Print & Mail

PrintSf.com

Print & Mail for Salesforce

Configuration & User Guide

Customer Relationship Management

PrintSf.com Print & Mail for Salesforce

{ for Appexchange™ }

Print Sf Free Edition

Customization & User Guide

Welcome

Thank you for your interest in Print Sf and our print marketing solutions. Print Sf provides salesforce.com customers with an easy and affordable way to manage, share and deliver marketing collateral, direct mail, and digital media. We help you leverage your adoption of Salesforce into more efficient and responsive print marketing and direct mail programs.

What Can You Do?

Print Sf's **Free Edition**, installed from the AppExchange, lets your team upload, share and email marketing documents and digital media for free. When needed, uploaded documents are easily ordered for on-demand print, shipment or direct mailing inside the USA, and billed to a credit card.

In addition to printing documents you upload, Print Sf also provides an on-line library of 1-to-1 Templates for common promotional needs, events and holidays. Templates are easily personalized to you and your Salesforce lists, then proofed and ordered in minutes.

For more customized needs, our **Enterprise Edition** lets you publish your organization's own Templates for on-demand availability.

More specifically, here's what you can accomplish with Print Sf **Free Edition**:

- Print, ship or direct mail materials you created both “off-line” or “on-line” (using Templates).
- Print and ship materials to trade shows, conferences, meetings, events or office locations.
- Print and ship new or updated materials direct to sales reps and channels partners.
- Create mail lists from Campaigns, Leads, Contacts, Users, Custom Reports or CSV files.
- Clean your mail lists in seconds, by removing duplicates, verifying and correcting addresses, and validating against the USPS delivery point and National Change of Address databases.
- Log shipping and direct mailing activities in Salesforce, and schedule follow-up tasks.
- Upload and share documents and digital media, such as data sheets, brochures, case studies, slides shows, videos, images, ZIPS, or any file.

- Email links to case studies, data sheets & presentations to Leads, Contacts, and Users.
- Convert uploaded files to PDF to share or print more easily
- Replace documents and media with new versions and notify appropriate Users
- Manage and share all your digital assets and media files within your marketing team, and flexibly control access given to your sales and partner teams.

Is It Really Free?

Free Edition is available to all your Salesforce Users (and non-users) without cost, up to 5 GB of storage per Salesforce instance. **Free Edition** is provided to benefit customers that periodically use our on-demand print, mail and data processing services. At any time should you wish to stop using **Free Edition**, any uploaded media can be downloaded or deleted, and it's easily uninstalled from Salesforce. All fee-based services – such as print and mail - are optional and on-demand.

For information on publishing your own templates with our **Enterprise Edition**, please call 866.799.4773 ext. 101, or email sales@printsf.com.

Print Sf also welcomes the opportunity to customize our application to your unique marketing, publishing, and work flow needs, and our Professional Services are a key value to customers. We offer an innovative, seasoned team brimming with talent in interactive campaigns, personalized media, and Salesforce-centric publishing.

Contacting Print Sf

Print Sf prides itself on quality service and exceeding customer expectations. We're available by phone or email to answer your questions and help you use our service. Beyond print and mail on demand, we also offer a complete menu of technical, creative and campaign development services.

Technical Support

At Print Sf, we're committed to providing you with timely answers to your technical support and order related questions. We provide support via email or telephone and are available weekdays, 8:30 am to 5:00 pm Pacific (GMT – 8:00):

Tech Support Email:	Telephone:
support@printsf.com	866.799.4773 ext. 102

Sales

For information on our other products and services, please contact our sales department:

Tech Support Email:	Telephone:
sales@printsf.com	866.799.4773 ext. 101

Live Training Sessions & Recorded Tutorials

We offer regular training sessions via on-line meetings, and are working to provide a growing library of video tours and tutorials on our web site.

Table of Contents

About This Document

This User Guide provides information for deploying and using Print Sf in a Salesforce.com environment, or "instance". This document is organized into the following chapters:

The **Getting Started** chapter covers system requirements and installation of Print Sf.

The **Managing Setup** chapter details setup and configuration steps at both Personal and Administrative levels.

The **Managing Content and Digital Media** chapter details how to upload, organize and share marketing documents and digital media.

The **Managing Mail Lists** chapter details how to create, correct and refresh your mailing lists from live Salesforce data or CSV files.

The **Managing Print & Mail Orders** chapter details how to create, submit and track orders for print on demand services

The **Designing for Print Sf** chapter provides guidance and resources which empower graphic designers to use the benefits of Template driven publishing.

Who Should Read This Guide

This document is intended to assist 3 types of audiences:

- **Salesforce Administrators** – for installation of Print Sf and Salesforce configuration
- **Print Sf Marketing Users** – Usually a marketing department role
- **Print Sf Sales Users** – Usually sales representatives and partners

Salesforce Administrators need focus only on the installation steps in Getting Started. For Print Sf Marketing Users, all Chapters provide details relevant to your usage of Print Sf. Lastly, for Print Sf Sales Users, the first and last chapters (Getting Started and Designing for Print Sf) may not be relevant to your role.

Getting Started

Getting started with Print Sf is fast and uncomplicated. The basic steps to configure and begin using Print Sf are outlined below, and more detail is provided in subsequent chapters.

System Requirements

To install and use Print Sf, you must have one of the following versions of salesforce.com:

- Professional Edition
- Enterprise Edition
- Unlimited Edition

Further, Group Edition users can use Print Sf separate from Salesforce entirely by obtaining separate login credentials for Print Sf directly. Since Group Edition does not offer API access, Print Sf will not interact with Group Edition data and work flow. Regardless, Group Edition customers in need of print marketing will find Print Sf a powerful, time-saving tool.

Print Sf requires NO SOFTWARE for your computer, except a web browser and Adobe Acrobat

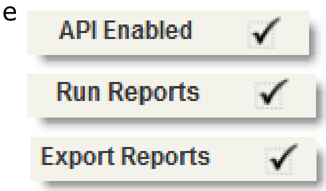
Reader to download proofs. Generally, we've used Print Sf successfully with these browsers, however we've focused testing on Firefox 2+ and Internet Explorer 6+:

- Microsoft Windows: Firefox 2+, Internet Explorer 6+, Safari 3+, Google Chrome 1+
- Mac: Safari, Opera and Firefox

Installing Print Sf

The following steps describe how to acquire Print Sf and the general steps in deploying the application.

1. **Install Print Sf** into your Salesforce instance by visiting our AppExchange page.
   a) Click the "Get it Now" button and follow the on screen prompts to install Print Sf. (You must have System Administrator credentials to install an application from the AppExchange.)
2. **Enable Security Settings** to allow Print Sf to interact with your data:
   a) For each User Profile that should access Print Sf, ensure the "API Enabled" setting is active.
   b) If you want to use Reports as a data source, ensure that "Run Reports" and "Export Reports" are enabled for each User Profile that has access to Print Sf.



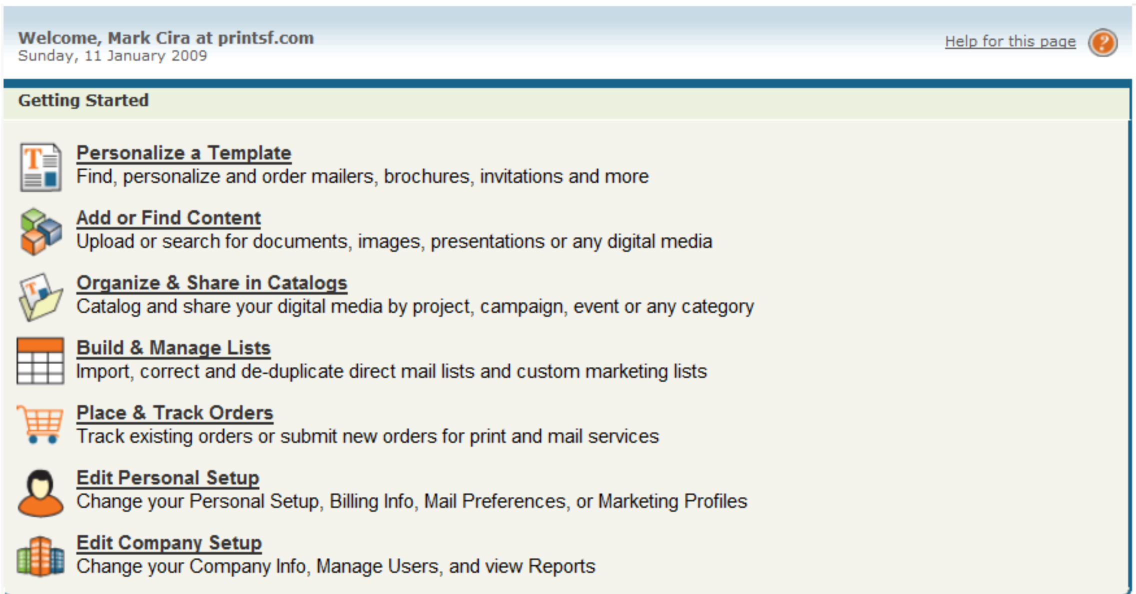
3. **Launch Print Sf** for the first time for your Organization:
   a) A Salesforce Administrator must launch Print Sf for the first time.
   b) Select Print Sf from the upper right drop down list of installed applications.
   c) Select the Print Sf Custom Tab to launch Print Sf, which will launch in a new window or browser tab depending on your browser settings.

   d) Pop ups must be enabled in your browser for our site. For instructions on enabling pop ups, see Enabling Pop Ups.
   e) When launching Print Sf for the first time, the Salesforce Administrator will be added to Print Sf as the first and only Print Sf User, with a Print Sf Security Profile of "Marketing User".
   f) Subsequent Salesforce Users will be added to Print Sf when they launch it for the first time, but they will be defaulted to a Print Sf Security Profile of "Sales User".
   g) The Salesforce Administrator will thus need to change at least one of the Print Sf Sales Users to be a Print Sf Marketing User in order to turn over general management of the Print Sf application to marketing. See the Manage Users section for details on changing a Print Sf Users' access rights and permissions.

Start Page and Navigation Basics

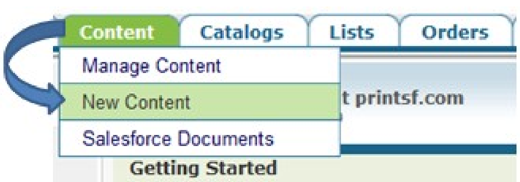
When Print Sf is launched from Salesforce, a separate browser window or browser tab will open, depending on your browser settings. Print Sf will open to the Start Page. We've worked hard to make Salesforce Users feel at home in Print Sf, and – once you've discovered a few additional features unique to Print Sf – you'll be off and running. Generally, here's what you need to know to navigate in and use Print Sf.

1. Upon launching Print Sf, you'll arrive at the Start page. Use the selections listed on the Start panel to access Templates, Content, Catalog, Orders, Lists or your Setup information.

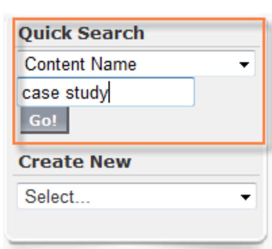


2. Alternately, use the top level tabs to access the same pages.

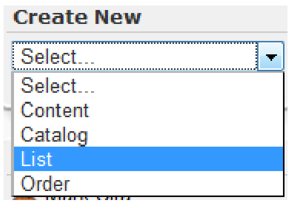
3. Unique to Print Sf, you may mouse over any Tab and go directly to any related page under the Tab, such as with Content > New Content



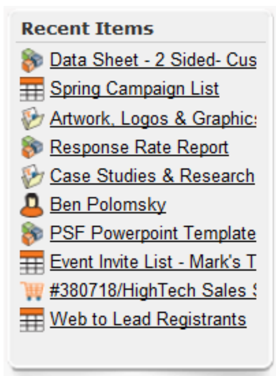
4. To quickly find records, you may use the Print Sf Quick Search panel to perform common searches.



5. Use the Create New pick list to quickly add new Content, Catalogs, Lists and Orders.

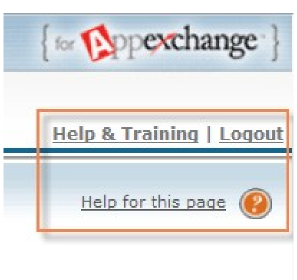


6. Use the Print Sf Recent Items panel to easily return to recently viewed Templates, Content, Catalogs, Lists, Orders and Users.



7. To search for records from any List of records, use the search panel found in the page title section.

8. Use the links in the upper right corner of every page to Get Help for the current page, visit our Help & Support section, or Log Out of Print Sf.



Managing Setup

Personal Setup

Before starting to use Print Sf, it's best to take a few minutes and complete setup of your User

Profile, Marketing Profile(s), and Billing information. By completing these steps up front, you'll avoid interrupting your ordering work flow to setup your preferences:

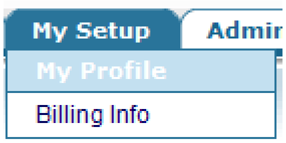
There are 3 areas of personal information to configure in Print Sf:

- Your **User Profile** contains your name, address, contact information and direct mailing preferences.
- One or more **Marketing Profiles** can be created to pre-populate information into document Templates, such as name, address, phone numbers, slogans, personal photos and logos.
- Your **Billing Information**, which is used at the time you submit Orders, includes credit card information and/or a corporate account number issued by Print Sf.

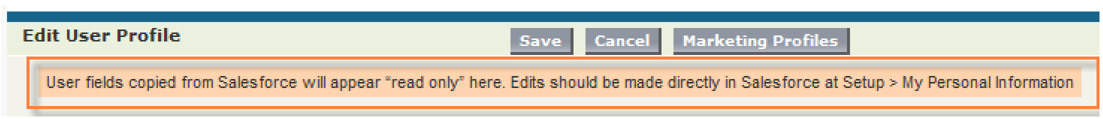
User Profile

Your User Profile page contains your contact information and mailing preferences.

1. To Edit your User Profile, select Setup > Personal Profile



2. Note that your Print Sf User Profile is synced to the originating Salesforce User record, and edits to basic contact information should be made in Salesforce directly. Synced fields display as read-only in Print Sf.



3. If you will be mailing, Select a Default Mailing Method.
4. If we will ship pre-addressed direct mail to you to deliver to your own post office (rather than mail "hands free" through Print Sf), enter your mailing permit information, as provided to you by the post office.

5. To save your changes, click Save or Marketing Profiles

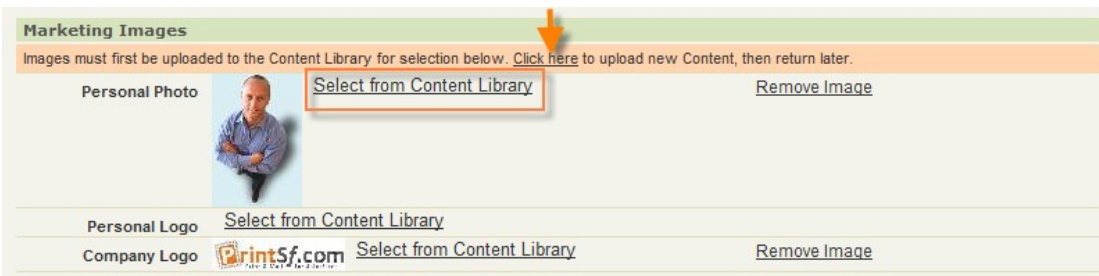
Marketing Profiles

Marketing Profiles are used to pre-populate contact information, logos and photos into template based print orders. If you will be using Print Sf Templates, you will need at least one Marketing Profile.

