

Communication Services Standard Orders Saint Mary's University (SMU) Customer User Guide

Version 1.2

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Version	Date	Description	Updated By
1.0	January 2019	<ul style="list-style-type: none">Initial Version	
1.1	November 2019	<ul style="list-style-type: none">Updated for Brand	
1.2	July 2021	<ul style="list-style-type: none">Updated for Brand	Frank Petrzala

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NOTE: The ‘Table of Contents’ are active links. To go to a specific section, left click on the topic you would like to review. The topic displays.

Within the User Guide, cross references are [blue](#). To move to a section, left click the cross reference.

Please note, this ‘User Guide’ is correct to the corresponding Platform at time of ‘Go Live’.

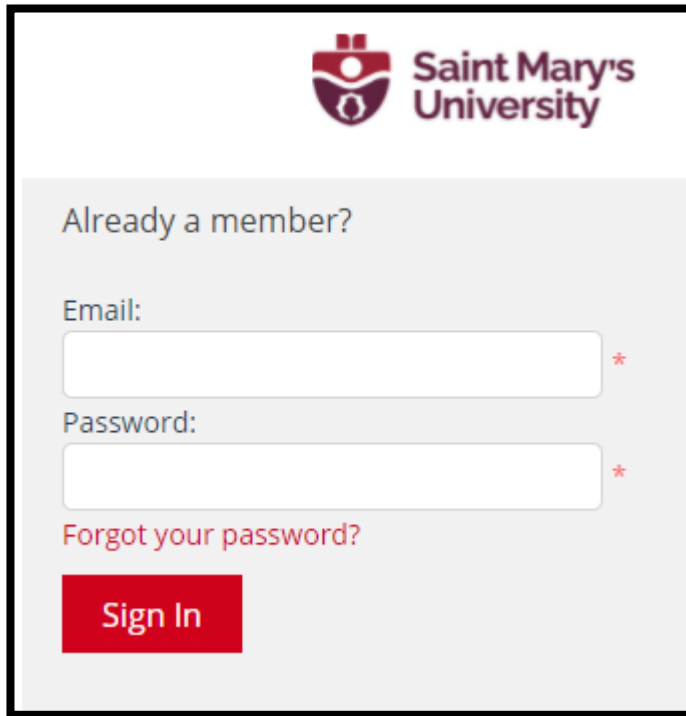
Further enhancements will be made over time, but the basic functionality will remain the same.

If ‘Process Changes’ are made, **Release Notes** will be made available via the **Xerox Account Team** to help provide continued support.

1. My Catalogue

'My Catalogue' is used to order standard print productions from the 'uStore Catalogue'.

2. Logging On



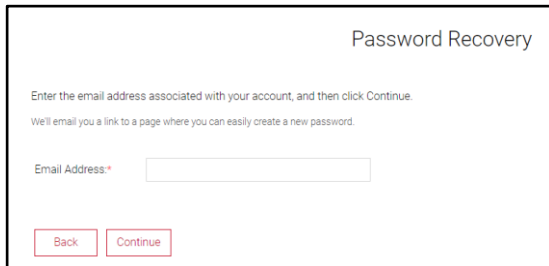
The screenshot shows the login page for Saint Mary's University. At the top, there is the university's logo and name. Below that, the text 'Already a member?' is displayed. There are two input fields: 'Email:' and 'Password:'. Both fields have a red asterisk (*) to their right, indicating they are required. Below the password field, there is a link that says 'Forgot your password?'. At the bottom of the form, there is a red button labeled 'Sign In'.

Using the URL provided, the **Login** Page is displayed.

Enter the Login Credentials supplied and click **Sign In**.

NOTE: All required fields are marked with a **Red** asterisk (*) and must be entered.

Forgot your Password?



The screenshot shows a 'Password Recovery' form. At the top right, it says 'Password Recovery'. Below that, there is a heading 'Enter the email address associated with your account, and then click Continue.' followed by a sub-heading 'We'll email you a link to a page where you can easily create a new password.' There is a text input field labeled 'Email Address: *'. At the bottom left, there are two buttons: 'Back' and 'Continue'.

Click '**Forgot your password?**'.

Enter your email address and click '**Continue**'.

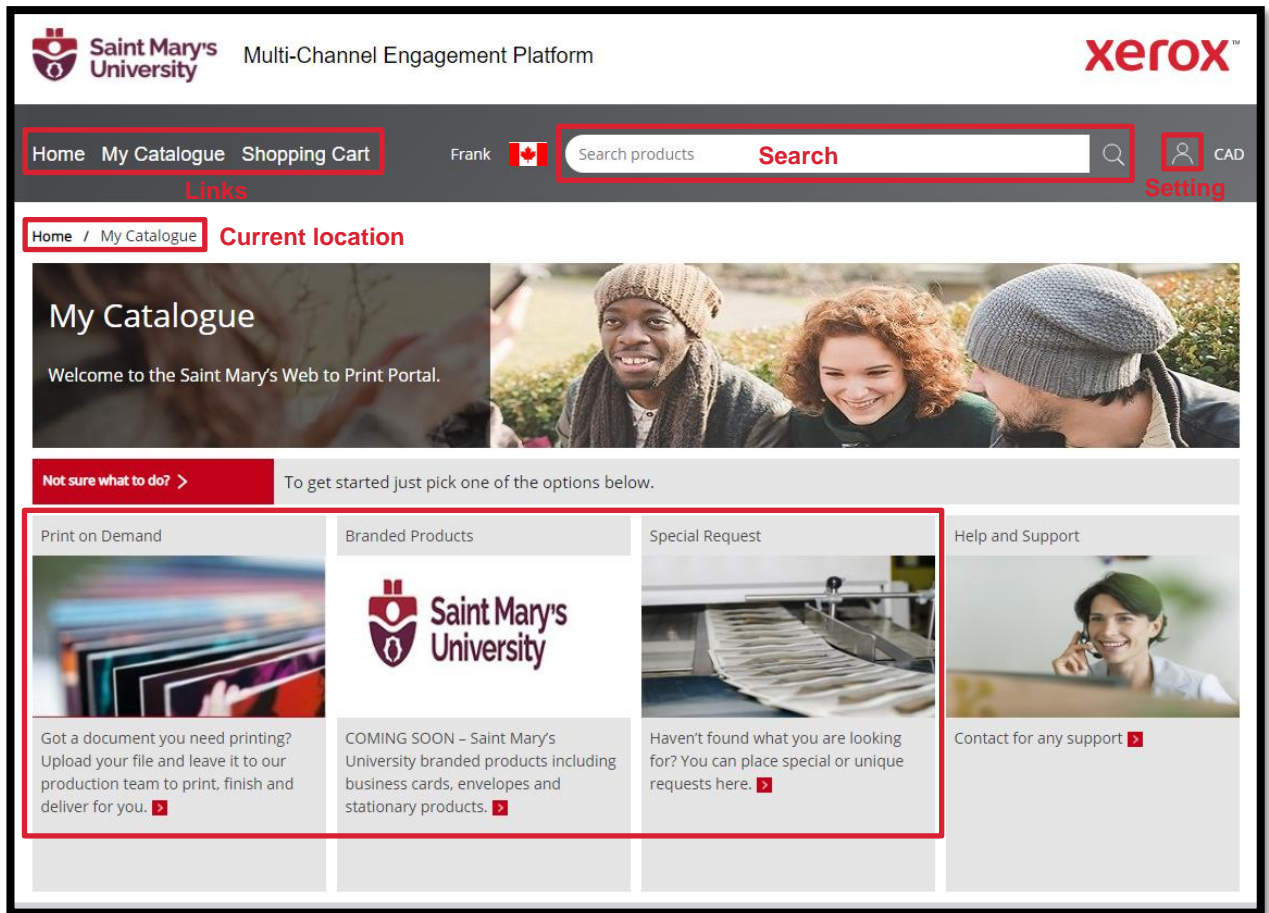
Follow the guidance provided in the email received.

The password must follow at least 3 of the following rules:

Password Policy	
Password minimum length:	8
Password maximum length:	20
Required digits:	At least 1 numeric character.
Required upper-case letters:	At least 1 upper case character.
Required lower-case letters:	At least 1 lower case character.
Required special characters:	At least 1 special character.
No re-use of historical passwords for:	Last 5 password renewals.

3. My Catalogue

'My Catalogue' is an online Catalogue for ordering standard Print products.




Tiles containing products

Similar products are grouped together. They are accessed by clicking a tile whose name indicates the product type.

To view products, click the tile for the type of product required.

NOTE: The 'Support' tile provides the email address for advice or support needed.

Then click the document category.

Or type the product name into the 'Search' box and click the  icon to retrieve matching products.

Click a link at the top of the Page to move to that Page:

- 'My Catalogue' Displays 'Catalogue Orders' for ordering standard products.
NOTE: Before using 'My Catalogue' for the first time enter 'Personal information' and 'Addresses' in 'My Account'.
Refer to 'Add Personal Information' section for details.
Refer to 'Maintain Addresses' section for details.

The current location in the 'Catalogue' is displayed under the Links:



Click a location to display that Page e.g. click 'My Catalogue' to display the 'My Catalogue' Page.

'Settings' has icons for:

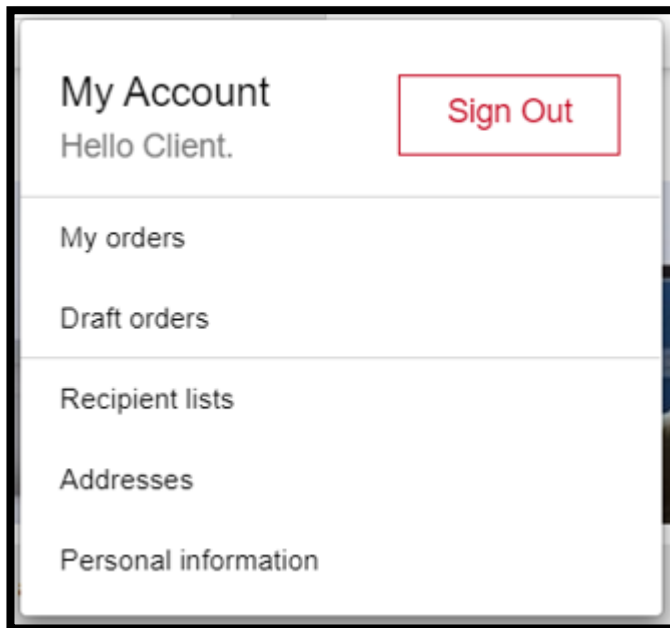
- Language designated.
- Currency designated.

And links to:

- 👤 'My Account' to 'Sign Out', maintain 'Recipient Lists', view Orders, set 'Personal Information' and 'Addresses' which are pulled through into Orders.
- 🛒 'Shopping Cart' to view the products selected.

Click a link for a list of 'My Account' options or to display the 'Shopping Cart'.

Sign Out



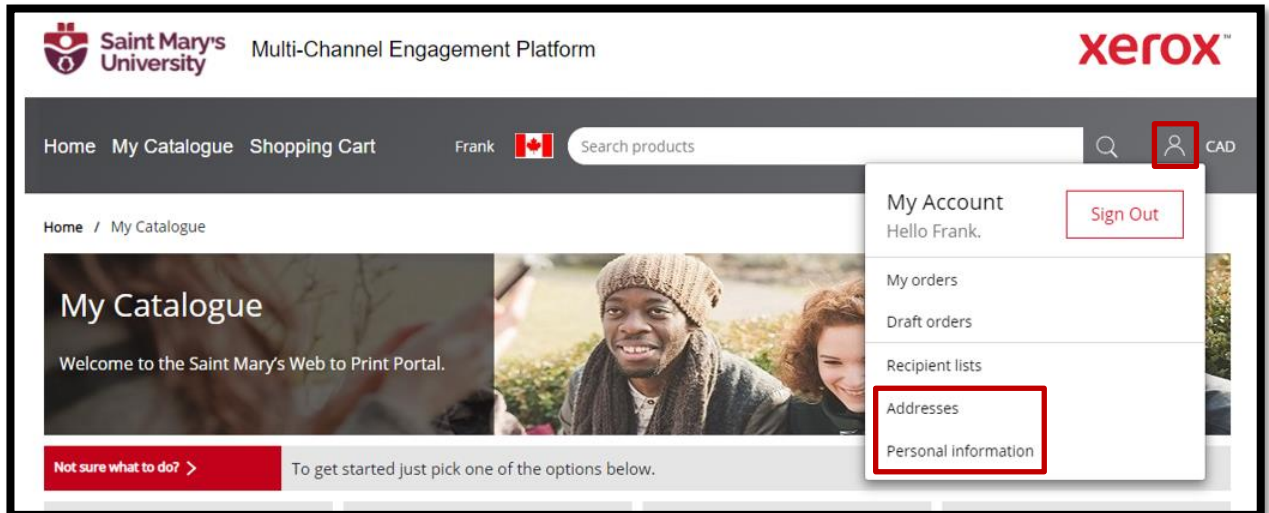
Click 👤 in 'Settings' and select 'Sign Out'.

NOTE: Some users may have additional options e.g. Approvers.

4. My Account – Setting Default Information for Catalogue Orders

'My Account' is used to manage Orders, maintain your details and 'Sign Out'.

Before ordering from the Catalogue for the first time, please enter 'Personal information' and 'Addresses' for the default shopping and billing information used in Orders.



Click  in 'Settings' to display the 'My Account' options:

- 'Sign Out'
- 'My orders'
- 'Draft orders'
- 'Recipient lists'
- 'Addresses'
- 'Personal information'

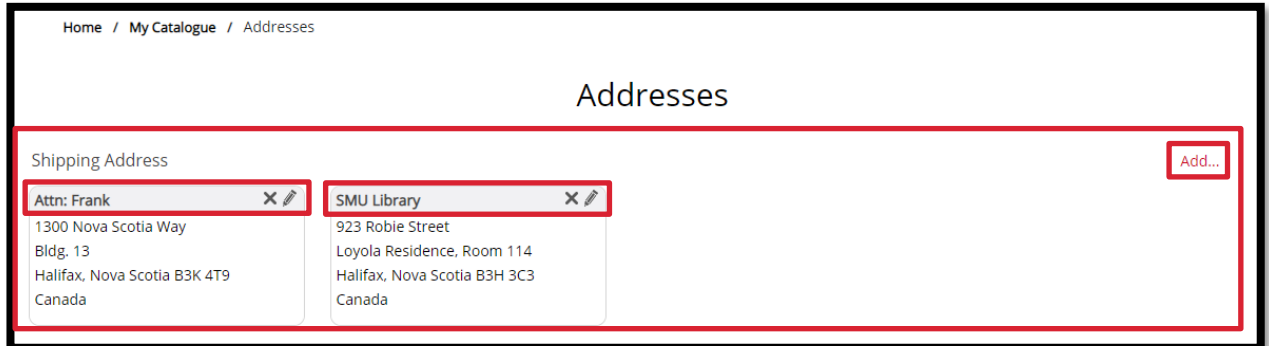
Click the option required.


To leave any of the 'My Account' options click a link at the top of the Page.

Maintain Addresses

Shipping Addresses are required for every Order. They can be managed in **'My Account'** and should be regularly maintained. Addresses may also be added or edited at **'Checkout'**.

Note: Preloaded **SMU** Addresses are available during **'Checkout'** on the **'Checkout - Order Summary'** screen. When used, the preloaded address is saved in your **'Shipping Address'** listing.



Click  in **'Settings'** and select **'Addresses'**.

The Customer and Shipping Addresses entered are displayed.

Add Addresses

Click **'Add'** for **'Customer Address'**.

Enter a meaningful **'Display name'**.

NOTE: The value entered in **'Display name'** is listed in the drop-down list when selecting addresses at **'Checkout'**.

If **'Display name'** is not entered, the address details are automatically added into **'Display name'** and should be edited to a meaningful name.

