Ordering

How To Successfully Navigate Through The Order Entry System

2018 Edition

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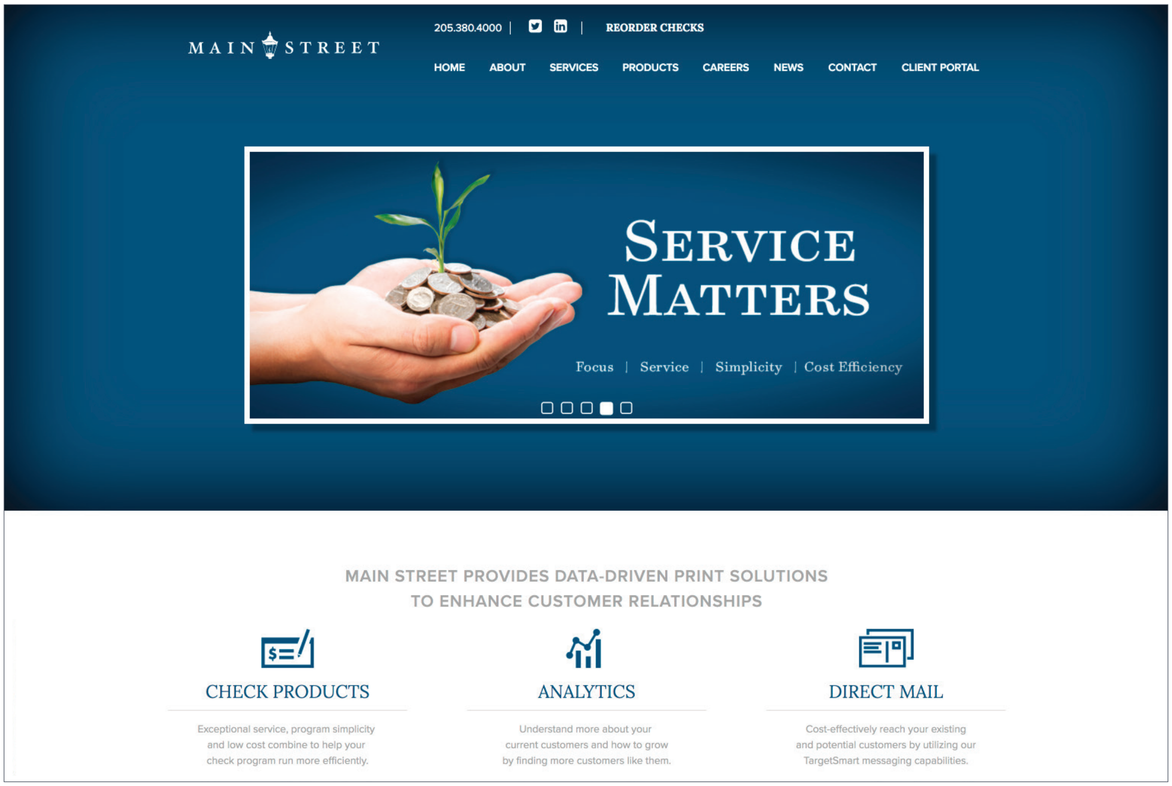


WELCOME TO MAIN STREET, INC.

You can access the Main Street Order Entry System via our website at

www.mainstreetinc.com

Once you are there, select Client Portal.

If you would like to bookmark the Order Entry Website,
the url is www.orders.mainstreetinc.com.

Thank You!

MAIN STREET

LOGIN PAGE

STEP 1: **Enter your Customer ID number**

Your Customer ID number has been provided to you. If you do not know your customer ID number, please contact your Client Service Team.

STEP 2: **Enter your Username**

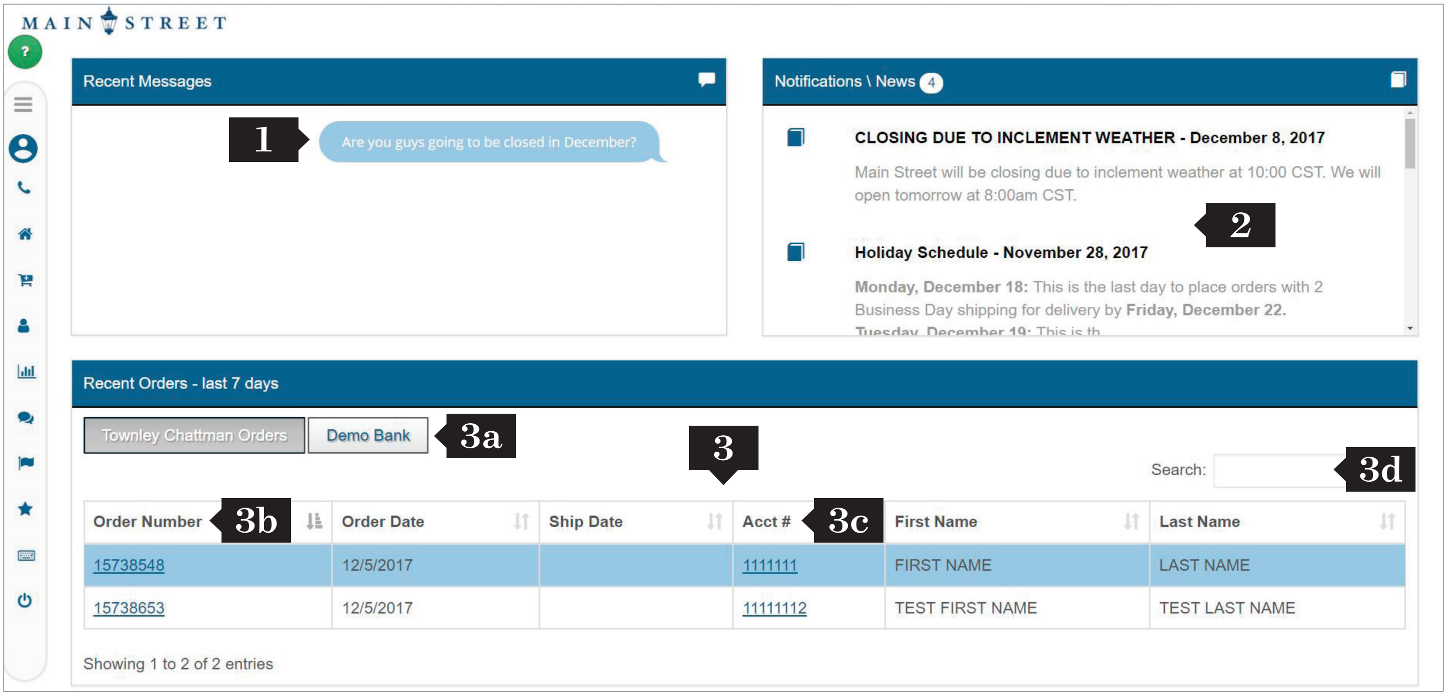
Your Username has been provided to you. If you do not know your Username, please contact your Client Service Representative.