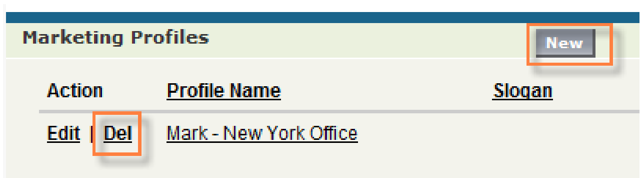
1. To View a list of your Marketing Profiles, select My Setup > My Profile and then click the

Marketing Profiles button at the Edit User page.

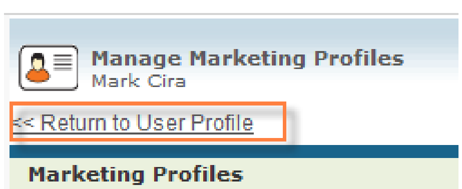
2. A default Marketing Profile is automatically created with details from your User Profile, and will show at the Marketing Profiles List.
3. Select Edit to customize contact details and presentation, or to select logos or photos from your Content Library.
4. Use the Select from Content Library link to select images previously uploaded, or use the Click here link to upload a file then return later.



5. Make changes to the Marketing Profile, and click Save.
6. Use the New and Delete selections to add or delete Marketing Profiles, accessed from the Manage Marketing Profiles page.



7. From the Manage Marketing Profiles page, select Return to User Profile to go back to your User Profile.

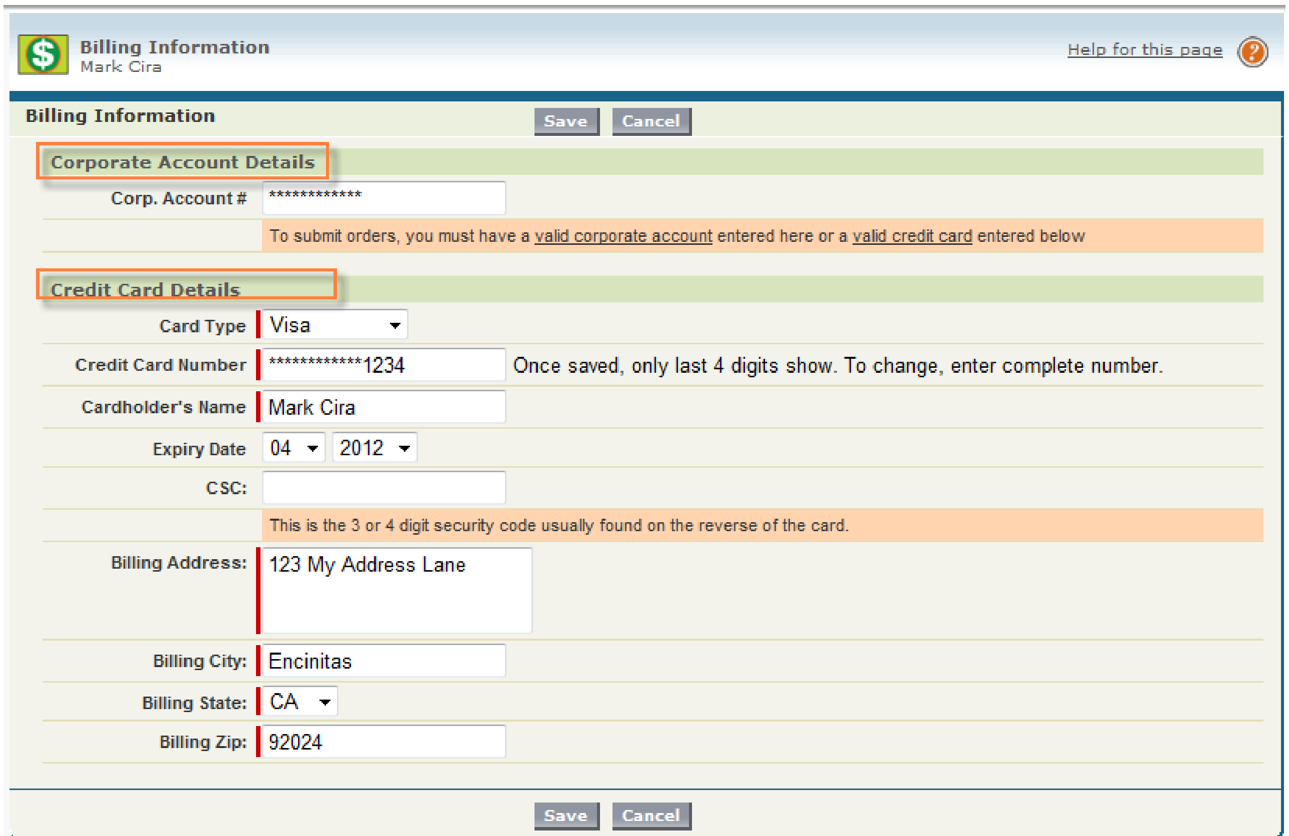


Billing Information

To submit an order for print on demand services, you must enter a valid credit card in your Billing Information page. Credit card information is stored securely and encrypted in all transactions. Alternately, Print Sf Enterprise Edition Users may enter an Account number if one has been provided.

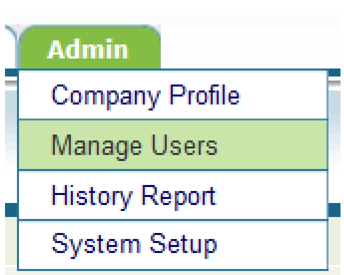
Use the New and Delete selections to add or delete Marketing Profiles, accessed from the Manage Marketing Profiles page.

1. To edit Billing information, select My Setup > Billing



2. Make your entries and click Save

3. If you are a Print Sf Marketing User, you may configure User Profiles, Marketing Profiles and Billing Information on behalf of others. See the Administration section for details on configuring other Users.

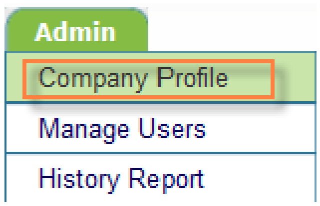


Company Setup

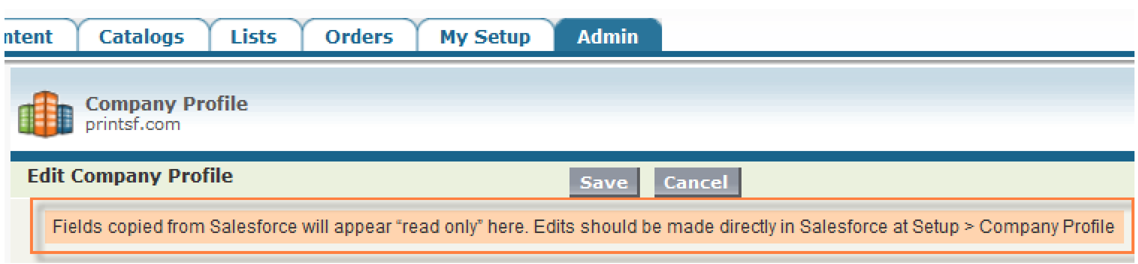
Company Profile

Use the Company Profile page to add or update information for your organization.

1. To access your Company Profiles, select Admin > Company Profile



2. If you are using the AppExchange version of Print Sf, your Company Profile is synced with your Salesforce Organization record. Therefore, the fields in your Company profile will be read only. Any changes to contact or other information should be made in Salesforce directly, and will be updated in Print Sf the next time it's launched from Salesforce.



Types of Users

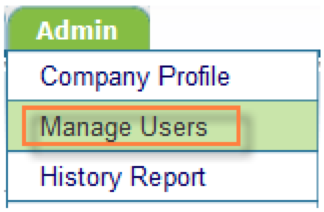
To help marketing and sales work collaboratively, Print Sf Free Edition delivers slightly different capabilities to different types of Users based on the User's Security Profile.

- Print Sf **Sales Users** are typically sales representatives or partners, and can:
  - Use Print Sf only on behalf of themselves
  - Generally access records they own except where another User has shared a record (such as an uploaded file).
- Print Sf **Marketing Users** are typically in marketing support or graphic design roles, and can:
  - Use Print Sf on behalf of themselves <u>AND</u> other Users.
  - Assign ownership of records to other Sales or Marketing Users (such as an Order or Mail List),
  - Access and manage Users and their User Profiles, Marketing Profiles and Billing Information.
  - Access and manage Orders, Lists, and other data for all of your Organization's Print Sf Users
  - Enter credit card information on behalf of themselves or others, but only see the last 4 digits of card numbers once saved to Print Sf.

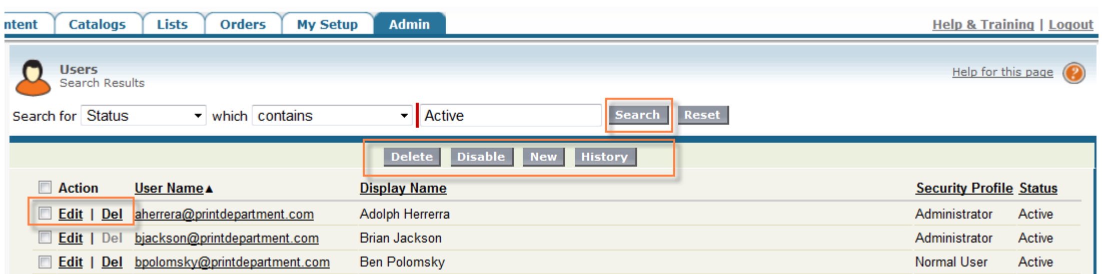
Manage Users

Using the Manage Users section of Print Sf, Marketing Users can create and modify other Print Sf Users, or make them Inactive.

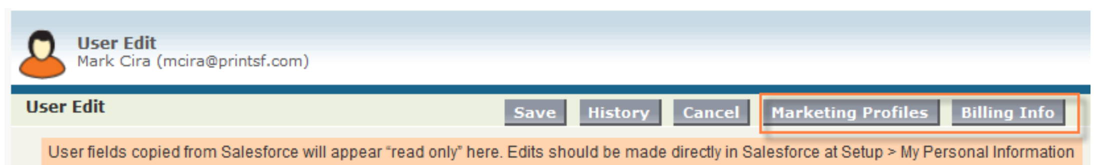
1. To Manage Users, select Admin > Manage Users



2. From the User List, use the buttons and links to search for, add, delete, disable, edit or report on Users.

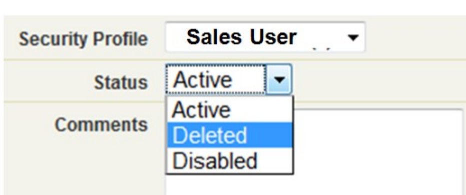


3. When editing or adding a new User, use the Billing and Marketing Profiles buttons on the Edit User page to access the User's additional setup information.



4. For more information on [Marketing Profiles]() and [Billing information](), see previous sections in the Personal Setup chapter.

5. At the User Edit page, use the Security Profile and Status selections to control Print Sf access to your Users.

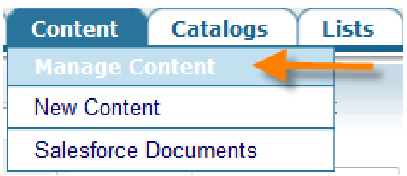


Managing Content & Digital Media

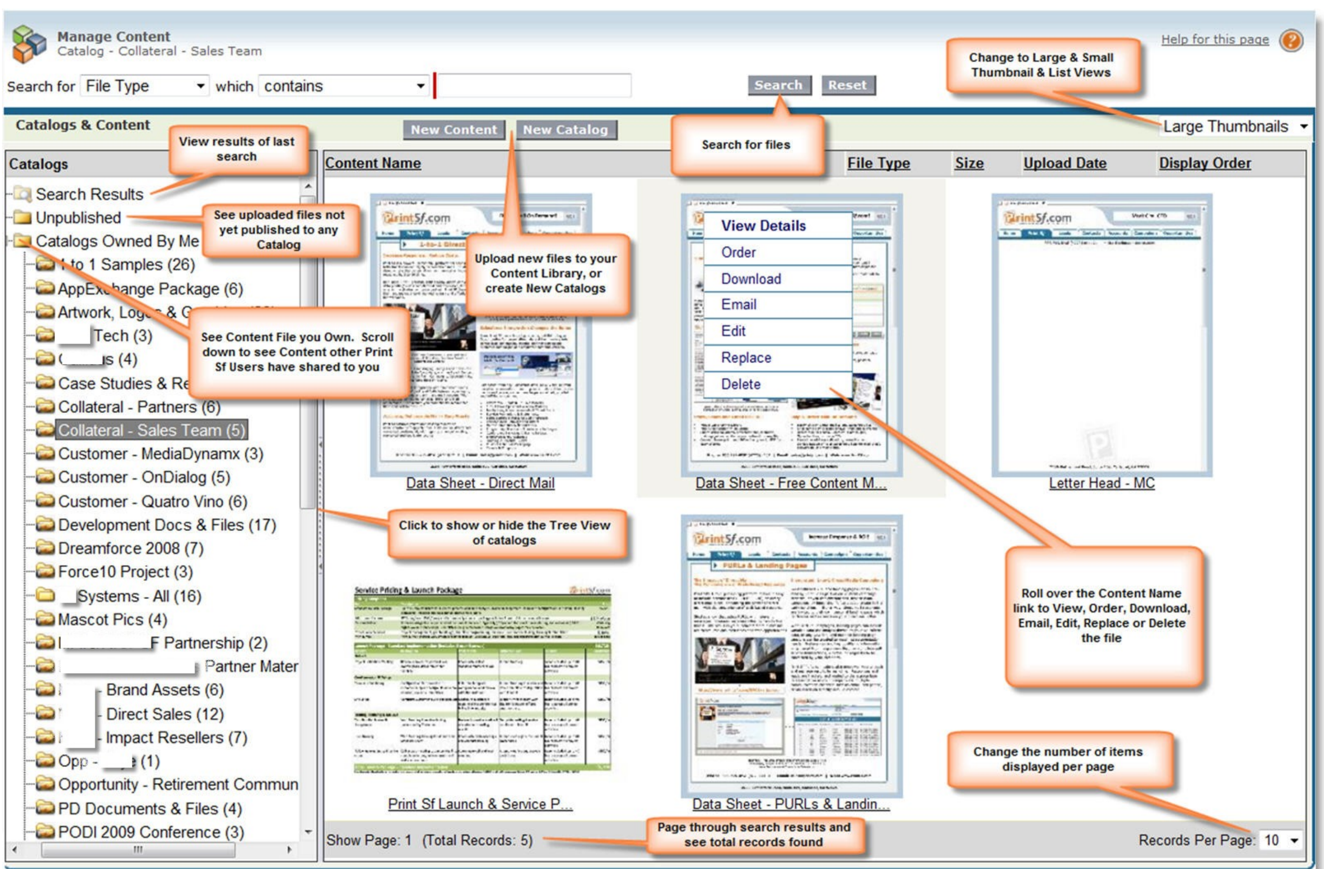
Print Sf's free Content Manager is used to upload, share, email and update documents, images, presentations and other digital media. Since print on demand Orders often reference images or PDF files stored in your Content Library, it's helpful to learn how to upload and manage Content first, and then start placing Orders using Content you've already uploaded.