Enter the **'Person Name'** and **'Company'**.

Enter address details and select **Country** from the drop-down list.

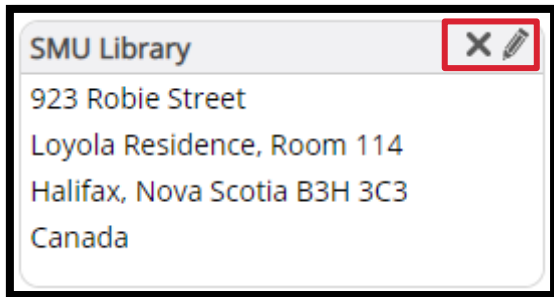
Scroll down to reach the fields at the bottom.


NOTE: All required fields are marked with a **Red** asterisk (*) and must be entered.


Enter an **'Address Reference'** and **'Phone'**.

Click **'Submit'** to save the address or click **'Cancel'** to leave the address without saving.

Edit / Delete Addresses



Click the **'Edit'** icon  to modify an address.
Make the changes required and click **'Submit'**.

Click the **'Delete'** icon  to remove an address.
Click **'OK'** to confirm.

Add Personal Information

'Personal information' contains the default information displayed in an Order and Password details.

Personal Information

Change Password (optional)

Old Password:	<input type="password" value="....."/>
New Password:	<input type="password"/>
Confirm New Password:	<input type="password"/>

Change Account Information

Email Address:*	<input type="text" value="frank.petrzala@smu.ca"/>
First Name:*	<input type="text" value="Frank"/>
Last Name:*	<input type="text" value="Petrzala"/>
Phone Number:	<input type="text"/>
Mobile Number:	<input type="text"/>
Fax Number:	<input type="text"/>
Company Name:	<input type="text"/>
Department:	<input type="text"/>
Job Title:	<input type="text"/>

* Indicates a required field

Click  in 'Settings' and select 'Personal information'.

Some 'Personal Information' is automatically entered from your account registration.

Enter or update incomplete 'Personal Information'.

NOTE: All required fields are marked with a **Red** asterisk (*).

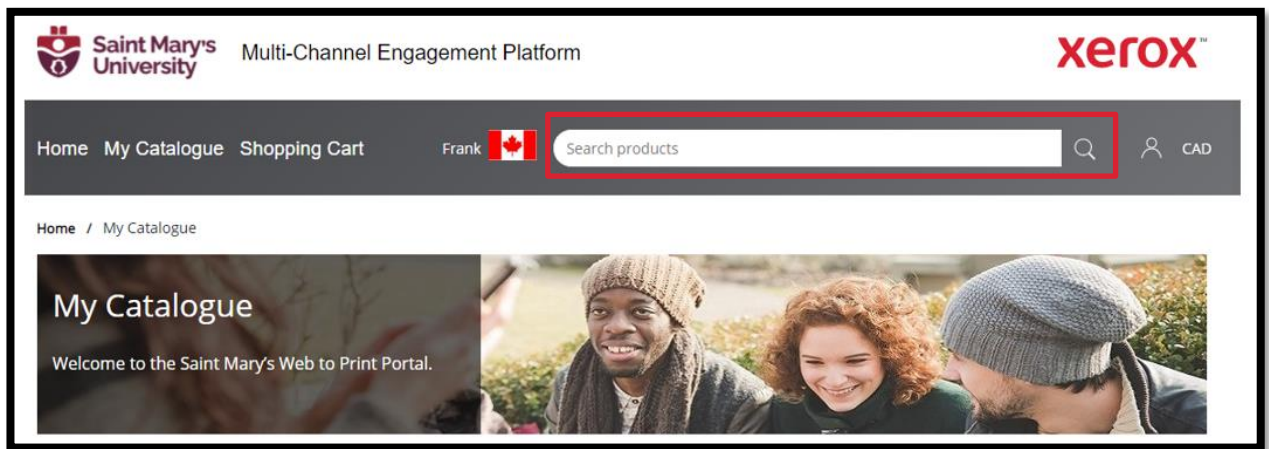
To update your Password enter your current Password into 'Old Password' then enter the new Password into 'New Password' and 'Confirm New Password'.


NOTE: Follow the password requirements in section '[Password Policy](#)'.

Click 'Update' to update the information.

5. Searching for a Product

Most Pages in 'My Catalogue' have a 'Search' option at the top right of the Page.

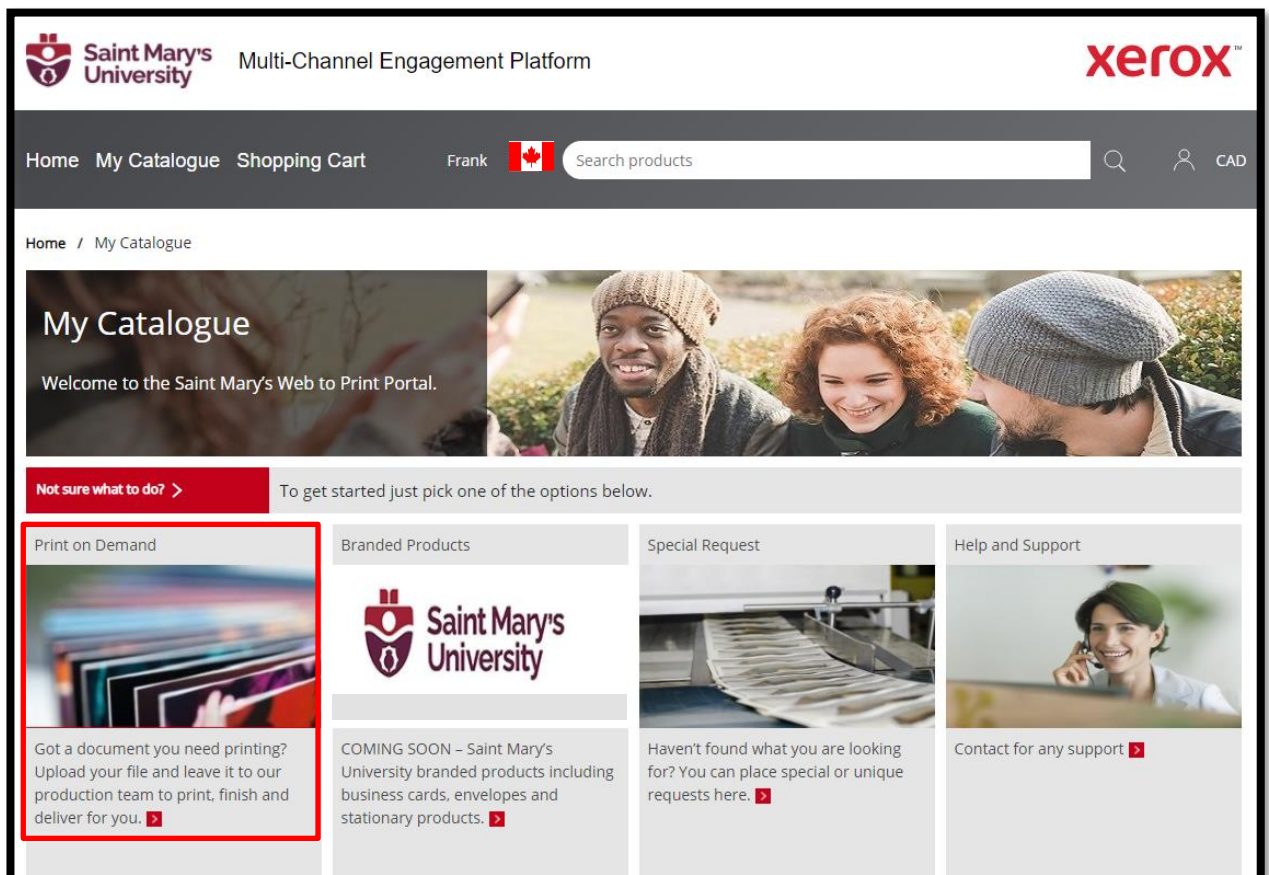


If the product name is known, type all or part into the 'Search' box and click the  icon.

All products matching the 'Search' text are displayed.

Click the required product to start the ordering process.

6. Print on Demand



Select **'Print on Demand'** from **'My Catalogue'** to order ad-hoc prints in a variety of formats with optional Tabs inserted. These may contain a mixture of Word, PowerPoint and PDF files.

Click the document category required to list the products available.

Scroll through the list to find the product required and click **'Proceed'** to select it.

Select a Product

The screenshot displays the Xerox Multi-Channel Engagement Platform interface. At the top, the Saint Mary's University logo and 'Multi-Channel Engagement Platform' text are visible on the left, and the Xerox logo is on the right. Below this is a navigation bar with 'Home', 'My Catalogue', and 'Shopping Cart' links, along with a user profile 'Frank' and a search bar. The main content area shows the breadcrumb 'Home / My Catalogue / Print on Demand'. A red box highlights the 'Print on Demand' breadcrumb. Below this is a red button labeled 'Not sure what to do?' and a grey instruction box: 'Choose a document category from the library below, click the 'O' symbol to expand and select the publication you need.' A list of categories is shown on the left, with 'Printing/Copies' selected and highlighted by a red box. Other categories include 'Bound Documents', 'Booklets', 'Pads', 'Cards', 'Tabs 9x11 5 Bank', and 'Labels'. To the right, two product cards are displayed. The first card is for 'Copies 8.5x11' with a description: '8.5x11 documents printed on white or colored paper with various finishing options'. A red box highlights the 'Proceed' button on this card. The second card is for 'Copies 8.5x14' with a similar description.

Check the product details to make sure this is the correct product and click **'Proceed'** to select the product.

Important: The selection of **'Printing/Copies'** is configured to be checked out without items from any other category. This is enforced by system rules in the **'Shopping Cart'**.

All **'Print on Demand'** items share common functionality when uploading and modifying print properties. Other options differ based on the item selected. For example, **'Copies 8.5x11'** has **'Tabs'** and **'Non Printable Slipsheet'**. **'Copies 8.5x14'** only has the option of **'Non Printable Slipsheet'**. **'Booklets'** have no additional options.

Upload the Source Files

Copies 8.5x11

Document Builder Finalize

Upload Document

- Local File
- Catalog
 - Non Printable Slipsheet 8.5x11
 - Tabs 9x11

Click to view options available

Finished Document Properties

Views and Preview icons

Total Price: \$0.00

Copies 8.5x11 properties

- Hole Punching *
None
- Folding *
None
- Stapling
None
- Scoring *
None
- Cutting
None

Next

In the 'Document Builder' click the 'Booklet' icon to display the options available. Options vary based on item selected.

NOTE: Upload file size maximum is 100Mb (per file). Multiple files can be uploaded. They will be printed as a single document.
Minimum image resolution is set to 150dpi (dots per inch). The system will provide a warning, but you can continue with configuring and submitting the order.
Standard image printing requires 300dpi.

Upload a File

Copies 8.5x11

Document Builder Finalize

Add File

Click on Browse to select a file to use in your print job.

Supported files: *.pdf, *.ppt, *.pptx, *.doc, *.docx

Printable paper size: 8.5x11

Browse

Total Price: \$0.00

Copies 8.5x11 properties

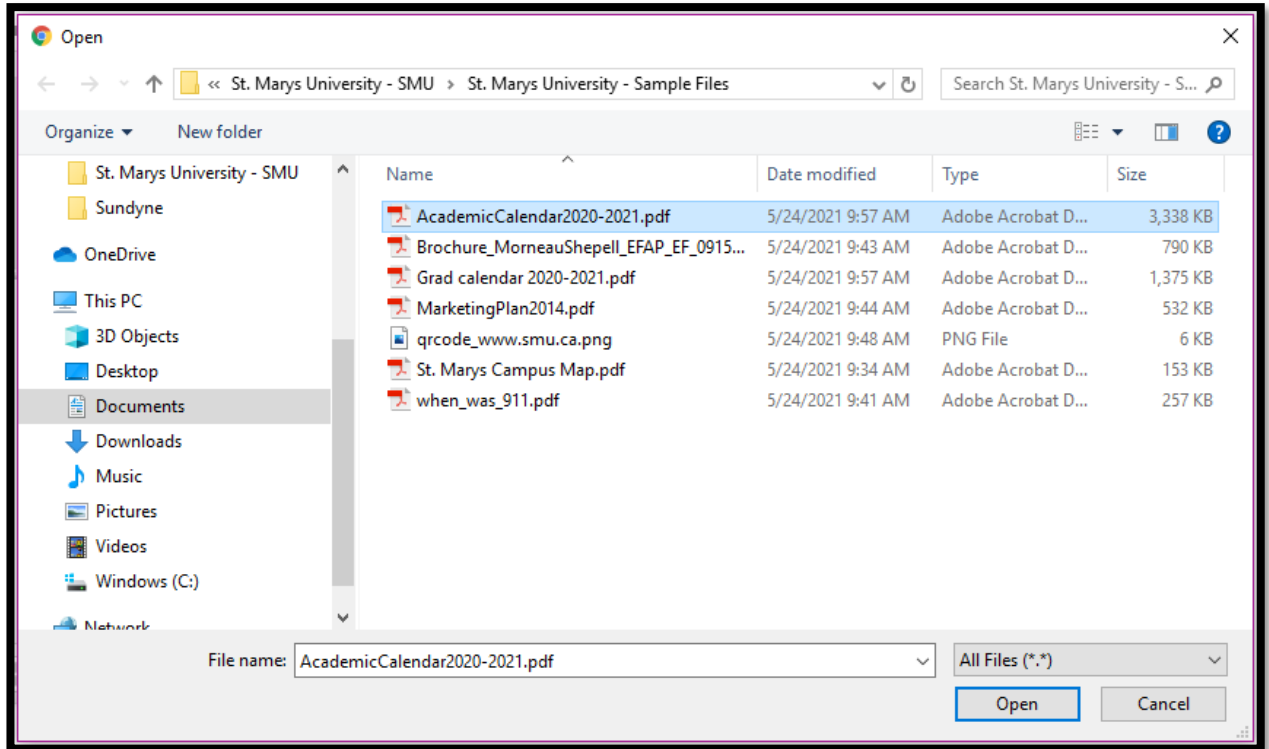
- Hole Punching *
None
- Folding *
None
- Stapling
None
- Scoring *
None
- Cutting
None

Next

Add a file location by selecting 'Upload Document' and 'Local File'.

Click 'Browse' to launch the file chooser.

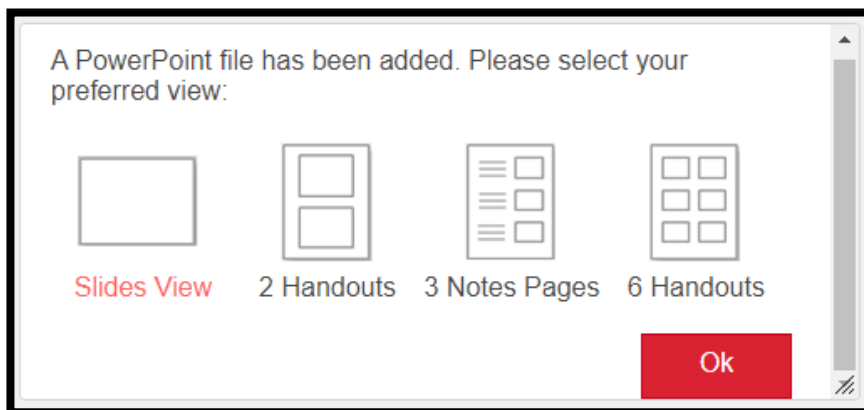
NOTE: Only the file types stated may be uploaded, but many applications will save files in PDF format e.g. Excel.



Navigate to the file required and double-click to select it.

