the mouse to click either the distributor button and/or the customer button to pre-fill the email address information.</li> </ul> <p>NOTE: When selecting either Fill in buttons, the fields will pre-populate with the email addresses on record for this distributor and customer.</p> <ul style="list-style-type: none"> <li>➤ <b>Fax Proof Required</b> - Once selected, enter fax numbers for the distributor and/or the customer or use the mouse to click either the distributor button and/or the customer button to pre-fill the fax number information.</li> </ul> <p>NOTE: When selecting either Fill in buttons, the fields will pre-populate with the fax numbers on record for this distributor and customer.</p>

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## Holiday Card Design Forms, cont.

Step	Action
15	<p><b><u>Composition Instructions</u></b></p> <ul style="list-style-type: none"> <li>➤ <b>Composition Instructions Line 1 thru 4</b> – enter any additional information required for composition of the card.</li> </ul>
16	<p><b><u>Logo &amp; Signature</u></b></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 indicate a logo is to be used for the inside of the card. The following options are available by clicking on the drop-down arrow. <ul style="list-style-type: none"> <li>○ <b>Stock Logo ID</b> – Click the drop down arrow and select the stock # from the Standard Logo cut book.</li> <li>○ <b>Custom to Follow</b> – Select either Hardcopy Mailed or Emailed (File Name) and key in the logo file name.</li> <li>○ <b>Previous Job</b> – Key in the previous plate #.</li> </ul> </li> <li>➤ <b>Signature Imprint</b> - Use the mouse to place a √ in the field to indicate a Signature is to be used for the inside of the card. <ul style="list-style-type: none"> <li>○ Select either <b>Hardcopy Mailed</b> or <b>Emailed (File Name)</b> and key in the logo file name.</li> </ul> </li> </ul>
17	Click the <b>Save</b> button to save the design form.
18	Complete the remaining screens as per the order requirements [i.e. Order Bottom, Line Item Detail, One Time Changes, etc.]
19	Press <b>F10</b> to save the order.



## Calendar Design Forms

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### Adding a Design Form

To add a new Design Form for an order, follow the steps below. This design form is for a basic calendar. Remember to reference your catalog for specific features based on the desired product code selected.

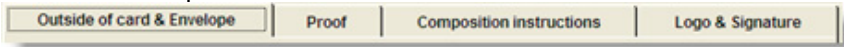
Step	Action
1	Navigate to <b>Contacts</b> from the <b>File</b> menu in CMS by clicking on the Sub-menu title <b>Contacts</b> .
2	Using the mouse, <b>Click</b> on the method by which you will be searching for a contact to place an order.  NOTE: You can search by <u>Phone Number</u> , <u>Short Name</u> , <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.  <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, then press <b>Enter</b> .  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	<b>OVR</b> , use this field to over ride the set price.  The <b>Price</b> field will fill automatically (unless <b>M</b> is in the OVR field in that case the price must be manually entered).
9	Add recall date, CSR, and any comments in the last three fields.

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## Calendar Design Forms, cont.

Step	Action
10	Once in the Comments field, press <b>F9</b> to access the Design Form screens.
11	<p>The Calendar Design Form screen will appear. To work through the screen, use the mouse to click on the Screen Tabs.</p> <p>This is an example of those tabs:</p> 
12	<p><b><u>Outside Calendar &amp; Envelope</u></b></p> <p>Complete the following fields as necessary:</p> <ul style="list-style-type: none"> <li>➤ <b>Foil/Ink Outside</b> – available in black only.</li> <li>➤ <b>Outside Imprint</b> – Use the mouse to remove the √ in the field to indicate no outside imprint. (The Outside Imprint Lines 1-2 will gray out.)</li> <li>➤ <b>Outside Imprint Line 1 thru 5</b> – Key the imprint information required for each line that applies.</li> <li>➤ <b>Envelope Imprint</b> - Use the mouse to remove the √ in the field to indicate no Imprint for the envelope. (The Env. Imprint Lines 1-4 will gray out.)</li> <li>➤ <b>Env. Imprint Lines 1 thru 4</b> - Key the imprint information required for each line that applies.</li> </ul>
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## Calendar Design Forms, cont.

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14	<p><b><u>Composition Instructions</u></b></p> <ul style="list-style-type: none"> <li>➤ <b>Composition Instructions Line 1 thru 4</b> – enter any additional information required for composition of the calendar.</li> </ul>
15	<p><b><u>Logo &amp; Signature</u></b></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 indicate a logo is to be used for the inside of the card. The following options are available by clicking on the drop-down arrow. <ul style="list-style-type: none"> <li>○ <b>Stock Logo ID</b> – Click the drop down arrow and select the stock # from the Standard Logo cut book.</li> <li>○ <b>Custom to Follow</b> – Select either Hardcopy Mailed or Emailed (File Name) and key in the logo file name.</li> <li>○ <b>Previous Job</b> – Key in the previous plate #.</li> </ul> </li> <li>➤ <b>Signature Imprint</b> - Use the mouse to place a √ in the field to indicate a Signature is to be used for the inside of the card. <ul style="list-style-type: none"> <li>○ Select either <b>Hardcopy Mailed</b> or <b>Emailed (File Name)</b> and key in the logo file name.</li> </ul> </li> </ul>
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