STEP 3: **Enter your Password**

If you are logging in for the first time or your password has been reset, please type in your Customer ID as your password. You will be prompted to change your password at the next screen.

STEP 4: **Click Sign In**

HOME SCREEN

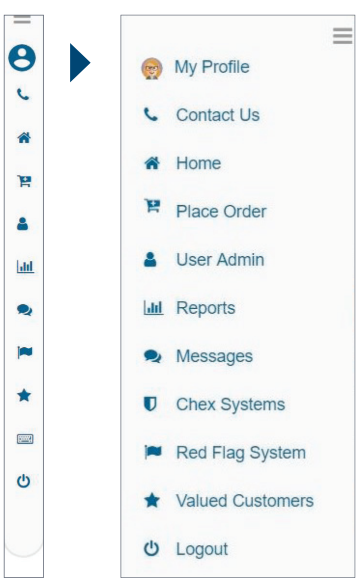


1 Recent Messages – displays our most recent messages with client services

2 News – Current information and updates

3 Recent Orders displays the last 7 days of orders YOU placed

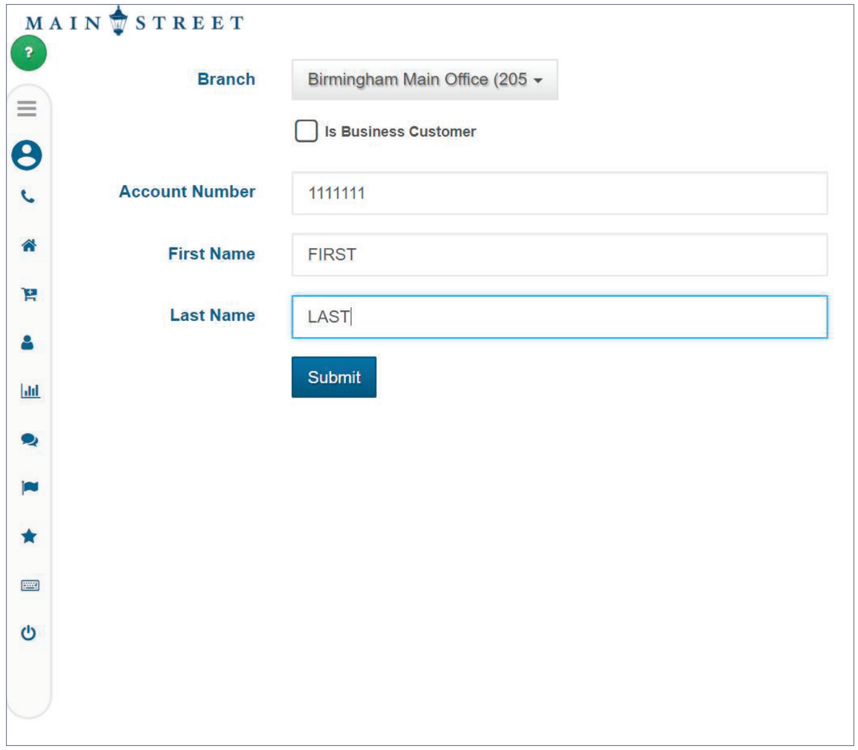
- **3a** Click your institutions name to display all orders placed by your institution in the last 7 days
- **3b** Click the Order number to pull up the order to make changes or track the order
- **3c** Click the Account number to see all orders placed for that account number
- **3d** Use the Search option to search the last 7 days of orders



The tool bar on the left of your screen provides what actions are available to you based on your assigned user rights:

My Profile	Displays your profile with Main Street
Contact Us	See our client service phone number or send us a message
Home	Select this option to go back to the home screen at any time
Place Order	Select to place/lookup an order
User Admin	Setup new users and update passwords
Reports	Shows standard reporting, management reports and invoices
Messages	Send a message to the client service department
Chex Systems	Select to start Chex Systems
Red Flag System	Enter accounts to block from ordering checks
Valued Customers	Enter a valued account

PLACING NEW ORDERS



STEP 1: **Place New Order**

Click the “Place New Order” button to begin placing a new order.

STEP 2: **Branch Selection**

Your branch will automatically default to your home branch, however, if you have rights, you can select other branches from the drop down menu.

STEP 3: **Account Information***

Enter “Account Number”
Enter “First Name”
Enter “Last Name”

**NOTE*: If the order is for a business or institution, select the “is Business Customer” to change the format to a Business name.

