



# CRM & Orders Primer



# CRM:

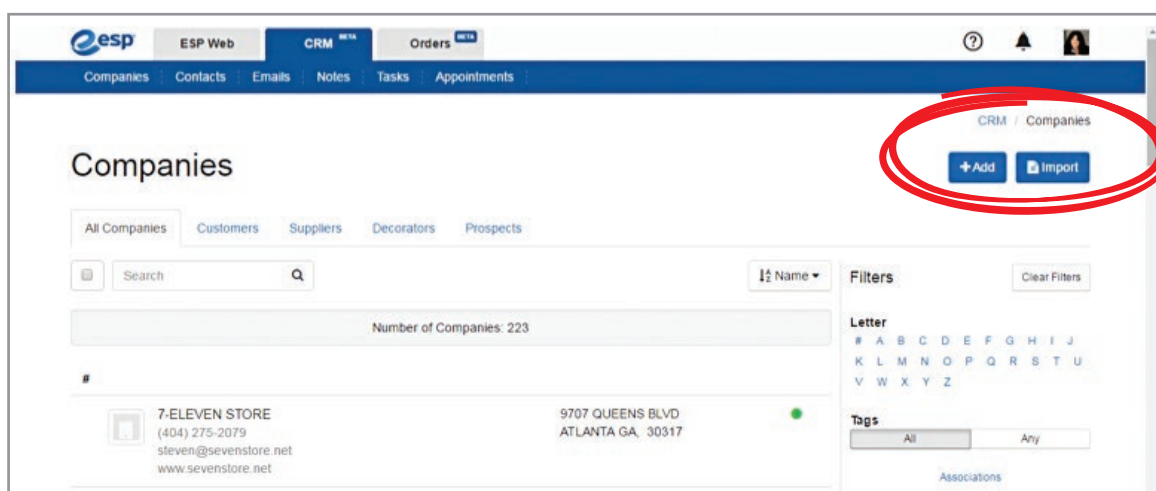
The ESP® CRM (Customer Relationship Manager) keeps all your important contacts, like prospects, customers, suppliers, decorators or any company or person, in one place.

CRM houses all of the standard contact information you would expect (name, company, addresses, telephone numbers) as well as all your notes, tasks, emails, presentations and orders associated with each contact, giving you a complete history at a glance.

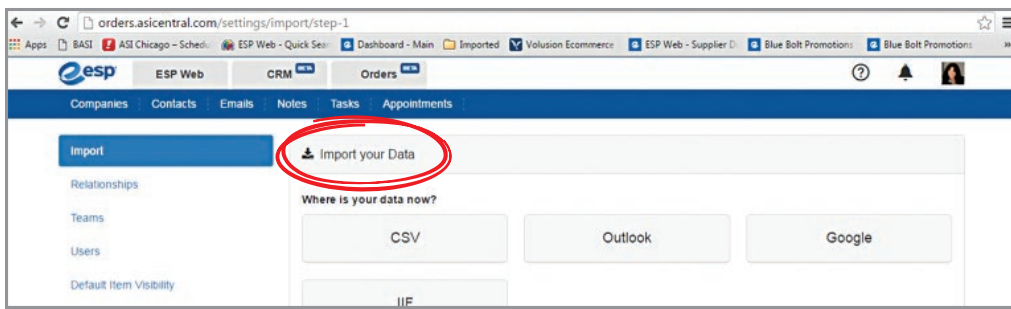
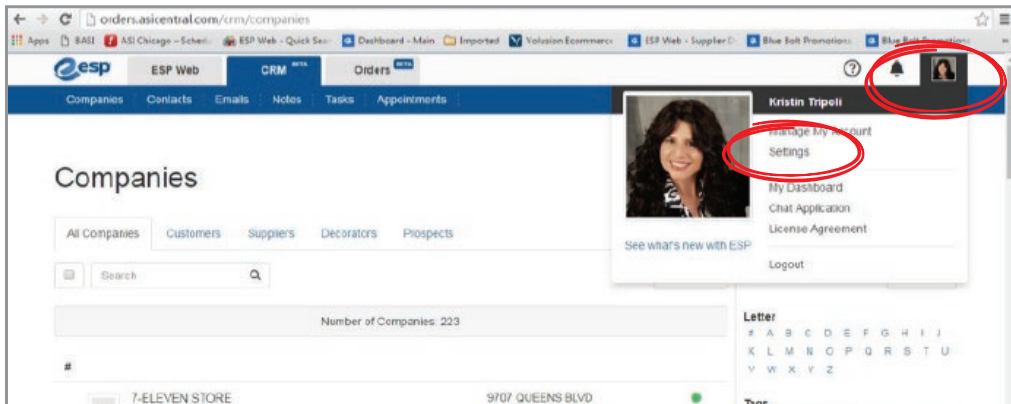
## Here's how it works:

### Adding Contacts

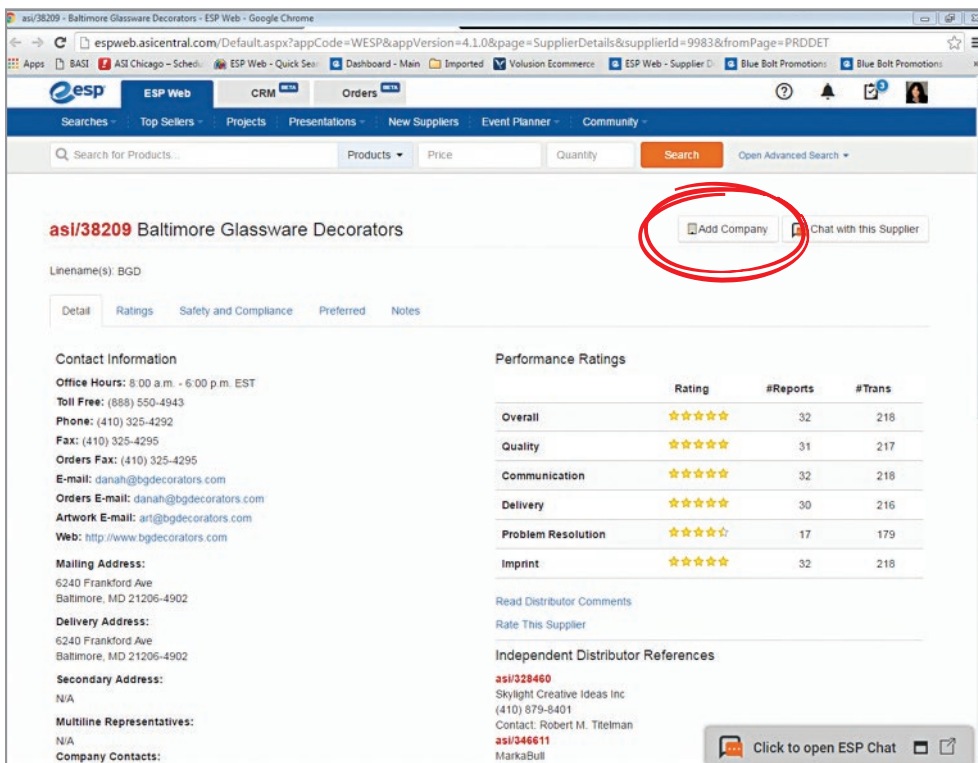
1. Current ESP Web® users will find that their preferred vendors and clients (all those associated with Projects and Presentations) have been automatically uploaded into CRM for them.
2. To begin adding a new contact, start with the blue “Add” button located in the top right corner. Want to add multiple contacts? No sweat! Use the blue “Import” button to add multiple contacts simultaneously from a CSV, Outlook, Google or IIF file.



- You can also upload contacts to your CRM from a CSV, Outlook, Google or IIF file by clicking on the "CRM" tab, going to the "User" icon in the top right corner, clicking on "Settings" and clicking on the appropriate buttons in the "Import" menu.

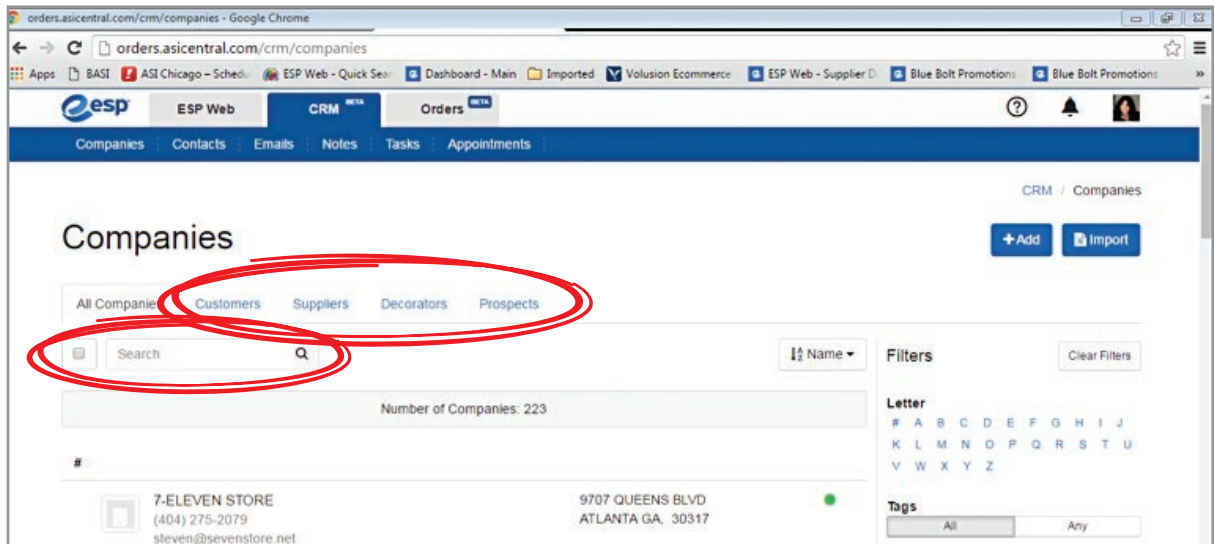


- Suppliers can be added directly from ESP® by going to the Supplier Detail page and clicking on "Add Company" in the top right corner.

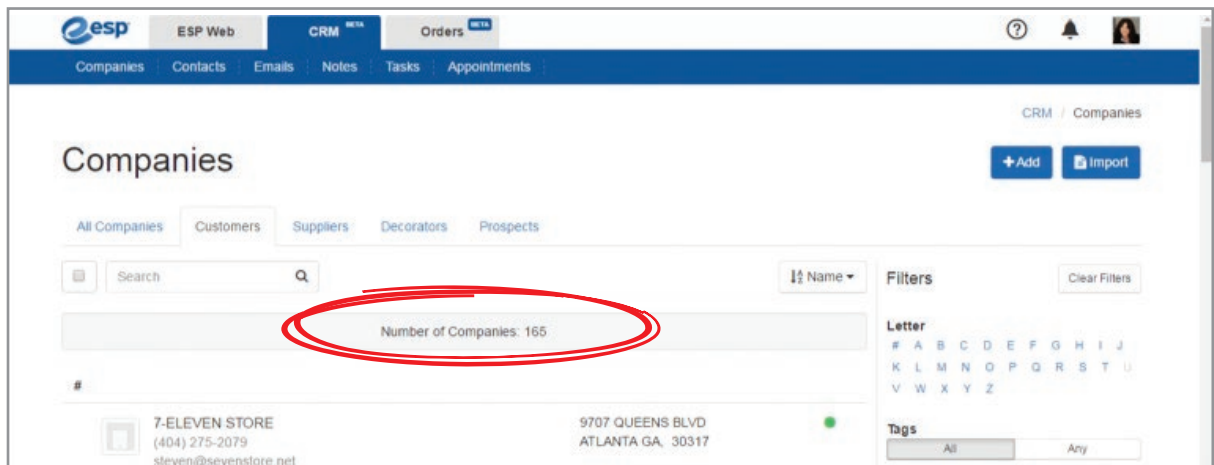


# Navigating Within CRM

1. Search for companies by using the Search box, or by clicking on the appropriate tabs (Customers, Suppliers, Decorators, Prospects).