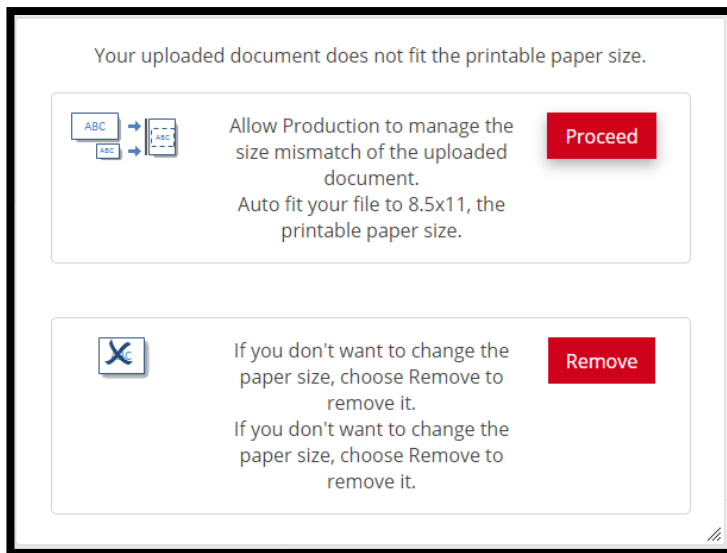
NOTE: Only one file may be selected at a time. Multiple files can be added and will be printed as a single document.

If a PowerPoint file is selected select the preferred view.



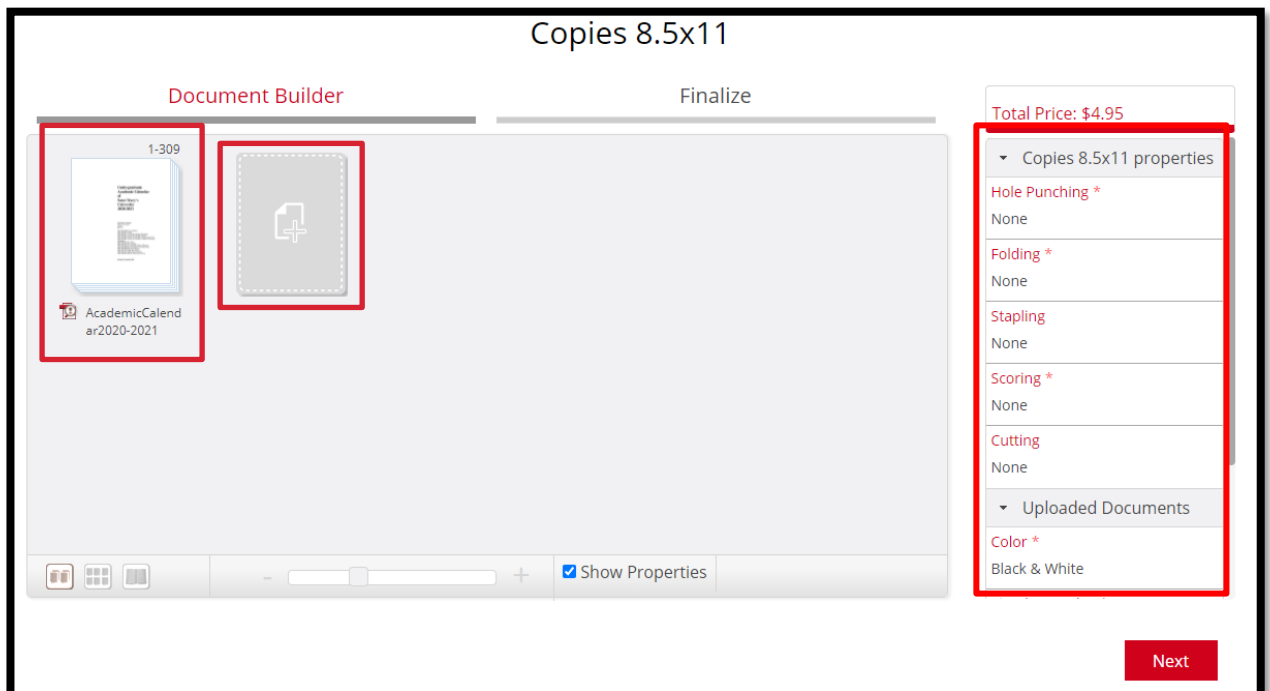
Wait for the file to upload and for its properties to be verified.

NOTE: A warning is displayed if the file's format is different to the format selected.



Click **'Proceed'** to allow Production to address the format mismatch.

Click **'Remove'** to remove the document to reformat it.



The **'Document Builder'** displays a Thumbnail of each file as **'Documents view'** is selected.

The file name is displayed underneath, and the page numbers it will use in the finished document are displayed above.

The **'Uploaded Documents'** properties display and can be modified.

If a  or  is displayed on the **'File Type'** icon there are missing properties.
NOTE: WORD, PowerPoint and PDF files are represented by a different icon.

Click the file name and enter an alternative name if required.

This action can be repeated to add multiple files.

Clicking **+** on the **'Document'** icon will display the **'Add File'** Window for uploading another **'Local File'**, **'Placeholder'**, **'Tabs - Cardstock'** or **'Slip Sheet'**.

They may be uploaded in any order as they can be manipulated later.

The files will be merged into the finished document even though they may have different file types.

Review and Update File or Page Properties

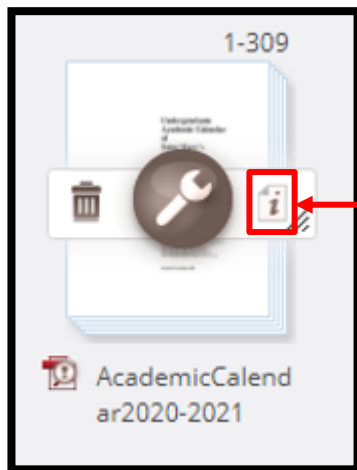
Properties indicate how the file is to be produced e.g. in color or double-sided.

Each file uploaded is verified to obtain the properties. These should be reviewed in **'Documents view'** to ensure all properties are available and correct. Any changes to properties in **'Documents view'** will update the properties of all pages in the file. If multiple files are uploaded each file may have different properties.



Refer to the section ['Manipulate Files in Documents view'](#) for details.






If specific pages require different properties, the pages may be reviewed in **'Page by page view'** and their properties updated there. Other pages in the file are not affected.




Refer to the section ['Manipulate Pages in Page by page view'](#) for details.



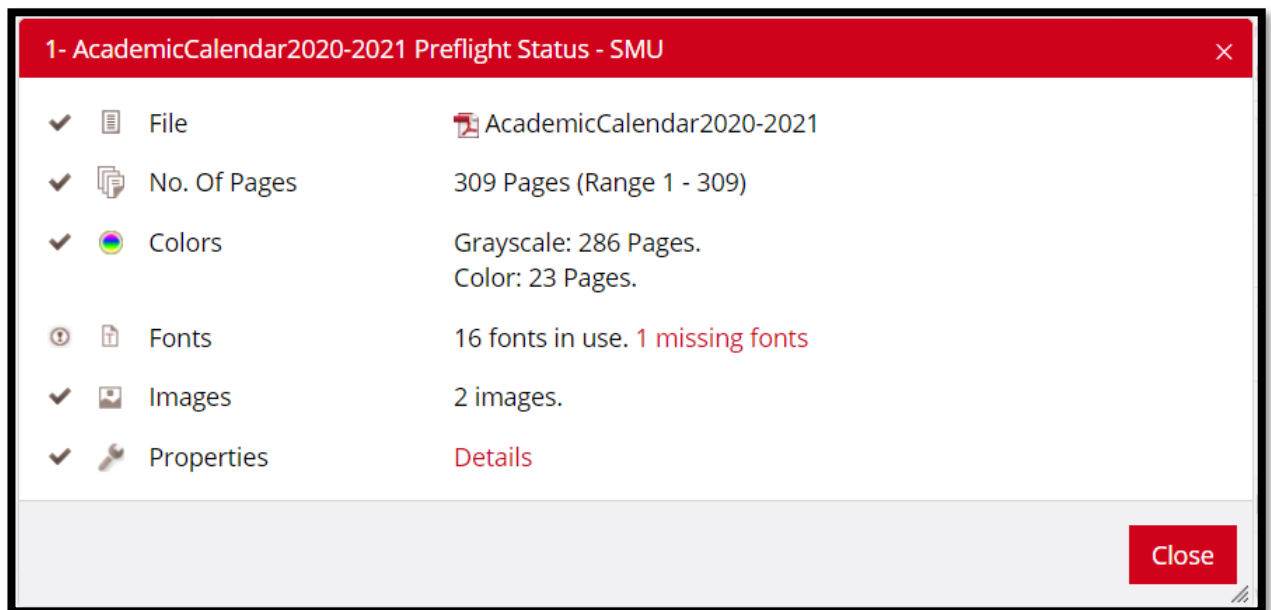
This icon is for "Pre-Flight" status which is covered in section **'Check File or Page Preflight Status'**.

For each file review the **'File Type'** icons.  or  indicates a property is invalid or missing:


Icon	Meaning
 AcademicCalendar2020-2021	'File Type' with invalid or missing properties If the 'File Type' icon has a  on it, the properties verified at upload are incomplete. NOTE: To proceed the properties must be reviewed and updated. Refer to the section 'Check File or Page Preflight Status' or the section 'Update File or Page Properties' for details.
 AcademicCalendar2020-2021	'File Type' with all properties valid and selected When the file's properties are complete the  is removed.
 Edit name as needed	'Edit' File Name Hover the Mouse cursor over the file name. Click the file name and amend the name.

	'Remove Document' Hover the Mouse cursor over the file's Thumbnail to display icons. Click the icon to delete the file and select 'OK' to confirm.
	'Properties' Hover the Mouse over the file's Thumbnail to display the icon. Click the icon to review and update properties.
	'Preflight Status' Hover the Mouse over the file's Thumbnail to display the icon. Click the icon to view the 'Preflight Status' .


Check File or Page Preflight Status



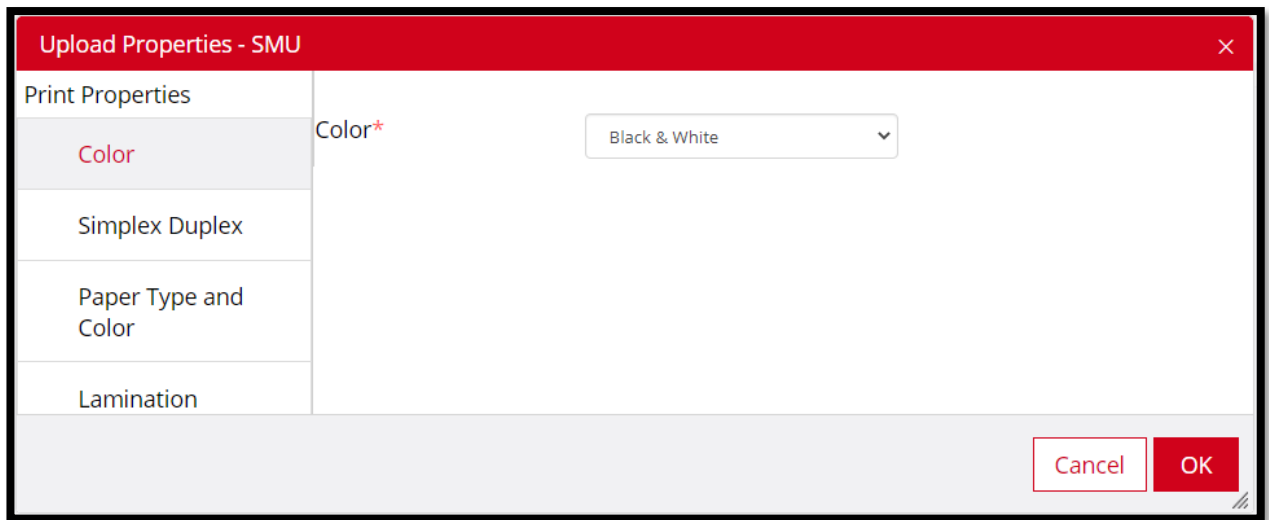
Hover the Mouse over the file's Thumbnail to display the icons.

Click the **'Preflight Status'** icon  to review the properties verified when the file was uploaded.

Scroll through the list and check each area is correct and marked with ✓.

NOTE: **'Properties'** is also available by clicking the **'Properties'**  icon.

Any area not marked with ✓ has incorrect or missing properties.



Click an error message displayed in **red** to identify the issue.

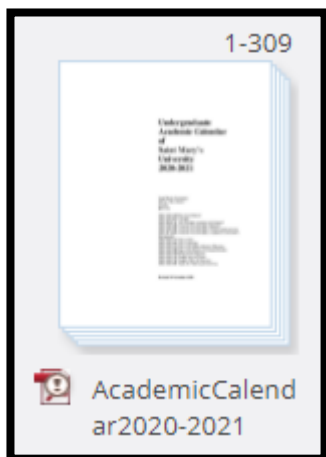
Click '**Details**' to display the incorrect or missing properties.

The property currently selected is colored **red**.

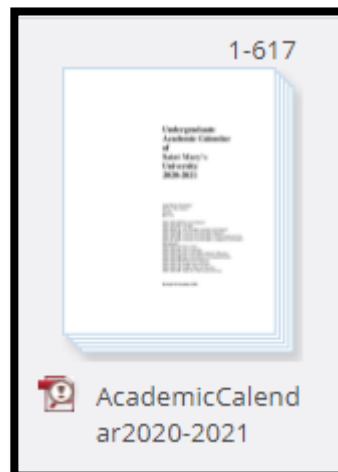
Click each property and check it has a value. Select an option from the drop-down list if required.

NOTE: The default printing setting is '**Black & White**', '**Double-Sided**' and printed on '**20lb**' paper.

In '**Page by Page View**', specific pages can be set to be printed in color without printing the entire document in color. Please refer to section '**Manipulate Pages in Page by page view**' for details.



Printed Double-Sided



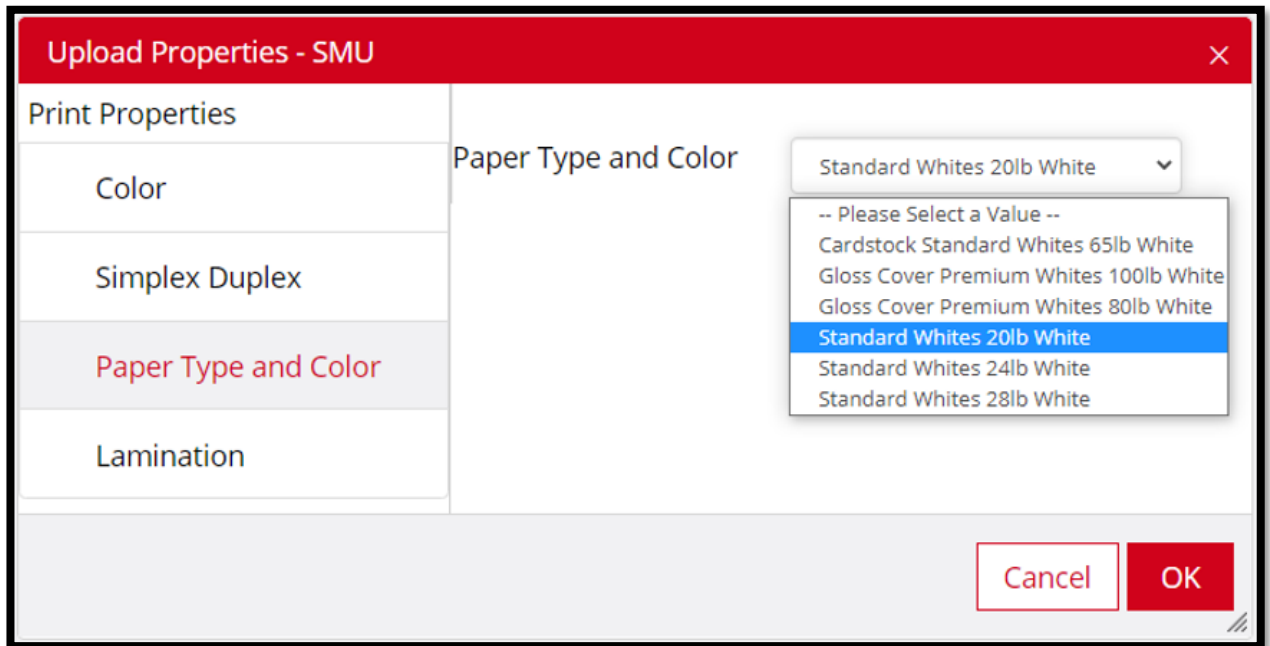
Printed Single-Sided

When the required properties are selected click '**OK**' to confirm.