Exploring the Content Library

1. To access the **Content Library**, select Content > Manage Content

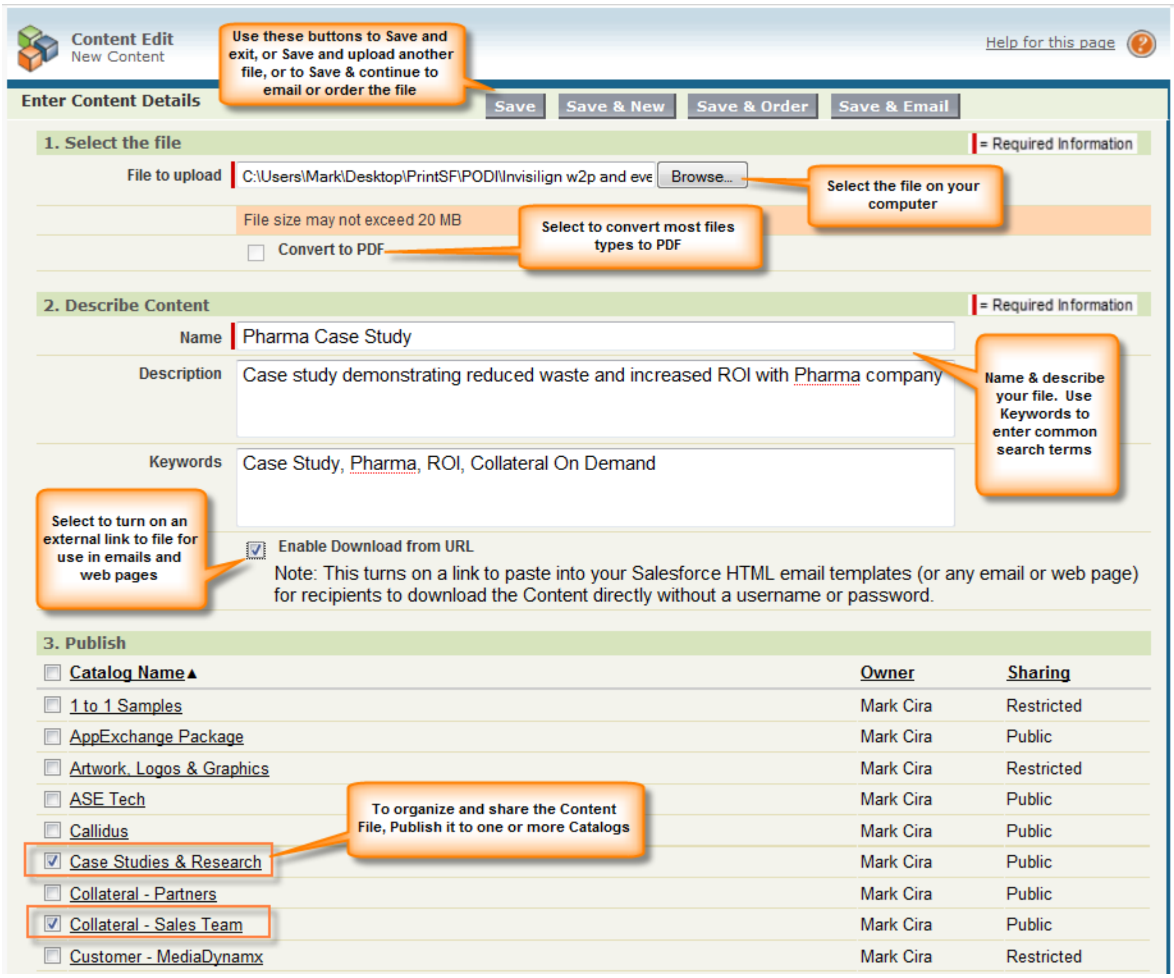


2. Review the graphic below for details on using your Content Library. [Click to enlarge]() to view a large image, which is stored centrally in our own Content Library.



Uploading & Viewing Content

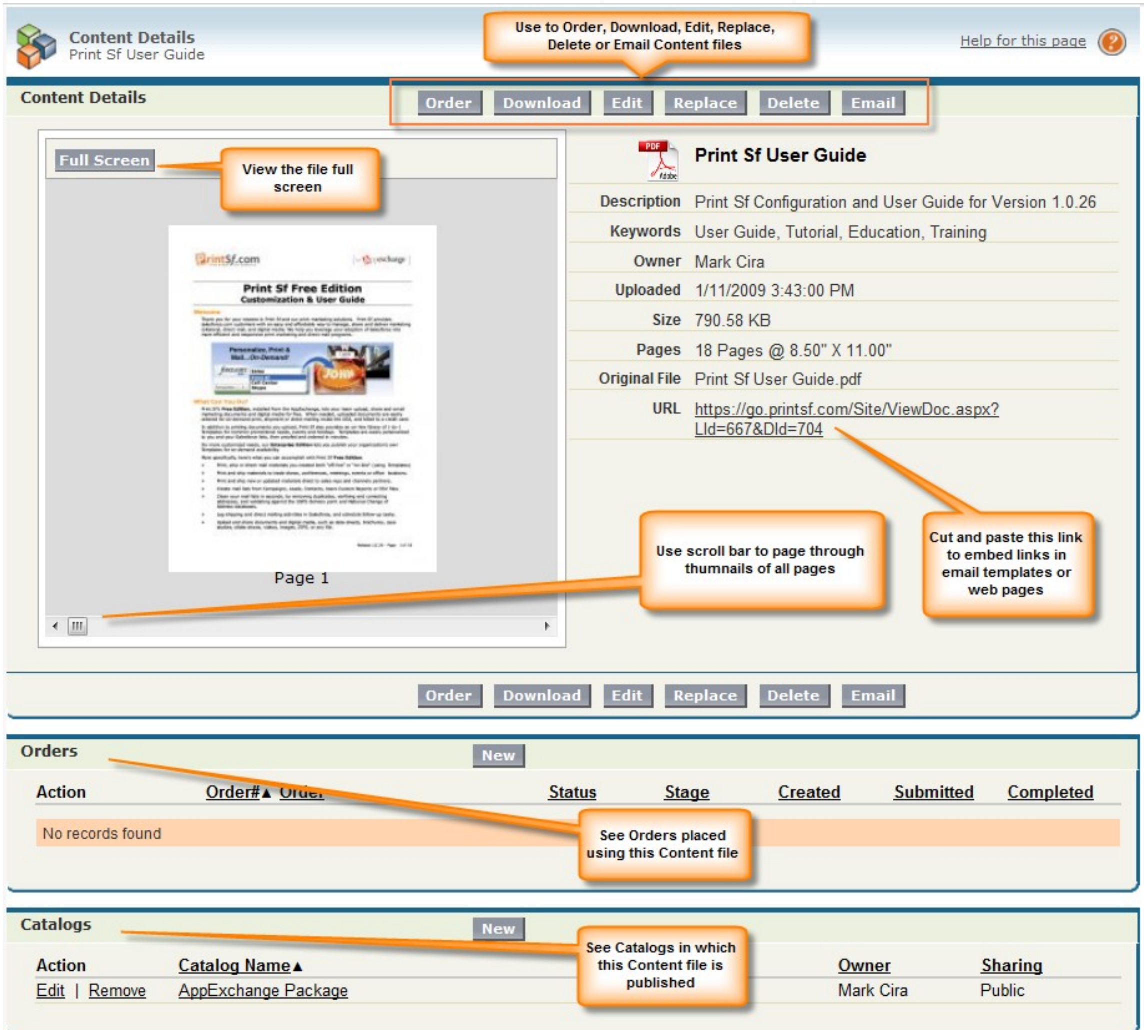
1. To **Upload New Content**, click the New Content button or select Content > New.



Click to enlarge this image (this will open an image stored "in the cloud" in the Print Sf Content Library).

2. To **View Content Files** select View Content for a specific file in the Content Library

3. Use the **Content Detail** page to download, email, edit or delete Content.

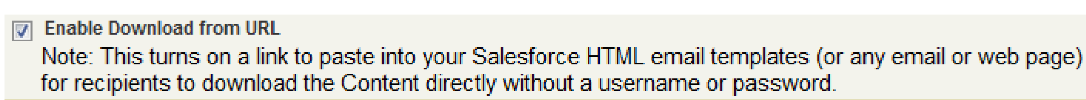


Click Here to enlarge this image. (Yes, once again from our Content Library!)

Emailing Links to Content

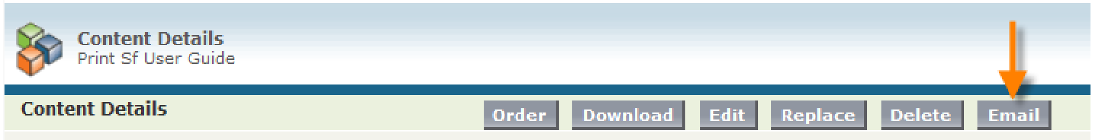
Use Print Sf to quickly email links to case studies, data sheets, presentations or other files to Salesforce Leads, Contacts, Users or others you type in, or that are in Outlook or other external email programs.

1. Be sure you have enabled the External URL for any Content file you will email.

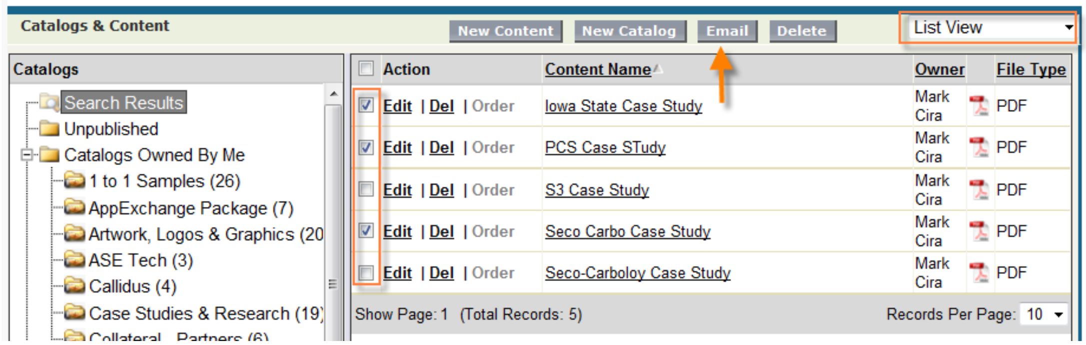


2. You may email links to a single Content file or multiple Content files at once.

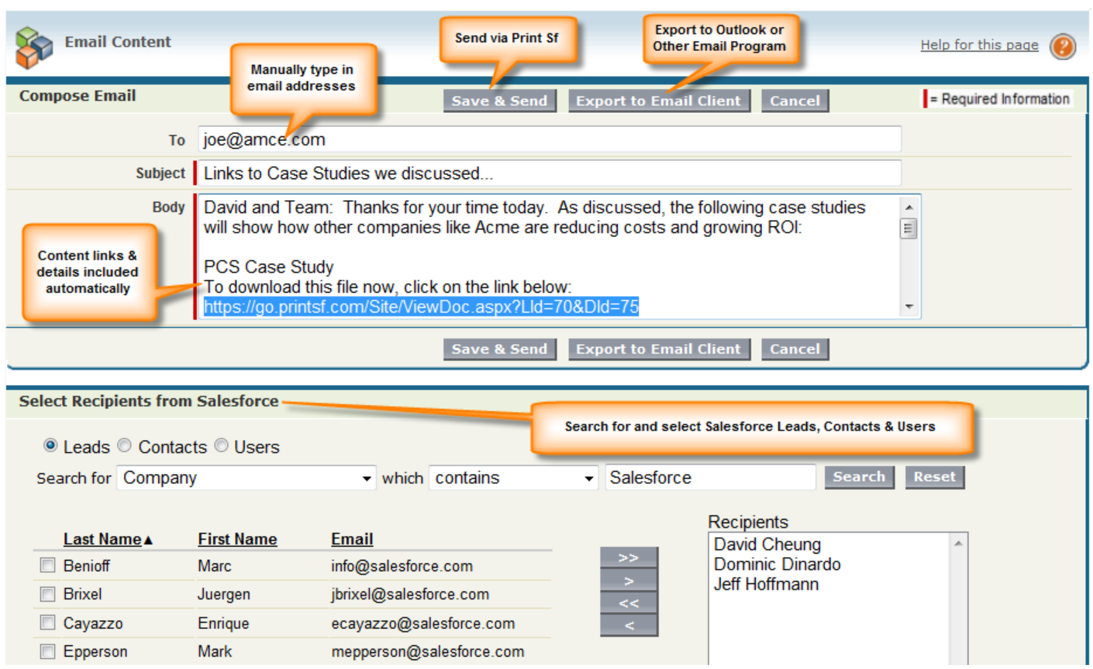
a) To email a single Content file click the Email button.



b) To email links to multiple files, go to Content > Manage Content, select List View, and then search for and select your files. Once they are selected (use the check boxes), then click the Email button.



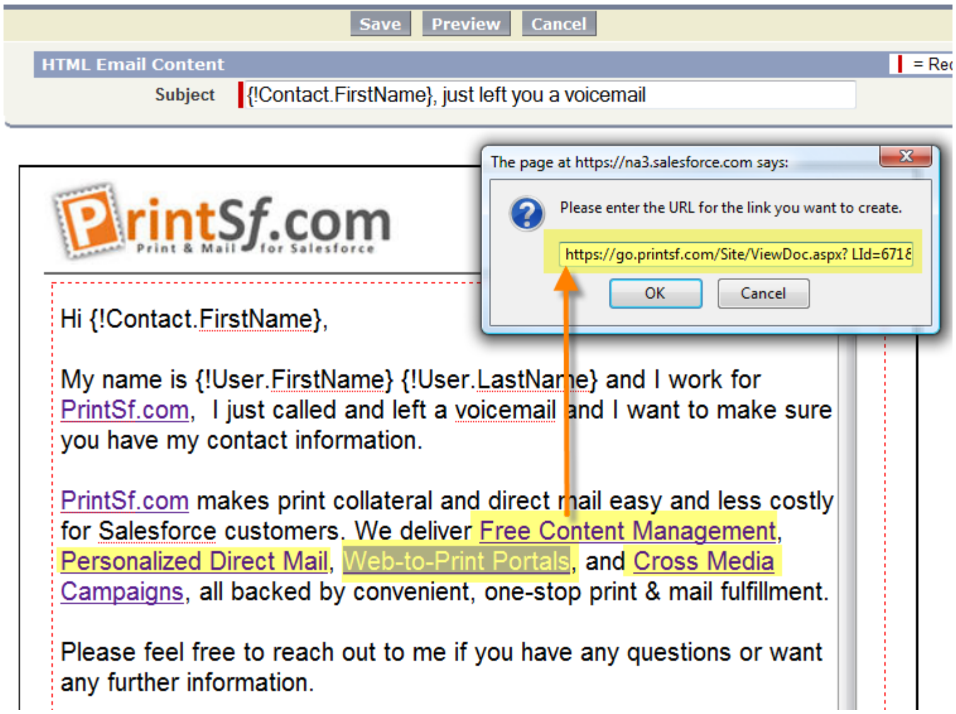
c) At the Email Content page, use the features shown below to compose and send your email. Click here to see a larger version of this graphic (downloaded from our Content Library!)