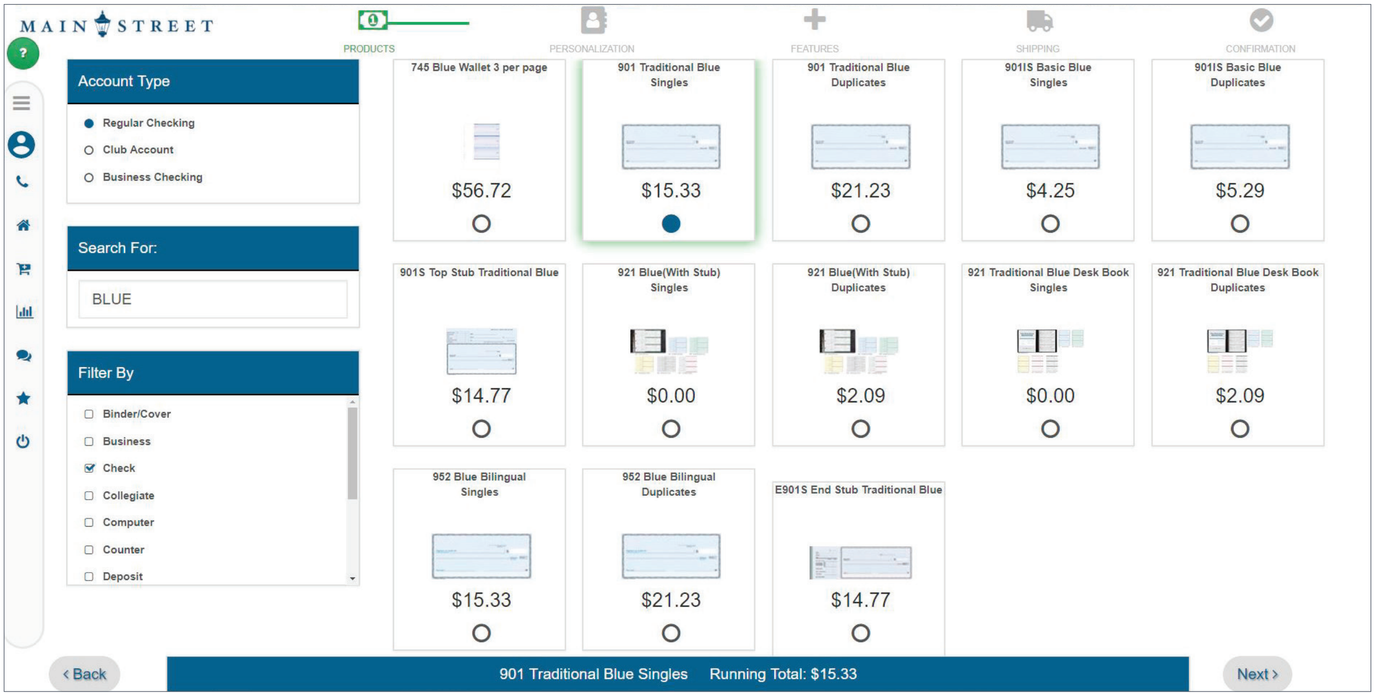
STEP 4: **Click Submit**

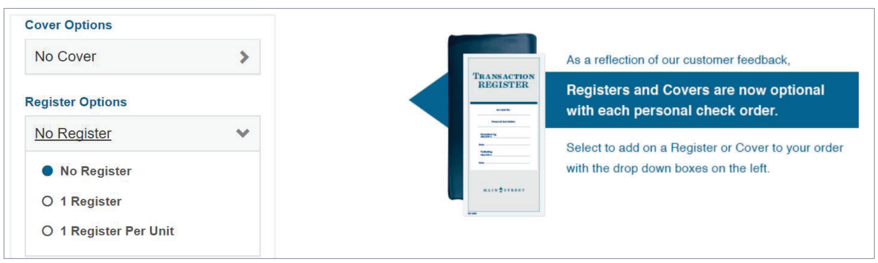
NEED HELP?

A tutorial is available in the upper left corner on each page if you need help.

Simply click the help button to launch a quick overview of the functions on the page!

PRODUCT SELECTION





STEP 1: Account Type

Select the desired "Account Type" from the list on the left hand side of the Products screen.
The Account Type selected determines the product, quantities, and pricing displayed.
**NOTE:* If you are placing an coupon order, please see special instructions on pages 14-15.

STEP 2: Products

Select the desired "Product" design from the images shown on the right of the screen. If there is a "default" product selected for your Institution for the Account Type selected, it will be the first item listed in your list of products.

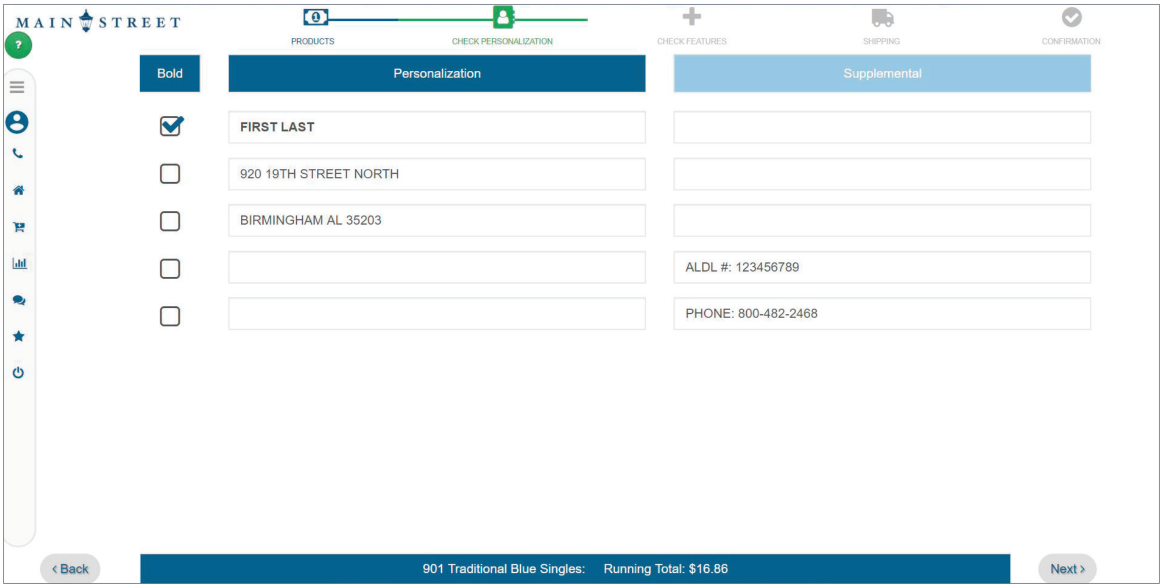
Click on the image to show a larger version of the image as well as specific product information. The pricing of all products is displayed below the image.

"Search For" and/or "Filter By" options are available on the left of your screen to assist you in reducing the list of products for easier selection.

STEP 3: Registers and Covers

Registers and/or Covers can be added to any order for a small additional charge.
Select to None if you do not want to include one. Select 1 Register/Cover if you want one per order.
Select 1 Register/Cover per unit if you would like one for each box of checks you order.

PERSONALIZATION



STEP 1: **Personalization***

Under the "Personalization" column, (left) enter the name and address you want printed on your checks. Please note: This is the same information that prints on the shipping label, so do not add anything you do not want displayed on the shipping label.

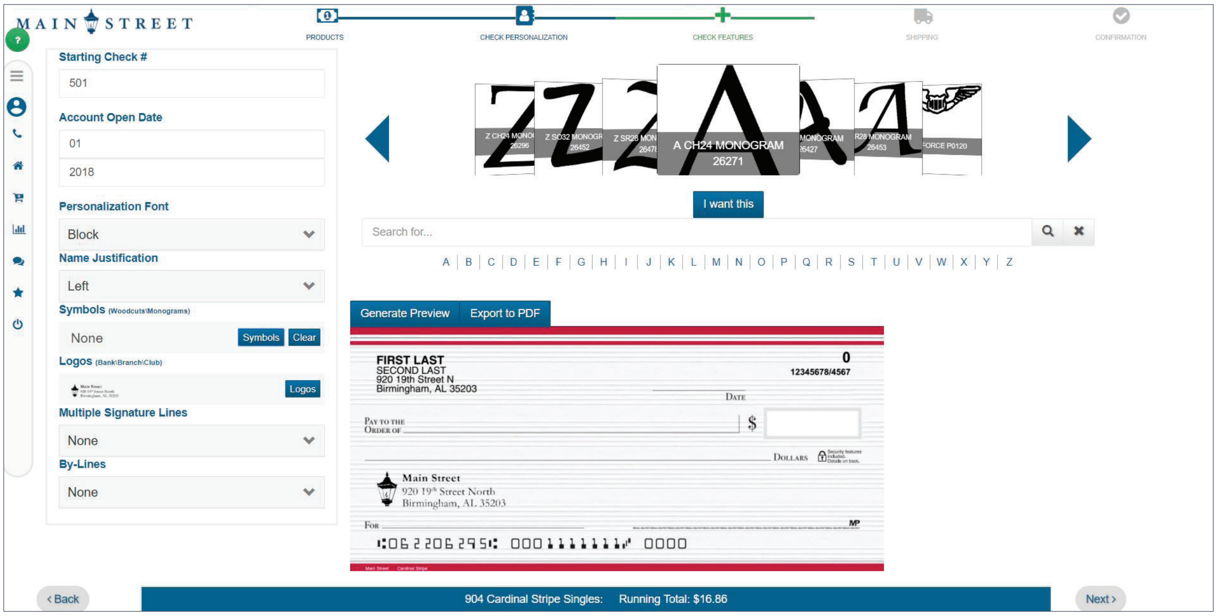
You may also **bold** up to three lines of personalization by selecting the check box to the left of the respective row.