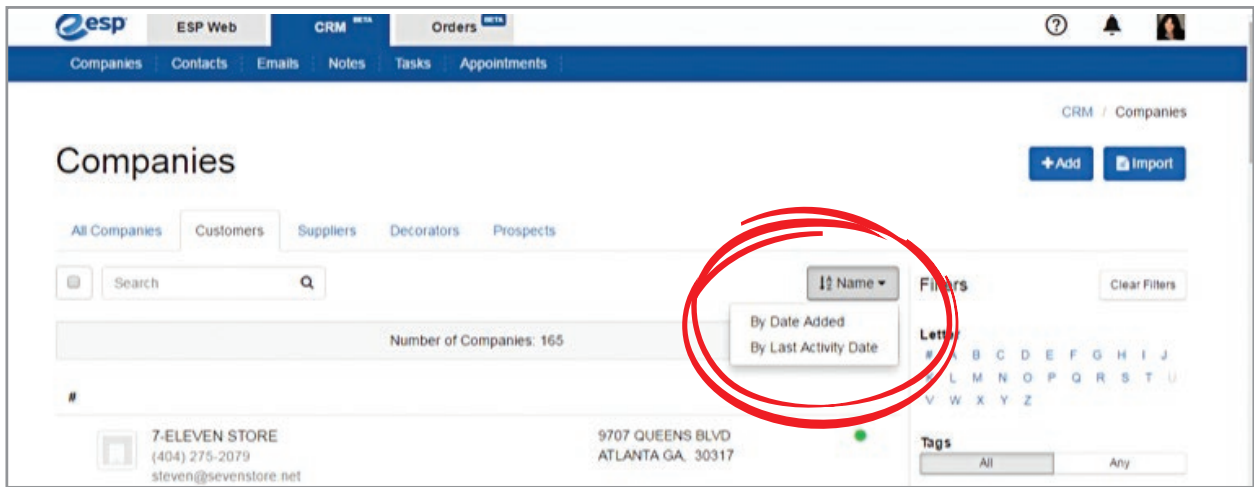


2. Clicking on each tab (Customers, Suppliers, Decorators, Prospects) displays the number of contacts in each area.

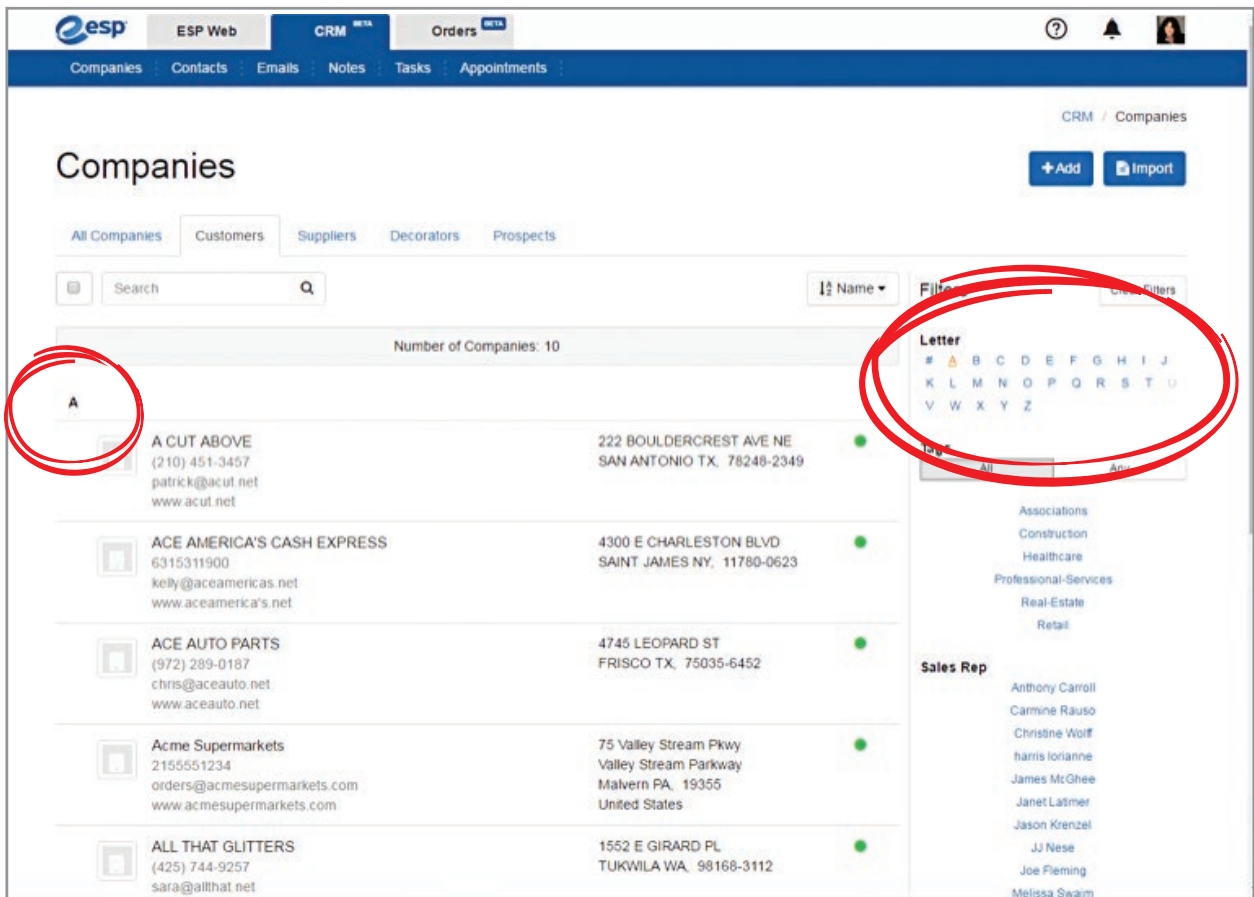














3. You can filter results by Date Added or Last Activity Date.




4. Click on a letter and all contacts beginning with that letter appear.



5. You can also search by sales rep. Simply click on a name under the Sales Rep field and all contacts associated with that person will appear.

	Acme Supermarkets 2155551234 orders@acmesupermarkets.com www.acmesupermarkets.com	75 Valley Stream Pkwy Valley Stream Parkway Malvern PA, 19355 United States		<b>Sales Rep</b> Anthony Carroll Carmine Rauso Christine Wolff harris Iorianne James McGhee Janet Latimer Jason Krenzel JJ Nese <b>Melissa Swaim</b> Rob Rawson Robin Smith Susan Hulme Theresa Pride
	ALL THAT GLITTERS (425) 744-9257 sara@allthat.net www.allthat.net	1552 E GIRARD PL TUKWILA WA, 98168-3112		
	AMERICAN CAB 9493367266 wade@americancab.net 9493367266	391 BOLTON RD RANCHO SANTA MARGARITA CA, 92688-2878		
	ANTIQUES & MORE (661) 968-9396 eric@antiquesmore.net www.antiquesmore.net	418 S TEXAS BLVD DELANO CA, 93215-3514		
	APOSTOLIC ASSEMBLY OF THE FAITH IN CHRIS (951) 456-2754 louis@apostolicassembly.org www.apostolicassembly.org	PO BOX 235 NORCO CA, 92860-2673		<b>Status</b> All Active Inactive

 ESP Web CRM Orders

Companies Contacts Emails Notes Tasks Appointments

CRM / Companies

Companies

All Companies Customers Suppliers Decorators Prospects

Search


Number of Companies: 1

A

Acme Supermarkets

2155551234  
orders@acmesupermarkets.com  
www.acmesupermarkets.com

75 Valley Stream Pkwy  
Valley Stream Parkway  
Malvern PA, 19355  
United States



Letter

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Tags

All Any













**Sales Rep**

Melissa Swaim

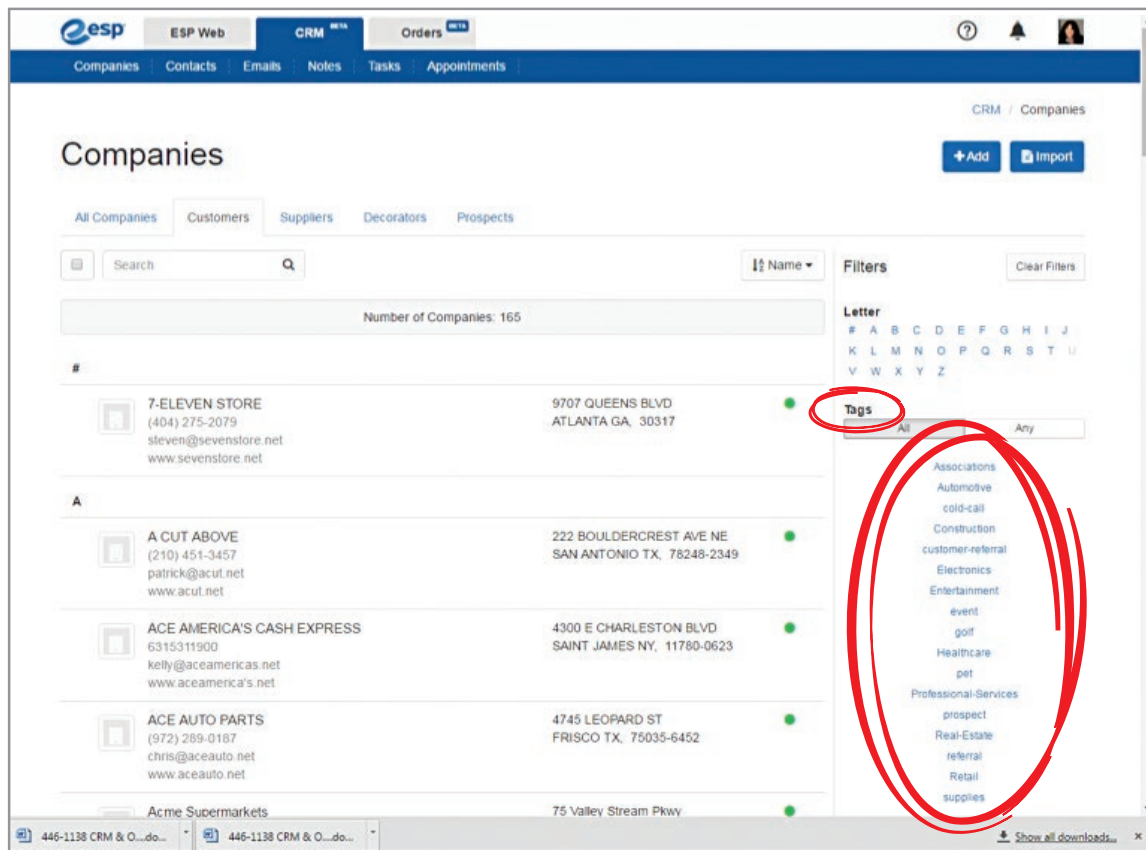
**Status**

All Active Inactive

6. Click on All, Active or Inactive under Status to view contacts in those categories.

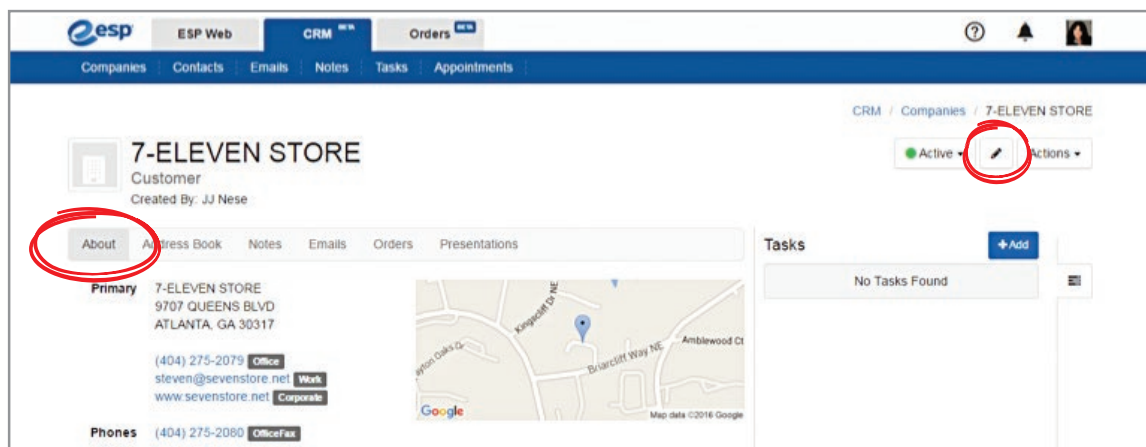
	Acme Supermarkets 2155551234 orders@acmesupermarkets.com www.acmesupermarkets.com	75 Valley Stream Pkwy Valley Stream Parkway Malvern PA, 19355 United States		<b>Sales Rep</b> Anthony Carroll Carmine Rauso Christine Wolff harris Iorianne James McGhee Janet Latimer Jason Krenzel JJ Nese Joe Fleming Melissa Swaim Rob Rawson Robin Smith Susan Hulme Theresa Pride
	ALL THAT GLITTERS (425) 744-9257 sara@allthat.net www.allthat.net	1552 E GIRARD PL TUKWILA WA, 98168-3112		
	AMERICAN CAB 9493367266 wade@americancab.net 9493367266	391 BOLTON RD RANCHO SANTA MARGARITA CA, 92688-2878		
	ANTIQUES & MORE (661) 968-9396 eric@antiquesmore.net www.antiquesmore.net	418 S TEXAS BLVD DELANO CA, 93215-3514		
	APOSTOLIC ASSEMBLY OF THE FAITH IN CHRIS (951) 456-2754 louis@apostolicassembly.org www.apostolicassembly.org	PO BOX 235 NORCO CA, 92860-2673		<b>Status</b> All Active Inactive
	ARTIFACTS (865) 223-9375 glenn@artifacts.net www.artifacts.net	4 BAYBERRY CIR KNOXVILLE TN, 37922-2380		

7. CRM lets you “tag” contacts into groups with labels such as “Referral” or “Health Care” so you can easily locate all companies in your CRM with any given tag at a later point in time. This helps you find groups of people and companies quickly, which is especially helpful if you are doing a targeted marketing campaign.



## Contact or Company Record Details

1. ABOUT – This area displays the basic info for a contact or company. Edit by clicking on the pencil icon in the top right corner.



2. Once in edit mode, you can

- Check the box indicating what category the contact belongs to: Customer, Supplier, Decorator or Prospect.
- Add additional phone numbers, fax numbers, etc.
- Add additional email addresses or domains
- Add website addresses
- Tag contacts with labels so you can easily find all companies in your CRM with any given tag. Enter your own tag or choose one from the drop-down menu and save.
- Add or edit primary contacts
- Add or edit billing information
- Indicate visibility of contact/company (Visible to Everyone, Only the Record Creator or Select Individual People)
- When finished, click "Save."

The 'Edit Company' form contains the following fields and options:

- Company Name:** 7-ELEVEN STORE
- Category:** Customer (selected), Supplier, Decorator, Prospect
- Phone:**
  - Primary: (404) 275-2079
  - Office: +1 (404) 275-2079
  - Office Fax: +1 (404) 275-2080
- Add Phone:** (button)
- Email:**
  - Work: steven@sevenstore.net
- Add Email:** (button)
- Add Email Domain:** (button)
- Website:**
  - Corporate: www.sevenstore.net
- Add Website:** (button)
- Tags:** Automotive (selected), Enter or Choose Tag
- Primary Contacts:** (button)
- Billing Information:** (button)
- Visible to:**
  - Everyone (selected)
  - Only the Record Creator
  - Select Individual People
- Buttons:** Cancel, Save

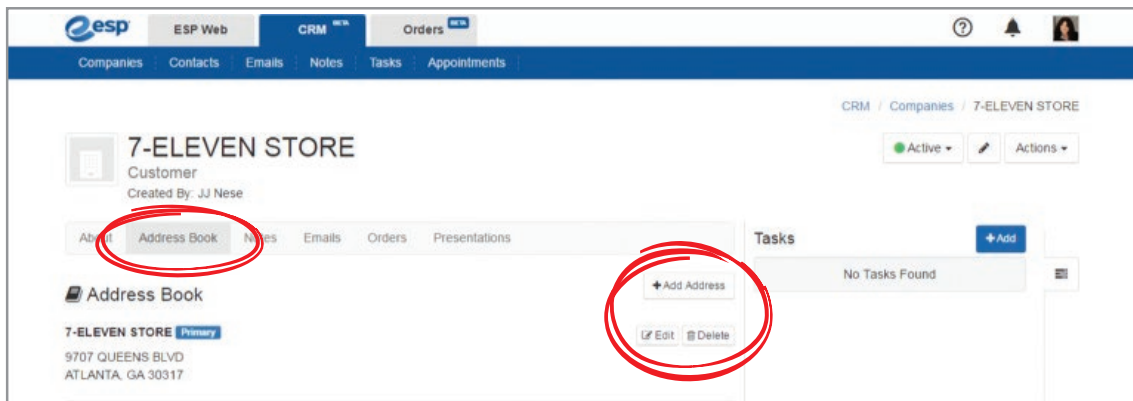
3. You can also add links to the record, associating contacts with companies, or companies with other companies, or contacts with other contacts. Enter the information or select from the drop-down menu.