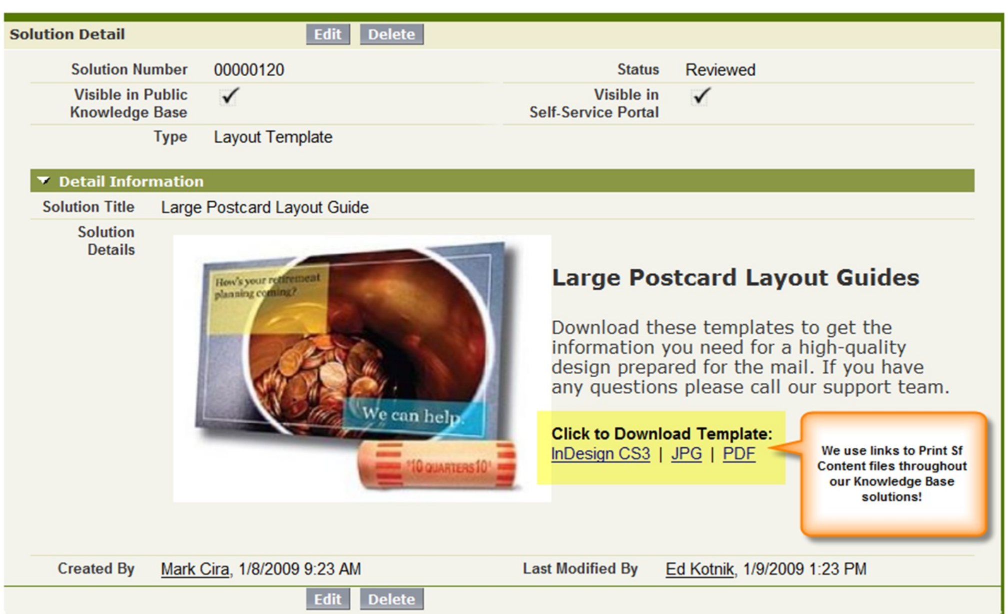
Linking Content in Salesforce HTML Templates and Other Web Pages

Print Sf's Content Manager gives you a central location to store media assets for reference from any email or web page. When a case study or presentation changes, you simply update it in Print Sf and all references to the Content point to the new version. Some handy ways to publish your centralized Content include:

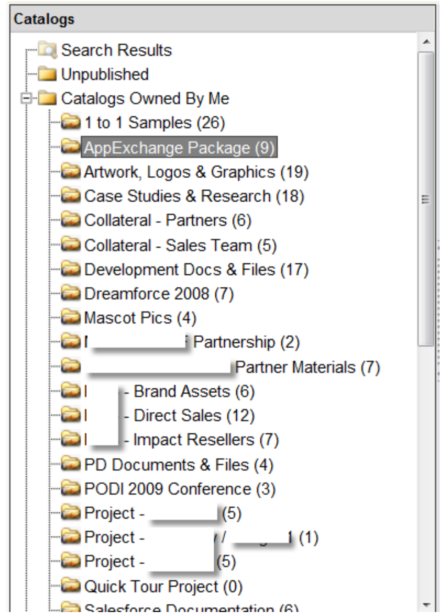
- Reference PDF data sheets from your web site which are centrally stored in Print Sf
- Include links to Case Studies and Data Sheets in your Salesforce email templates



- Include links to Help Documents and file downloads in your Salesforce HTML Knowledge Base Solutions. Click to enlarge this image.



Using Catalogs to Organize & Share Content



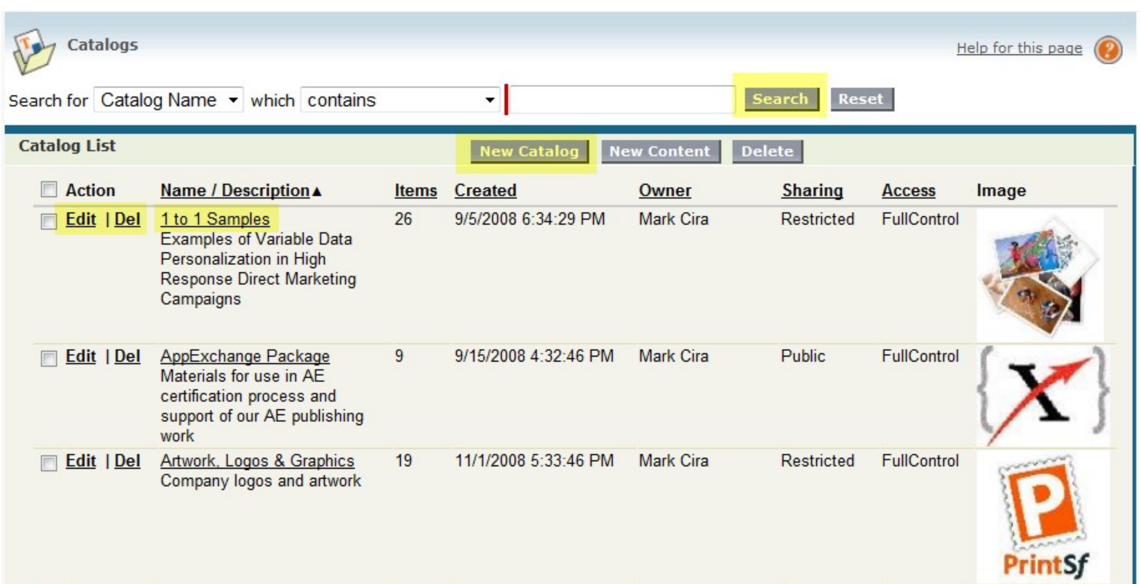
Catalogs are used to organize and share Content with Users. Create Catalogs to organize and share by group, project, campaign, sales channel, or for any purpose. Examples of using Catalogs to organize Content include:

- Create Catalogs to share Content appropriate for a group of sales representatives.
- Create Catalogs to share with specific types of partners or sales channels.
- Create a Catalog for a specific sales rep, office or partner, to hold Content that's specific to that party.
- Create Catalogs for events, projects or campaigns, to organize and share digital media specific to that purpose and team of users.
- Create Catalogs for specific Opportunities, to organize presentations, proposals, case studies and other Content specific to the Opportunity.

Better still, since any Content file can be shared or "Published" in multiple Catalogs, you can conveniently reference and publish a single Content file for many different purposes and audiences.

Manage Catalogs

1. To **Manage Catalogs**, select Catalogs > Manage Catalogs from the Print Sf Tabs.

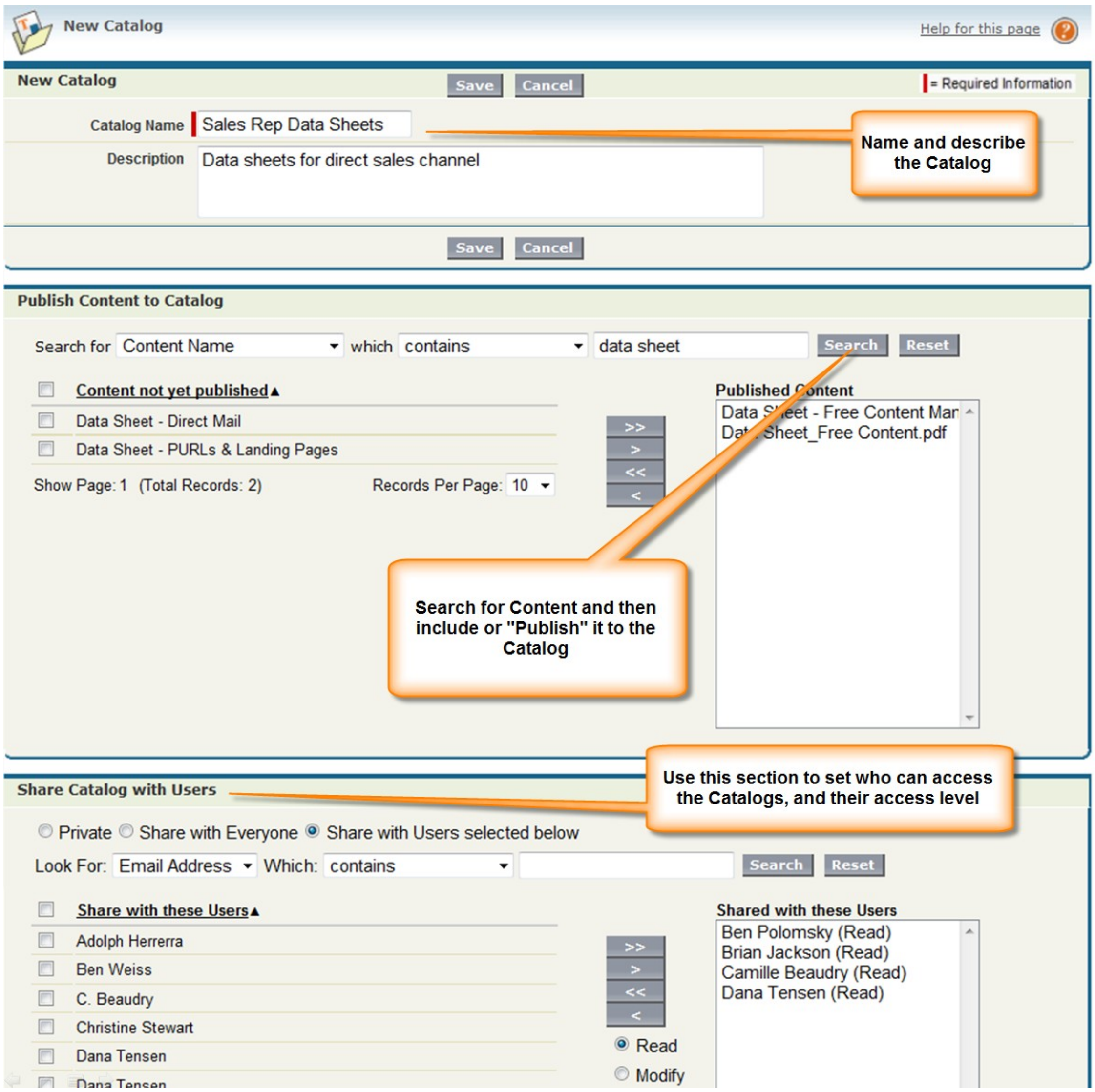


2. Use the features highlighted above to search, add, delete, edit and view Catalogs

Adding Catalogs

1. To Add a New Catalog, select Catalogs > New

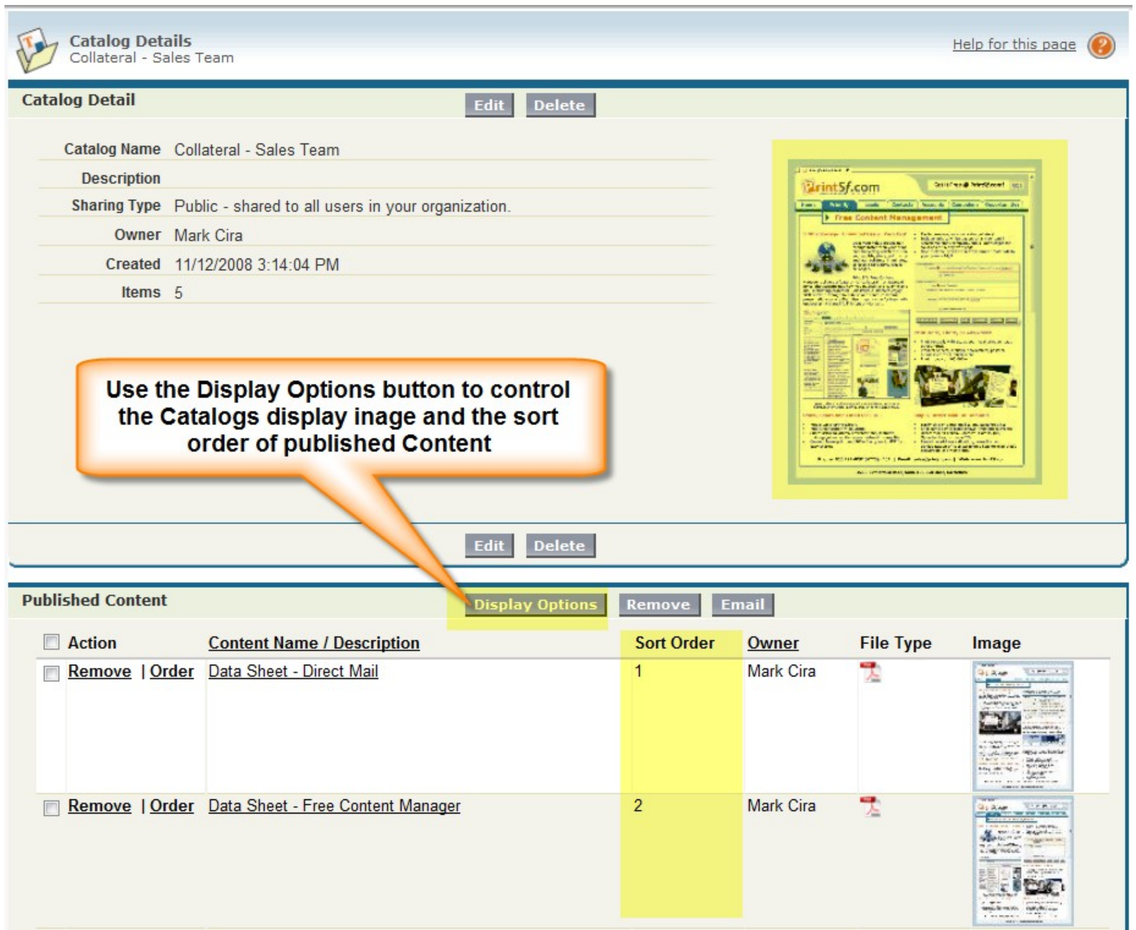
2. Use the New Catalog page to name and describe your Catalog, and to select Content to include or "Publish". Then select Users and sharing permissions in the bottom panel.



3. After making your entries, click Save to save the Catalog.

Catalog Display Options

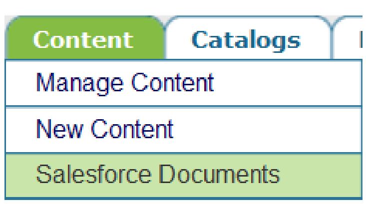
1. To manage Display Options for a Catalog, such as the sort order of Published Content, or to designate a Display Image to represent the Catalog, use the Display Option button at the Catalogs Detail page.