**NOTE*: Each horizontal row across, i.e. the Personalization and the Supplemental Information combined, cannot exceed 44 characters (some products allow less than 44 characters per row). Any information entered as "Personalization" WILL print on the shipping label. See Supplemental Information to add non-address information to your check.

STEP 2: **Supplemental Information***

Under the "Supplemental Information" column (right), enter any additional information you would like printed on your check. Examples may be Driver's License number or Phone Number etc.

**NOTE*: Each horizontal row across, i.e. the Personalization and the Supplemental Information combined, cannot exceed 44 characters (some products less than 44 characters per row). Any information entered as "Supplemental Information" WILL NOT print on the shipping label.



STEP 1: Starting Check Number

Enter “Starting Check Number”. The number you put here can be any number but “zero”.

STEP 2: Personalization Font

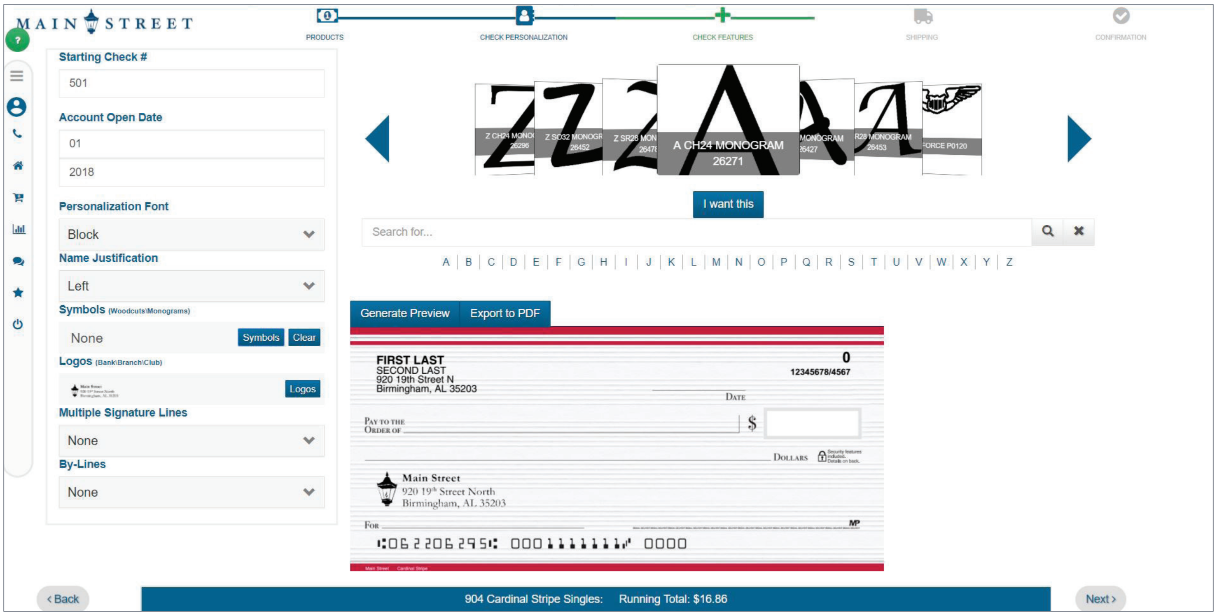
Select a “Personalization Font” from the drop down menu. To see a preview of the selected font on your check, select the “Generate Preview” button and it will refresh your check preview. If there is a charge for the font, it will be reflected in the “Running Total” listed at the bottom.

STEP 3: Name Justification

For some check styles, you can select to have the name and address justified to the left, to the right, or to the center. To see a preview of the selected justification on your check, select the “Generate Preview” button and it will refresh your check preview.

STEP 4: Symbols (Monograms/Woodcuts)

Add a detail of personalization by selecting a symbol from over 200 available symbols. To select a symbol (monogram or woodcut), click the Symbols icon on the left of the screen. A search menu will appear at the top of the screen that will allow you to search the symbols by keyword and/or the symbol codes. To see a preview of the selected symbol on your check, select the “Generate Preview” button and it will refresh your check preview. If there is a charge for the use of the symbol, it will be reflected in the “Running Total” listed at the bottom.



STEP 5: **Backgrounds/Logos**

If available you may select an alternative background image and/or logo by clicking the Backgrounds icon or the Logos icon on the left of the screen. A search menu will appear at the top of the screen that will allow you to search the available backgrounds/logos. To see a preview of the selected background/logo on your check, select the "Generate Preview" button and it will refresh your check preview. If there is a charge for the use of the alternative background/logo, it will be reflected in the "Running Total" listed at the bottom.

STEP 6: **Signature Lines**

Depending on the product selected, you may have up to three Signature Lines available. Leave the option selected as "None" for one signature line. To see a preview of the signature lines on your check, select the "Generate Preview" button and it will refresh your check preview.