Click '**Close**' to return to the '**Document Builder**' Page.

The  or  on the '**File Type**' icon is removed.

Update File or Page Properties



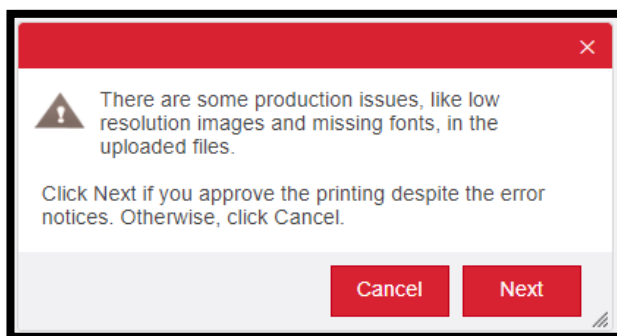
Hover the Mouse over the file's Thumbnail to display the icons.

Click the '**Properties**' icon .

Click each property and check it has a value. Select an option from the drop-down list if required.

Scroll to display the properties at the bottom. When the required properties are set click '**OK**' to confirm.

Click '**Next**' to continue submitting the job.

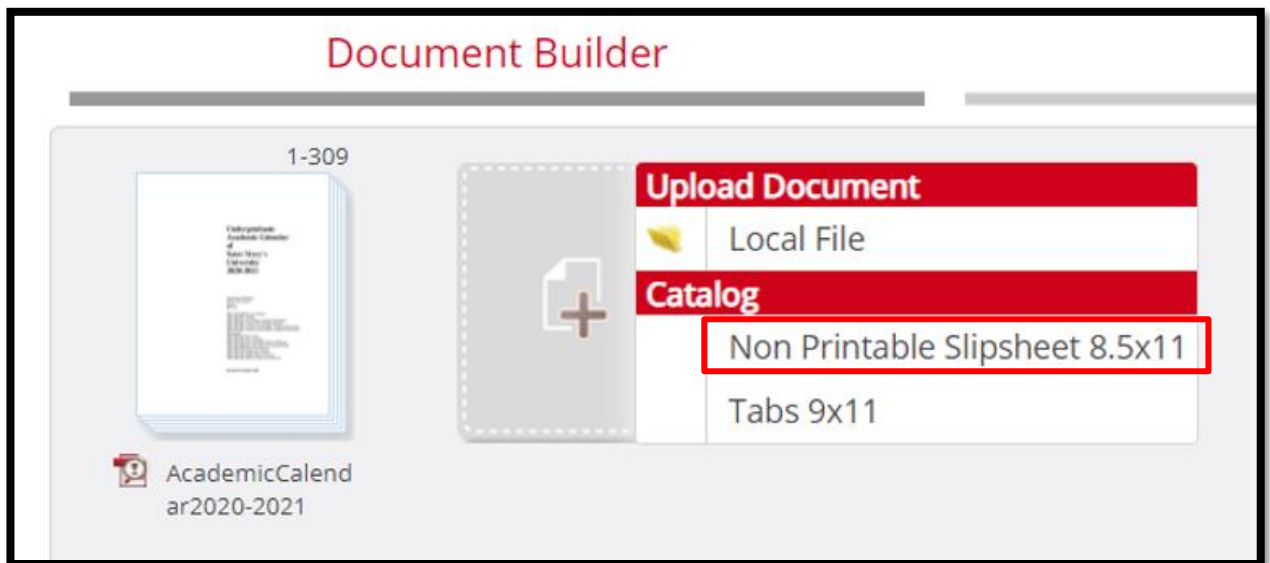


When a job is submitted with defined errors within the job, the application will display a warning message.

Click '**Cancel**' to make corrections. Click '**Next**' to continue to print "As Is".

Add Non Printable Slipsheet 8.5x11

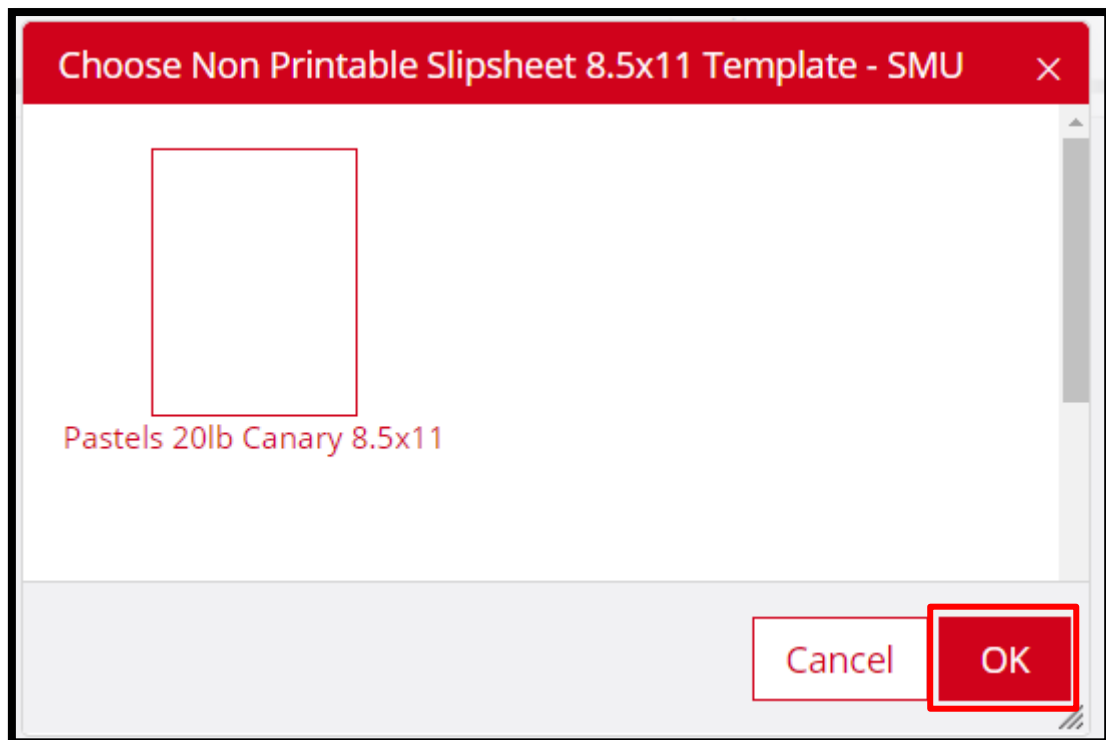
'Slip Sheet': A sheet that is inserted to designate a separation. It could be within a document or at the end of a document.



Set view to **'Page View'**.

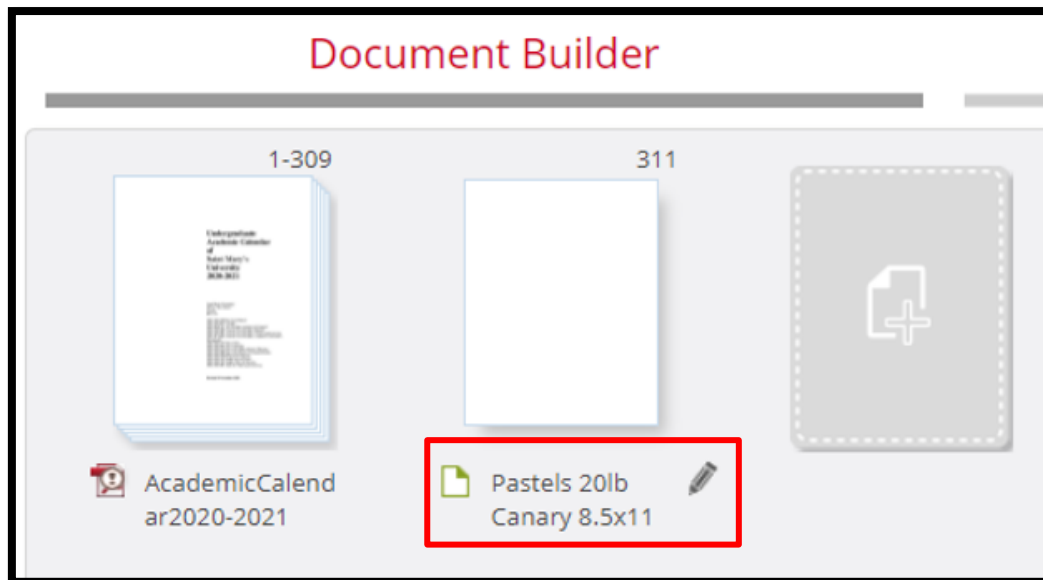
Hover to the left of the page the **'Slip Sheet'** needs to be inserted and click the **'+'**.

Click **'Slip Sheet'**.



Click to select the appropriate **'Slip Sheet'**.

Click **'OK'**.



Hover cursor over the name of the **'Slip Sheet'** added to bring up the pencil to edit the display name of the tab.

Click on the **'Pencil'**.

Enter a meaningful name.

Add Tab Dividers - Method 1 - Catalog Selection – Standalone Order

Tab dividers are used to divide the document into smaller sections with Tabs at the side to aid navigation to a section.

Tabs 9x11 5 Bank

CustomizeFinalize


Tab 1

Tab 2

Tab 3

Tab 4

Tab 5



Page 1

[Refresh Preview](#)

[Next](#)

Select the **'Print on Demand'** tile.

Select **'Tabs'**.

Enter tab labels.

Click **'Refresh Preview'**.

Note: If additional tab labels are needed with different text, repeat ordering as necessary for tabs needed after adding this request to the **'Cart'**. If multiple quantities of tabs with the same labels, enter quantity on the next page.

Click **'Next'**.

Enter requirements as needed.

Note: If changing to color, indicate color required in the **'Special Instructions'** textbox on the next page.

View Proof. If changes needed, click **'Back'** or change requirements. To proceed, click in the checkbox for **'Proof is Approved'**.

Click **'Add to Cart'**.

Refer to section **'10 Shopping Cart – Summary of Products Selected'** for details.

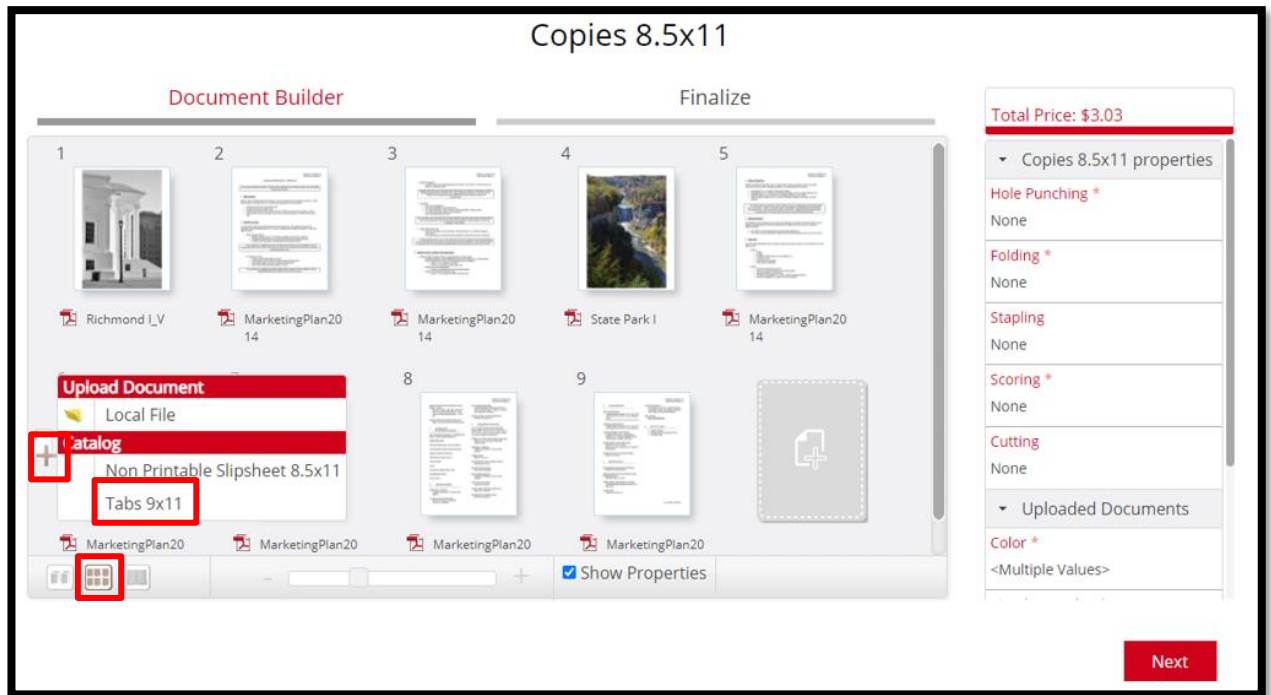
Add Tab Dividers - Method 2 - Adding Tabs in 'Document View' or 'Page by Page View'

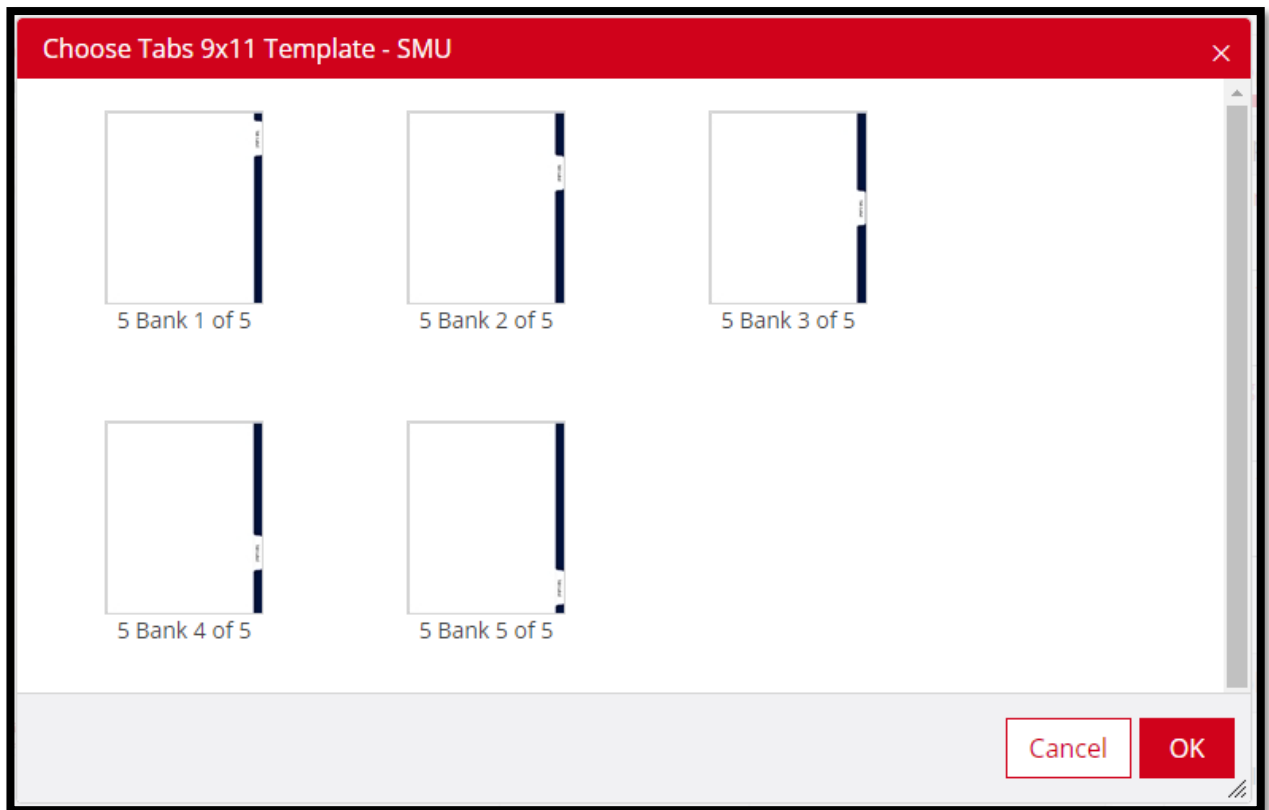
Tabs (dividers) can be added within a document. Based on the view, the tabs are either added within the uploaded file(s) (**Page by Page View**) or separate from the file(s) '**Document View**'. Tabs are added one at a time and selected from a '**5 Bank**' set-up.