The screenshot shows the CRM interface for the '7-ELEVEN STORE' record. The 'Links' section is highlighted with a red circle, and a dropdown menu is open showing a list of companies to link to:

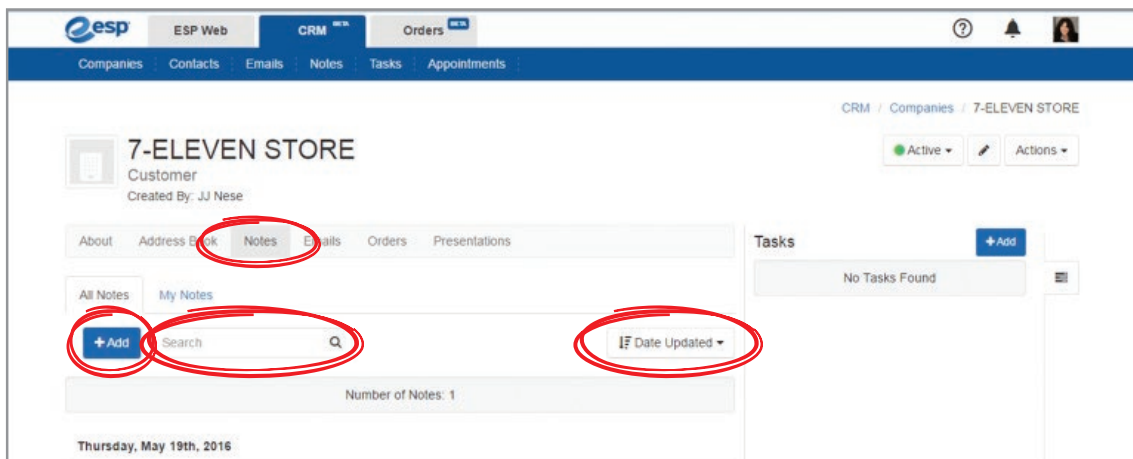
- A CUT ABOVE
- AA Moshay Inc
- AA SMOG TEST ONLY
- AAA Innovations
- ABC Embroidery
- ACE AMERICA'S CASH
- ACE AUTO PARTS



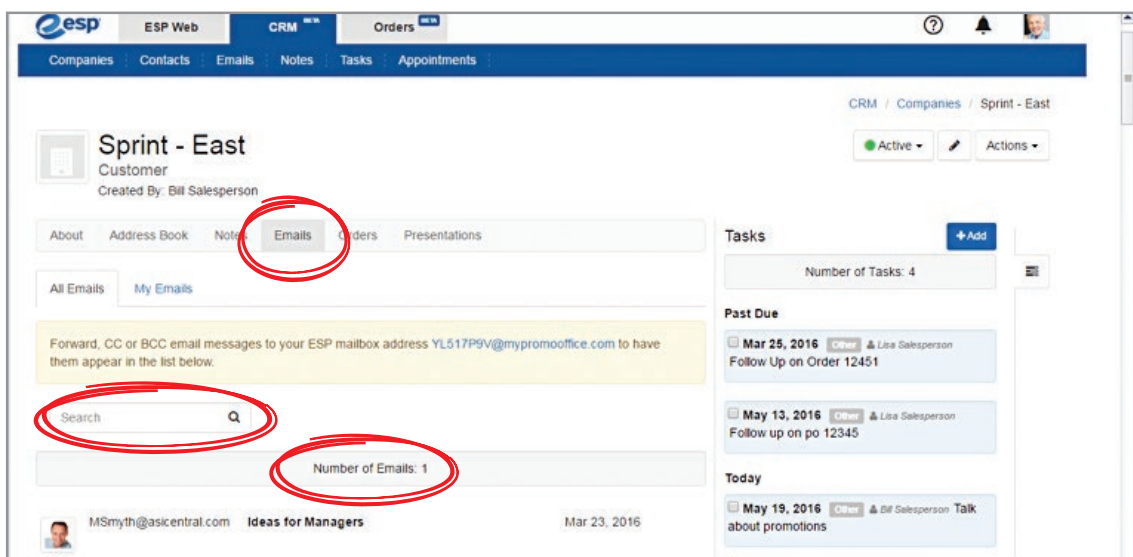
4. ADDRESS BOOK – Here, you are able to add or edit address info and store multiple addresses.



5. NOTES – Add unlimited notes on each contact or company. CRM allows you to sort notes by date added, and also search within notes.



6. EMAILS – All CRM users have a unique email address associated with their account (xxxx@mypromooffice.com). When emailing someone outside of ESP, forward, CC or BCC this unique email address, and all of your email correspondence will be stored with the appropriate contact/company in ESP CRM. You can search emails as well.



7. **ORDERS** – Quickly view all Quotes, Orders, Invoices and Sample Requests associated with each contact/company. You can also begin an order, invoice or quote from inside a contact/company record by clicking on the Create Order, Create Invoice or Create Quote buttons. Watch the fields of these forms automatically populate with the info from your CRM.

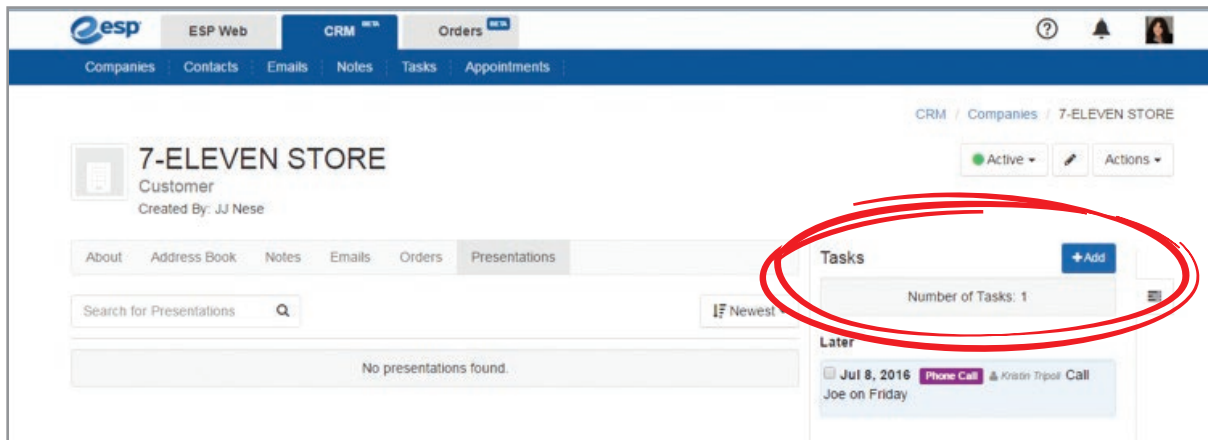
The screenshot shows the CRM interface for a customer named '7-ELEVEN STORE'. The 'ORDERS' tab is selected and highlighted with a red circle. Below the tab, there are buttons for 'Create Order', 'Create Invoice', and 'Create Quote'. A table lists several orders with columns for Order #, Date, Total, Amount Due, and Status. The status for all listed orders is 'Open'.

Order #	Date	Total	Amount Due	Status
10566	5/5/16	\$3,108.00	\$3,108.00	Open
10565	5/5/16	\$3,626.00	\$3,626.00	Open
10561	5/5/16	\$2,844.00	\$2,844.00	Open
10539	5/4/16	\$532.50	\$532.50	Open
10378	4/14/16	\$3,225.00	\$3,225.00	Open

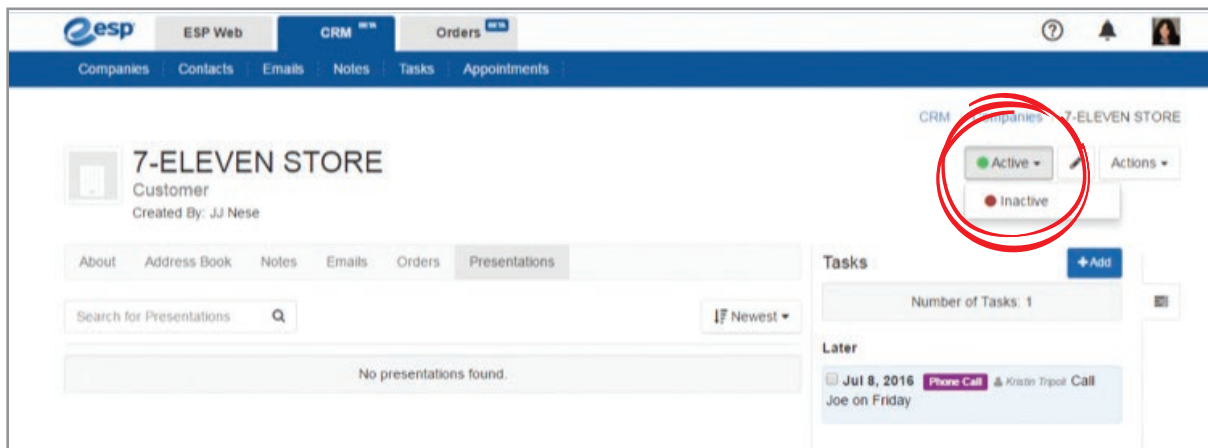
8. **PRESENTATIONS** – Any presentations you've created or sent to any given contact/company will appear in the associated record. Sort presentations alphabetically, by date added or by products. Search for presentations using keywords.

The screenshot shows the CRM interface for a customer named '7-ELEVEN STORE'. The 'PRESENTATIONS' tab is selected and highlighted with a red circle. Below the tab, there is a search bar labeled 'Search for Presentations'. A dropdown menu is open, showing sorting options: 'Newest', 'Oldest', 'Products - Most', 'Products - Least', 'Name - A to Z', and 'Name - Z to A'. The 'Newest' option is currently selected.

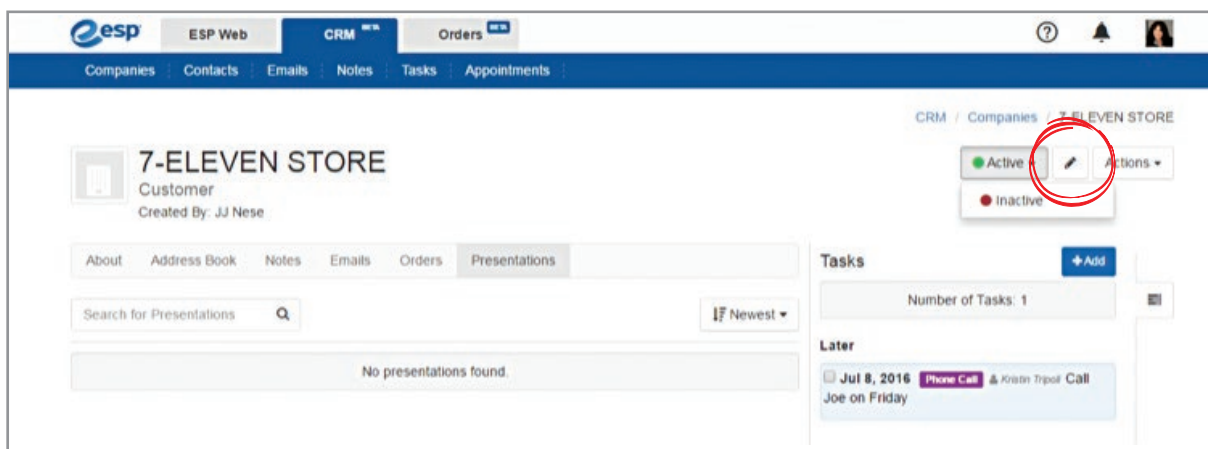
9. TASKS – On any tab in the record, you can always add Tasks by clicking on the blue +Add button.



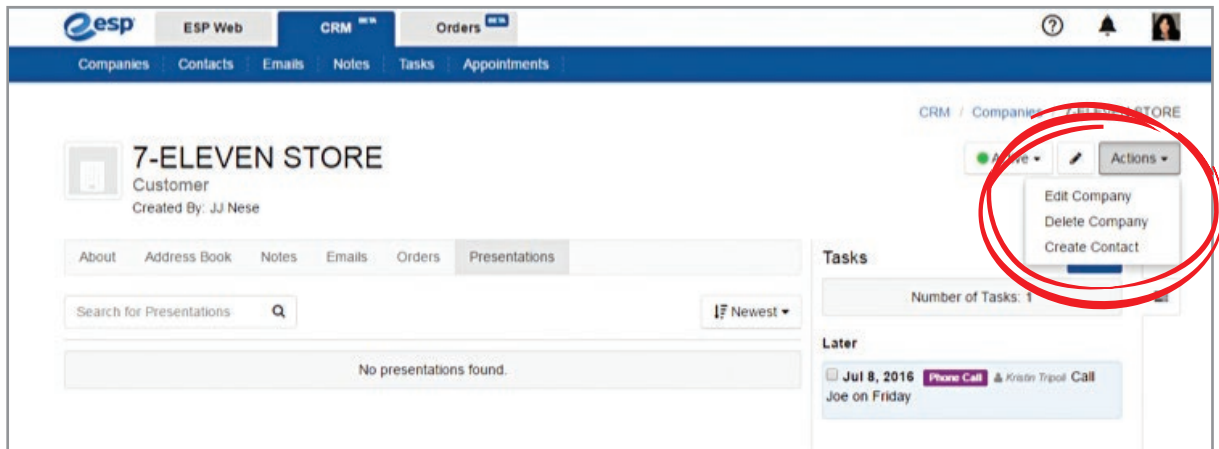
10. ACTIVE/INACTIVE – Indicate whether the contact/company is Active or Inactive using the drop-down menu in the top right corner.



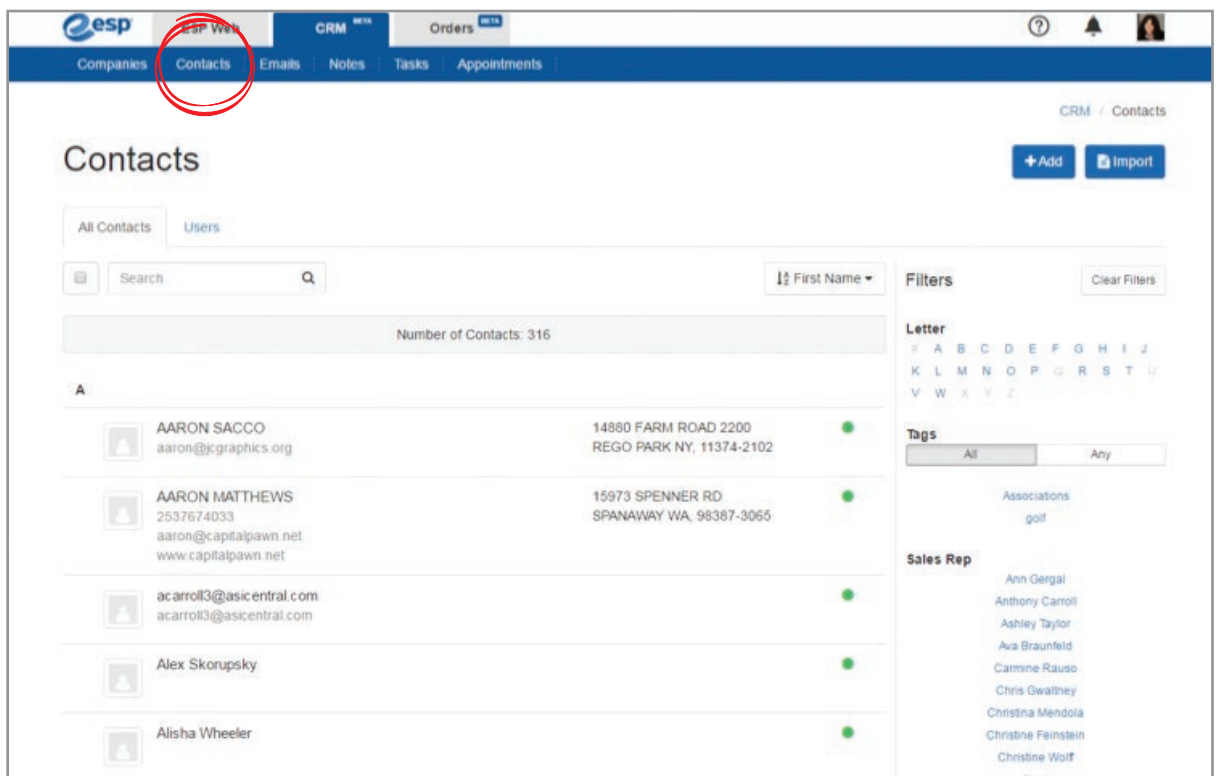
11. EDITING CONTACTS/COMPANIES – The pencil icon in the top right corner allows you to edit.