STEP 7: **Bylines**

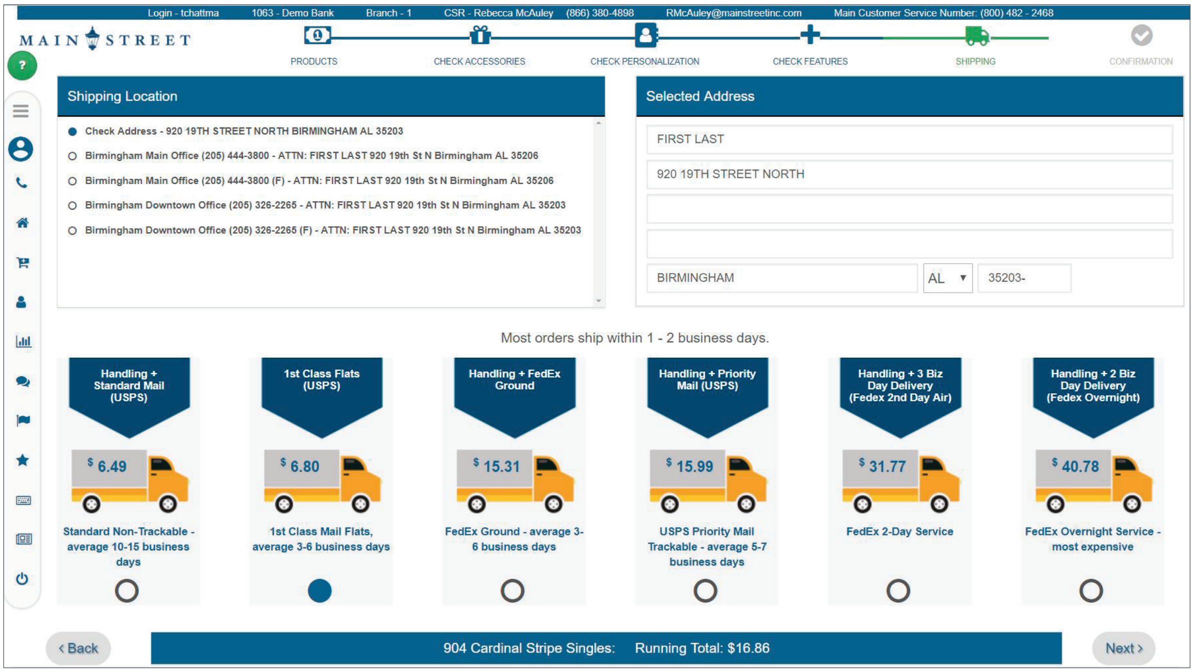
Create your own personalized message to appear above the signature line on your checks. You may utilize 1 or 2 lines depending on other personalized options previously selected. To add a byline, select the drop down option to display the 2 text areas where you may enter your special byline (up to 35 characters per line, including spaces). *For example:* **I Love My Grandkids!**

To see a preview of the selected byline(s) on your check, select the "Generate Preview" button and it will refresh your check preview. If there is a charge for the use of the byline(s), it will be reflected in the "Running Total" listed at the bottom.

STEP 8: **Click Next**

The Next Button is located on the right bottom of the screen.

SHIPPING



STEP 1: **Select the Shipping Address**

Select the address to which you would like to ship on the left of your screen. You may ship your order to the check address or any of the branch addresses listed. The shipping address does not have to match the address printed on the check.

STEP 2: **Verify the Shipping Address**

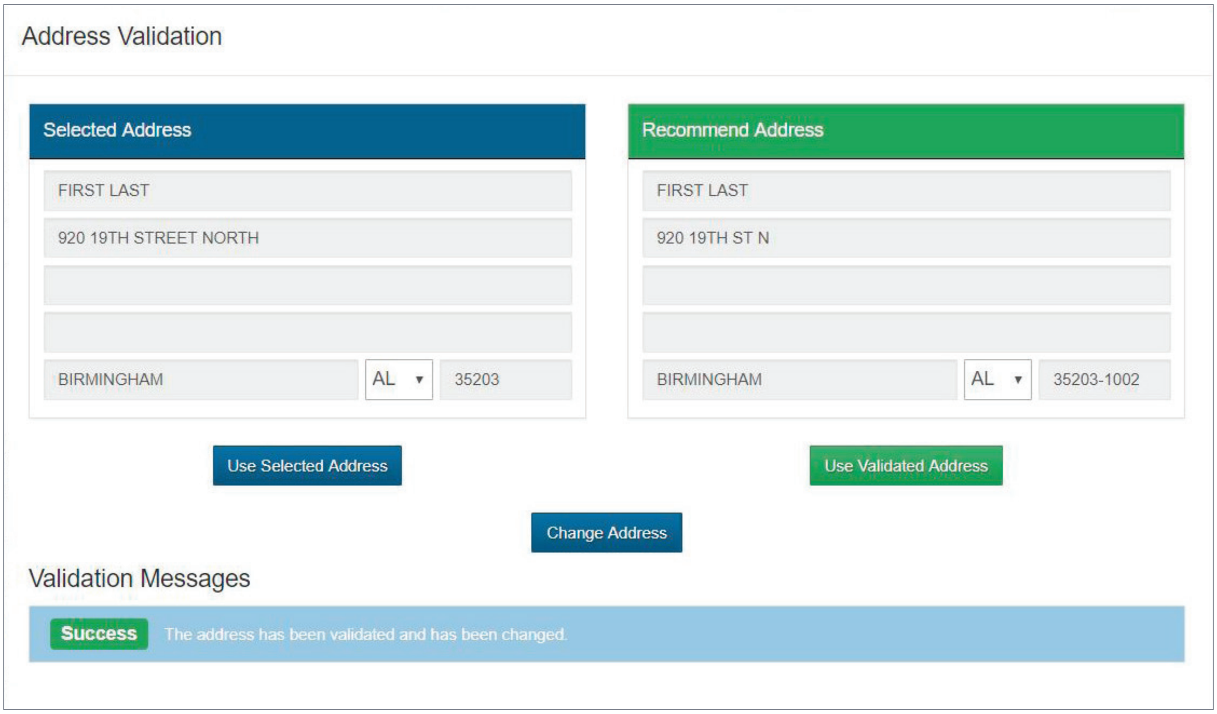
Verify the Selected Address showing on the right is the address to which you would like to ship.

STEP 3: **Select a Shipping Method**

Select a shipping method from the shipping options displayed. The shipping fees and delivery timing estimates are listed on each category for ease of selection. The “Running Total” listed at the bottom of the screen will reflect your running total and include the cost of the ship method selected.