This example is adding tabs within an uploaded file while within '**Page by Page View**'.

Hover the mouse to the left of where the tab is to be inserted. A '+' sign displays.

Click the '+'.
Click '**Tabs 9x11**'.



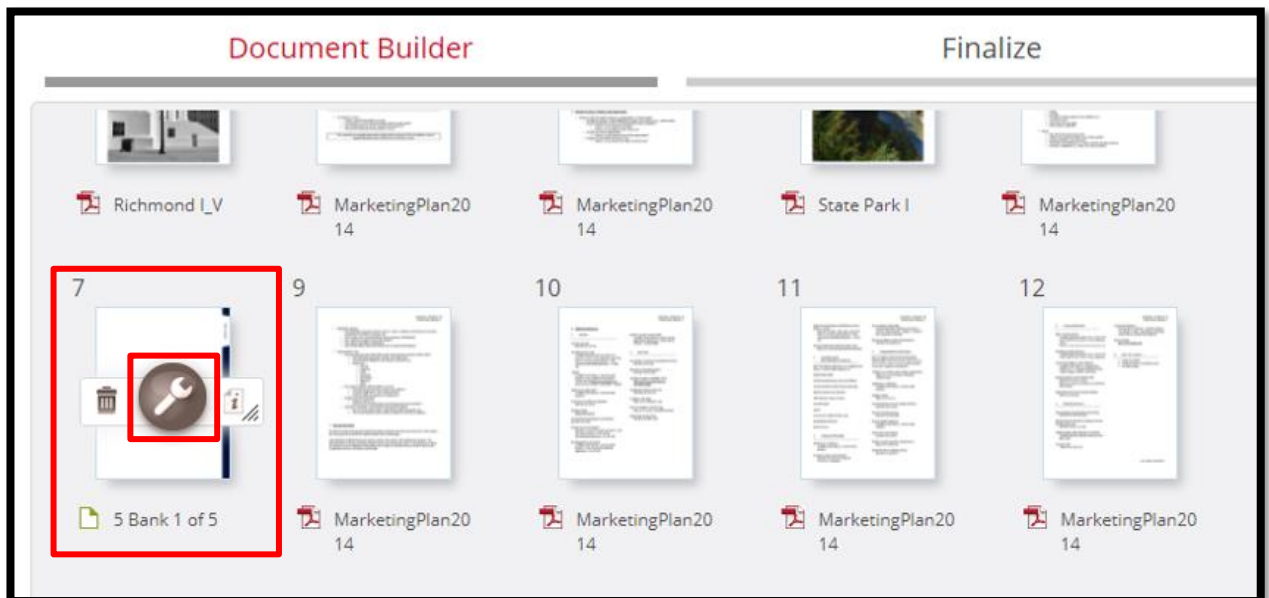


Five tabs display.

'5 bank 1 of 5' is the tab at the top right edge. The tabs proceed down the edge with '5 Bank 5 of 5' being the tab at the bottom right edge.

Select the appropriate tab.

Click 'OK'.

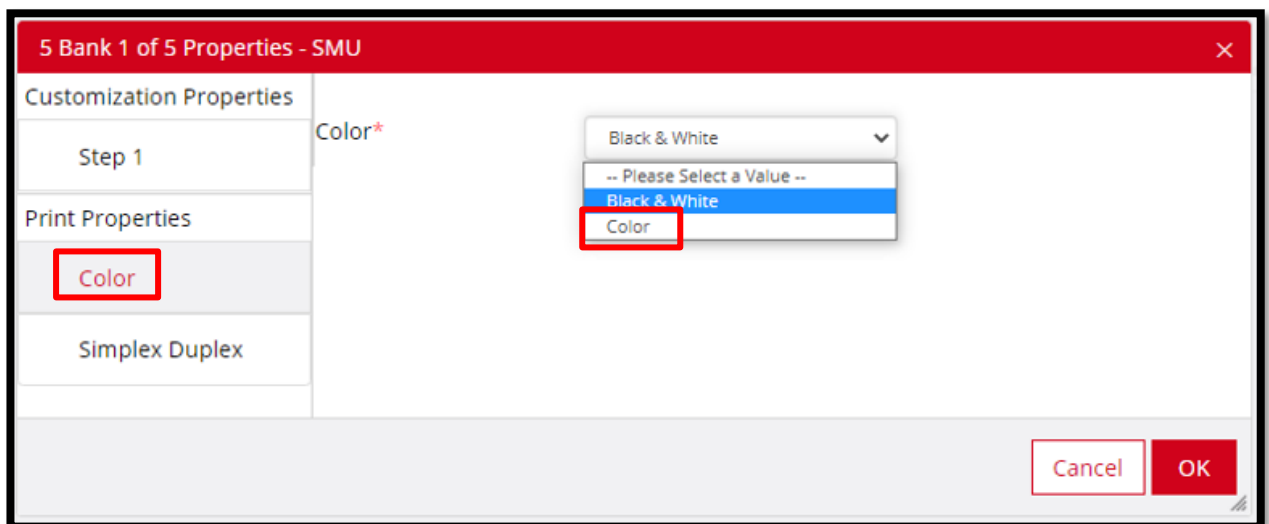


Hover the cursor over the tab and click the wrench to name the tab.



Enter '**Tab Label**'.

Note: Color defaults to '**Black & White**'.

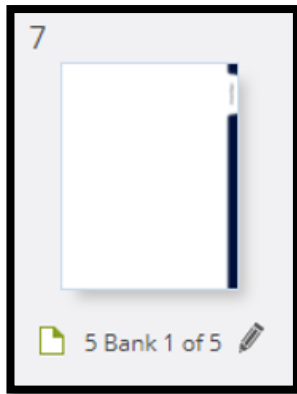


Click '**Color**' to change tab printing from '**Black & White**' to '**Color**'.

Note: If changing to color, indicate color required in the '**Special Instructions**' textbox on the '**Order Final Step**' page.

Click drop-down and select '**Color**'.

Click '**OK**'.



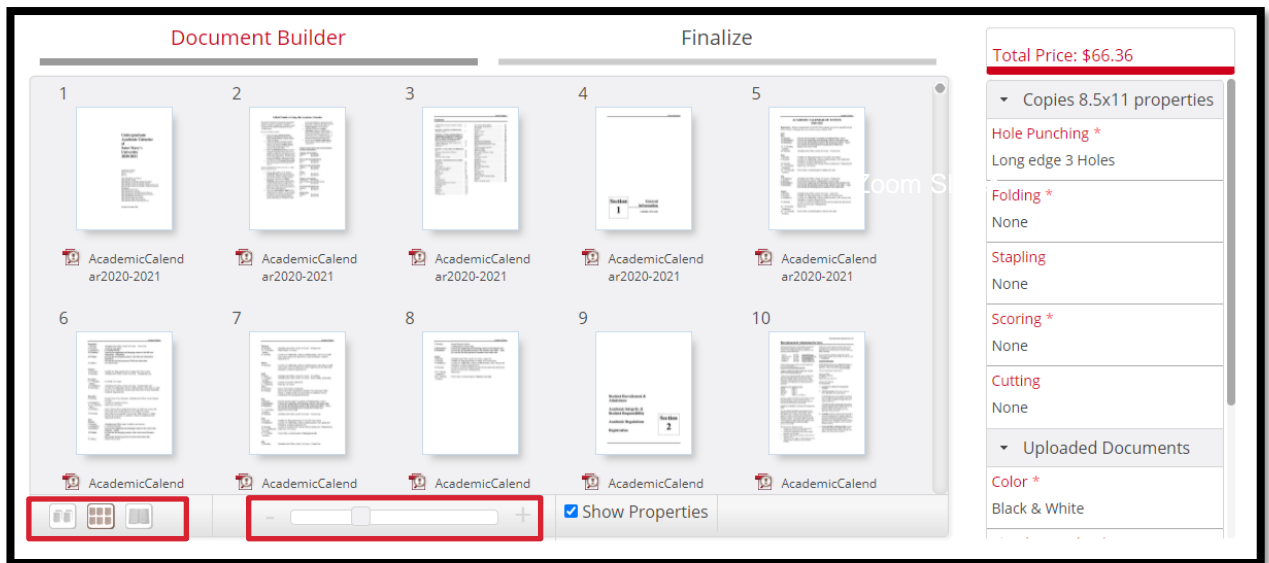
Hover over the text below the tab and edit name if needed.

NOTE: To ensure you can validate which tab was selected without previewing the document, please leave the tab specific information in place. I.e. '1 of 5'.

Repeat to add additional tabs a necessary.

Note: Tab position can be reused.

Review the Layout



The finished document can be manipulated by clicking the icons below:



'Documents view'



'Page by page view'

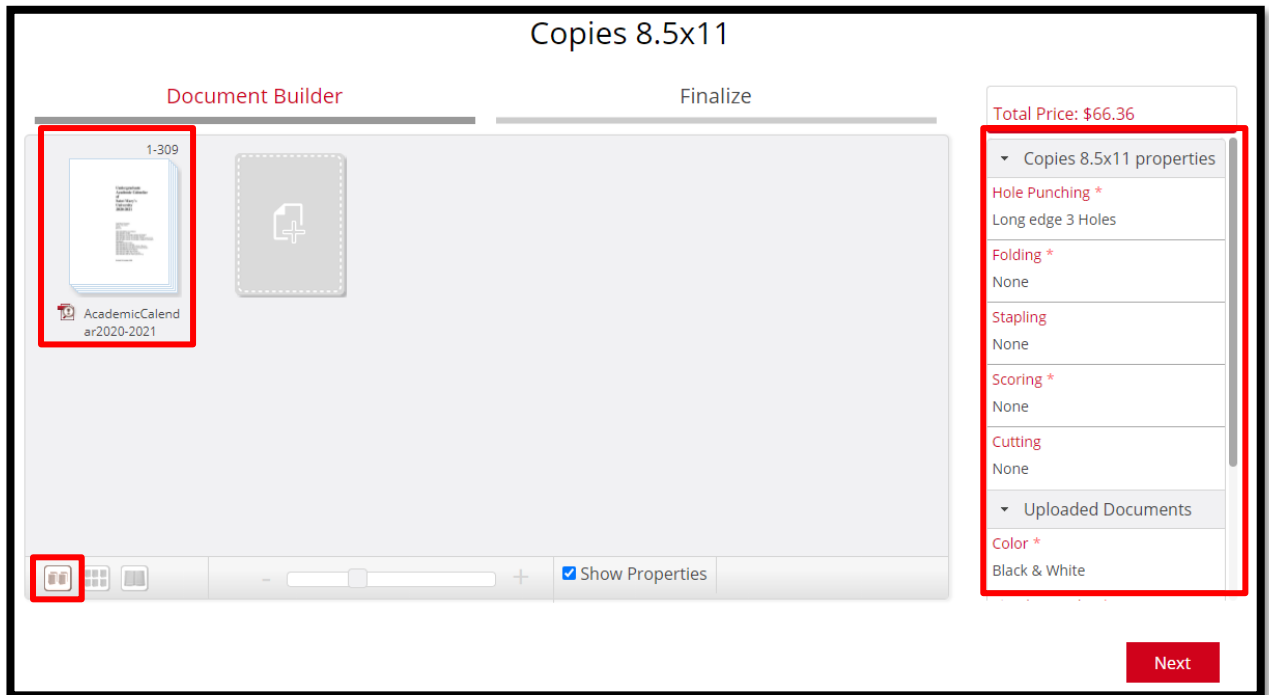



'Preview'

NOTE: The icon for the layout currently selected is highlighted.

The files or pages displayed can be made larger or smaller using the 'Zoom' slider.

Manipulate Files in Documents view



Click the '**Document Views**'  icon to view the files uploaded, Non Printable Slipsheet 8.5x11 and Tabs 9x11.

NOTE: This is the default view.

Click the '**Booklet**' icon to upload more '**files**', '**Non Printable Slipsheet 8.5x11**' and '**Tabs 9x11**'.

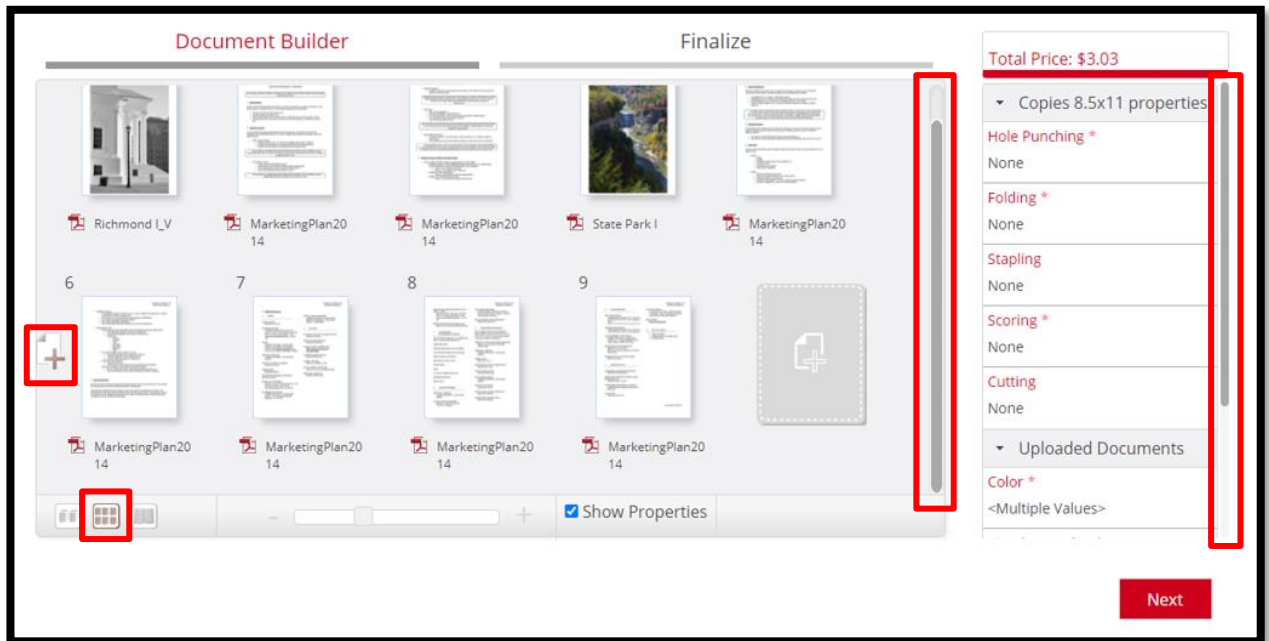
Note: When added in '**Documents View**', the additions are at the end of the previously added components.

To add '**Slipsheet**' or '**Tabs**' within the file itself, switch to '**Page by Page View**'.