12. ACTIONS – The Actions drop-down menu in the top right corner allows you to Edit, Delete or Add contacts/companies.



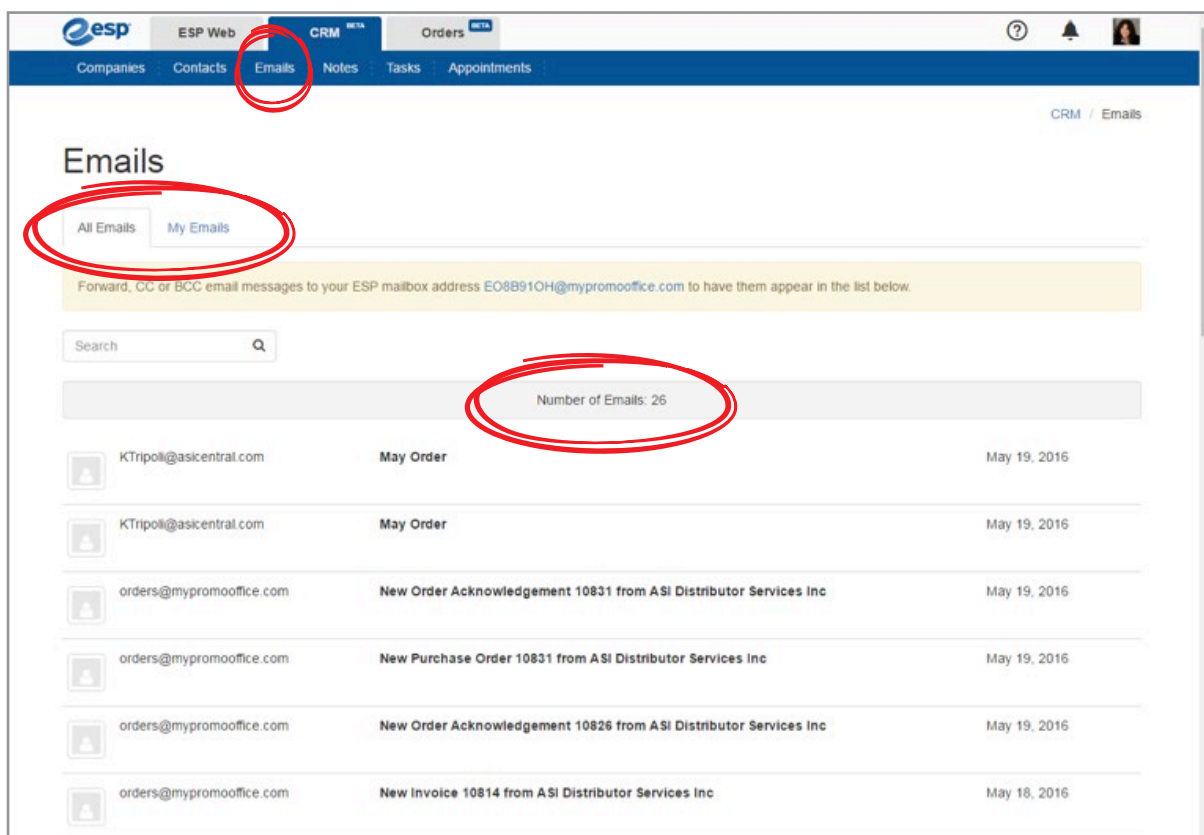
13. CONTACTS – The Contacts menu operates the same way as the Companies menu, except there are no Orders or Presentations associated with Contacts (people), as they are associated with Companies (businesses).





# Emails

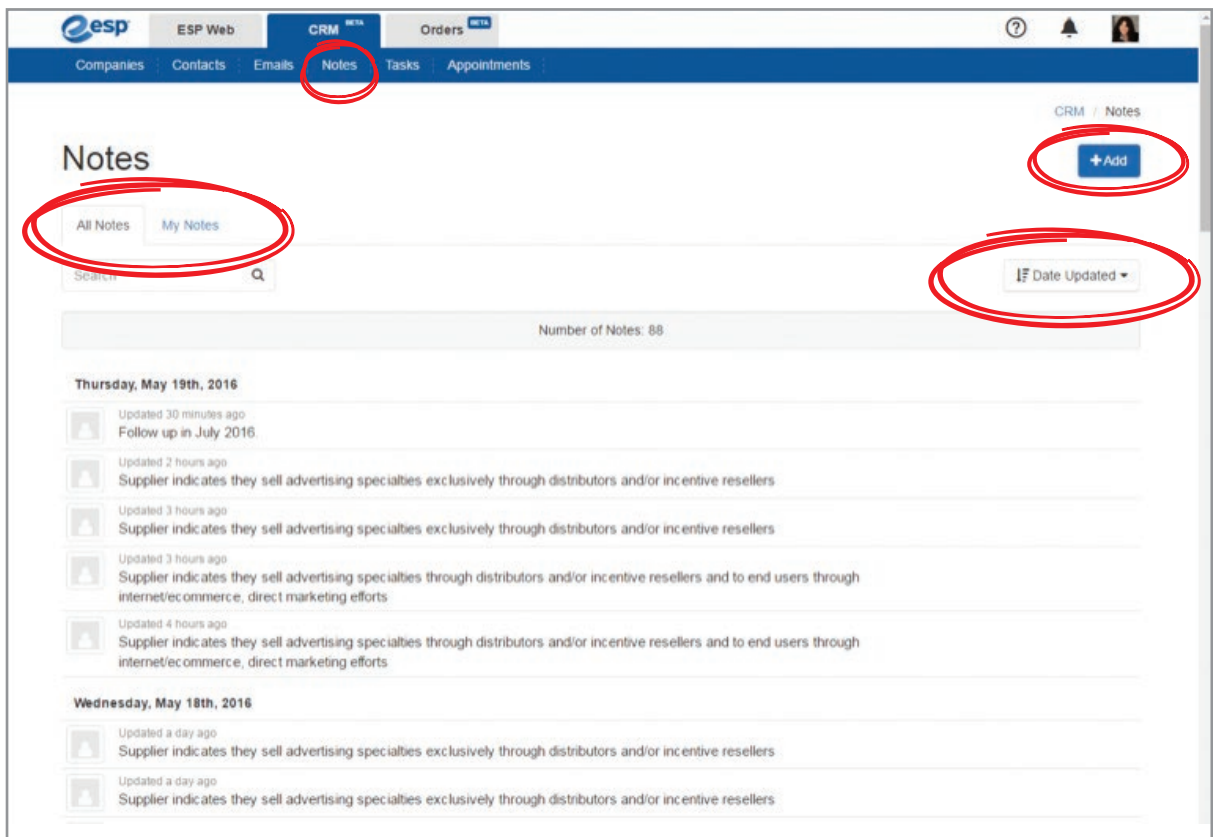
1. Every CRM user has a unique email address that is associated with their account (xxxx@mypromoooffice.com). When emailing someone outside of ESP, forward, CC or BCC this unique email address, and all of your email correspondence will be stored with the appropriate contact/company in ESP CRM as well as under the Emails tab on the main menu. You can search through your messages using keywords. Tabs are broken out between All Emails (which would include any visible vendor, customer and prospect emails sent or received by anyone in your company) and My Emails (only the emails you personally send and receive).



# Notes

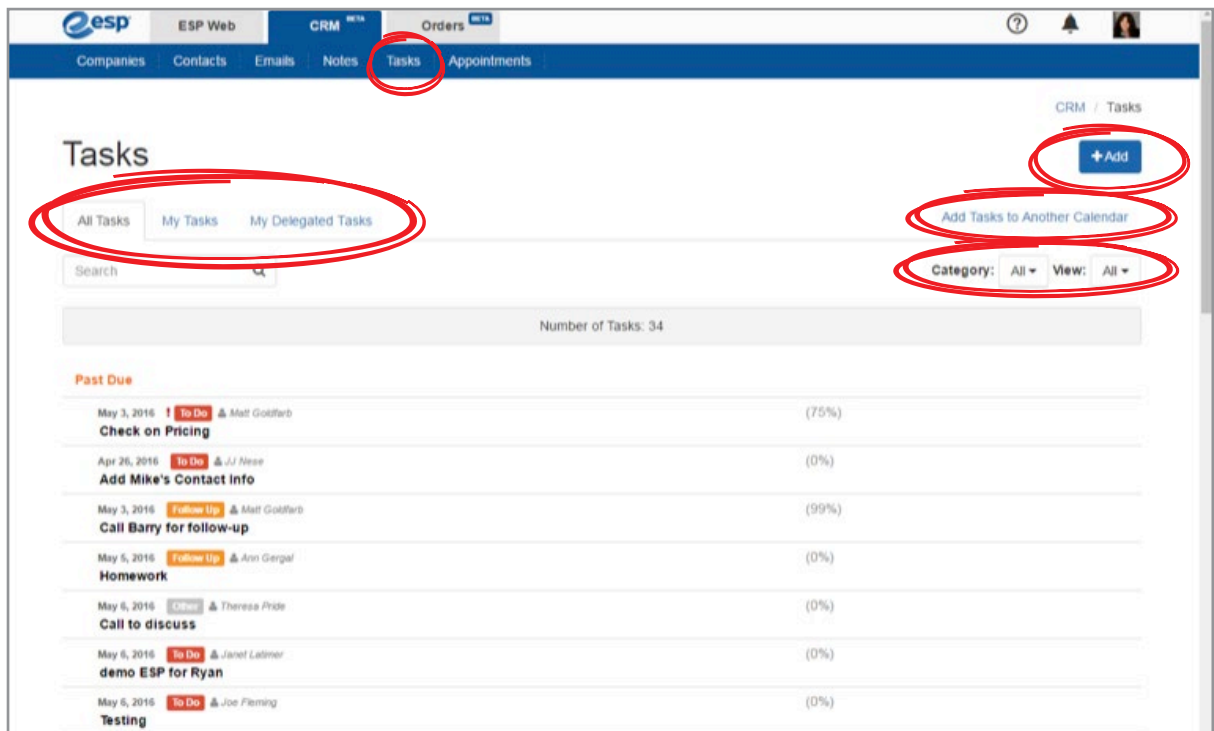
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1. Notes are divided into two segments – All Notes and My Notes. All Notes includes any visible note entered by anyone in the company, while My Notes displays only the notes you've entered. Notes are displayed by either Date Added or Date Updated.
2. Notes can be edited or deleted. To do so, hover your mouse to the right of the note and two icons will appear – a pencil icon and a trash can icon. Edit notes with the pencil icon and delete notes with the trash can icon. Or simply click on a Note and the icons appear in the top right corner of a new window alongside the Note you're working on.
3. Add a note by clicking on the blue +Add button in the top right corner. As you add notes, you can link them to contacts or companies and indicate who can see them by clicking on Everyone, Only the Record Creator or Select Individual People.



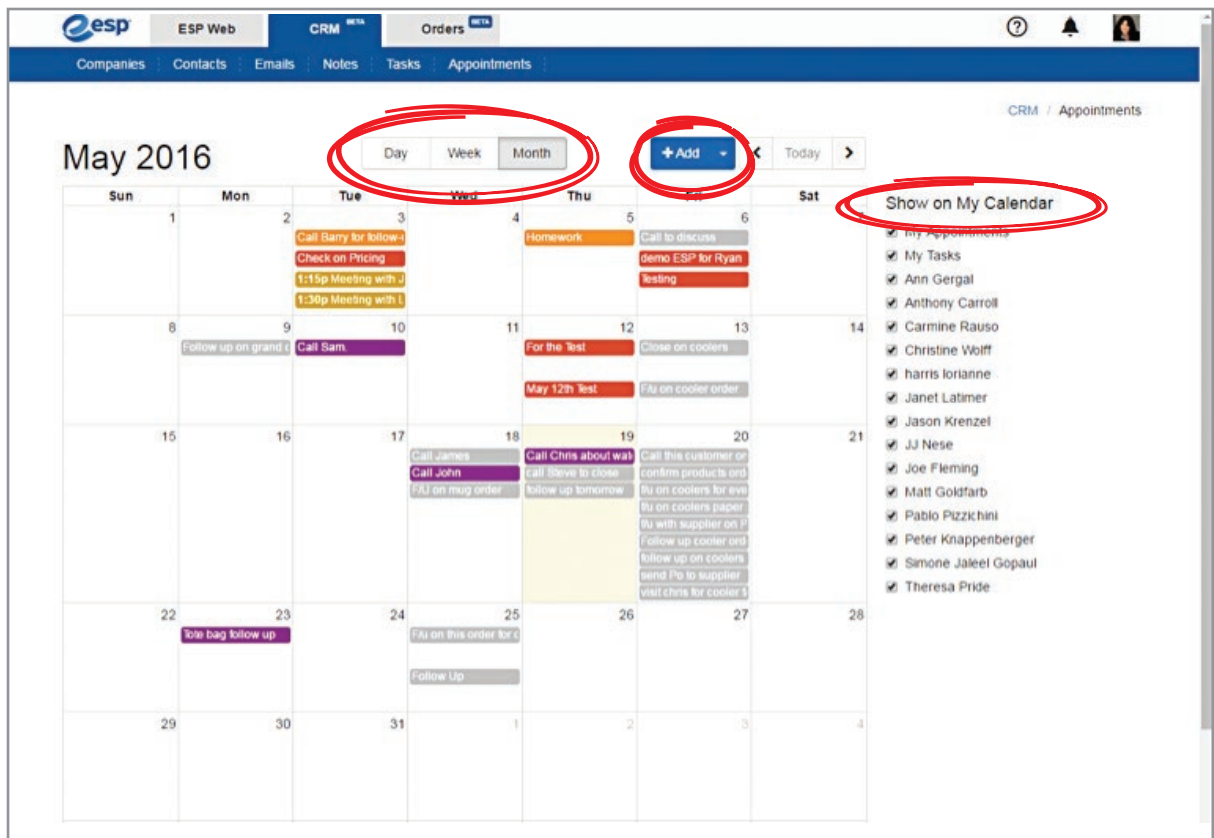
# Tasks

1. Tasks are divided into All Tasks (company-wide Tasks that are visible), My Tasks (your own) and My Delegated Tasks (Tasks you've created and assigned to others in your company). Each of these areas allow Tasks to be searched with keywords.
2. Add a task by clicking on the blue +Add button in the top right corner. A pop-up window opens where you give the Task a name, put it in a Category (email, phone call, meeting, etc.), assign it to yourself or to another person in your company, give it a due date, link it to a company or contact, mark Visibility as Public or Private and give it a brief description. Hit Save to create the new task.
3. Tasks may be viewed by Category or by Open, Completed or All status.
4. Tasks display with Past Due appearing first, followed by Today, Tomorrow and Next Week.
5. Tasks may be edited or deleted by hovering your mouse to the right of the Task and two icons will appear – a pencil icon and a trash can icon. Edit Tasks with the pencil icon and delete Tasks with the trash can icon. Or simply click on a Task and the icons appear in the top right corner of a new window alongside the Task you're working on.
6. When editing a Task, there is an Additional Information link under the Due Date field. Click on it to enter Start Date, Progress, Priority and Status, if needed.
7. You can add your Tasks to another calendar by clicking on the Add Tasks to Another Calendar link in the top right corner. A pop-up box with instructions will appear.



# Appointments

1. The Appointments tab takes you to a calendar where you can display your view by Day, Week or Month.
2. Using the menu on the right side, you can choose what you would and would not like to display. You can display your Tasks and Appointments by clicking on those options.
3. You can add new Appointments or Tasks by clicking on the blue +Add button at the top of the page. Use the drop-down arrow to choose Appointment or Task. Follow the prompts in the pop-up window. For Appointments, add a Title, Location, Start and End Time, Description, mark Visibility and even set an Alert. For Tasks, add a Task Name, Category, Assigned To, Due Date, Links, Visibility and Description.