STEP 4: **Click Next**

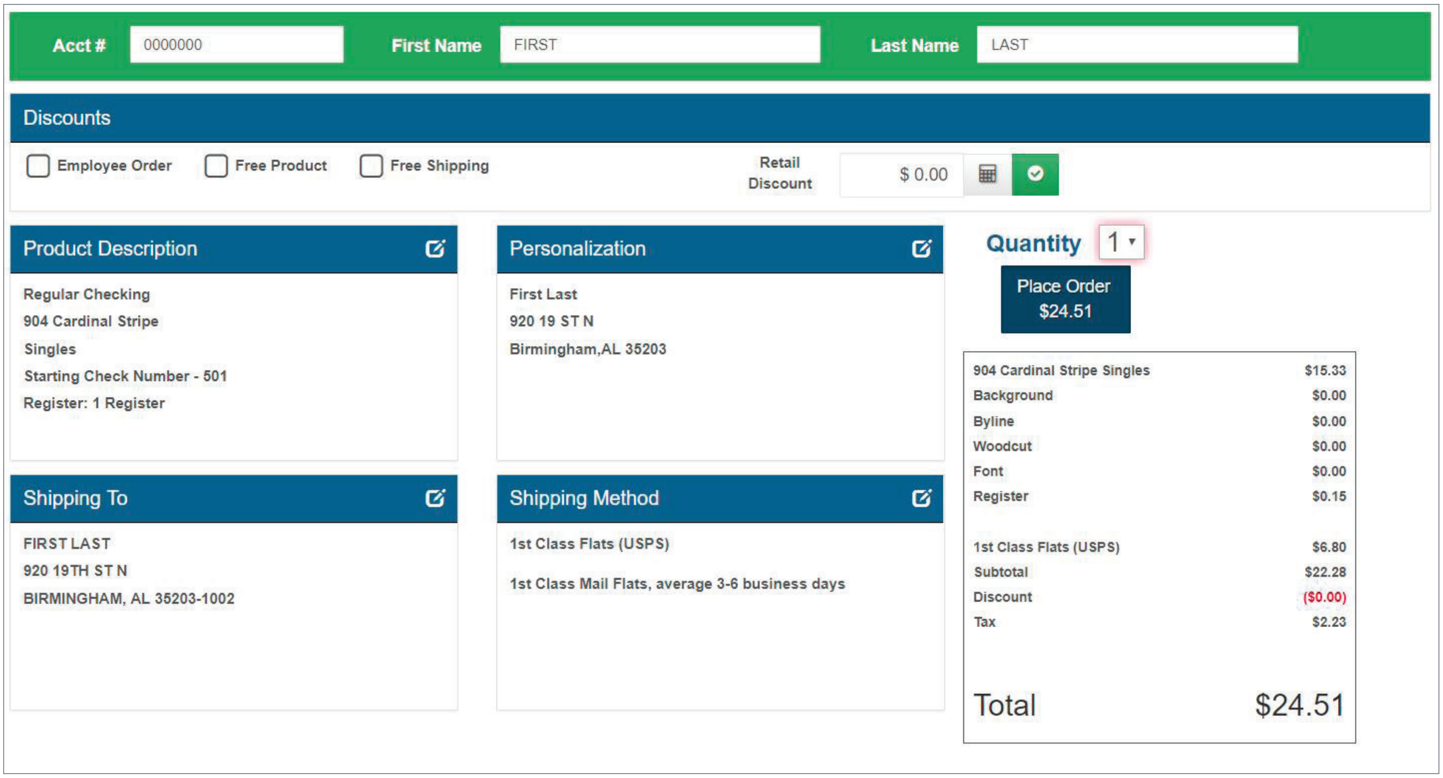
The Next Button is located on the right bottom of the screen.



STEP 5: **Validate the Shipping Address**

We validate the address to which you are shipping, so if you changed the selected address, you may be presented again with available shipping options based on the ship methods available for that address. Please note that we may modify your selected address to match standard address formats.

REVIEW & SUBMIT



STEP 1: **Review**

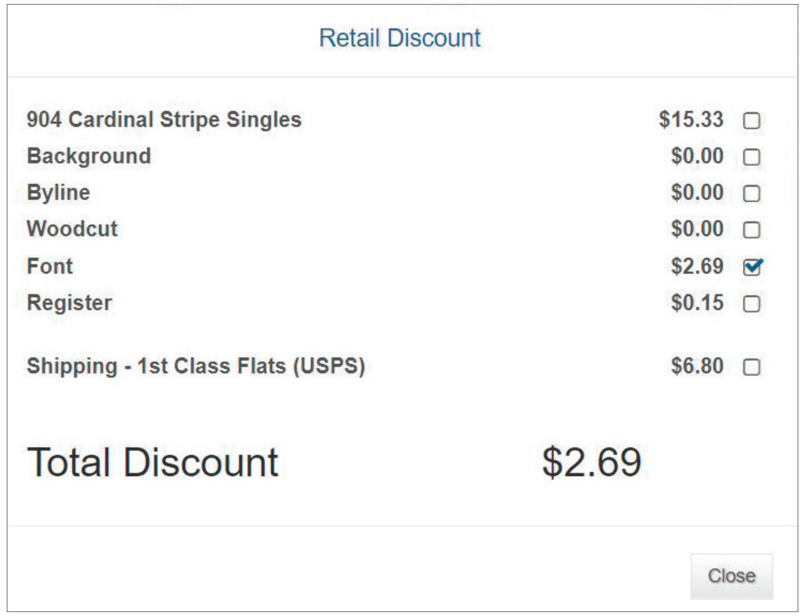
Review the order details. You are able to update any portion of the order from this screen by selecting the area you would like to update and entering the changes. Additionally, the pricing breakdown for your order is displayed on the right.

STEP 2: **Quantity**

If you would like to order more than one box of checks, you can change the quantity using the drop down box to the right of the quantity.

STEP 3: **Employee Orders**

Your Financial Institution may get discounted employee orders for checks. Click on “Employee” in the top left corner to have the correct discount applied to the order.



STEP 4: **Discounts**

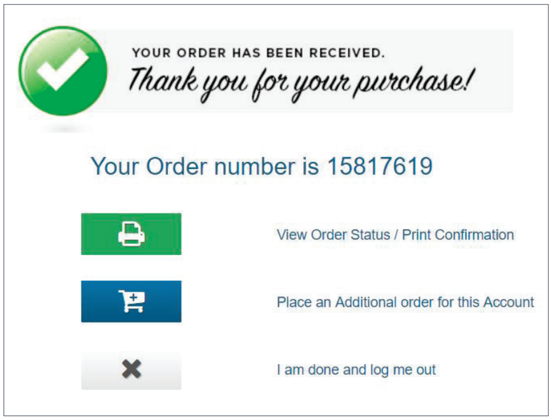
This area will be displayed to you based on your assigned rights. Discounts can be applied in three ways.

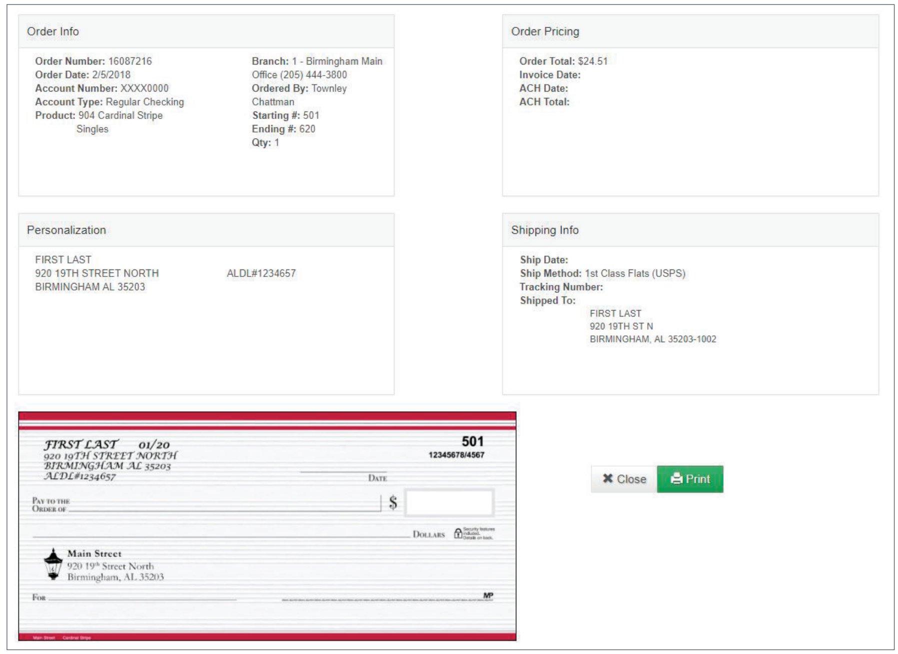
- Free Product - select if your Financial Institution wants to pay for the consumer's product
- Free Shipping - select if your Financial Institution wants to pay for the consumer's shipping
- Retail Discounts – select if you want to customize what portion of the order your Financial Institution wants to pay

**NOTE*: Applying these discounts provides ADDITIONAL discounts over and above what you have offered under the Account Type established by your Financial Institution.