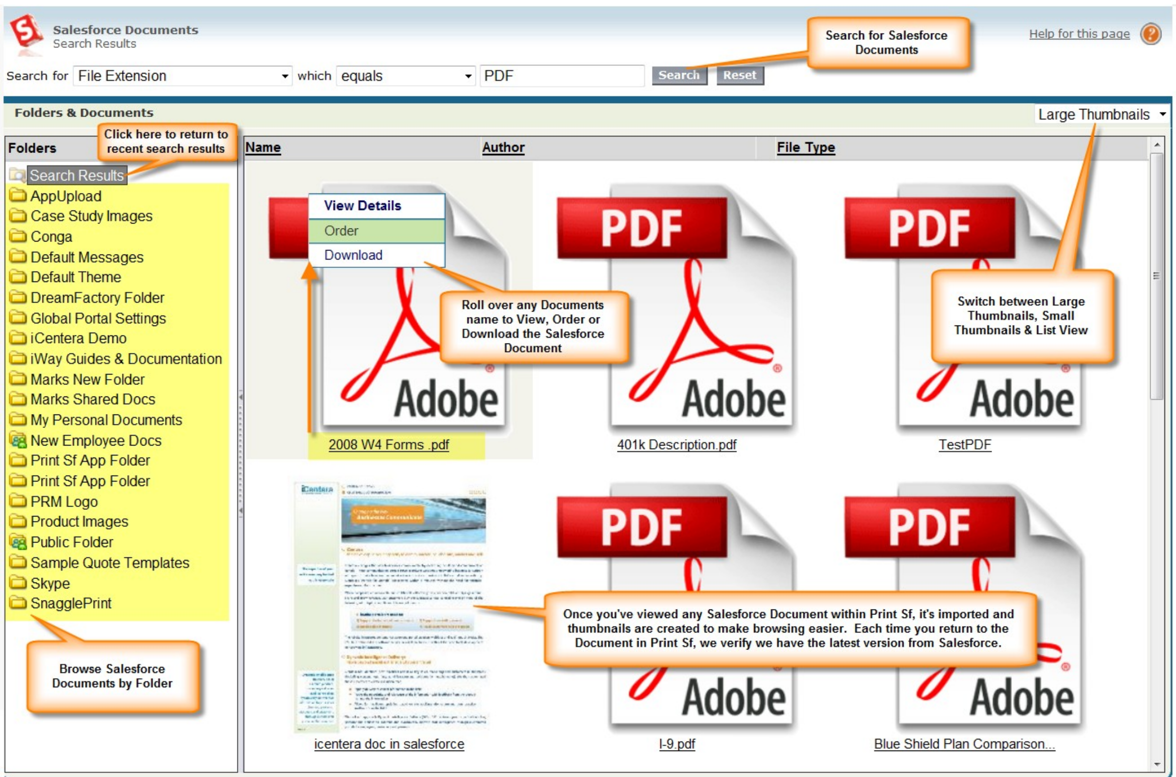
Working with Salesforce Documents in Print Sf

Because you may have many marketing assets stored in Salesforce as Salesforce Documents, Print Sf also makes it easy to search for, review, import and order Salesforce Documents.

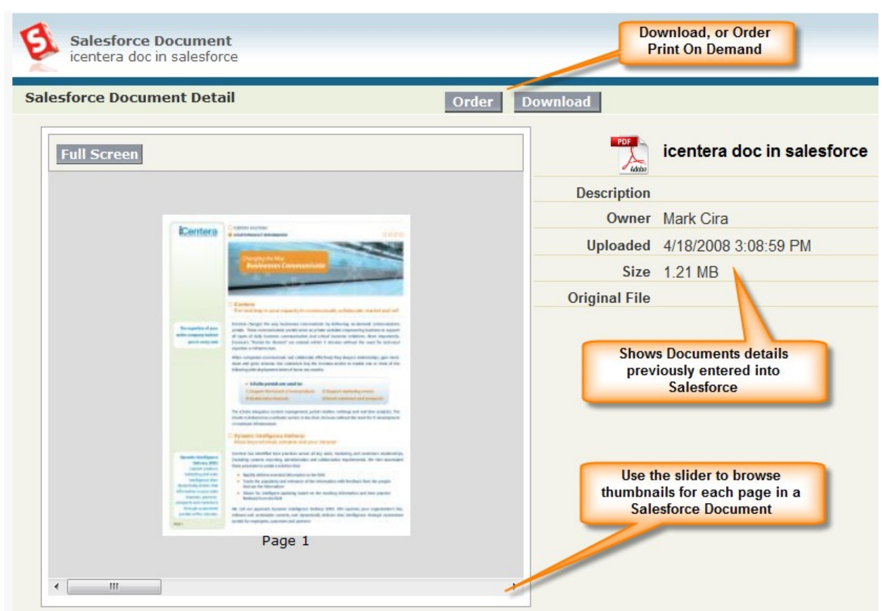
1. To **Browse Salesforce Documents** in Print Sf, select Content > Salesforce Documents.



2. Once at the Salesforce Documents page, use the features illustrated below to **Find, View, Download or Order Salesforce Documents.**



3. To **View a Salesforce Document**, click "View Details", or click on the Document Name.



Managing Mail Lists

Print Sf truly makes direct mail both easy and accurate, with direct mail Campaigns executed in minutes. Of course, any mail Campaign's success relies on a clean and accurate Mail List. Thus, before placing orders for direct mail, you'll use Print Sf to build, clean and validate your Lists.

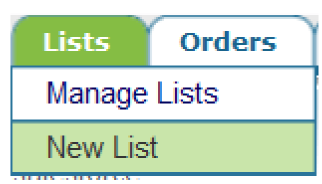
If you work with lots of Mail Lists, you'll also enjoy some great tools to organize, find and update (or "refresh") your Lists. Professionals that are managing multiple lists for multiple sales channels will love how Print Sf keeps your Lists organized and updated.

Generally, here's how you'll use Print Sf to manage Mail Lists:

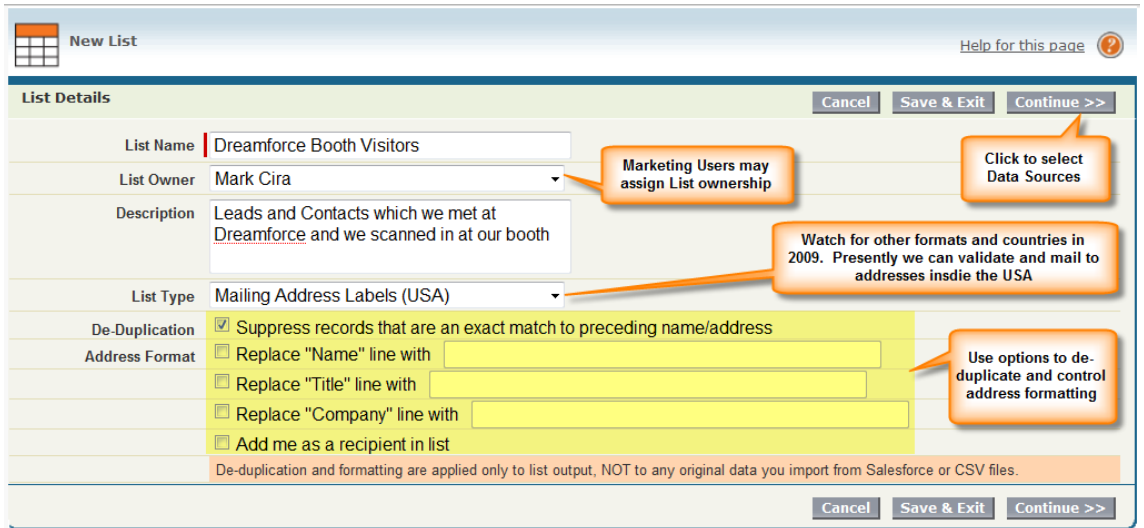
- Create Lists in Print Sf based on any combination of Salesforce Campaigns, Reports, Leads, Contacts or Users. You may also include data from outside of Salesforce, by combining uploaded CSV files with data you've pulled from Salesforce.
- If you're a Print Sf Marketing User, each List may be owned by you or another User, such as sales reps or distributors. If you handle lots of lists, this will keep your Lists organized and assure you always use the right List for the right person.
- Once all your "Data Sources" are selected, you will "Build" your List, which combines all your imports into a single Mail List, and performs these steps in moments:
    - Removes duplicates (optional)
    - Verifies that the USPS can deliver to each address via USPS databases
    - Corrects many address errors, and inserts missing Suite #'s in many cases
    - Separately verifies each address against the National Change of Address database, and updates recipients that have moved (Print Sf Enterprise Edition)
    - Produces a delivery point bar code for each record in the List
    - Identifies and reports on all records that are "Undeliverable"
    - Provides a direct link to any undeliverable Salesforce Lead or Contact, to quickly make edits and updates which Print Sf could not correct automatically
    - Provides you a final "List Count" and report of deliverable records, which are available for mailing
- For recurring mailings, such as a weekly "Thank You for Your Business" program based on closed Opportunities, Mail Lists can be updated or "Refreshed" from Salesforce Reports or other data with a single click. This means you can design recurring mail programs on top of Salesforce Reports (Ex: "Closed Opportunities - Last Month") which, once built, take less than a minute to execute each day, week, month or quarter.
- If you maintain lots of Lists, you'll enjoy finding, reviewing and updating any list in moments.

Adding a List

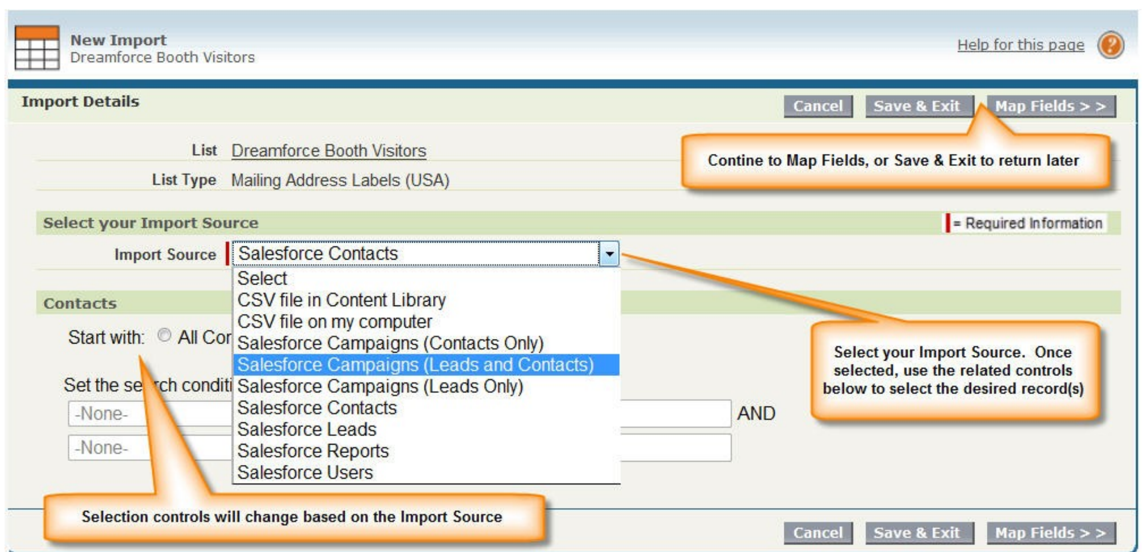
1. To **Add a Print Sf List**, select Lists > New List



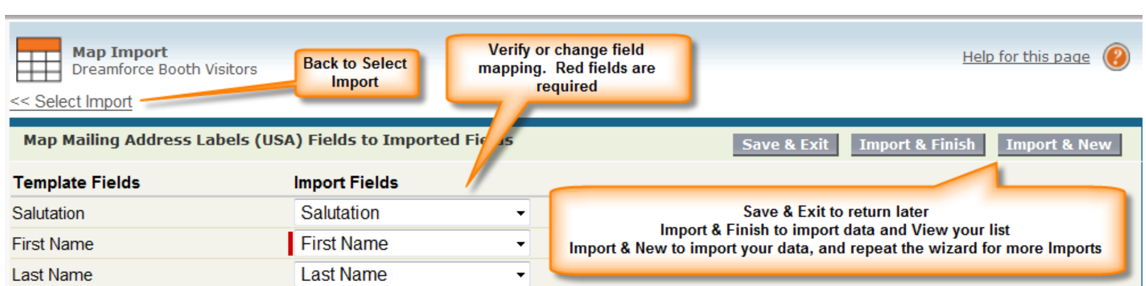
2. Describe your List, and select your options, then Continue.



3. At the New Import step, select an Import Source, and define the records for import.

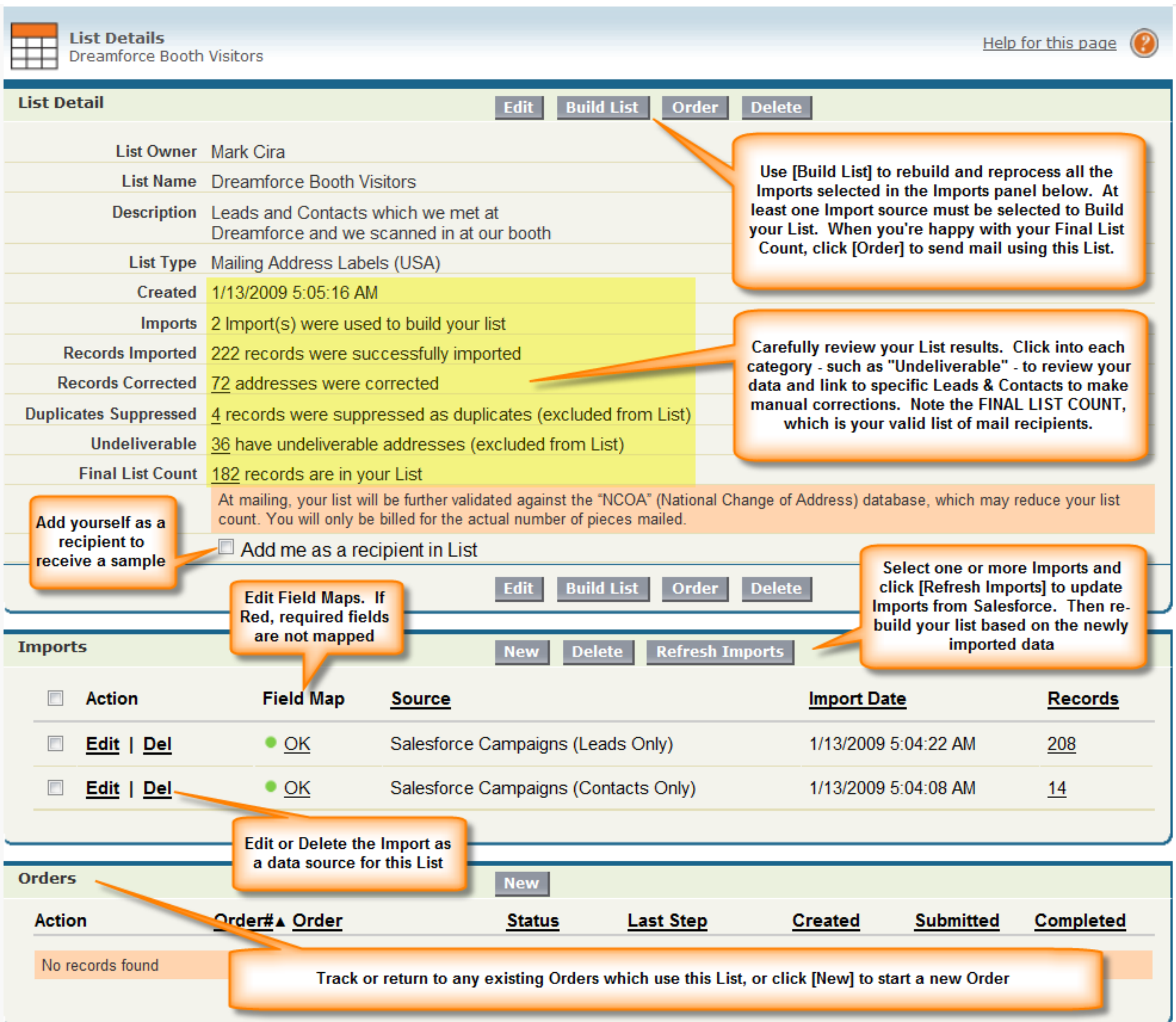


4. At the Map Fields step, verify the default mapping is correct or make changes. Leads, Contacts and Users will map automatically, but use extra care when mapping Reports, or when you wish to map a Custom field rather than a Standard Field.