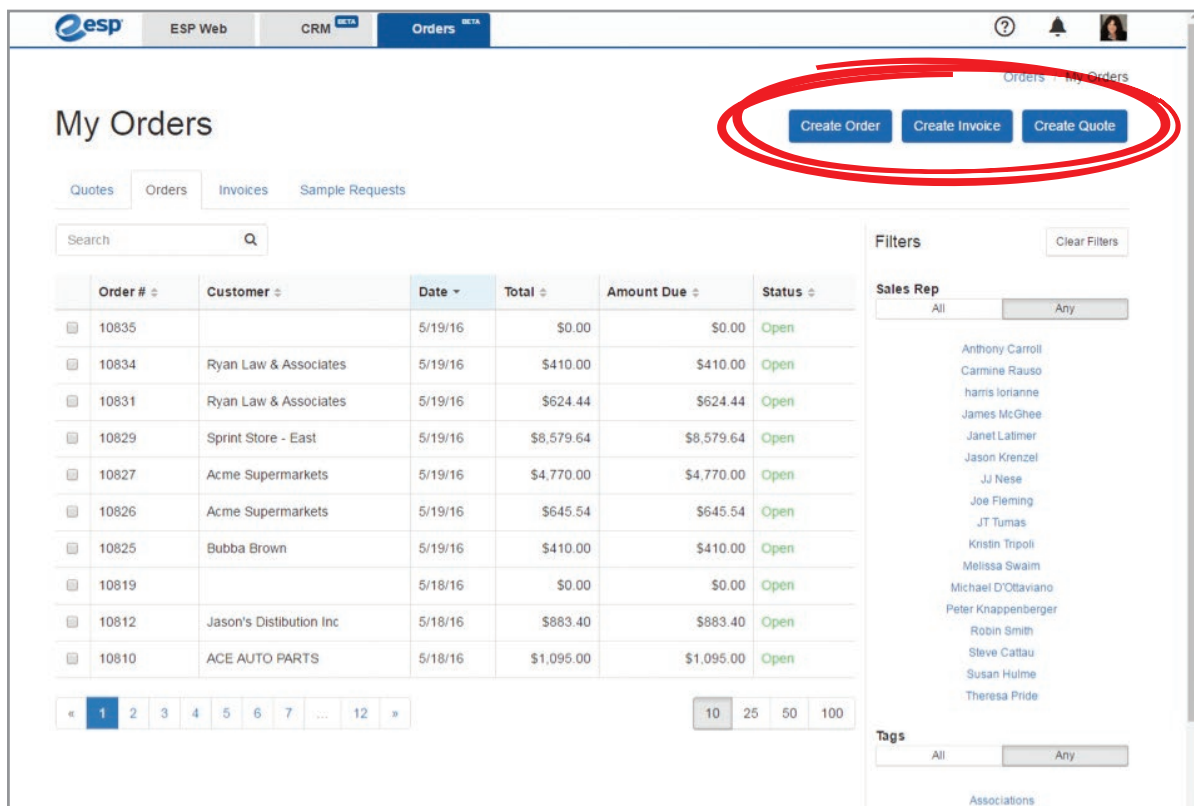
# Orders:

ESP Orders stores all your Quotes, Orders, Invoices and Sample Requests in one centralized hub. You can also create a new Order, Invoice or Quote from any page in the Orders module, or directly from ESP.

## Here's how it works:

### Creating New Orders from Inside the Orders Module

1. In the top right corner of every page in the Orders module, you will see three blue buttons, "Create Order," "Create Invoice" and "Create Quote." Click on the appropriate button to get started.



ESP Web CRM Orders

My Orders

Quotes Orders Invoices Sample Requests

Search

Order #	Customer	Date	Total	Amount Due	Status
10835		5/19/16	\$0.00	\$0.00	Open
10834	Ryan Law & Associates	5/19/16	\$410.00	\$410.00	Open
10831	Ryan Law & Associates	5/19/16	\$624.44	\$624.44	Open
10829	Sprint Store - East	5/19/16	\$8,579.64	\$8,579.64	Open
10827	Acme Supermarkets	5/19/16	\$4,770.00	\$4,770.00	Open
10826	Acme Supermarkets	5/19/16	\$645.54	\$645.54	Open
10825	Bubba Brown	5/19/16	\$410.00	\$410.00	Open
10819		5/18/16	\$0.00	\$0.00	Open
10812	Jason's Distribution Inc	5/18/16	\$883.40	\$883.40	Open
10810	ACE AUTO PARTS	5/18/16	\$1,095.00	\$1,095.00	Open

Filters

Sales Rep

All Any

Anthony Carroll  
Carmine Rauso  
harris Iortianne  
James McGhee  
Janet Latimer  
Jason Krenzel  
JJ Nese  
Joe Fleming  
JT Tumas  
Kristin Tripoli  
Melissa Swaim  
Michael D'Ottaviano  
Peter Knappenberger  
Robin Smith  
Steve Cattau  
Susan Hulme  
Theresa Pride

Tags

All Any

Associations

## 2. Click on "Create Order".

Your screen will show a field for Customer. Enter the customer name or select a contact from your CRM. If the contact was pulled from your CRM, every data point that you have in the CRM record will automatically populate in the appropriate field in your new Order. Many of the remaining fields have drop-down menus for quick and easy Order creation.

You will notice four steps to complete your Order across the bottom of the page. These are Pricing, Decoration, Shipping and Purchase Orders.

The screenshot shows the 'eesp Order' form. At the top, there's a 'Customer' field with a dropdown menu. To the right, there's a status 'Open' and two monetary values: '\$0.00 Order Total' and '\$0.00 Balance Due'. Below these are fields for 'Sales Person' (filled with 'Kristin Tripoli (Me)'), 'PO Reference', 'Order Date' (05/05/2016), 'In-Hand Date', and 'Ship Date'. The form is divided into three contact sections: 'Billing Contact', 'Shipping Contact', and 'Acknowledgement Contact', each with a dropdown and an 'Edit' button. Below these are fields for 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags'. At the bottom, there's a progress bar with four steps: '1 Pricing', '2 Decoration', '3 Shipping', and '4 Purchase Orders'. The 'Pricing' step is highlighted with a red circle. Below the progress bar is a table with columns: 'Item', 'Qty', 'Price', 'Amount', 'Margin', and 'Tax'. A tip box says 'Tip: Add a product to your order.' At the bottom right, there's a 'Subtotal: \$0.00' and a 'Discount: 0.00%' field. The bottom of the form has 'Cancel' and 'Save' buttons.

Item	Qty	Price	Amount	Margin	Tax
------	-----	-------	--------	--------	-----

Subtotal: \$0.00  
Discount: 0.00%

## a) Pricing

- You can add a product several ways. If you will be adding a product that is not in ESP, click on the Add Product drop-down menu, and then on "New Product." This gives you the option of adding an image and entering a Product Number, Name and Description. Below these fields you will find a drop-down menu for Supplier. Enter your Supplier or find it in the drop-down if that Supplier record is in your CRM. Across the top, you will see menu tabs for Configuration, Decoration, Instructions, Shipping and Vendor Charges. Each tab is intuitive, providing organized fields and drop-down menus to help you fill out your Order quickly and completely. You are not required to fill out every field or tab – simply pick and choose whatever works best for your needs. Several fields are linked to your CRM, so if your customer or supplier has an existing record, all related fields will auto-populate. If your customer or supplier is not in your CRM, a record will automatically be created for them once the Order is completed and saved.

1 Pricing 2 Decoration 3 Shipping 4 Purchase Orders

Add Product Add Service Add Title

New Product

Tip: Add a product to your order.

Item	Qty	Price	Amount	Margin	Tax
------	-----	-------	--------	--------	-----

Subtotal: \$0.00

Cancel Save

esp Order

Add Product

Configuration Decoration Instructions Shipping Vendor Charges

Description	Qty	Net Cost	Margin (%)	Price
	1	\$0.0000	0.00%	\$0.0000

+ Add Line Item

Total Price: \$0.00  
Total Cost: \$0.00

Product Number

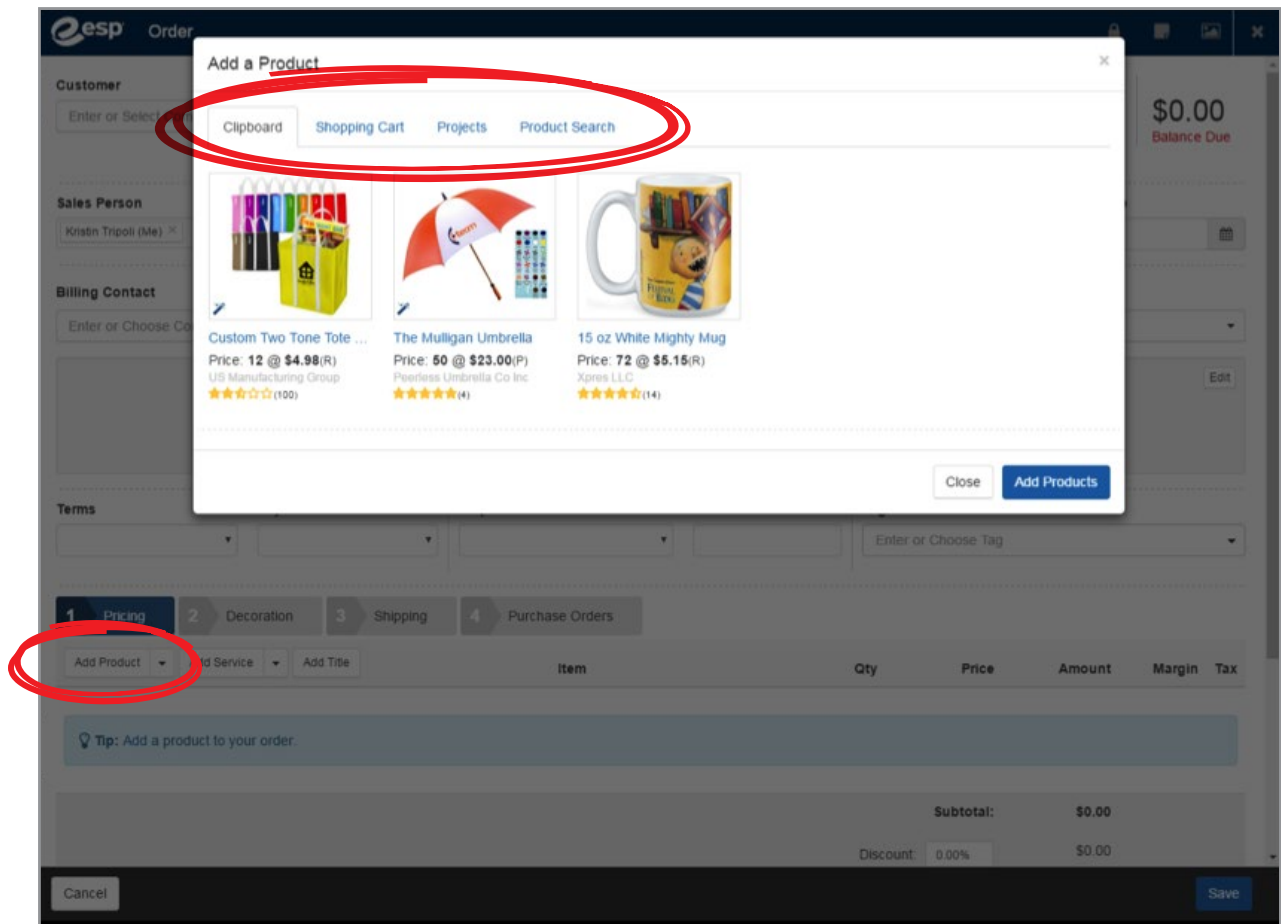
Product Name

Product Description

Supplier

Delete Product Cancel Save

- If you will be adding a product that **is** in ESP, click on the “Add Product” button. A pop-up window will appear, giving you the option to add a product from your Clipboard, Shopping Cart, Projects or a Product Search (this instantly opens a search box right inside the Orders module).





- You also have the ability to add additional fees such as Freight, Shipping & Handling and Service Charge by using the drop-down menu or by clicking on the Add Service button.

The screenshot displays the 'esp Order' form. At the top, the 'Customer' section includes a dropdown for 'Enter or Select Company' and a status indicator 'Open'. To the right, the 'Order Total' and 'Balance Due' are both listed as '\$0.00'. Below this, the 'Sales Person' is set to 'Kristin Tripoli (Me)'. The 'PO Reference', 'Order Date' (05/19/2016), 'In-Hand Date', and 'Ship Date' fields are also visible. The form is divided into three contact sections: 'Billing Contact', 'Shipping Contact', and 'Acknowledgement Contact', each with an 'Enter or Choose Contact' dropdown and an 'Edit' button. Further down, there are fields for 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags'. A navigation bar at the bottom shows four tabs: '1 Pricing', '2 Shipping', '3 Shipping', and '4 Purchase Orders'. The 'Add Service' dropdown menu is open, showing options for 'Freight', 'Shipping & Handling', and 'Service Charge'. A red circle highlights this menu. The 'Add Title' button is located to the right of the 'Add Service' button. The bottom of the form features a 'Subtotal: \$0.00' and 'Cancel'/'Save' buttons.

Item	Qty	Price	Amount	Margin	Tax
Subtotal: \$0.00					

- Add a title by clicking on the Add Title button, which is directly right of the Add Service button.

## b) Decoration

- Hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts. You will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions

esp Order #10836

Sales Person: Kristin Tripoli

PO Reference:

Order Date: 05/19/2016

In-Hand Date:

Ship Date:

Billing Contact: Enter or Choose Contact

Shipping Contact: Enter or Choose Contact

Acknowledgement Contact: Enter or Choose Contact

Terms:

Pay With:

Ship Via:

Account:

Tags: Enter or Choose Tag

1 Pricing 2 Decoration 3 Shipping 4 Purchase Orders

Add Product

Imprint Locations

**Custom Two Tone Tote Bags**

Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2 tone tote bag features a colored body & large offset white handles for easy carry - great for holding your retail purchases. Use to create fun promotional gift bags! Customize w/ an imprint of your logo & recipients are sure to carry your name all around town. Does not come with gusset.

Configure

Copy

Delete

Cancel Preview More Send Save

esp Custom Two Tone Tote Bags

Back

Decoration (optional)

Add your decoration details.

Imprint Method:

Upload Logo: ☒ Upload

Logos must be png, tif, jpg, or eps file format.

Imprint Location Name: Location 1

Imprint Color: Enter logo colors

Decoration Instructions: Type your comments

**Custom Two Tone Tote Bags**

US Manufacturing Group

asi/92433

**Order Summary**

Quantity: 15

Total Product Price: \$74.70

Total product price is for merchandise only. This price does not include any tax, setup, or decoration charges.

Save

### c) Shipping

- Click on the blue Shipping tab. Hover your mouse over the product image and an Edit button will appear. Click on it and a Shipping window will appear where you can enter new information or import it directly from your CRM. A drop-down menu provides a selection of multiple shipping methods. Remember to always click on the blue Save button to save your edits.

The screenshot displays the 'esp' Order #10837 interface. The top navigation bar includes the 'esp' logo and the order number. Below this, there are fields for Sales Person (Kristin Tripoli), PO Reference, Order Date (05/19/2016), In-Hand Date, and Ship Date. The main content area is divided into sections for Billing Contact, Shipping Contact, and Acknowledgement Contact, each with an 'Edit' button. Below these are fields for Terms, Pay With, Ship Via, Account, and Tags. A navigation bar at the bottom of the main section includes tabs for Pricing, Decoration, Shipping (highlighted with a red circle), and Purchase Orders. A 'Create Invoice' button is also present. Below the navigation bar, there is a section for 'Shipping Destinations' with a list of products. One product, 'Custom Two Tone Tote Bags - 3', is highlighted with a red circle, and its 'Edit' button is also circled in red. The 'Edit Product' window is open, showing the 'Shipping' tab. The 'Vendor Shipping Details' section includes fields for Ship To, Shipping Date, and Ship Via. The 'Ship Via' dropdown menu is open, showing a list of shipping methods, with 'Best Way' selected. The 'Edit Product' window also includes fields for Product Number, Product Name (Custom Two Tone Tote Bags - 3), Product Description, and Supplier (US Manufacturing Group). A 'Delete Product' button is at the bottom left, and 'Cancel' and 'Save' buttons are at the bottom right.