STEP 5: **Place Order**

Click the blue "Place Order" button on the right to place the order.





Order Confirmation

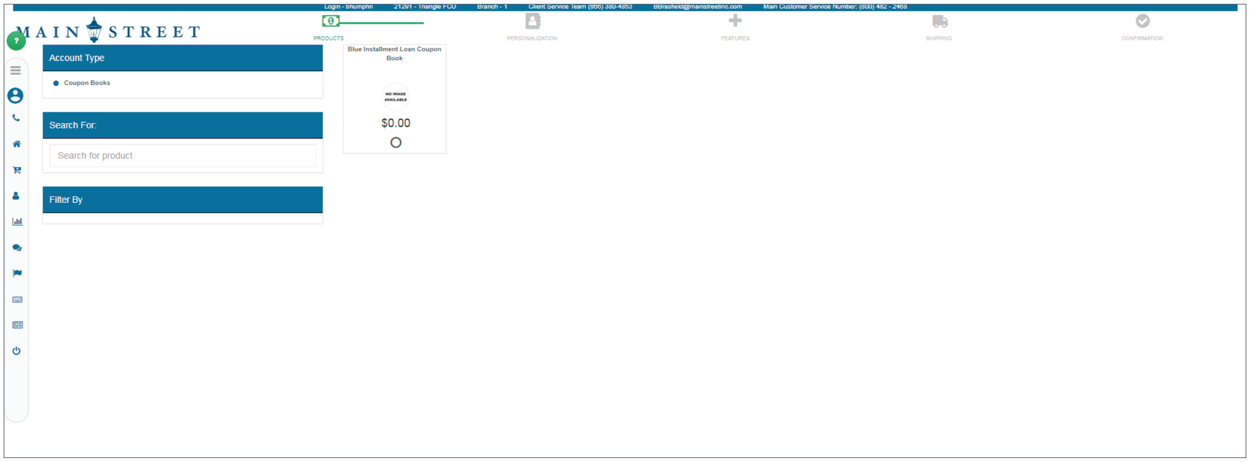
- View Order Status/Print Confirmation – Select this option to print and order summary page for the order:
- If another order is being placed for same account number, click “Place an Additional order for this Account”.
- If you are done with placing orders for this account, click “I am done”.

Congratulations!

You have successfully placed an order!

If you have any questions please contact our Client Service Department at **1 (800) 482-2468.**

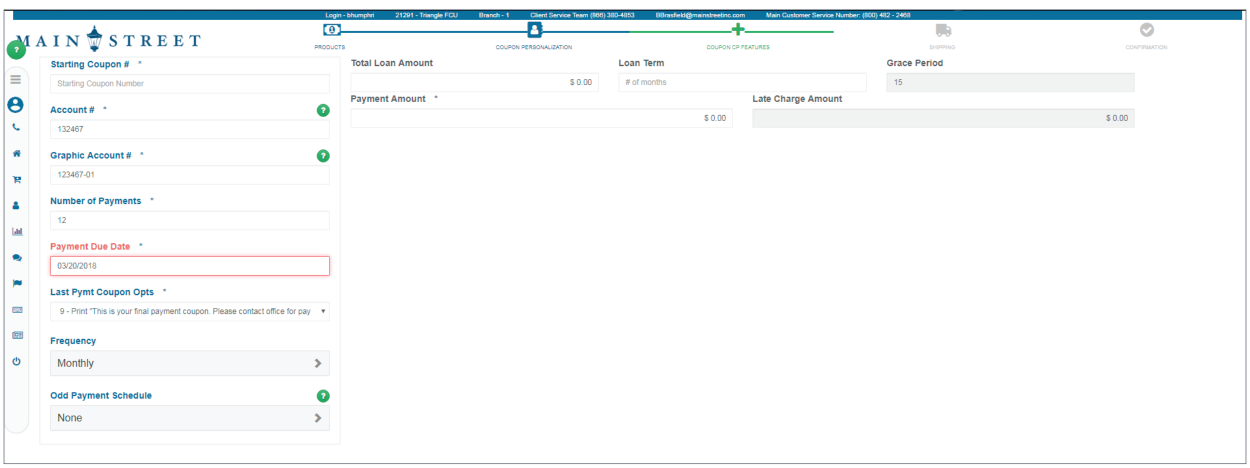
ORDERING COUPON BOOKS



STEP 1: Select the Account Type “Coupon Books”

STEP 2: Select the product for which you would like to order

STEP 3: Click Next



STEP 1: Starting Coupon Number

Enter the starting coupon number. This cannot be greater than 3 digits.