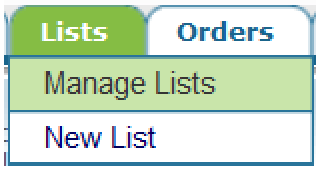
Reviewing, Correcting, Refreshing and Ordering with Lists

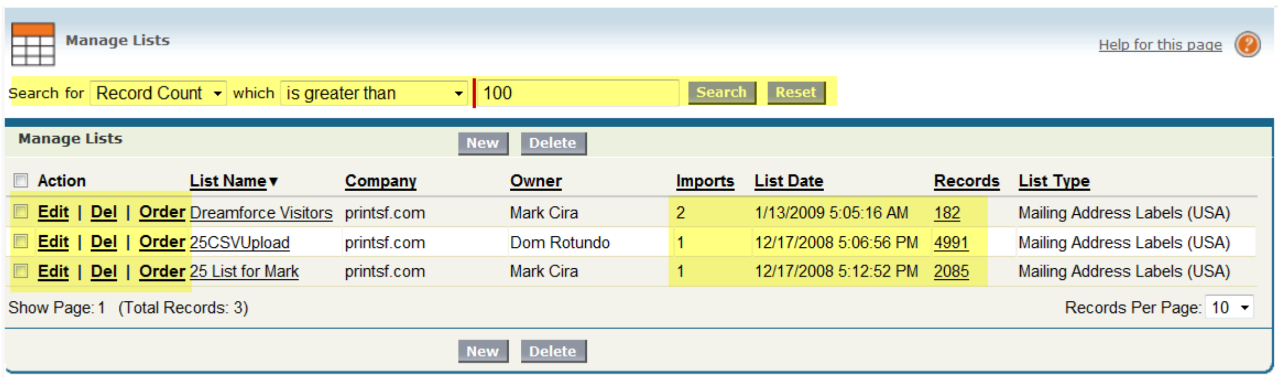
1. To review your List validation results or other List details, or to add or delete Imports contained in your List, or to Refresh your Imports from Salesforce, use the List Detail page as shown below.



Searching for Lists

To find a List, use your Quick Search Panel or select Lists > Manage Lists to search for Lists more flexibly. Use the Manage Lists page to browse, view, edit and delete Lists.





Managing Print & Mail Orders

Users of Print Sf Free Edition enjoy convenient access to print and mail on demand services. Orders placed in Free Edition are printed, shipped and/or direct mailed by Print Sf to any U.S. residential or business address.

Free Edition lets Users flexibly build documents and place Orders for about 30 of the most common products needed by Salesforce customers. Customers with needs beyond what Free Edition provides, should explore Print Sf Enterprise Edition and our Professional Services, where we build a solution tailored to your specific needs.

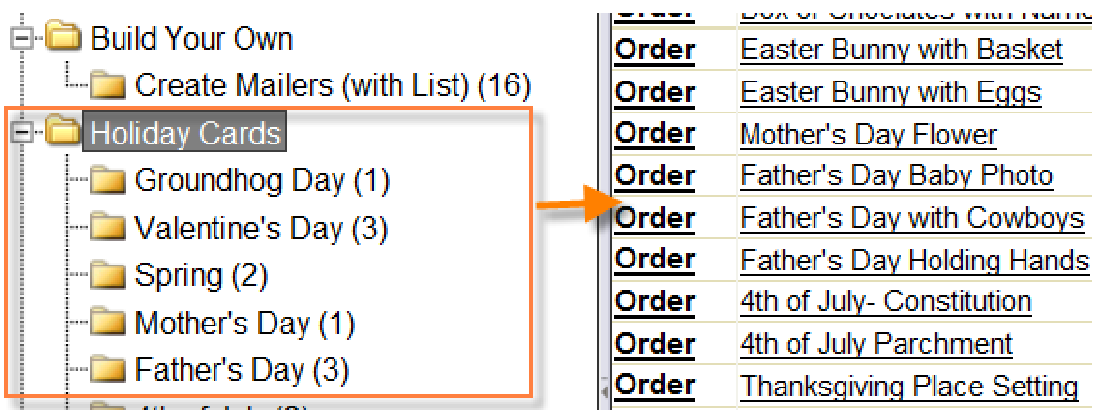
Flexible options exist to deliver fulfillment internationally, and most any product and publishing work flow can be accommodated. Custom solutions can include 1-to-1 sales proposals, welcome kits and admission packages, personalized catalogs, on-demand directories, and more. Beyond just print, we can also deliver data driven, personalized media within web sites, flash and video.

For more information on Enterprise Edition and custom solutions, contact us at sales@printsf.com or 866.799.4773 x101.

Methods of Ordering

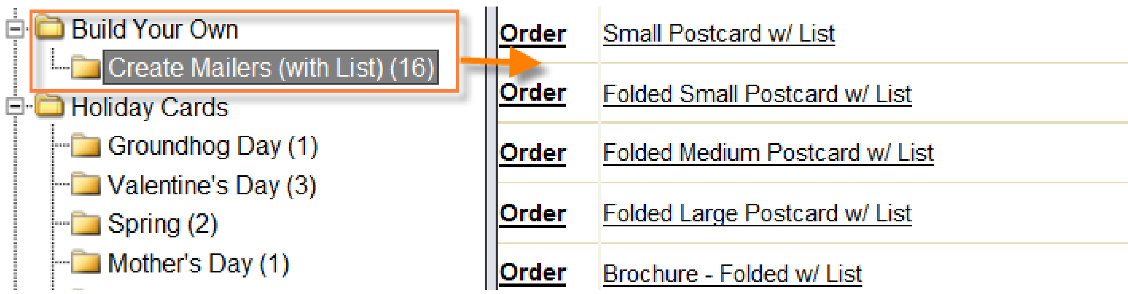
Print Sf helps you order using Templates, Images and PDF files. Generally, this operate as follows:

1. **Order Using Our Designs** – Use our Public Templates for common promotions and events, and to stay in touch with Leads and Contacts. Simply personalize, proof and submit.

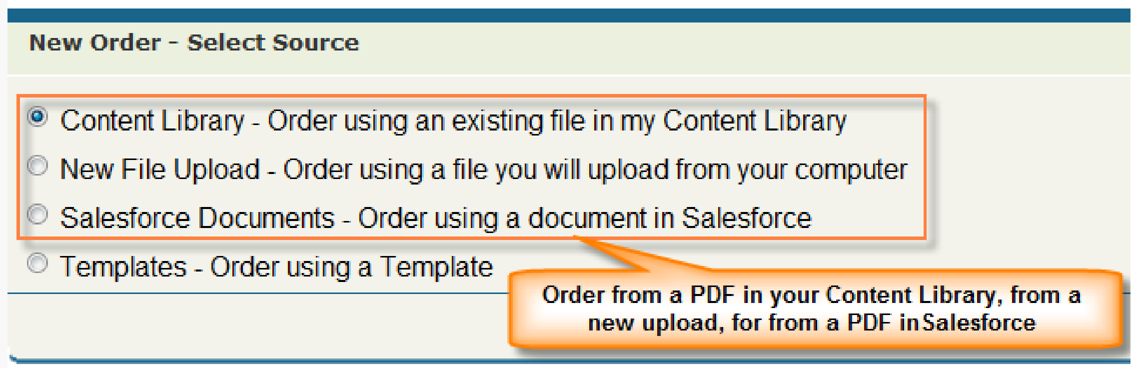


2. **Order Using Your Designs** – Create your own designs in your graphic design software and then order in one of two ways:

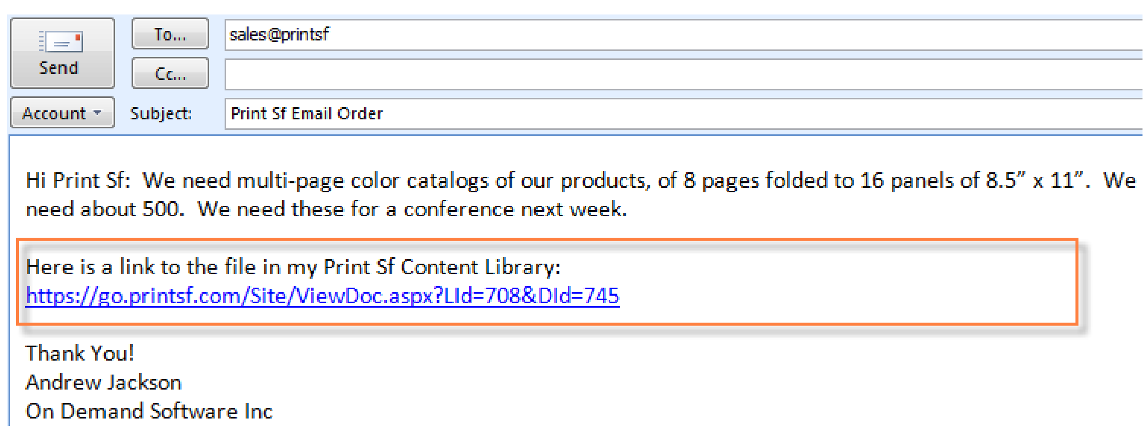
   a) *Mailers (Images):* For mailers, use our "**Build Your Own**" Templates, where your designs are submitted as two separate front and back side images built to our Layout Guide specifications. This method let's you see your pieces trimmed for bleeds and shows your mail addresses and postal indicia when proofing. In other words, you see exactly how it will appear in print.



b) *Non-Mailers (PDFs):* Simply order using a new or existing PDF in your Content Library, or select a PDF from Salesforce Documents. When ordering from a PDF, you do NOT get to proof bleeds or see mail addresses and permits imposed on your pieces.



3. **Order by Email:** If the products, paper types or finishing options you see on-line don't match your needs, send us an email at sales@printsf.com. Within the email, include a link to the PDF file stored in your Content Library, and tell us what you need. We'll call with any questions and provide a timely quote by email for your approval.



Ordering Using Our Templates

Print Sf provides an ever-growing library of public Templates for common promotions, events and marketing needs. Most public Templates are in postcard format, and intended for mailing.

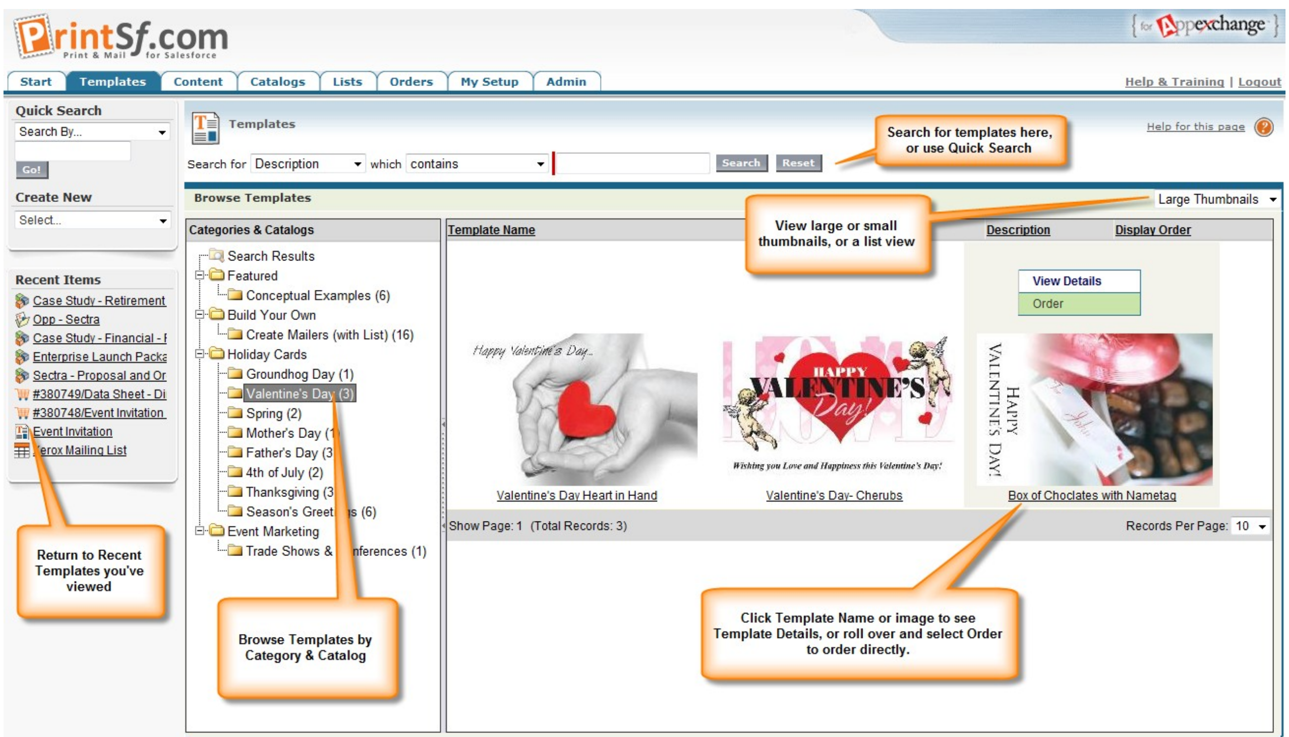
Before You Order

Before starting an Order using one of our Templates, make sure the following are in place:

1. Photos or logos to use in the pieces are uploaded to your Content Library
2. Your Mail List is created and corrected, and you've reviewed the reports on duplicate and undeliverable records, and your final list count. In short, make sure you're happy with your List.
3. If we will imprint your postal indicia and ship to you to mail, make sure your permit information is setup in your User Profile (required to imprint indicia other than our own). If we are mailing, you can skip this step.
4. You've created or edited your Marketing Profile information (optional), and Setup your Billing information (you can also enter it when ordering).

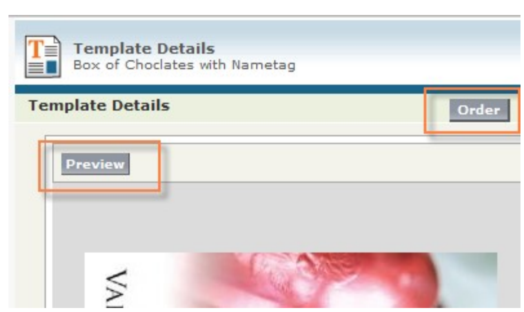
Select a Template

To select a Template to order, click the Template Tab, then browse or search for a Template.



At the Template Detail page, click Preview to see a low resolution PDF sample.