Order #10837

Sales Person: Kristin Tripoli

PO Reference:

Order Date: 05/19/2016

In-Hand Date:

Ship Date:

Billing Contact: Enter or Choose Contact

Shipping Contact: Enter or Choose Contact

Acknowledgement Contact: Enter or Choose Contact

Terms:

Pay With:

Ship Via:

Account:

Tags: Enter or Choose Tag

1 Pricing 2 Decoration 3 Shipping 4 Purchase Orders

Create Invoice

Add Product

Shipping Destinations

Custom Two Tone Tote Bags - 3

Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2 tone tote bag features a colored body & large offset white handles for easy carry - great for holding your retail purchases. Use to create fun promotional gift bags! Customize w/ an imprint your logo & recipients are sure to carry your name all around town. Does not come with gusset.

Edit

Delete

Edit Product

Configuration Decoration Instructions Shipping Vendor Charges

Vendor Shipping Details

Ship To: Enter or Choose Contact

Shipping Date:

Ship Via:

Best Way

Canada Post International Parcel

Canada Post Priority Worldwide

Canada Post Regular Parcel

Canada Post Xpresspost

Cust Pick Up

Delivery Truck

FedEx International Ground

FedEx International Priority

FedEx 2Day

FedEx Ground

Federal Express

FedEx Priority Overnight

Local Carrier

Other

Purolator

UPS 2 Day

UPS 2nd Day Air

UPS 3 Day

Product Number:

Product Name: Custom Two Tone Tote Bags - 3

Product Description: Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2

Supplier: US Manufacturing Group

Delete Product

Cancel Save

#### d) Purchase Orders

- To create a PO, simply click on the blue Purchase Orders button. You can Preview or Send it by clicking on the corresponding white or blue button at the bottom left of the page.

The screenshot shows the 'esp Order #10837' form. The 'Purchase Orders' tab is selected and highlighted with a red circle. Below the tabs, the 'Add Product' dropdown is set to 'US Manufacturing Group', and the 'Item' list shows 'Custom Two Tone Tote Bags - 3' with a quantity of 15 and a net cost of \$2,980. At the bottom left, the 'Preview' and 'Send' buttons are circled in red. The top right shows the 'Order Total' and 'Balance Due' as \$74.70. The bottom right has a 'Create Invoice' button.

e) You have three options at this point: save the Order, send it to someone at your company or send an acknowledgement to a customer.

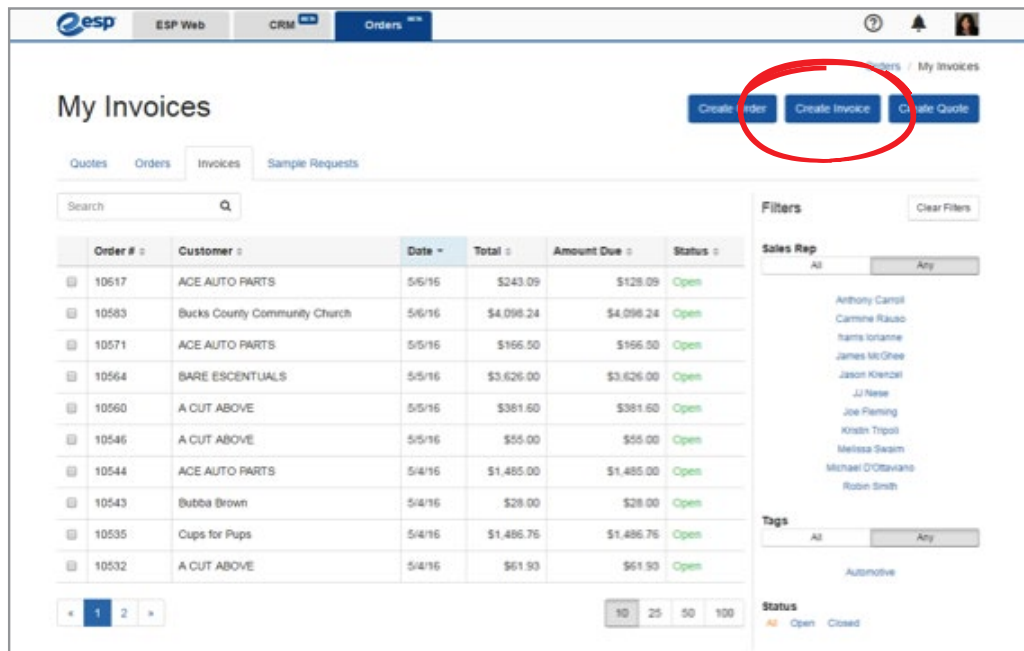
f) You can also create an invoice in one click by clicking on the blue Create Invoice button.

The screenshot shows the 'esp Order #10837' form. The 'Create Invoice' button is circled in red. Below the 'Add Product' dropdown, the 'Item' list shows 'Custom Two Tone Tote Bags - 3' with a quantity of 15 and a net cost of \$2,980. At the bottom right, the 'Send' button is circled in red, and a dropdown menu is open showing options: 'Send Sales Order to someone at my company' and 'Send Acknowledgement to my customer'.



# Creating New Invoices from Inside the Orders Module

1. Click on "Create Invoice."



2. Your screen will show a field for Customer. Enter the contact name or select a contact from your CRM. If you are entering a new contact, you will receive a prompt asking if you would like to create a new customer record in CRM. If the contact is already in your CRM, every data point in the CRM record will automatically populate in the appropriate field in your new Invoice. Many of the remaining fields have drop-down menus for quick and easy Invoice creation.

The screenshot shows the 'Invoice' form in the ESP Web interface. The 'Customer' field is circled in red. The form includes fields for Sales Person, PO Reference, Invoice Date, In-Hand Date, and Ship Date. There are also sections for Invoice Contact and Shipping Contact. At the bottom, there are tabs for 'Pricing' and 'Decoration'. The 'Pricing' tab is selected, and there are buttons for 'Add Product', 'Add Service', and 'Add Title'. A table at the bottom shows columns for Item, Ordered Qty, Invoiced Qty, Price, and Amount Tax.

Customer \*

Enter or Select Company

Open \$0.00 \$0.00  
Invoice Total Balance Due

Sales Person Kristin Tripoli (Me) PO Reference Invoice Date 05/19/2016 In-Hand Date Ship Date

Invoice Contact Enter or Choose Contact Shipping Contact Enter or Choose Contact

Terms Pay With Ship Via Account Tags Enter or Choose Tag

1 Pricing 2 Decoration

Add Product Add Service Add Title

Item	Ordered Qty	Invoiced Qty	Price	Amount Tax
------	-------------	--------------	-------	------------

Tip: Add a product to your order.

3. You will notice two steps to complete your Invoice across the bottom of the page. These are Pricing and Decoration.
- **Pricing:** Under the blue Pricing tab, you can click on the Add Product, Add Service and Add Title buttons or use the associated drop-down menus to add charges to your invoice. Once your product has been added, hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts to populate price and quantity needed. By clicking on the blue Continue button, you will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions. Click save, and your Invoice will display the relevant information in each associated field.

The screenshot displays the 'esp' Invoice #10843 interface. At the top, the 'Customer' is set to '7-ELEVEN STORE'. The 'Sales Person' is 'Kristin Tripoli'. The 'Invoice Date' is '05/19/2016'. The 'Invoice Total' and 'Balance Due' are both '\$0.00'. The 'Invoice Contact' and 'Shipping Contact' are both '7-ELEVEN STORE, 9707 QUEENS BLVD, ATLANTA, GA 30317'. The 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags' fields are empty. The 'Pricing' tab is selected, and the 'Custom Two Tone Tote Bags' product is listed. The 'Configure' button for this product is circled in red. The 'Decoration' tab is also visible. The bottom of the interface includes a 'Cancel' button, a 'Preview' button, a 'More -' dropdown, and a 'Send' button.

Item	Ordered Qty	Invoiced Qty	Price	Amount	Tax
Total (USD)				\$0.00	
Subtotal:				\$0.00	

- **Decoration:** Click on the blue Decoration tab. Hover your mouse over the product image and an Edit button will appear. Click on it and an expanded Decoration window will appear, giving you additional Decoration sub-tabs for Artwork, Personalization and Shipping. On any of these sub-tabs, you can add an additional Imprint Location, ESP Charge (pulled straight from the Product Detail in ESP), Run Charge or Fixed Charge (this drop-down allows you several label options for this additional fee). You will also see a menu at the top of the page for Configuration, Instructions, Shipping and Vendor Charges. All of these areas are optional and provide you the opportunity to be as general or as detailed in your Invoice as you wish. Remember to always click on the blue Save button to save your edits.

**Edit Product**

Configuration Decoration Instructions Shipping Vendor Charges

Location: Location 1

Artwork Personalization Shipping

US Manufacturing Group

☐ Upload  
Logos must be png, tif, jpg, or eps file format.

Imprint Type:

Logo Size:

Logo Color:

Proof Required:

Vendor Notes:

**Product Number**

**Product Name**  
Custom Two Tone Tote Bags - 3

**Product Description**  
Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2

**Supplier**  
US Manufacturing Group

**Decoration Charges**

Description	Qty	Net Cost	Margin (%)	Price	Visible
<a href="#">+ Add ESP Charge</a> <a href="#">+ Add Run Charge</a> <a href="#">+ Add Fixed Charge</a>					

[+ Add Imprint Location](#)

[Delete Product](#) [Cancel](#) [Save](#)

4. Click on the blue Pricing button again and you will find a professional-looking Invoice. In the upper right corner, you can view the Invoice Total in green and the Balance Due in red. If a deposit or partial payment was made and entered, the Balance Due will automatically adjust to reflect the payment. In the lower right corner, you will see a white Enter Payment button. Click on it to enter payments as they are received. You can also add a discount and select a sales tax rate in the fields provided, which automatically adjusts the Invoice Total.

Customer: 7-ELEVEN STORE

Invoice #10845

Invoice Total: \$243.09

Balance Due: \$243.09

Invoice Date: 05/19/2010

Invoice Contact: 7-ELEVEN STORE, 8707 QUEENS BLVD, ATLANTA, GA 30317

Shipping Contact: 7-ELEVEN STORE, 8707 QUEENS BLVD, ATLANTA, GA 30317

Item	Ordered Qty	Invoiced Qty	Price	Amount	Tax
Custom Two Tone Tote Bags - 3	0	12	\$4.9000	\$58.8000	
Rush Service	0	1	\$104.0000	\$104.0000	
Total (USD)	0	12		\$159.76	
Set Up Charge	1		\$83.3000	\$83.3000	
Subtotal				\$243.09	
Discount: 0.00%				\$0.00	
Sales Tax				\$0.00	
Total Amount				\$243.09	
Amount Paid				\$0.00	

Send Invoice

5. At this point, you can Preview, Save or Send your Invoice. The customer email address stored in your CRM will auto-populate the form, as will your preferred email address and unique CRM email address. You can use the auto-generated message or write your own before clicking the blue Send button.

Send Invoice

To: chris@aceauto.net

CC: Kristin Tripoli, MyPromoOffice

BCC: Enter or Select User

Subject: New Invoice 10617 from ASI Distributor Services Inc

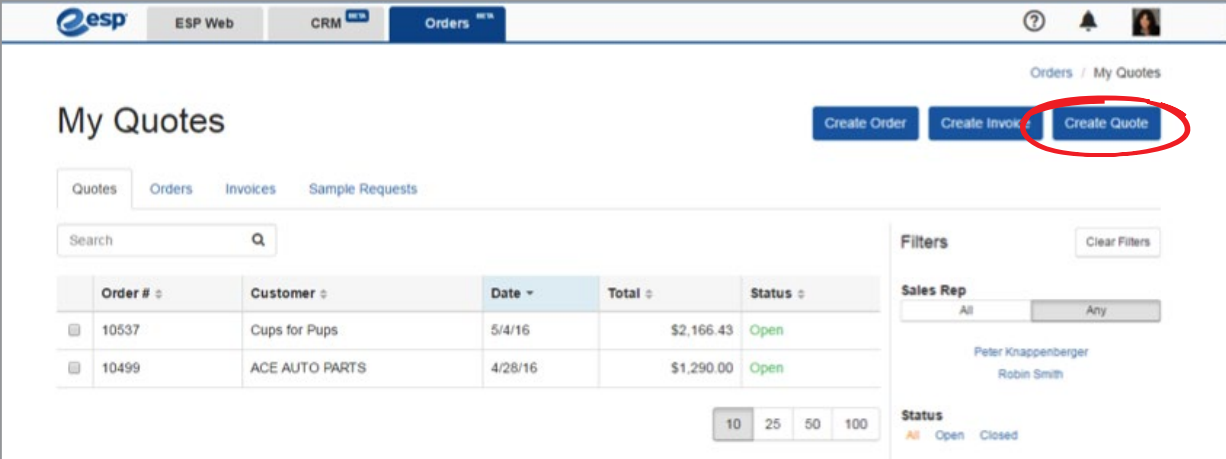
Message: Hello, Thank you for your business. Please submit this invoice to your accounts payable department. We appreciate your business and look forward to working with you again soon.

Include Order Document

Send Invoice

# Creating New Quotes from Inside the Orders Module

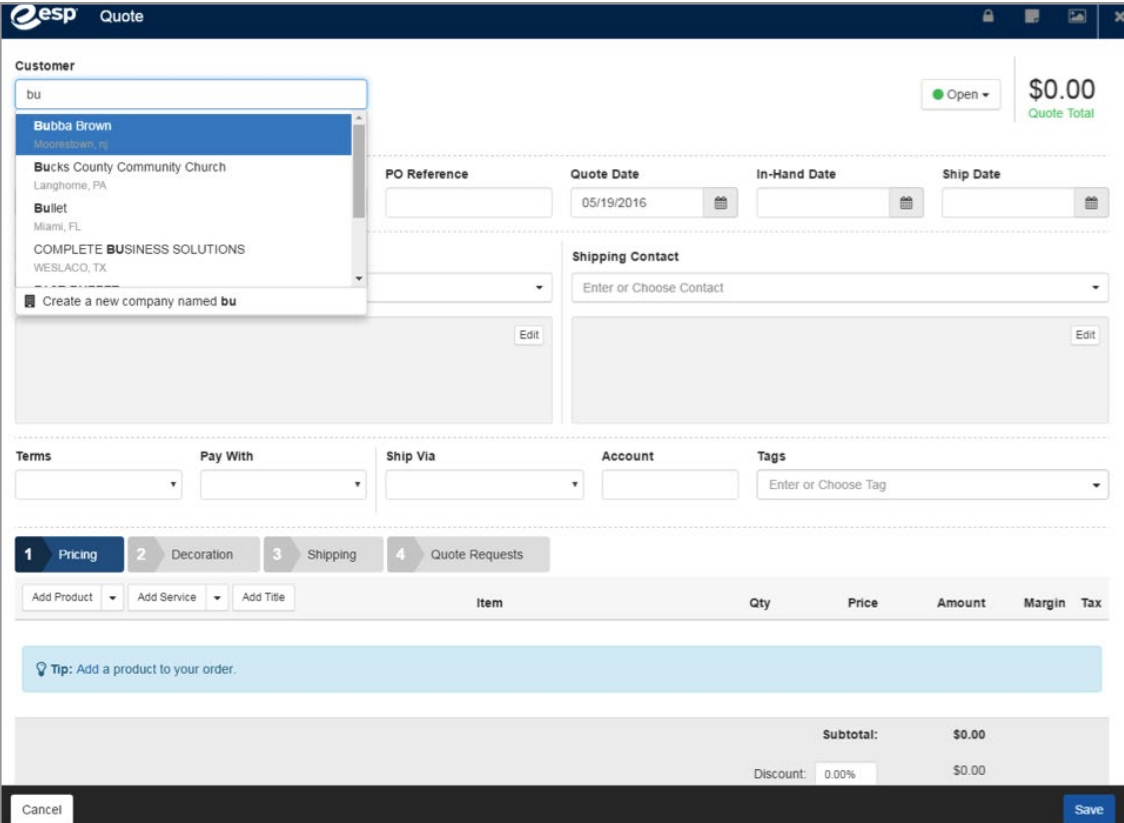
1. Click on "Create Quote."