Each tile displays a Thumbnail of the file with the file name displayed below and the page numbers it will occupy in the finished document displayed above. Tab dividers have a label on the Tab at the side.

To rearrange left click a file, '**Tab**' divider or '**Slipsheet**', holding the Mouse button down move the cursor to the position required. Hold it there until an empty space is displayed to move the item into.

Manipulate Pages in Page by page view

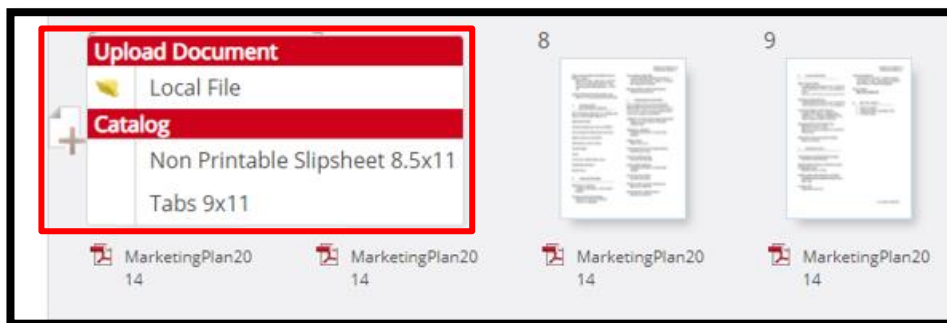


Note: In the example above, three files were uploaded, 'Richmond I_V', 'State Park I' and 'MarketingPlan2014'. While being 3 individual files, when printed, they are printed as a single document.

Click the 'Page by page view'  icon to view a Thumbnail for each individual page, Non Printable Slipsheet 8.5x11 or Tab 9x11.

To insert a new 'file', 'Non Printable Slipsheet 8.5x11' or 'Tab 9x11' within a document, hover the mouse to the left of the page where you want to insert and a '+' displays.

Click the '+' to display options available.



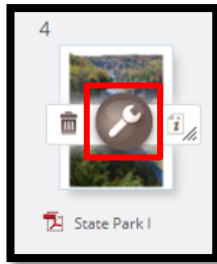
Select appropriate option.

Each page Thumbnail has the file name it originated in displayed below and the page number it will occupy in the finished document are displayed above.

To rearrange the pages, 'Non Printable Slipsheet 8.5x11' or 'Tab 9x11', left click a page, 'Slipsheet' or 'Tab' divider and holding the Mouse button down move the cursor to the position required. Hold it there until an empty space is displayed to move it into.

NOTE: Pages can be moved between files of different types.

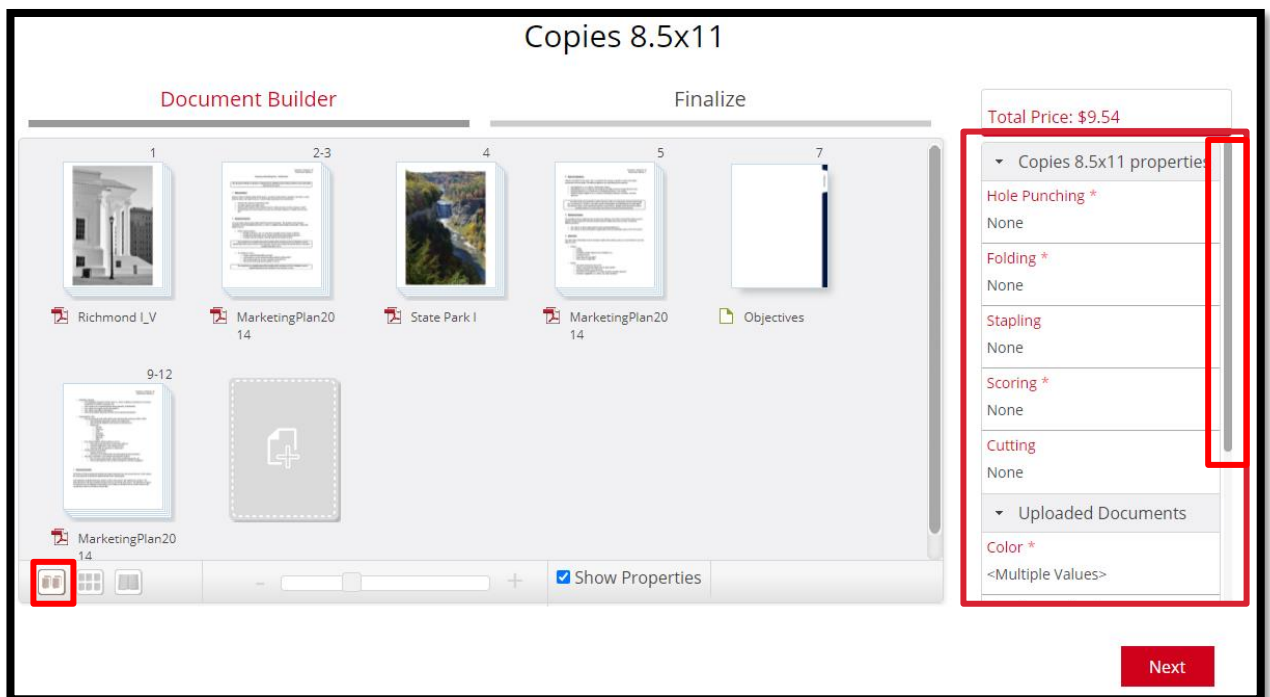
To display and modify properties for a given page, hover the mouse over the page and click on the wrench.



The properties that are modified apply to this page exclusively and does not affect any of the other pages in the 'Document Builder'.

Update Finished Document Properties

The properties for the finished document may be different to the component files.



Note: View is set to 'Document View'.

The 'Finished Document Properties' are displayed on the right of the 'Document Builder'.

Total Price: \$9.54

▼ Copies 8.5x11 properties

Hole Punching *

None

Folding *

None

Stapling

None

Scoring *

None

Cutting

None

▼ Uploaded Documents

Color *

<Multiple Values>

Click each 'Print Property' to display the options selected below. Check they have the correct value. Click the 'Print Property' again to close the options.

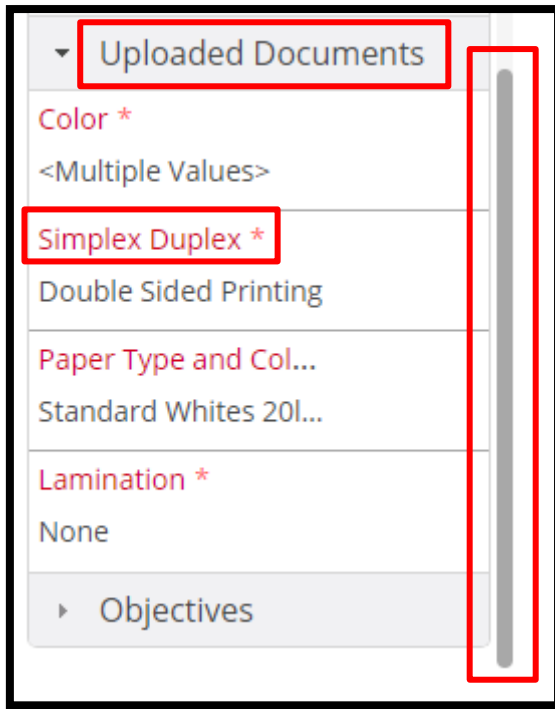
Copies 8.5x11 Properties - SMU

Print Properties

Hole Punching	Hole Punching*	None
Folding		
Stapling		
Scoring		
Cutting		

Cancel OK

To modify a property, click an option to display the 'Upload Properties' Pane.



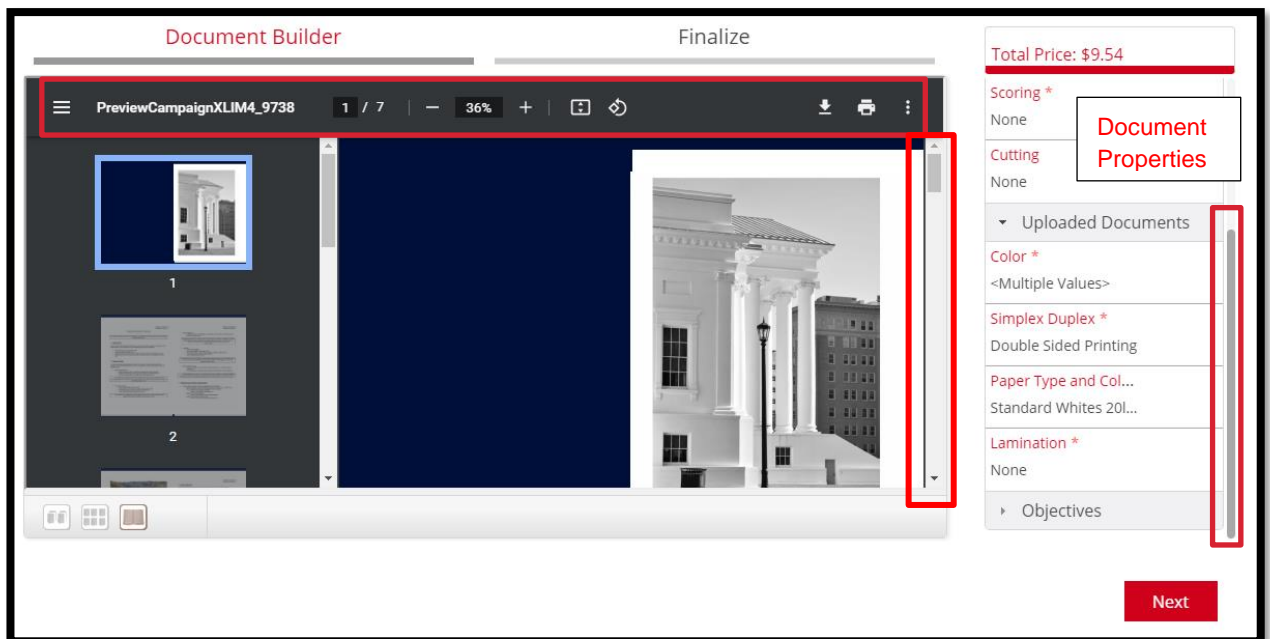
NOTE: The default printing setting is double-sided and 'Black & White'.


To change print setting, click on 'Simplex Duplex' under 'Upload Documents'.

The 'Upload Properties' for this document has been modified. 'Color*' is set to '<Multiple Values>' due to being a mix of 'Black & White' and 'Color' pages.

Update the options required and click 'OK'.

Preview the Finished Document



The finished document is reviewed by clicking the 'Preview' icon  to create a PDF. The PDF is displayed using the properties selected, so you can see exactly what the finished document will look like.



Use the 'Scroll Bar' to move between Pages.

To change the image size hover the cursor over the PDF to display the commands and click  or  to make the image larger or smaller, or click  for 'Fit to width'.

Check the layout and properties meet your requirements.

Update the '**Finished Document Properties**' on the right of the '**Document Builder**' if required.

NOTE: The '**Preview**' is updated to show the changes selected.

Or click the '**Documents view**'  icon or '**Page by page view**'  icon to exit the PDF and make the required changes.

Refer to the section '[Check File or Page Preflight Status](#)' or the section '[Update File or Page Properties](#)' for details.

Click the '**Preview**' icon  to display a PDF with the changes selected.

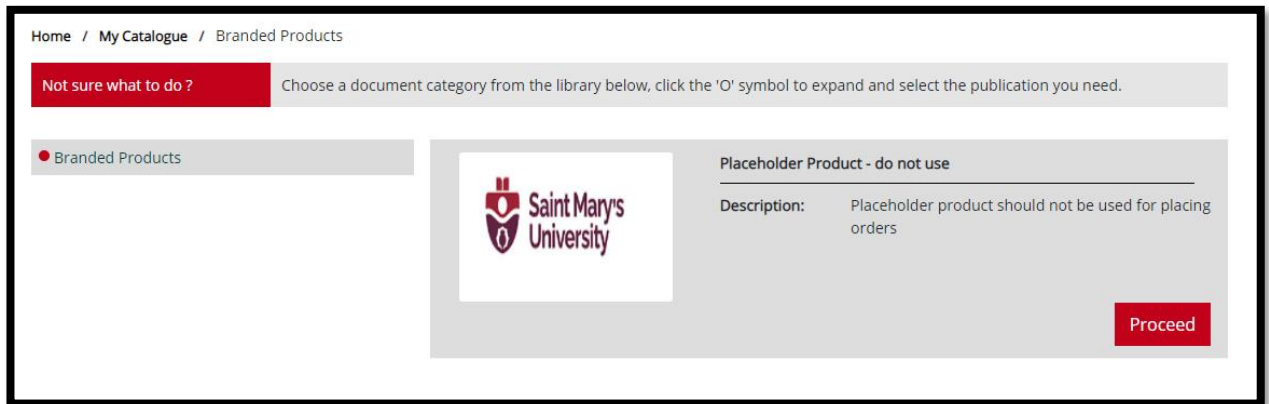
When the finished document meets your requirements click '**Next**' to proceed.

Refer to section '[9 Order Final Step - Enter Product Requirements](#)' for details.

7. Branded Products

'**Branded Products**' are for ordering St. Mary's University specific products.

Click the '**Branded Products**' tile on the '**Home**' screen.

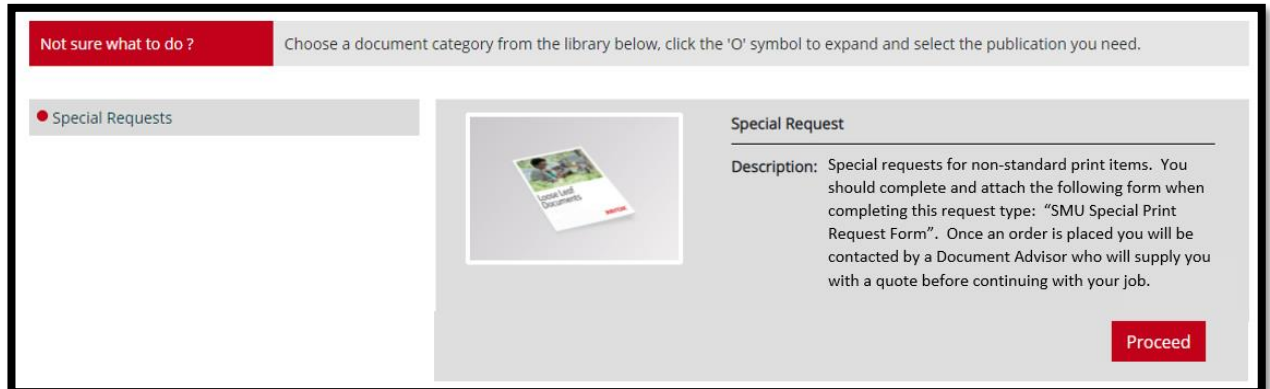


Click '**Proceed**' for item being requested.

8. Special Request

This is used for ordering items that are not defined within the catalog. Prior to selecting this item, please ensure that you have completed '**SMU Special Print Request Form**'. This will need to be uploaded with the request.

Click '**Special Request**' tile on '**Home**' screen.



Click '**Proceed**'.

Enter requirements.

Upload file(s). Supported files: *.PDF, *.PPT, *.PPTX, *.DOC, *.DOCX, *.EPS, *.EPSF, *.JPG, *.JPEG, *.XLSX, *.ZIP

Note: Multiple files can be uploaded at one time. If multiple specifications are required for the print job, attach a detailed file with the information.

The form '**SMU Special Print Request Form**' must be included.

Click '**Add to Cart**'.

Important: The selection of '**Special Request**' is configured to be checked out without items from any other category. This is enforced by system rules in the '**Shopping Cart**'.