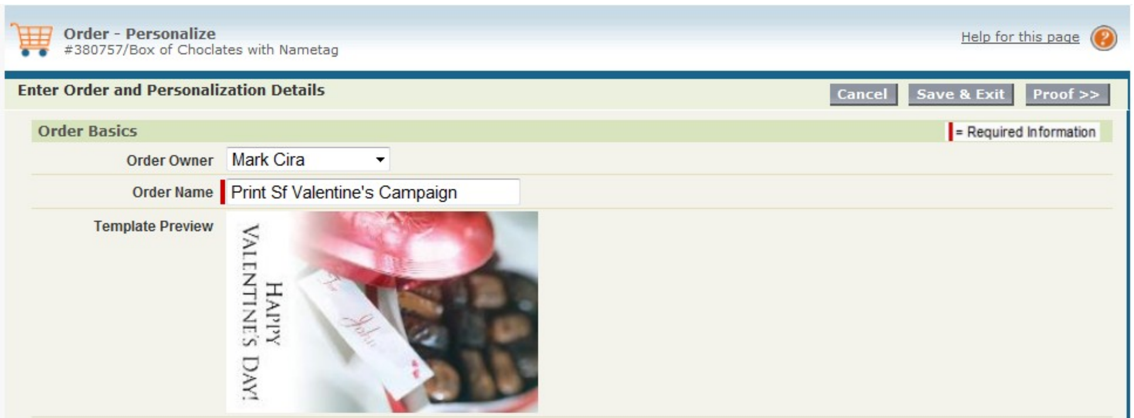
Click Order to start an order using the Template.



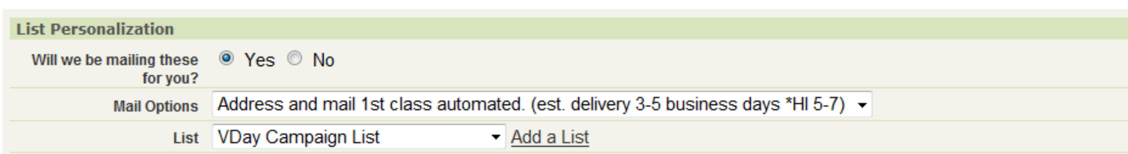
Personalize The Template

The first step in ordering a Template is the Personalize page. Use this page to Personalize your document by selecting a List and using Form Fill personalization.

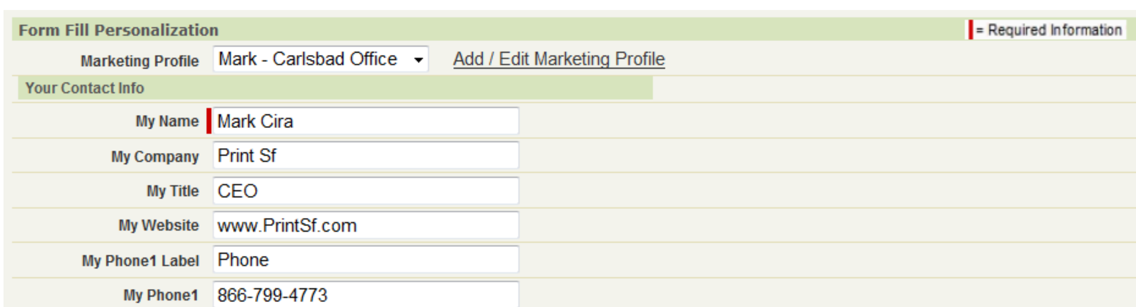
1. At the Order Basics section, select the Order Owner, and name the Order .



2. Use List Personalization to personalize your Order with a List. Select your mailing options and List, or click Add a List to create a save and exit and create a new List.

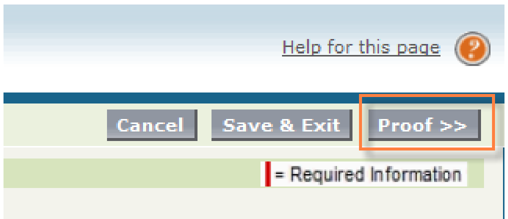


3. Use Form Fill Personalization to enter details that will appear the same across all pieces, such as your contact information. Select a Marketing Profile to populate default values into Form Fill fields.



4. Select images from your Content Library to include in your document.

5. When your entries are complete, click on Proof>> to proof your Order, or select Save & Exit to save your entries and return later.



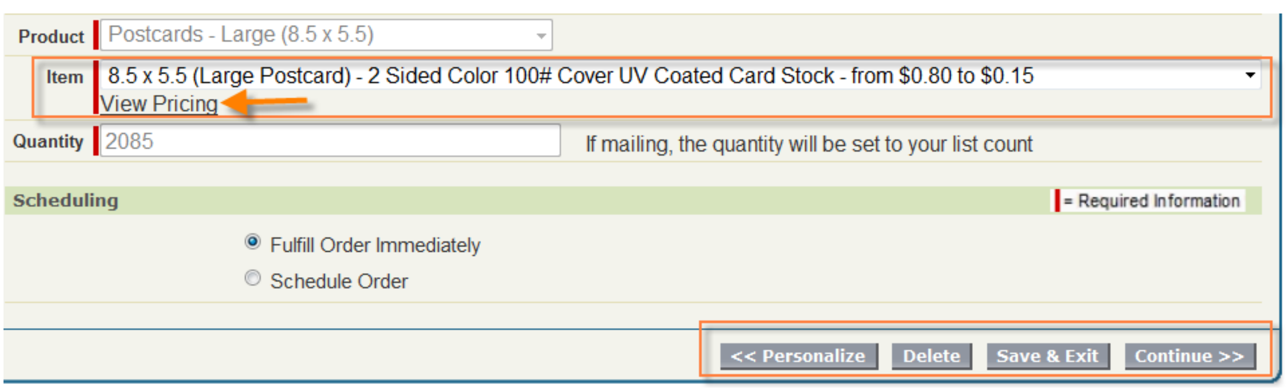
Proof Your Document

Proof your document carefully for any mistakes in data entry, and overall presentation.

- Use the << Proof Previous Entry and Proof Next Entry >> to proof several records in your List.
- Use the <<Make Changes button to go back.
- Use the Make PDF Proof button to open a low resolution PDF proof. Save the PDF and email it if you need to someone else to approve it.
- To continue with your Order, select Approve Proof.

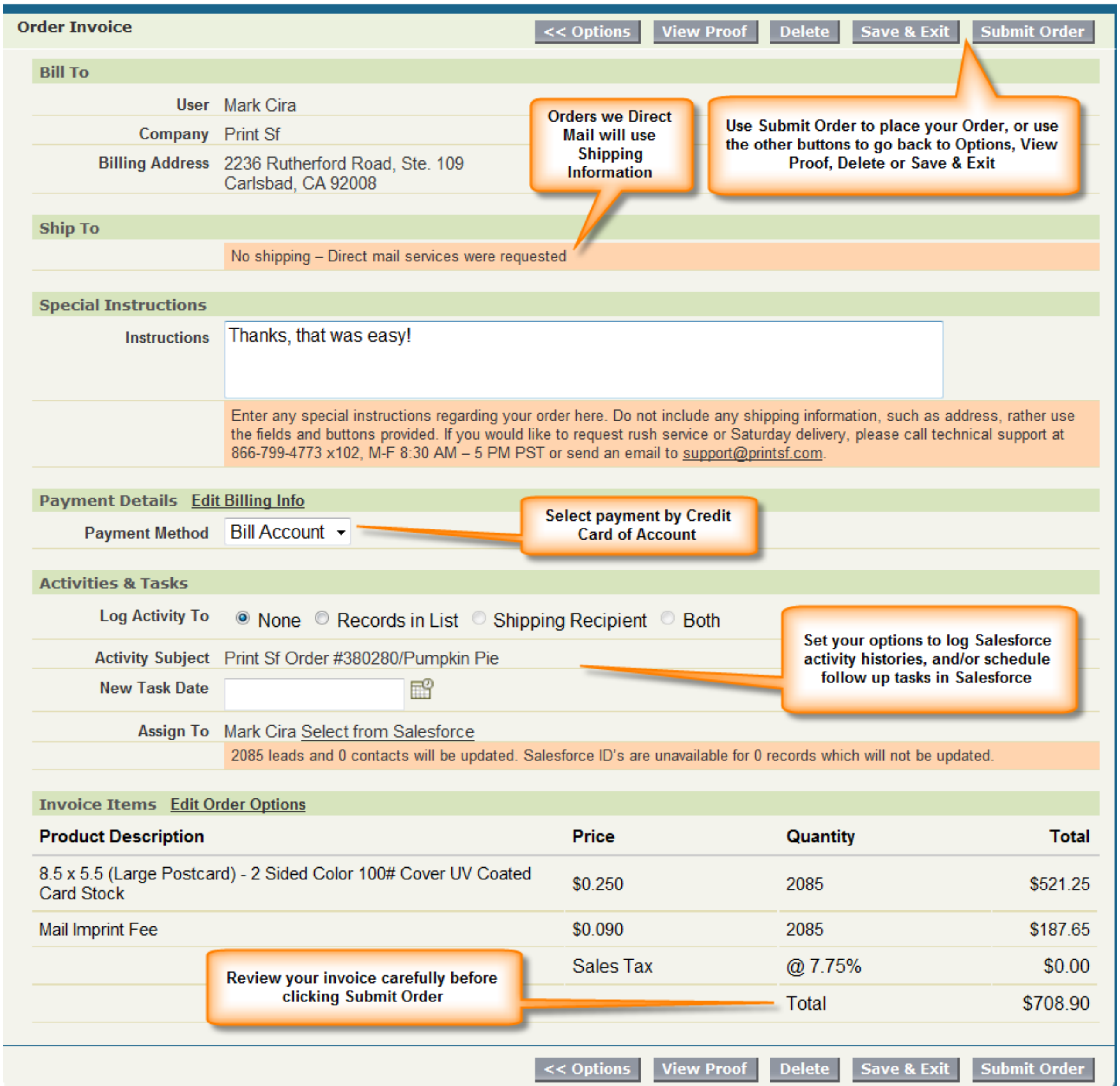
Select Order Options

At the Order Options page, select your Product Item, and optionally schedule your Order, then Continue.

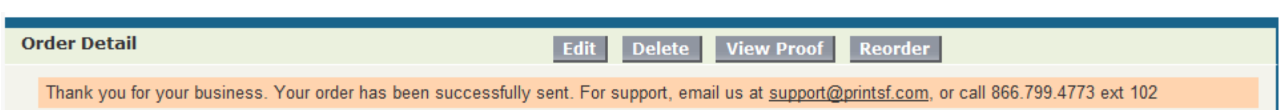


Review Invoice, Select Shipping and Set Salesforce Activity Logging Options

At the Invoice page, use the features detailed below to finalize and submit your Order.



After Order submission, you will go to the Order Detail page and see a confirmation message. You will also receive an email confirmation on submission and another email upon fulfillment.



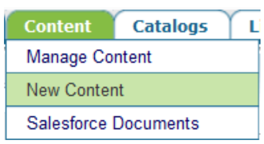
Ordering using Your Designs

In addition to using our public Templates, you can also Order files you've created in your own graphic design software. You can submit your designs two ways, as images or as PDFs.

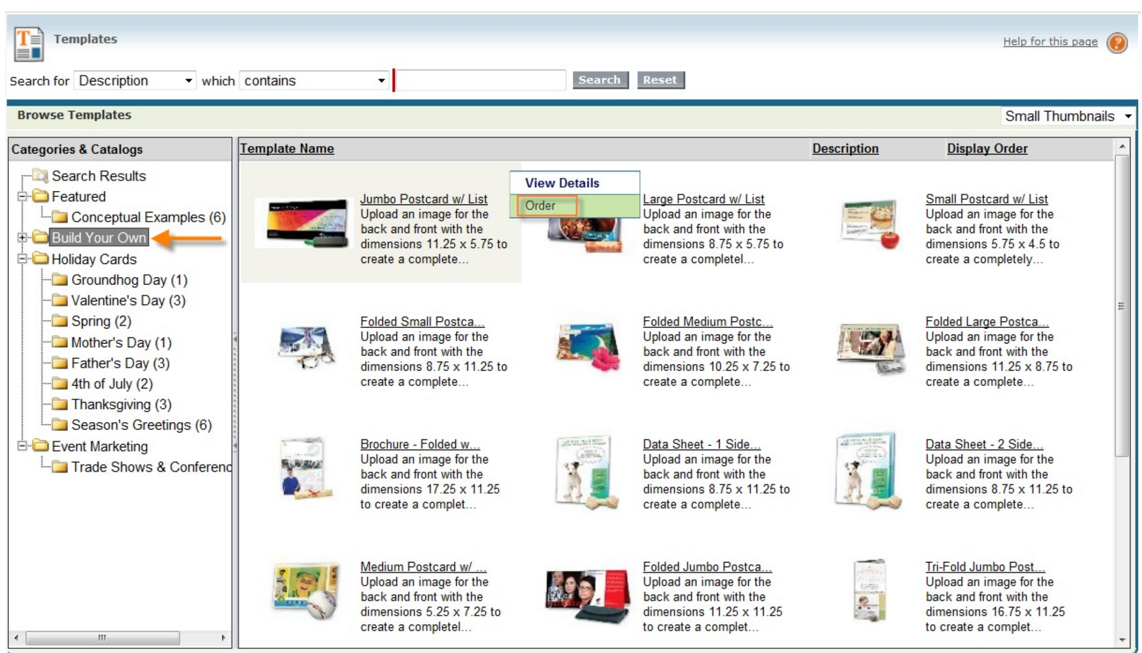
Ordering with Images in "Build Your Own" Templates

To assure quality, we suggest you output your designs as images (1 image per page or side), and use our "Build Your Own" Templates. This work flow allows you to see accurate proofs that are trimmed/cropped, and to see your addresses and postal indicia imposed on the proofs. In other words, by submitting your designs as images (rather than PDFs), you'll get to see exactly what the print layout will be.

1. To Orders using designs you submit as images (1 image per side), start by using or Layout Guides to import into your graphic design software, and design to correct dimension and postal requirements based.
2. Once your design is done, output the front and back side as two different images, recommended at 200 or 300 DPI.
3. Next upload your images to the Content Library to make them available in future Orders.

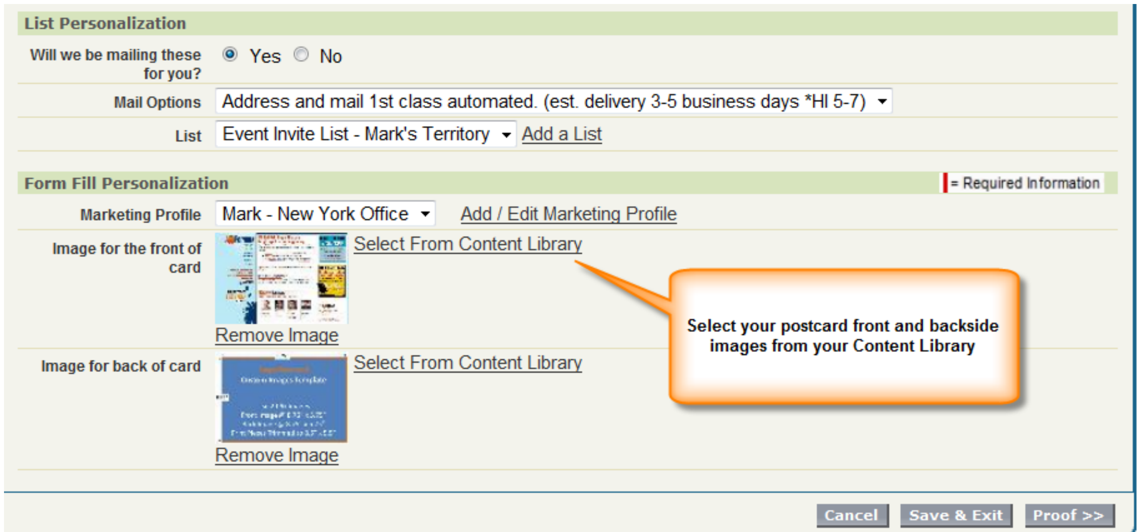


4. To start an Order, select your desired Template from the "Build Your Own" Template Catalog.



5. Roll over any Template and click View Details to review it, or click Order to start your Order.

6. At the Personalize page, follow the same steps noted in the prior section (which detailed ordering using Print Sf public Template), including naming your Order, assigning an Owner, and selecting your mailing options. For "Build Your Own" Templates, however, Form Fill Personalization is limited to just two items – your front and back images.