The screenshot shows the 'My Quotes' page in the Orders module. The page has a navigation bar with 'ESP Web', 'CRM', and 'Orders' tabs. The 'Orders' tab is active. The page title is 'My Quotes'. There are three buttons: 'Create Order', 'Create Invoice', and 'Create Quote'. The 'Create Quote' button is circled in red. Below the buttons is a search bar and a table of quotes. The table has columns: Order #, Customer, Date, Total, and Status. There are two quotes listed: 10537 for 'Cups for Pups' and 10499 for 'ACE AUTO PARTS'. To the right of the table is a 'Filters' section with 'Sales Rep' and 'Status' filters. The 'Sales Rep' filter is set to 'Any' and the 'Status' filter is set to 'Open'.

Order #	Customer	Date	Total	Status
10537	Cups for Pups	5/4/16	\$2,166.43	Open
10499	ACE AUTO PARTS	4/28/16	\$1,290.00	Open

2. Your screen will show a Customer field. Enter the contact name or select a contact from your CRM. If you are entering in a new contact, you will receive a prompt asking if you would like to create a new customer record in CRM. If the contact is already in your CRM, every data point in the CRM record will automatically populate in the appropriate field in your new Quote. Many of the remaining fields have drop-down menus for quick and easy Quote creation.



The screenshot shows the 'Quote' creation form. The 'Customer' field is open, showing a list of contacts. The 'Quote Date' is set to 05/19/2016. The 'Quote Total' is \$0.00. The form has several sections: 'Customer', 'PO Reference', 'Quote Date', 'In-Hand Date', 'Ship Date', 'Shipping Contact', 'Terms', 'Pay With', 'Ship Via', 'Account', 'Tags', and a 'Pricing' section. The 'Pricing' section has tabs for 'Pricing', 'Decoration', 'Shipping', and 'Quote Requests'. The 'Pricing' tab is active. The 'Pricing' section has a table with columns: Item, Qty, Price, Amount, Margin, and Tax. The table is empty. Below the table is a 'Tip: Add a product to your order.' message. At the bottom of the form is a 'Subtotal' of \$0.00 and a 'Discount' of 0.00%.

Item	Qty	Price	Amount	Margin	Tax
------	-----	-------	--------	--------	-----

Subtotal: \$0.00  
Discount: 0.00% \$0.00



3. Across the bottom of the Quote, you will see four tabs: Pricing, Decoration, Shipping and Quote Requests

- **Pricing:** Under the blue Pricing tab, you can click on the Add Product, Add Service and Add Title buttons, or use the associated drop-down menus to add charges to your invoice. Once your product has been added, hover your mouse over the product image and a Configure button will appear. Click on it and follow the prompts to populate price and quantity needed. By clicking on the blue Continue button, you will arrive at an optional Decoration page where you can choose an Imprint Method, upload a logo, indicate the imprint location and color, and provide decorator instructions. Click save and your Quote will display the relevant information in each associated field.

The screenshot displays the ESP Quote #10846 interface. At the top, the customer is listed as "7-ELEVEN STORE". The quote total is \$0.00. The interface includes fields for Sales Person (Kristin Tripoli), PO Reference, Quote Date (05/19/2016), In-Hand Date, and Ship Date. Billing and Shipping contacts are listed as "7-ELEVEN STORE" at "9707 QUEENS BLVD, ATLANTA, GA 30317". Below these are fields for Terms, Pay With, Ship Via, Account, and Tags. At the bottom, there are four tabs: "1 Pricing", "2 Decoration", "3 Shipping", and "4 Quote Requests". The "Pricing" tab is selected and highlighted with a red circle. Under the "Pricing" tab, there are buttons for "Add Product", "Add Service", and "Add Title". A product titled "Custom Two Tone Tote Bags" is listed with a description: "Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2 tone tote bag features a colored body & large offset white handles for easy carry - great for holding your retail purchases. Use to create fun promotional gift bags! Customize w/ an imprint of your logo & recipients are sure to carry your name all around town. Does not come with gusset." Below the product description, there are buttons for "Configure", "Copy", and "Delete". The "Configure" button is highlighted with a red circle. The bottom of the interface includes a "Cancel" button, a "Preview" button, a "More -" button, and a "Send" button with a "Save" button next to it.

Item	Qty	Price	Amount	Margin	Tax
Total (USD)			\$0.00	\$0.00	
Subtotal:			\$0.00		
Discount:			\$0.00		

- Decoration:** Click on the blue Decoration tab. Hover your mouse over the product image and an Edit button will appear. Click on it and an expanded Decoration window will appear, giving you additional Decoration sub-tabs for Artwork, Personalization and Shipping. On any of these sub-tabs, you can add an additional Imprint Location, ESP Charge (pulled straight from the Product Detail in ESP), Run Charge or Fixed Charge (this drop-down allows you several label options for this additional fee). You will also see a menu at the top of the page for Configuration, Instructions, Shipping and Vendor Charges. All of these areas are optional and provide you the opportunity to be as general or as detailed in your Quote as you wish. Remember to always click on the blue Save button to save your edits.

The screenshot displays the ESP Quote #10846 interface. The top section shows the Customer (7-ELEVEN STORE), Sales Person (Kristin Tripoli), and Quote Date (05/19/2016). The Quote Total is \$159.76. The interface includes tabs for Pricing, Decoration (highlighted with a red circle), Shipping, and Quote Requests. The Decoration tab shows a product listing for "Custom Two Tone Tote Bags - 3" with an "Edit" button (also highlighted with a red circle). Below the product listing, the "Edit Product" window is open, showing tabs for Configuration, Decoration (highlighted with a red circle), Instructions, Shipping, and Vendor Charges. The Decoration tab further shows sub-tabs for Artwork, Personalization, and Shipping (all highlighted with red circles). The main content area of the Edit Product window displays the product details, including the product number, name, description, and supplier (US Manufacturing Group). The bottom of the window features a "Delete Product" button and "Cancel" and "Save" buttons.

- **Shipping:** Click on the blue Shipping tab. Hover your mouse over the product image and an Edit button will appear. Click on it and a Shipping window will appear where you can enter new information or import it directly from your CRM. A drop-down menu provides multiple shipping methods from which to select. Remember to always click on the blue Save button to save your edits.

**Edit Product**

Customer: 7-ELEVEN STORE  
Sales Person: Kristin Tripoli  
Billing Contact: Enter or Choose Contact  
7-ELEVEN STORE  
9707 QUEENS BLVD  
ATLANTA, GA 30354  
Terms: Add Product

**Configuration** **Decoration** **Instructions** **Shipping** **Vendor Charges**

**Vendor Shipping Details**  
Ship To: Enter or Choose Contact  
Shipping Date:   
Ship Via:   
Best Way  
Canada Post International Parcel  
Canada Post Priority Worldwide  
Canada Post Regular Parcel  
Canada Post Xpresspost  
Cust Pick Up  
Delivery Truck  
FedEx International Ground  
FedEx International Priority  
FedEx 2Day  
FedEx Ground  
Federal Express  
FedEx Priority Overnight  
Local Carrier  
Other  
Purulator  
UPS 2 Day  
UPS 2nd Day Air  
UPS 3 Day

**Product Number**

**Product Name**  
Custom Two Tone Tote Bags - 3

**Product Description**  
Incorporate a promotional product into your next marketing campaign that can carry your brand name around. With water resistant, non-woven polypropylene material, our reusable 2 tone tote bag

**Supplier**  
US Manufacturing Group

**Delete Product** **Cancel** **Save**

- **Quote Requests:** While Quotes are sent to clients, Quote Requests are sent to Suppliers. Click on the blue Quote Requests tab. The ESP Supplier for each product on your Quote will appear next to the item they provide.

**Quote #10652**

**Sales Person**  
Kristin Tripoli

**PO Reference**

**Quote Date**  
05/09/2016

**In-Hand Date**

**Ship Date**

**Billing Contact**  
Enter or Choose Contact  
CHRIS STONE  
4745 LEOPARD ST  
FRISCO, TX 75035-6452

**Shipping Contact**  
Enter or Choose Contact  
CHRIS STONE  
4745 LEOPARD ST  
FRISCO, TX 75035-6452

**Terms**

**Pay With**

**Ship Via**

**Account**

**Tags**  
Enter or Choose Tag

**1 Pricing** **2 Decoration** **3 Shipping** **4 Quote Requests** **Create Order**

Item	Qty	Net Cost
US Manufacturing Group asi92433 Custom Two Tone Tote Bags - 3	12	\$2,988.00
Peerless Umbrella Co Inc asi76730 The Mulligan Umbrella Product #: 2419WGF		\$0.00
<b>Total Units</b>	12	
<b>Total (USD)</b>		\$35.86
<b>Total (USD)</b>		\$0.00

**Cancel** **Preview** **More** **Send** **Save**

You can Preview or Send Quote Requests using the buttons displayed underneath each Supplier. If you select the blue Send button, a new window will display the request and email message that will be sent to the Supplier. Click Cancel or Send to finish.

**esp** Quote #10652

Sales Person: Kristin Tripoli PO Reference: Quote Date: 05/09/2016 In-Hand Date: Ship Date:

Billing Contact: Enter or Choose Contact Shipping Contact: Enter or Choose Contact

CHRIS ST... 4745 LEOP... FRISCO, T...

Terms: Price Add Product

**Send Quote**

To \* sales@usmg.com

CC Kristin Tripoli MyPromoOffice

BCC Enter or Select User

Subject \* New Quote Request 10652 from ASI Distributor Services Inc

Message

Hello,

I am very interested in your products. Please provide a quote on the these items I found in ESP so that I may present accurate pricing to my buyer.

☒ Include Order Document

**Quote Request #10652**

ASI Advertising Specialty Institute ASI Distributor Services Inc 4000 S. Green Rd. Tempe, AZ 85281-6000

Sales Person: Kristin Tripoli Quote Date: 05/09/2016

US Manufacturing Group 14555 Westmont Dr Houston, TX 77060-4741 CHRIS STONE 4745 LEOPARD ST FRISCO, TX 77520-9402

**Custom Two Tone Tote Bags - 3**

Integrate promotional products, your next marketing campaign material starts with bags. Bags & Totes, with color, design, non-woven and polypropylene materials. Our reusable 20x14x10 bag features a colored body & design opportunities to help carry your message. Your next campaign starts here! Create for promotional gifts, giveaways or get yourself organized & inspired! Includes carry strap & top handle. Does not come with gusset.

	Quantity	Cost	Amount
	12	\$2.5000	\$30.00
<b>Total Units</b>	12		
<b>Total Price</b>			\$30.00

**Decoration Details**

Proof Required: None

**Total: \$30.00**

Thank you!

Cancel Send

4. Once your Quote is ready to be sent to your client, click on the Send link in the lower right corner of your screen. A new window will display the Quote and email message that will be sent to your client. Click Cancel or Send to finish.

The image shows two overlapping windows from the 'esp' system. The background window is the 'Quote #10846' page for customer '7-ELEVEN STORE'. It displays fields for Sales Person (Krahn Trippel), PO Reference, Quote Date (05/19/2016), In-Hand Date, and Ship Date. It also shows Billing and Shipping contact information for '7-ELEVEN STORE' at 9707 QUEENS BLVD, ATLANTA, GA 30317. A 'Create Order' button is visible on the right. The foreground window is the 'Send Quote' modal, which includes a 'To' field (eleven@sevenstore.net), a 'Subject' (New Quote 10846 from ASI Distributor Services Inc), and a message body. It also has a 'Send' button circled in red.

5. Please note that from the original Quote page, you can create an Order in one click simply by clicking on the blue Create Order button at the right of the page.

The image shows the 'Quote #10652' page for customer 'ACE AUTO PARTS'. It displays fields for Sales Person (Krahn Trippel), PO Reference, Quote Date (05/09/2016), In-Hand Date, and Ship Date. It also shows Billing and Shipping contact information for 'CHRIS STONE' at 4745 LEOPARD ST, FRISCO, TX 75035-6452. A 'Create Order' button is circled in red at the bottom right of the page. The page also includes a table with columns for Item, Qty, Price, Amount, Margin, and Tax, and a 'Custom Two Tone Tote Bags - 3' product listing.



With one click on the Create Order button, the Quote above becomes the Order below.

The screenshot shows the 'Order #10653' interface in the eesp system. The header bar displays the order number, which is circled in red. The main content area includes a 'Customer' dropdown set to 'ACE AUTO PARTS', a 'Sales Person' dropdown set to 'Kristin Tripoli (Me)', and a 'PO Reference' field. The 'Order Date' is '05/09/2016'. The 'In-Hand Date' and 'Ship Date' fields are empty. The 'Billing Contact' and 'Shipping Contact' are both 'CHRIS STONE' at '4745 LEOPARD ST, FRISCO, TX 75035-6452'. The 'Acknowledgement Contact' is also 'CHRIS STONE' at the same address. The 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags' fields are empty. The 'Create Invoice' button is circled in red. The 'Pricing' tab is active, showing a table with columns: Item, Qty, Price, Amount, Margin, and Tax. The table contains one item: 'Custom Two Tone Tote Bags - 3' with a quantity of 12, a price of \$4.9800, an amount of \$59.7600, and a margin of 40.00%. The total units are 12, and the total USD is \$59.76. The 'Total (USD)' row shows a total of \$59.76 and a tax of \$23.90. The bottom of the interface has a 'Cancel' button, a 'Preview' button, a 'More' button, and a 'Send' button.