- No actual pricing is available until after the Print Shop reviews the order and prices it.
 - The initial price is set to CAD 0.01 as this triggers the entering of '**FOAP**' at checkout.
 - Do not adjust this price.
- To apply the pricing to the item, the Print Shop will '**Cancel**' your initial order. The following then occurs:
 - You receive an email notifying you of the cancellation of this order.
 - The order is returned to your '**Shopping Cart**'.
 - The Print Shop is logged into the system as you and they will '**Edit**' the item adding the price as well as any other adjustments that are necessary.
 - **The Print Shop does not checkout the order.**
- Fifteen minutes **after** you receive the cancellation email, login and go to your shopping cart.
 - If the price is acceptable to you, commence the '**Checkout**' process.
 - If the price is unacceptable:
 - Click the 'X' to remove the item from your '**Shopping Cart**'.
 - If the item is still needed, submit a new order with modified specifications to address the price concerns.
 - **PLEASE VALIDATE SHIPPING ADDRESS DURING CHECKOUT PROCESS**

9. Order Final Step - Enter Product Requirements

'Order Final Step' will vary dependent on the product being ordered.

Home / My Catalogue / Order final step

Copies 8.5x11

Quantity: Items

Special Instructions

Time Zone (GMT-05:00) EST (US & Canada)

Standard 06/30/2021 11:23

Negotiated (Requires Approval of Production Team. 8am to 5pm - Monday to Friday as working hours)

Note: The Standard due date and time displayed above will update when the order has been submitted and again upon approval if approval is required. The Negotiated due date and time entered requires approval by the production team. Please note that the date and times do not include shipping from the Print Center.

Total Quantity:	13
Delivery Price:	Will be added to order when job is completed
Total Price:	\$10.63 CAD

Proof Proof is approved *

Check the product details to make sure this is the correct product.

Enter the 'Quantity' required.

Enter a message for the Print Room in 'Special Instructions'.

Select the appropriate due date.

Note: To determine an appropriate '**Negotiated**' date, contact your Account Advisor by sending an email to: **SMUPrint@xerox.com**

Click '**Recalculate**' if you modified '**Quantity**' to calculate the cost exclusive of shipping.

As '**Print on Demand**' products are specified by the user, confirmation is required that the final product has been checked.

To view the final product, click '**Proof**' to generate a PDF. This is a preview and not an actual proof.

Scroll through and check it meets your requirements.

Click away from the PDF to close it.

Click the '**Proof is approved**' tick box to confirm the final product is checked and meets requirements.

If changes are required, click '**Back**' to return to the previous Page.

Click '**Add to Cart**' to place the Order in the '**Shopping Cart**'.

Click '**Continue Shopping**' or '**Checkout**' to process your Order.

Refer to section '**10 Shopping Cart – Summary of Products Selected**' for details.

10. Shopping Cart – Summary of Products Selected

The **'Shopping Cart'** is a summary of all products selected. This provides the opportunity to revise the Order before **'Checkout'**.

IMPORTANT:

'Copies' must be submitted by themselves. This example has mixed items including **'Copies'**. The focus will be checking out the **'Copies'**. The **'Checkout'** button is disabled due to this mix in the cart. To enable the checkout button, the cart needs to be configured that only **'Copies'** are in the cart. The following options are available:



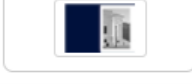
- Uncheck the checkbox to the left of an item to not include in this order. After submitting the initial order, go back to the **'Shopping Cart'** and recheck the checkbox and checkout the remaining items in the order*.
- Move an item(s) to checkout later will allow checking out of the copies.

* **'Special Request'** orders also must be checked out by itself.

Shopping Cart

Shopping Cart Items - To Check Out Now

Check Out Now


<input checked="" type="checkbox"/> Select all	Name	Units	Price	
<input checked="" type="checkbox"/>	 Copies 8.5x11 AcademicCalendar2020-2021 Details Edit	Total: 13 Items	\$66.36 CAD	×
<input checked="" type="checkbox"/>	 Pads 8.5x11 St. Marys Campus Map Details Edit	Total: 5 Items	\$2.90 CAD	×
<input checked="" type="checkbox"/>	 Copies 8.5x11 Richmond LV Details Edit	Total: 13 Items	\$10.63 CAD	×

Xerox Copies products cannot be ordered with other products. It must be ordered separately.

Subtotal \$79.89 CAD


[Continue Shopping](#) [Checkout](#)

Saved Items - To Check Out Later

Name	Units	Price	
 Booklets 8.5x11 MarketingPlan2014 Details	Total: 10 Items	\$2.71 CAD	×

IMPORTANT:

- If the order has been in the **'Cart'** for more than a day, the item needs to be edited to reset the Service Level. Click **'Edit'**.

The **'Shopping Cart'** is displayed after selecting a product and clicking **'Add To Cart'** or by clicking the **'Shopping Cart'** icon  at the top right of the Page. The **'Shopping Cart'** contains products in two lists:

Shopping Cart - To Check Out Now

Products are included in the Order when **'Checkout'** is clicked.

NOTE: To save an item for later checkout, click the **'Cart'** icon to the left of the item name.

Products may be selected:

- For **'Reorder'** in **'Order History'**.
- From **'My Catalogue'**.

- **Saved Items - To Check Out Later**

Products remain in the **'Shopping Cart'** when **'Checkout'** is clicked.

They may be deleted or moved into the **'Shopping Cart - To Check Out Now'** list when you are ready to order.

NOTE: To move a **'Saved'** item into the current **'Shopping Cart'**, click on the **'Cart'** to the left of the item name.

To add another product to the **'Shopping Cart'**, click **'Continue Shopping'** and select another product.

Or modify the contents of your **'Shopping Cart'** and click **'Checkout'** to finalize the Order and proceed to **'Checkout'**.

Processing Products in 'Shopping Cart Items - To Check Out Now'

Products in this list are included in the Order when '**Checkout**' is clicked.

Shopping Cart

Shopping Cart Items - To Check Out Now

Select all


	Name	Units	Price
<input checked="" type="checkbox"/>	<div style="border: 1px solid red; padding: 2px;"> Copies 8.5x11 AcademicCalendar2020-2021 Details Edit </div>	Total: 13 Items	\$66.36 CAD
<input checked="" type="checkbox"/>	<div style="border: 1px solid red; padding: 2px;"> Copies 8.5x11 Richmond I_V Details Edit </div>	Total: 13 Items	\$10.63 CAD

Subtotal \$76.99 CAD

The following options are available:

Icon	Function	Use
Product Thumbnail	To identify the product. This may be a larger version of the Thumbnail, a Proof or an Order Confirmation.	Click the Thumbnail to display the product. Click the X at the top right of the Window to close the Window.
	Moves the product into the ' Saved Items - To Check Out Later ' list. The product is not included in the Order at ' Checkout '.	Click the ' Check Out later ' icon.
Edit	Return to the product for amending the requirements. Refer to the following sections for details: 'Order Final Step - Enter Product Requirements' . 'Upload the Source Files' . Revise the information and click ' Add to Cart ' to return the product with the amended details to the ' Shopping Cart '.	Click the ' Edit ' icon to return to the product for amending requirements:
X	Delete product.	Click the ' Delete ' X icon to remove it from the ' Shopping Cart '.

Updating Product Changes

Any product marked with  has been changed since it was placed in the 'Shopping Cart'. The 'Shopping Cart' cannot proceed to 'Checkout' until this is resolved, or the product is moved into the 'Saved Items - To Check Out Later' list.







Click the icon to display a 'Tooltip' explaining the issue.

Click 'Edit', update the product, and click 'Add to Cart' to return the product with the amended details to the 'Shopping Cart'.

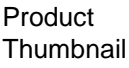


Processing Products in 'Saved Items - To Check Out Later'

Products in this list remain in the 'Shopping Cart' when 'Checkout' is clicked. They are saved for ordering later.

Note: If the order has been in the 'Saved Items - To Check Out Later' for more than a day, the item needs to be edited once moved to the "Cart" to reset the Service Level. Click 'Edit'.

Saved Items - To Check Out Later			
	Name	Units	Price
	 Booklets 8.5x11 MarketingPlan2014 Details	Total: 10 Items	\$2.71 CAD 
	 Pads 8.5x11 St. Marys Campus Map Details	Total: 5 Items	\$2.90 CAD 

The following options are available:

Icon	Function	Use
	To identify the product. This may be a larger version of the Thumbnail, a Proof or an Order Confirmation.	Click the Thumbnail to display the product. Click the X at the top right of the Window to close the Window.
	Moves the product into the 'Shopping Cart - To Check Out Now' list. The product is included in the next Order.	Click the 'Add To Cart'  icon. Once in the 'Cart', click 'Edit' to set the Service Level.
X	Delete product.	Click the 'Delete' X icon to remove it from the 'Shopping Cart'.

Proceed to Checkout

When you have confirmed the products to be included in this Order click 'Checkout' to finalize the Order and proceed to 'Checkout'.

11. Checkout - Order Summary

Addresses are defined in 'My Account > Addresses' to save typing them into Orders. Refer to the section 'Maintain Addresses' for details.

Checkout - Order Summary

Address Details Payment & Submission

Shipping

Select Shipping Address **Send to multiple addresses**

Select from My Shipping Addresses 1300 Nova Scotia Way, E **Add...**

Select From Storefront Address Book

Selected address

Attn: Frank **Edit...**

1300 Nova Scotia Way
Bldg. 13
Halifax, Nova Scotia B3K 4T9
Canada

Order Items

Name	No. of Units
Copies 8.5x11 - AcademicCalendar2020-2021	13 Items
Copies 8.5x11 - Richmond I_V	13 Items

Service
Courier(Additional charges n)

< Back **Next >**

Click 'Select From Storefront Address Book' to use a Preloaded SMU Address.

Shipping Address - SMU

Select an address and click 'OK':

Search: **Find** Clear Search

Contact Person	Company	Address1	Address2	City	State	Country	Zip	Phone	Fax	AddressReference
<input type="radio"/> SMU User	Saint Mary's University	923 Robie Street	abc	Halifax	NS	CA	B3H 3C3	123456	123	a1

Cancel **OK**

Click on an address to select.

Shipping Address - SMU

Select an address and click 'OK':

Search: **Find** Clear Search

Contact Person	Company	Address1	Address2	City	State	Country	Zip	Phone	Fax	AddressReference
<input checked="" type="radio"/> SMU User	Saint Mary's University	923 Robie Street	abc	Halifax	NS	CA	B3H 3C3	123456	123	a1

Cancel **OK**

Click 'OK'.

Address Details Payment & Submission

Shipping

Select Shipping Address **Send to multiple addresses**

Select from My Shipping Addresses 923 Robie Street, abc, H **Add...**

[Select From Storefront Address Book](#)

Selected address

SMU User **Edit...**

Saint Mary's University
923 Robie Street
abc
Halifax, Nova Scotia B3H 3C3
Canada
Address reference: a1

Note: Once added as a 'Shipping Address', preloaded addresses will be saved within 'My Shipping Addresses' and can be edited.

Edit the Displayed Address

Click 'Edit' to amend the address displayed.

Amend the address and click 'Submit' to confirm.

NOTE: This will amend the address in 'My Account'.

Create a New Address

To use an unlisted address click 'Add' and enter a new set of address details.

NOTE: All required fields are marked with a Red asterisk (*).

The value entered in 'Display name' is listed in the drop-down list when selecting addresses at 'Checkout'.

Click 'Submit' to save the address details to 'My Account' and display this address as the 'Shipping Address'.

Select Shipping Address

Checkout - Order Summary

Address Details Payment & Submission

Shipping

Select Shipping Address **Send to multiple addresses**

Select from My Shipping Addresses 1300 Nova Scotia Way, E **Add...**

[Select From Storefront Address Book](#)

Selected address

Attn: Frank **Edit...**

1300 Nova Scotia Way
Bldg. 13
Halifax, Nova Scotia B3K 4T9
Canada

Name	No. of Units
Copies 8.5x11 - AcademicCalendar2020-2021	13 Items
Copies 8.5x11 - Richmond LV	13 Items

Service

Courier(Additional charges n

Courier(Additional charges may apply)

Pickup at on-campus(Kiosk)

< Back **Next >**

The first '**Shipping Address**' in '**My Account**' and the '**Service**' (delivery time) is automatically selected and displayed.

Select the appropriate '**Service**' from the drop-down list for the delivery method of the order.

Note: If '**Courier**' is selected, charges will be added by the Print Shop when they complete the order.

An alternative address may be selected from the drop-down list.

Refer to section '**Maintain Addresses**' for details.

Send to Multiple Addresses

An Order may have portions shipped to more than one location.

Address Details > Payment & Submission

Send to multiple addresses Cancel multiple addresses shipment

- Shipping addresses
- Items assignment

Select the shipping addresses you wish to ship to

No records to display.

Add new address Add address from list

	Address alias	Contact Person	Country	State	City	Zip	Address	
<input checked="" type="checkbox"/>	Library	SMU Library	Canada	Nova Scotia	Halifax	B3H 3C3	923 Robie Street	Edit
<input checked="" type="checkbox"/>	1300 Nova Scotia Way, Bldg. 13, Halifax, Halifax, B3K 4T9, Canada	Attn: Frank	Canada	Nova Scotia	Halifax	B3K 4T9	1300 Nova Scotia Way	Edit
<input type="checkbox"/>	923 Robie Street, abc, Halifax, Nova Scotia, B3H 3C3, Canada	Updated SMU User	Canada	Nova Scotia	Halifax	B3H 3C3	923 Robie Street	Edit

< Back Edited preloaded address(es) will appear in the list. Next >

Click **'Send to multiple addresses'**.

Click **'Cancel multiple addresses shipment'** to return to the **'Checkout Order Summary'** Page.

To use an unlisted address, click **'Add new address'** and enter a new set of address details.

When multiple Shipping addresses are required click the box for the required address in the address list.

Click **'Next'** to assign a quantity to each address.

Address Details > Payment & Submission

Send to multiple addresses Cancel multiple addresses shipment

- Shipping addresses
- Items assignment

Attach each order item to the relevant shipping address

Unassigned items

Thumbnail	Name	Total Units	Remaining Units	Assign Units	To Address
	Copies 8.5x11 - AcademicCalendar2020-2021	13 Items	13 Items	<input type="text" value="7"/>	SMU Library 923 Robie Assign
	Copies 8.5x11 - Richmond LV	13 Items	13 Items	<input type="text" value="13"/>	SMU Library 923 Robie Assign

Assign all

SMU Library 923 Robie Street, Loyola Residence Room 114, Halifax, Nova Scotia, B3H 3C3, Canada
923 Robie Street, Loyola Residence, Room 114, Halifax, Nova Scotia, B3H 3C3, Canada

Attn Frank 1300 Nova Scotia Way, Bldg 13, Halifax, Nova Scotia, B3K 4T9, Canada
1300 Nova Scotia Way, Bldg. 13, Halifax, Nova Scotia, B3K 4T9, Canada

In **'Assign Units'** enter the quantity required at a specific address.

Select the address from the drop-down list.

Click **'Assign'** to assign the quantity to that address or click **'Assign all'** to assign all entries.
NOTE: An entry is displayed in the **'Assigned'** list for the Shipping address.

Address Details > Payment & Submission

Send to multiple addresses Cancel multiple addresses shipment

1. Shipping addresses
 2. Items assignment

Attach each order item to the relevant shipping address

Unassigned items
 No unassigned items available

Attn Frank 1300 Nova Scotia Way, Bldg 13, Halifax, Nova Scotia, B3K 4T9, Canada
 1300 Nova Scotia Way, Bldg. 13, Halifax, Nova Scotia, B3K 4T9, Canada

Name	Assigned Units	Unassign
Copies 8.5x11 - AcademicCalendar2020-2021	7 Items	Unassign
Copies 8.5x11 - Richmond I_V	7 Items	Unassign

SMU Library 923 Robie Street, Loyola Residence Room 114, Halifax, Nova Scotia, B3H 3C3, Canada
 923 Robie Street, Loyola Residence, Room 114, Halifax, Nova Scotia, B3H 3C3, Canada

Name	Assigned Units	Unassign
Copies 8.5x11 - AcademicCalendar2020-2021	6 Items	Unassign
Copies 8.5x11 - Richmond I_V	6 Items	Unassign

< Back Next >

If any items are unassigned, assign the **'Remaining Units'** to **'Shipping Addresses'**.
 Click **'Unassign'** to remove an allocation and return the product to the **'Unassigned Items'** list.
 Click **'Next'** to do a final **'Shipping'** review and update as necessary.