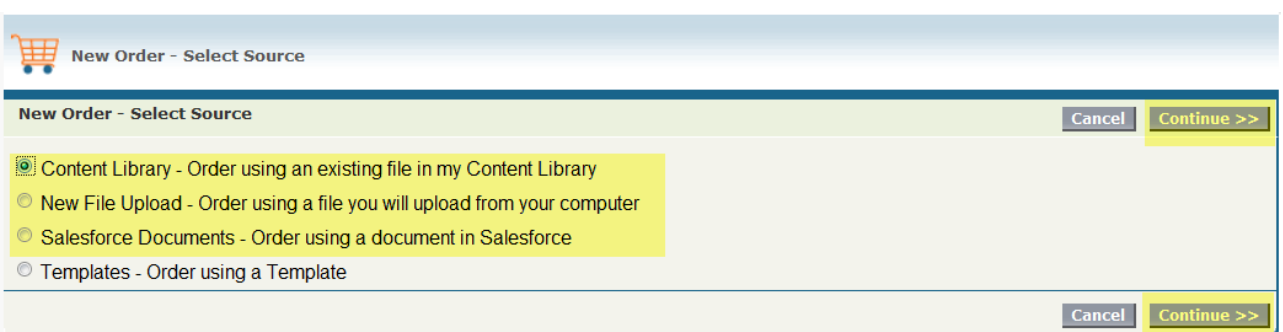
7. Continue to Proof your Order, and note the addresses, indicia and/or fold lines imposed in your Proof. Make sure your pieces appear as desired and expected. Designs built to our Layout Guide specifications will appear correctly.

8. Approve your Proof and continue to the Options and Invoice pages, completing those steps outlined in the prior chapter entitled "Ordering Using Our Templates".

Order Using a PDF

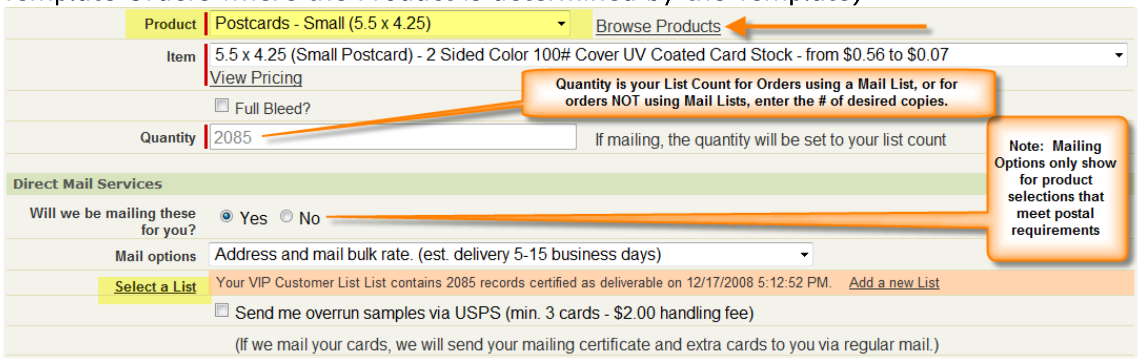
Ordering using a PDF is a quick and easy way to submit your data sheets, brochures, business cards, newsletter or other designs. Note, however, that for Orders that involve mail addressing, we advise that you submit your designs as images using the "Build Your Own" Templates detailed in the last section.

1. To Order using a PDF, select Order > New Order, and then select your PDF document by browsing the Content Library, uploading a new PDF, or selecting a PDF from Salesforce.



2. Your Order work flow will be similar to ordering a Template, however you will skip the Personalize and Proofing steps for PDF orders.

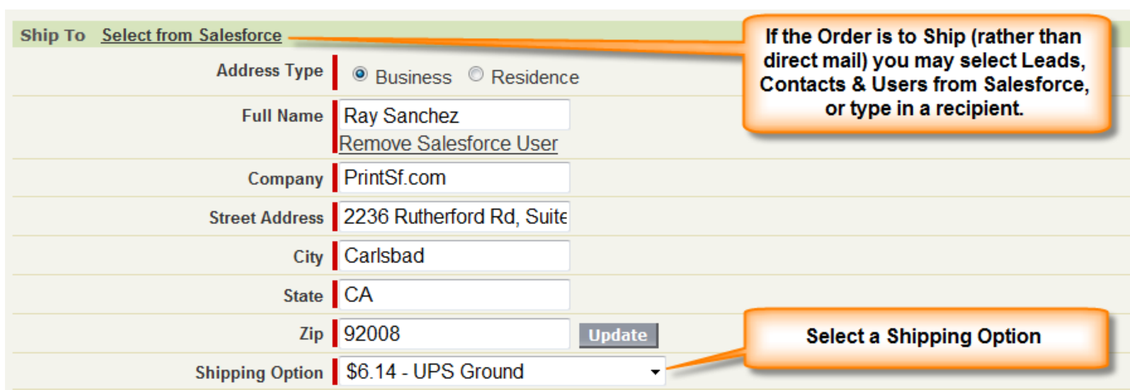
3. With PDF order, you must tell Print Sf which Product you wish to print (versus Template Orders where the Product is determined by the Template)



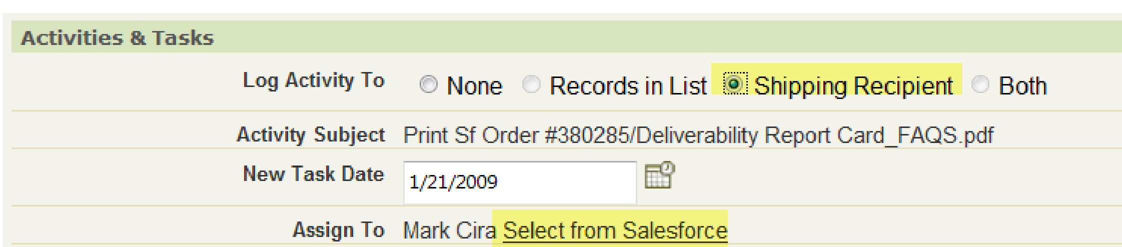
4. As with Template Orders, PDF Orders allow you to set your mailing preferences and optionally select a Mail List at the Options page. You will only be asked to select Mail Options if the Product you selected is mail compliant. (see above image).

5. Continue to the Invoice page by selecting [Continue>>]

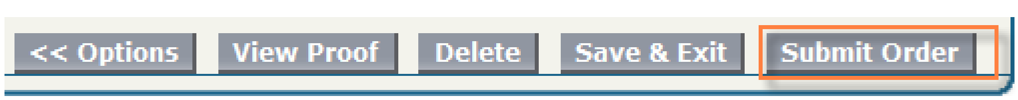
6. At the Invoice page, type in the shipping recipient, or select it from Salesforce.



7. At your option, record activity histories and follow up Tasks to your Shipping Recipient or Mail Recipients (when they are Salesforce Leads and Contacts). Also take care to assign follow up Tasks to the proper Salesforce User, if tasks should not assigned to you.



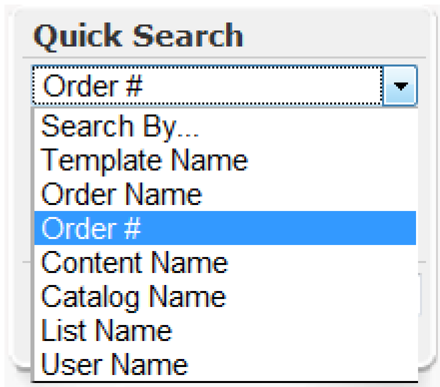
8. To submit your Order, click Submit



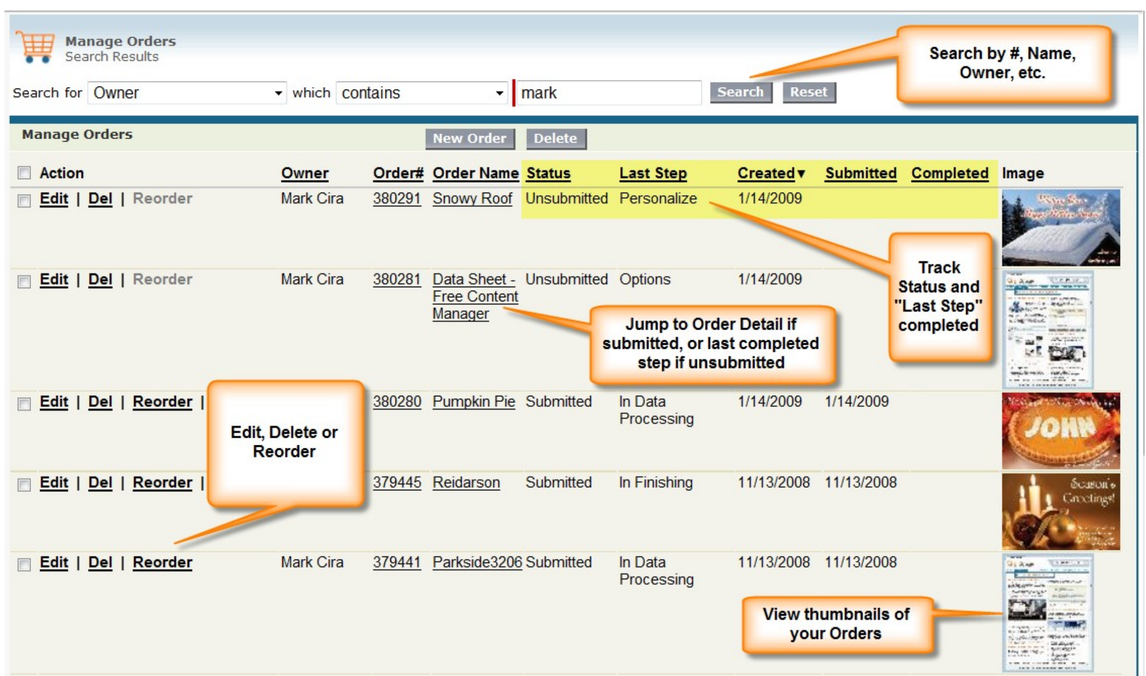
Find, Edit, Delete, Reorder and Track Orders

Generally, to find and manage Orders, you may:

- Use the Quick Search panel:



- Alternately, select Order > Manage Orders to go to your list of Orders at the Manage Orders page, and then use the Search panel in the page title bar:
- At the Manage Order page, use the features illustrated below to edit or delete Orders not yet submitted, or to reorder or check Status of your Orders.

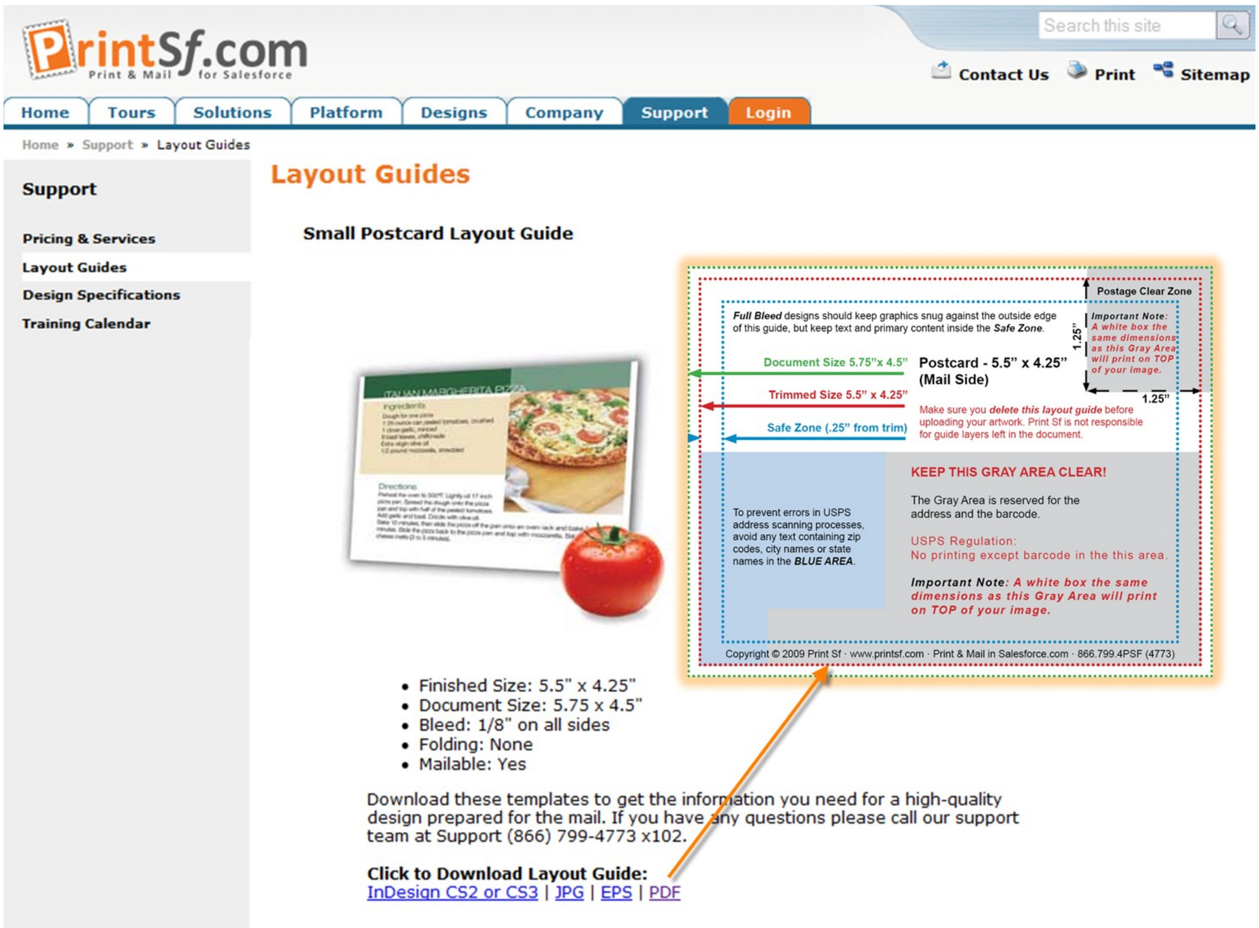


Designing for Print Sf

If you will be designing marketing materials to submit to Print Sf, we've developed a variety of design resources to make it easy to publish and print your materials with Print Sf.

Layout Guides & Design Specifications

We offer a Library of free Layout Guides to import into your design software, which take care of all the heavy lifting on bleeds, fold marks and addressing zones. And to assure you output your images and PDF for optimal results, review our Design Specifications page as well.



600+ Stock Layouts & Themes

To help jump start your next creative process, we also offer 600+ layouts from StockLayouts.com. Visit our Designs page to search for and review our many Stock Layouts, then contact us.