Item	Qty	Price	Amount	Margin	Tax
Custom Two Tone Tote Bags - 3	12	\$4.9800	\$59.7600	40.00%	
Total Units	12				
Total (USD)			\$59.76		\$23.90

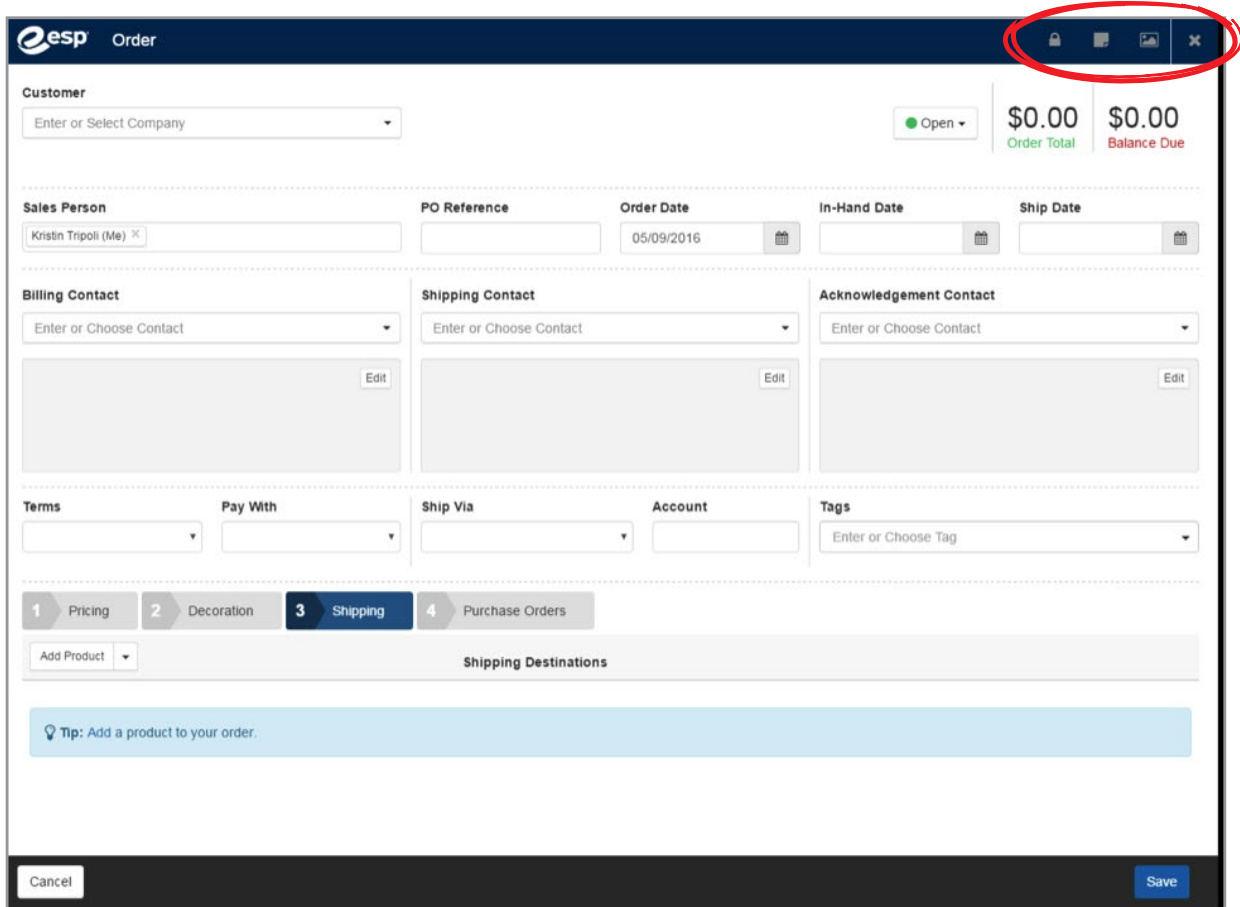
With one click on the Create Invoice button, the Order above becomes the Invoice below:

The screenshot shows the 'Invoice #10654' interface in the eesp system. The header bar displays the invoice number, which is circled in red. The main content area includes a 'Customer' dropdown set to 'ACE AUTO PARTS', a 'Sales Person' dropdown set to 'Kristin Tripoli (Me)', and a 'PO Reference' field. The 'Invoice Date' is '05/09/2016'. The 'In-Hand Date' and 'Ship Date' fields are empty. The 'Invoice Contact' and 'Shipping Contact' are both 'CHRIS STONE' at '4745 LEOPARD ST, FRISCO, TX 75035-6452'. The 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags' fields are empty. The 'Pricing' tab is active, showing a table with columns: Item, Ordered Qty, Invoiced Qty, Price, Amount, and Tax. The table contains one item: 'Custom Two Tone Tote Bags - 3' with an ordered quantity of 12 and an invoiced quantity of 12, a price of \$4.9800, and an amount of \$59.7600. The total units are 12, and the total USD is \$59.76. The 'Total (USD)' row shows a total of \$59.76. The bottom of the interface has a 'Cancel' button, a 'Preview' button, a 'More' button, and a 'Send' button.

Item	Ordered Qty	Invoiced Qty	Price	Amount	Tax
Custom Two Tone Tote Bags - 3	12	12	\$4.9800	\$59.7600	
Total Units	12	12			
Total (USD)				\$59.76	

# Visibility, Notes and Artwork

Whether you are in an Order, Invoice or Quote, there are four icons across the top blue bar of the page. The lock icon represents Visibility, the page icon represents Notes, the image icon represents Artwork and the X icon allows you to close the page.

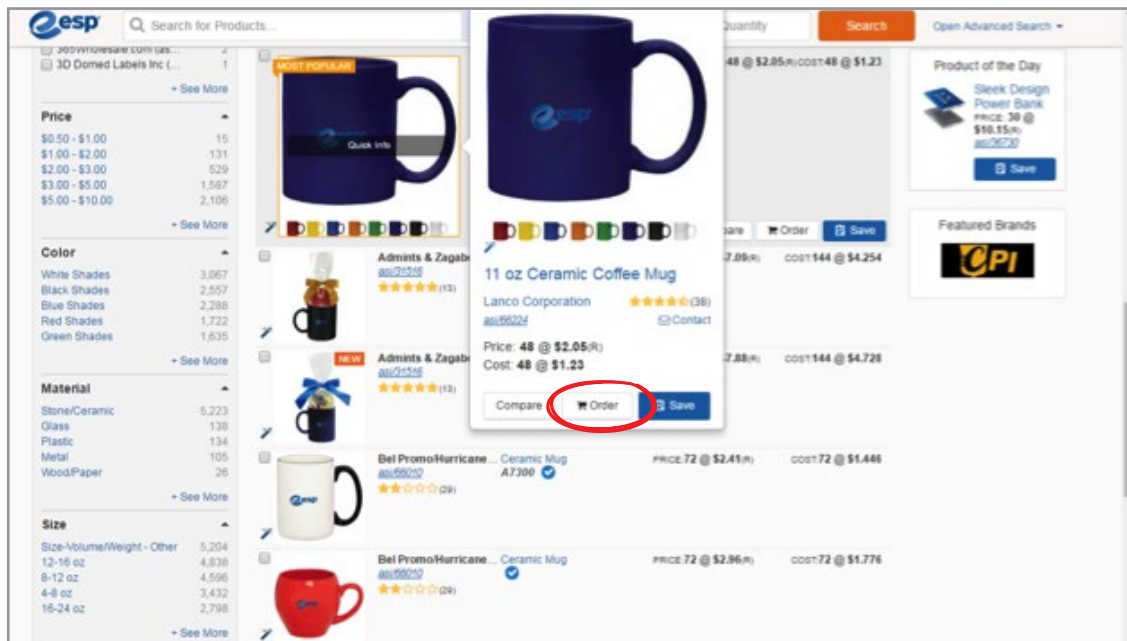


The screenshot shows the 'esp Order' form. At the top, a dark blue navigation bar contains four icons: a lock (Visibility), a document (Notes), an image (Artwork), and an 'X' (Close). These icons are circled in red. Below the navigation bar, the form is divided into several sections: 'Customer' with a dropdown menu; 'Sales Person' with a dropdown menu showing 'Kristin Tripoli (Me)'; 'PO Reference', 'Order Date' (05/09/2016), 'In-Hand Date', and 'Ship Date' with calendar icons; 'Billing Contact', 'Shipping Contact', and 'Acknowledgement Contact' with dropdown menus and 'Edit' buttons; 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags' with dropdown menus; and a 'Shipping Destinations' section with an 'Add Product' button. At the bottom, there is a 'Cancel' button and a 'Save' button. A light blue tip box at the bottom left says 'Tip: Add a product to your order.'

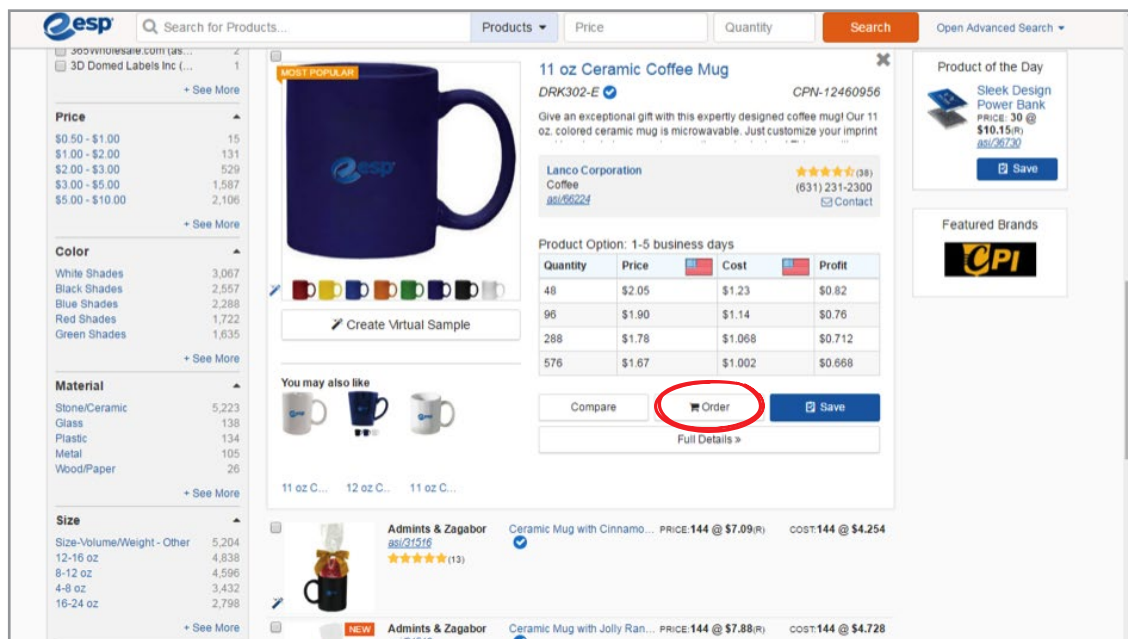
- **Visibility:** Click on the Visibility icon and a side window opens, allowing you to select who can see each form. Click the icon again to close the side window.
- **Notes:** Clicking on the Notes icon will open a side window and bring up any Notes associated with the form, and also give you an opportunity to add new Notes. Click the icon again to close the side window.
- **Artwork:** Clicking on this icon opens a side window that allows you to upload associated Art Files. Click the icon again to close the side window.
- **Close:** Clicking on this icon closes the page.

## The fastest way to create orders and quotes is right from within your ESP search results!

1. Run a product search.
2. There are many ways to easily create an **Order** right from your ESP search results.
  - Place your mouse over the product you're interested in and an Order button with shopping cart icon will appear. Click Order to start a new order.



- Click anywhere in the product search result box and a quick view window will appear with the same Order button as above. Click Order to start a new order.



- Click through to the full product detail page and click Order to start a new order.

The screenshot shows the ESP Web interface for a 11 oz Ceramic Coffee Mug (Product # DRK302-E). The page includes a large image of the mug, a color selection bar, and a table of pricing options. The 'Order' button is circled in red.

Quantity	Catalog Price	Net Cost	Profit
48	\$2.05	\$1.23	\$0.82
96	\$1.90	\$1.14	\$0.76
288	\$1.78	\$1.068	\$0.712
576	\$1.67	\$1.002	\$0.668

Price Includes: One color imprint. Mugs must be ordered in multiples of 24.

Color: Black, Red, Yellow, Lime, Ocean Blue, Midnight Blue, Orange  
 Size: 11 oz  
 Material: Ceramic  
 Imprint Method: Silkscreen  
 Category: Mugs & Steins-Ceramic; Mugs & Steins-General

- Create an Order straight from your Clipboard.

The screenshot shows the ESP Web interface with the 'Clipboard (3)' dropdown menu open. The menu lists three items: Custom Two Tone Tote Bags, The Mulligan Umbrella, and 15 oz White Mighty Mug. The 'Order' button is circled in red.

Quantity	Catalog Price	Net Cost	Profit
48	\$2.05	\$1.23	\$0.82
96	\$1.90	\$1.14	\$0.76
288	\$1.78	\$1.068	\$0.712
576	\$1.67	\$1.002	\$0.668

Price Includes: One color imprint. Mugs must be ordered in multiples of 24.

Color: Black, Red, Yellow, Lime, Ocean Blue, Midnight Blue, Orange  
 Size: 11 oz  
 Material: Ceramic  
 Imprint Method: Silkscreen  
 Category: Mugs & Steins-Ceramic; Mugs & Steins-General

3. ESP walks you step by step through the Order creation process.

- Click on the Order button
- Enter the quantity and click on Continue
- Enter the decoration information (optional) and click Continue
- Choose your customer from the drop-down menu if they are in your CRM; if not, enter the client name and ESP will ask you if you'd like to create a new record in your CRM.
- Click Create Order, and the Order is automatically created.
- Remember: From your Order, you can create an Invoice in one click and send a PO in one click.

4. To create a **Quote** right from your ESP search results, save your desired products to the Shopping Cart.

- Check the products you want in your Quote.
- Click on the Order drop-down menu and select Create Quote. The quote is automatically created.
- Remember: From your Quote, you can create an Order in one click, and an Invoice in one click from your Order.

The top screenshot shows the ESP Web interface with a search for 'ceramic mugs' resulting in 6,340 results. A dropdown menu is open over the 'Order' button, with 'Create Quote' highlighted. The bottom screenshot shows the 'Quote #10855' page. The quote total is \$51.25. The page includes fields for Customer (7-ELEVEN STORE), Sales Person (Kristin Tripoli), and Billing/Shipping Contact (7-ELEVEN STORE). A table of items is shown at the bottom, with '11 oz Ceramic Coffee Mug' highlighted.

Item	Qty	Net Cost
11 oz Ceramic Coffee Mug	25	\$1.2300
<b>Total Units</b>	<b>25</b>	
<b>Total (USD)</b>		<b>\$30.75</b>



5. Quotes, Orders and Invoices that were created from each other will be marked with a blue link at the top left corner of the screen for easy access to all related documents.

The screenshot displays the eSP Order #10856 interface. At the top, the header shows 'Order #10856' in a blue link. Below this, the 'Customer' section includes a table with the following data:

Type	Date	Amount
Quote #10855	5/19/16	\$51.25

A red circle highlights the 'Linked transaction' link in the Customer section. The 'Sales Person' is listed as 'Krisin Tripoli (Me)'. The 'Order Date' is '05/20/2016'. The 'In-Hand Date' and 'Ship Date' are both empty. The 'Billing Contact' and 'Shipping Contact' are both '7-ELEVEN STORE' at '9707 QUEENS BLVD, ATLANTA, GA 30317'. The 'Acknowledgement Contact' is empty. The 'Terms', 'Pay With', 'Ship Via', 'Account', and 'Tags' are all empty. The 'Pricing' tab is selected, showing a table with the following data:

Item	Qty	Price	Amount	Margin	Tax
11 oz Ceramic Coffee Mug	25	\$2.0500	\$51.2500	40.00%	
Total Units			25		
Total (USD)			\$51.25	\$20.50	

The 'Create Invoice' button is visible in the top right corner. The bottom of the screen shows a 'Cancel' button, a 'Preview' button, a 'More' button, and a 'Send' button.



# Thank You!

We hope that ESP CRM & Orders helps you streamline the way you do business and makes your life a little bit easier. If you have any questions, concerns or suggestions, please don't hesitate to contact product support at **(800) 546-1350 ext.2** or [support@asicentral.com](mailto:support@asicentral.com).