Address Details Payment & Submission

Shipping
 Select Shipping Address

Cancel multiple addresses shipment
Edit shipments

1300 Nova Scotia Way, Bldg. 13, Halifax, Halifax, B3K 4T9, Canada Edit

Order Items

Name	Assigned Units
Copies 8.5x11 - AcademicCalendar2020-2021	7 Items
Copies 8.5x11 - Richmond I_V	7 Items

Service

Courier(Additional charges n v)

Courier(Additional charges may apply)

Pickup at on-campus(Kiosk)

Library Edit

Order Items

Name	Assigned Units
Copies 8.5x11 - AcademicCalendar2020-2021	6 Items
Copies 8.5x11 - Richmond I_V	6 Items

Service

Courier(Additional charges n v)

Courier(Additional charges may apply)

Pickup at on-campus(Kiosk)

< Back Next >

Click **'Cancel multiple addresses shipment'** to cancel the current multiple shipment configuration.

Click **'Edit shipments'** to make modifications to the multiple shipment configuration.

Click **'Edit'** to make a modification to the address.

Select the appropriate **'Service'** from the drop-down list for the delivery method for each address.

Note: If **'Courier'** is selected, charges will be added by the Print Shop when they complete the order.



Click **'Next'**

Checkout Confirmation and Budget Center Details

Checkout - Order Summary

Address Details > Payment & Submission

Ordered Items

Name	Units	Price
 Copies 8.5x11 AcademicCalendar2020-2021 Details	Total: 13 Items	\$66.36 CAD
 Copies 8.5x11 Richmond I_V Details	Total: 13 Items	\$10.63 CAD

Tax: \$0.00 CAD

Total: \$76.99 CAD

Please enter your account information details

FOAP*	Department*	Percentage*
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

* Note: Fields identified with "*" are mandatory.

[< Back](#)

Checkout button is disabled until required account information is populated

[Checkout](#)

Please enter your account information details

FOAP*	Department*	Percentage*
123456 1234 12345 1234	Marketing	100

* Note: Fields identified with "*" are mandatory.

< Back Checkout

A summary of the Order is displayed.

Review the Order and click '**Back**' to modify the Order if necessary.

Enter '**FOAP**', '**Department**', and '**Percentage**'.

NOTE: The format for '**FOAP**' is: **123456 1234 12345 1234**

More than one '**FOAP**', '**Department**' (alphanumeric), and '**Percentage**' can be used for the order. The '**Percentage**' column must add up to 100.

Click '**Checkout**' to confirm the Order.

Checkout Complete

Saint Mary's University Multi-Channel Engagement Platform xerox™

Home My Catalogue Shopping Cart Frank Search products CAD

Home / My Catalogue / Checkout complete

Order Summary

Your order has been received successfully.
 Order number: **801621**
 We will notify you when your order is ready.

[Print Order Details](#) [Continue Shopping](#)

The Order is submitted and a confirmation '**Order number**' is displayed.

An automated email confirmation is sent summarizing the details.

To print a copy, click '**Print Order Details**' to generate a copy of the Order and click '**Print**'.

To create a new Order, click '**Continue Shopping**' or click a link at the top of the Page.

12. Order History

'Order History' contains every Catalogue Order you placed. It displays the 'Status' of Orders and provides information such as the 'Purchase details' and 'Delivery Details'. A receipt may be printed, and products may be reordered.

Home / My Catalogue / Order history

Order History

Order ID: View: **All orders**
Waiting for Fulfillment
Orders in progress
Shipped orders
Pending payment
Live orders

[Advanced Search](#)
[Clear search results](#)

Order#	Order Date	Total	Status	Actions
801621	6/23/2021	\$76.99	Waiting for Fulfillment	Show receipt Edit Order
190621	6/18/2021	\$4.13 CAD	Waiting for Fulfillment	Show receipt Edit Order
880621	6/18/2021	\$0.15 CAD	Waiting for Fulfillment	Show receipt Edit Order
760621	6/18/2021	\$3.19 CAD	Shipped	Show receipt

Click  in 'Settings' to display the 'My Account' options.

Click 'My Orders' to display a list of Orders.

The list displayed depends on the specific group of Orders selected in 'View' and any search details entered.

Note: 'Pending Payment' and 'Live Orders' are not applicable to SMU.

Refer to the section 'Filter Order History' and the section 'Search Order History'.

To leave 'Order History' click a link at the top of the Page.

View an Order

Order#	Order Date	Total Amount	Status	Actions
801621	6/23/2021	\$76.99 CAD	Waiting for Fulfillment	Show receipt Edit Order
190621	6/18/2021	\$4.13 CAD	Waiting for Fulfillment	Show receipt Edit Order
880621	6/18/2021	\$0.15 CAD	Waiting for Fulfillment	Show receipt Edit Order
760621	6/18/2021	\$3.19 CAD	Shipped	Show receipt

The 'Orders List' displays details of the Order types selected from the 'View' drop-down list or the result of a search.

Orders with a 'Status' of 'Waiting for Fulfillment' have not been started. Clicking 'Edit Order' will return them to the 'Shopping Cart' where they may be amended.

Clicking '**Show Receipt**' will display a receipt. Click '**Print**' to print a copy.

Clicking the '**Order Number**' or '**Status**' will display the Order details.


View Order Details

All Order details are displayed. When a similar Order is required it may be reordered to avoid re-entering the details.

Order Details

Order#: 760621 [Show receipt](#)
Payment details: ONCP - Clearing

Purchase details

	Product	Units	Price
	Copies 8.5x11 MarketingPlan2014 Details	Reorder Total: 10 Items	\$3.19 CAD

Delivery details

	Address	ID	Product Name	No. of Units	Status	Tracking
Delivery 1	SMU Library	28763	Copies 8.5x11 MarketingPlan2014	10 Items	Delivered	Tracking: N/A Pickup at on-campus(Kiosk) Shipping Date: 6/18/2021

Subtotal: \$3.19 CAD
Tax: \$0.00 CAD
Total: \$3.19 CAD

[Back](#)

Click the '**Order Number**' or '**Status**' to display the Order.

Clicking '**Show Receipt**' will display a receipt. Click '**Print**' to print a copy.

Review the '**Purchase details**'.

When a similar product is required click '**Reorder**' to copy all or part of an Order.

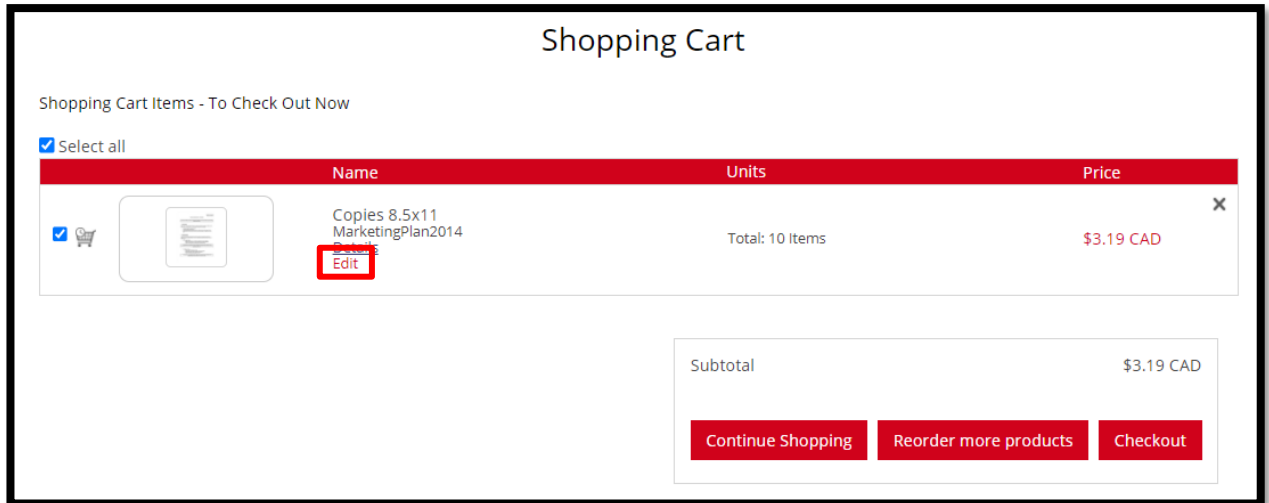
The delivery details are displayed in '**Delivery details**'.

Hover the Mouse cursor over an address name to display the address.

Click '**Back**' to display the '**Orders List**'.

Reordering Products

When a product has been ordered before, all or part of a previous Order can be copied.



In the **'Orders List'** click the **'Order Number'** or **'Status'** to display the Order.

Review the products in **'Purchase details'** and click **'Reorder'** for the product required.

A copy of the product is moved into the **'Shopping Cart'**.

Click **'Reorder more products'** to return to **'Order History'** where more products may be selected. Refer to the section **'Order History'** for details.

To modify the products in the **'Shopping Cart'**:

- Click the **'Delete'** **X** icon to remove a product from the **'Shopping Cart'**.

IMPORTANT: All reorder items need to be edited to reset the Service Level.

- Click **'Edit'** to display product details and reset Service Level. Make additional updates as necessary with the new requirement e.g. the **'Quantity'** may be different. Revise the information and click **'Add to cart'** to return the product with the new details to the **'Shopping Cart'**. Refer to the section **'Shopping Cart – Summary of Products Selected'** for details.
- Click the **'Check Out later'** icon to move the product into the **'Saved Items - To Check Out Later'** list.

Search Order History

To retrieve a specific Order, enter the 'Order Number' into 'Order ID' and click .

Order History

[Advanced Search](#)

Orders List [Clear search results](#)

Order#	Order Date	Total Amount	Status		
801621	6/23/2021	\$76.99 CAD	Waiting for Fulfillment	Show receipt	Edit Order
190621	6/18/2021	\$4.13 CAD	Waiting for Fulfillment	Show receipt	Edit Order
880621	6/18/2021	\$0.15 CAD	Waiting for Fulfillment	Show receipt	Edit Order
760621	6/18/2021	\$3.19 CAD	Shipped	Show receipt	

If the 'Order Number' is not known click 'Advanced Search'.

Order ID:

Date range: From: To:

Shipping Address:

Product:

Search in:

'Advanced Search' parameters display.

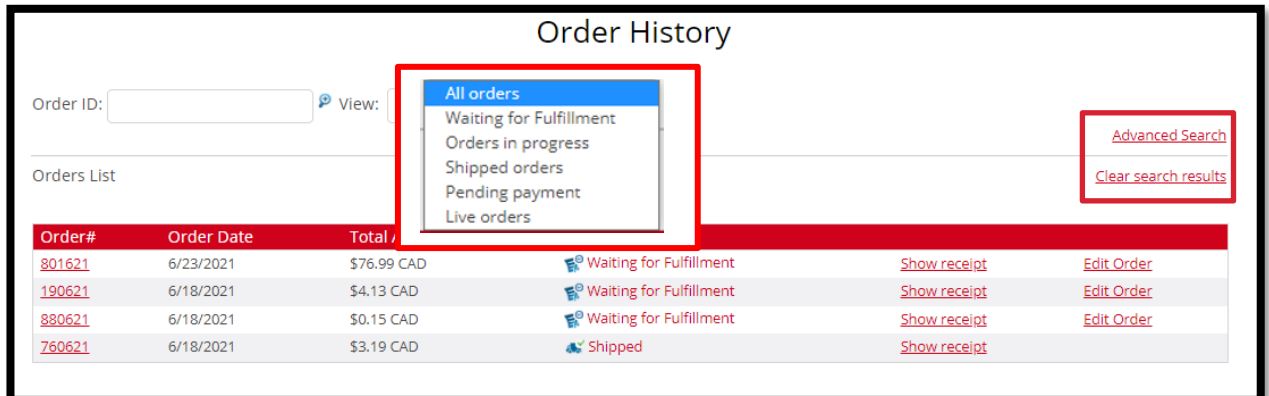
Enter details into the Search fields and click 'Search'.

Clicking 'Clear' will reset the entries.

Clicking 'Clear search results' will display all Orders or 'Simple search' will close the advanced search details.

Filter Order History

The Order list can be filtered to display a specific group of Orders.



The screenshot shows the 'Order History' interface. At the top, there is a search bar for 'Order ID' and a 'View:' dropdown menu. The dropdown menu is open, showing options: 'All orders', 'Waiting for Fulfillment', 'Orders in progress', 'Shipped orders', 'Pending payment', and 'Live orders'. To the right of the dropdown, there are links for 'Advanced Search' and 'Clear search results'. Below the search bar is the 'Orders List' table.

Order#	Order Date	Total	Status	Actions
801621	6/23/2021	\$76.99 CAD	Waiting for Fulfillment	Show receipt Edit Order
190621	6/18/2021	\$4.13 CAD	Waiting for Fulfillment	Show receipt Edit Order
880621	6/18/2021	\$0.15 CAD	Waiting for Fulfillment	Show receipt Edit Order
760621	6/18/2021	\$3.19 CAD	Shipped	Show receipt

Select a group of Orders from the '**View**' drop-down list.

Note: '**Pending Payment**' and '**Live Orders**' are not applicable to **SMU**.

The list is automatically updated.

Clicking '**Clear search results**' will display all Orders.

13. Draft Orders

When selecting a product is interrupted or a link is clicked to move to another area, the product is saved in the **'Drafts'** folder. It may be retrieved later, and the Order completed. Depending on the point in the process the **'Draft'** is created, an attached file may or may not be included in the **'Draft'**. The file is included if the **'Draft'** is saved on the **'Order Final Step - Enter Product Requirements'** page.

The screenshot shows a web interface titled "Draft orders". It is divided into two main sections: "Last Draft Orders" and "Saved Draft Orders".

Last Draft Orders: This section contains a table with two rows. Each row has a "Delete" icon (X), a "Continue" icon (right arrow), a "Save" icon (floppy disk), a product image, a "Product Name", and a "Creation Date".

Delete	Continue	Save	Product Name	Creation Date
			8.5x11 Bound Document	6/22/2021 12:51:06 PM
			Copies 8.5x11	6/21/2021 12:42:21 PM

Saved Draft Orders: This section contains a table with one row. It has a "Delete" icon (X), a "Continue" icon (right arrow), a "Save" icon (floppy disk), a "Product Name", a "Description", and a "Creation Date".

Delete	Continue	Save	Product Name	Description	Creation Date
			Special Request	Special request for Fall Program	6/21/2021 10:26:35 AM


Click  in **'Settings'** to display the **'My Account'** options.


Click **'Draft orders'** to display a list of Orders.

Draft Orders are displayed in the **'Last Draft Orders'** list.


Click the **'Delete'** icon  to remove a product.

Click **'OK'** to confirm.

Click the **'Continue'** icon  to continue ordering the product.

Click the **'Save'** icon  to move the product into **'Saved Draft Orders'** list.

Enter a **'Description'** to remind you why the product is being kept.

NOTE: Products can be retrieved by clicking the **'Continue'** icon .

To leave **'Draft orders'** click a link at the top of the Page.

14. Recipient Lists

Not Used by SMU at this time.

Recipient Lists are sets of details which are inserted into specific dynamic products e.g. a **'Course Certificate'** template would use a Recipient List containing the Course date, title, and attendees.

Recipient Lists are managed in **'My Account'**.

Click  in **'Settings'** to display the **'My Account'** options.

Click **'Recipient list'**