STEP 2: Account Number

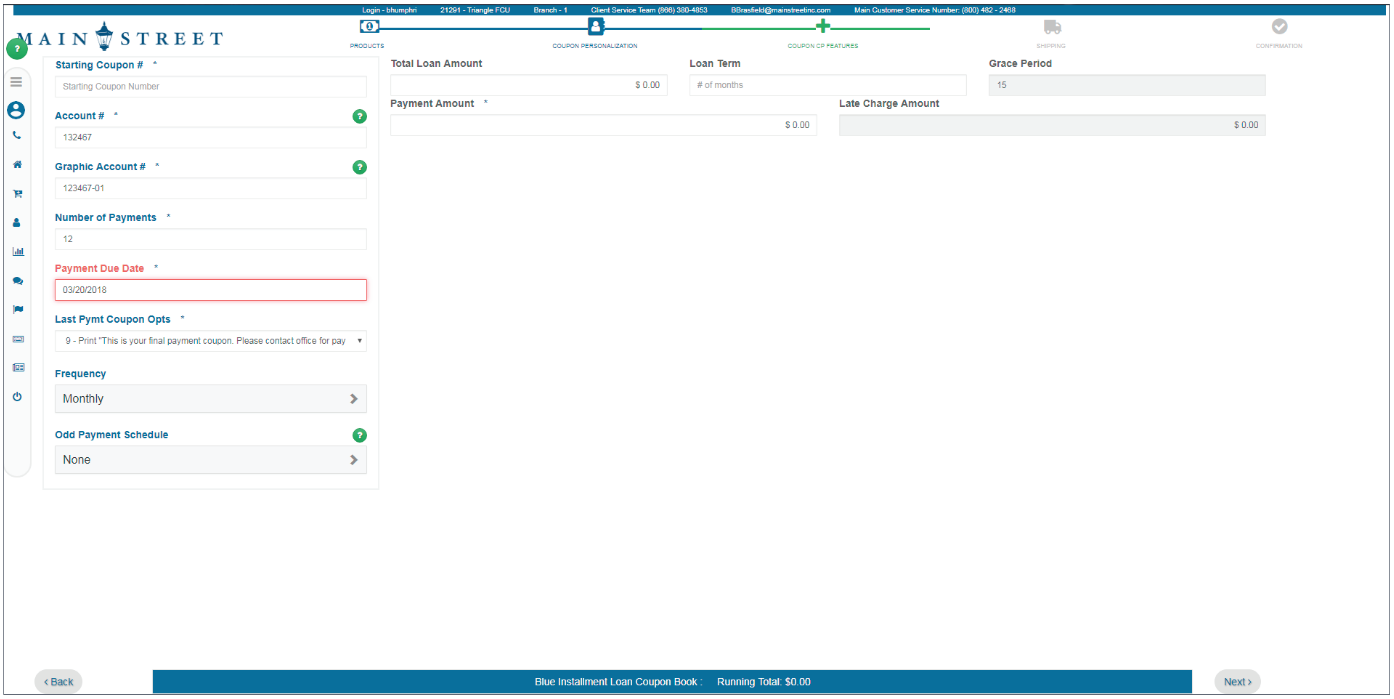
Enter the numeric account number.

STEP 3: Graphic Account Number

Enter the account number that will print on the coupon book. This may have letters or special characters in it, such as a hyphen (-) or slash (/).

STEP 4: Number of Payments

Enter the number of payments.



STEP 5: Payment Due Date

Enter the due date of the payment.

STEP 6: Last Payment Coupon Options

Choose the preferred verbiage that will print on the last payment coupon.

STEP 7: Total Loan Amount

Enter the total loan amount.

STEP 8: Loan Term

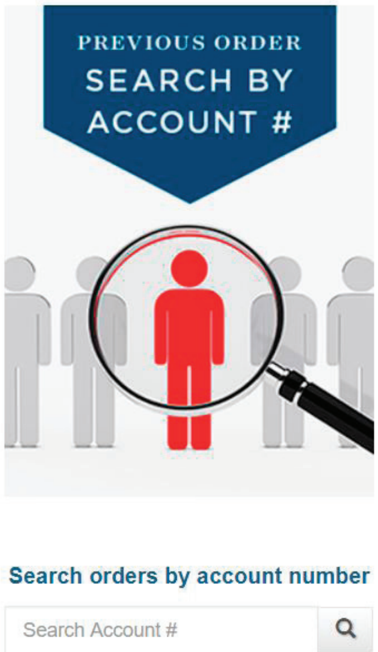
Enter the loan term.

STEP 9: Payment Amount

Enter the payment amount.

STEP 10: Click Next and proceed with steps listed on page 9, “Shipping”

ORDER LOOKUP/ACTIONS



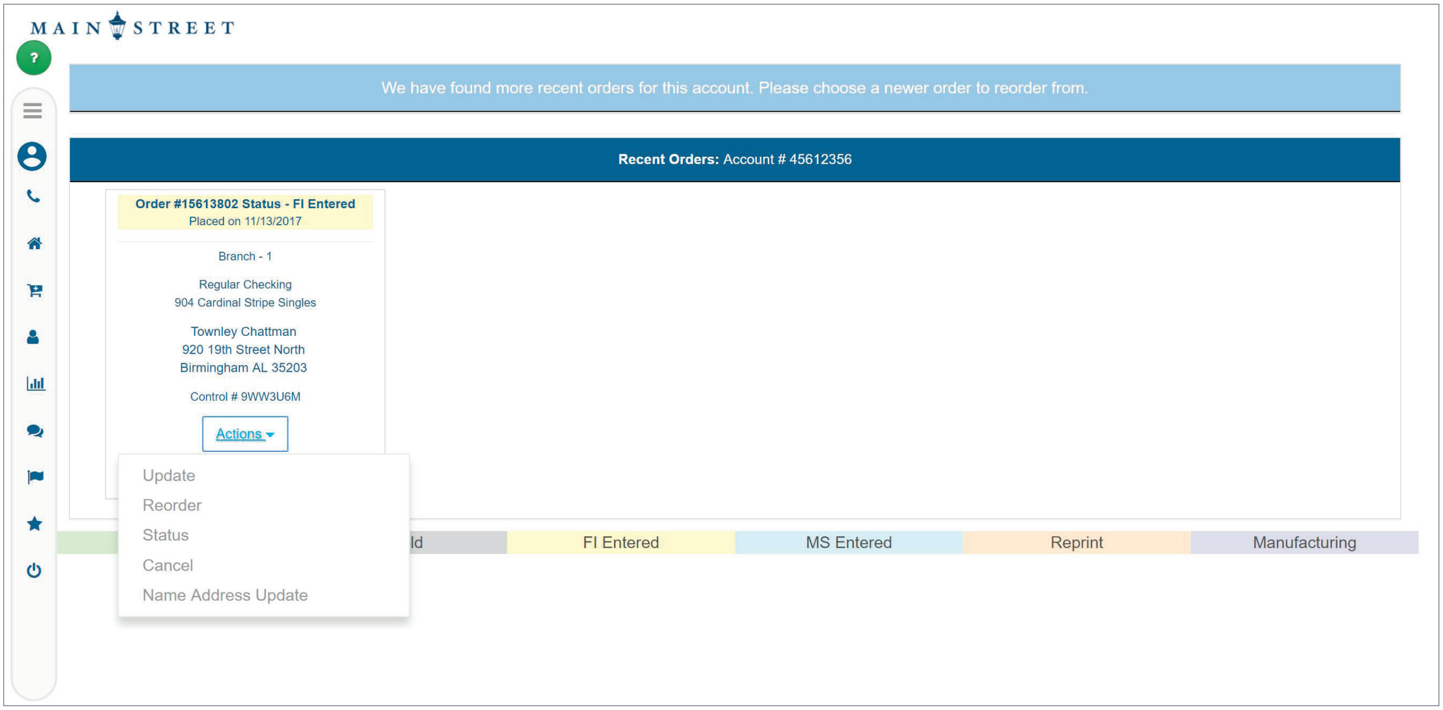
STEP 1:

Order Lookup is to be used if you would like to reorder from a past order. You can look up an order by entering either the Account Number or Previous Order Number in the search box.

STEP 2:

Click the magnifying glass to the right of the search box to return your results. When you search by Account Number, you will see all orders placed for that Account. When you search by order number, you will only see the specific order for which you are searching.

ORDER LOOKUP/ACTIONS (continued)



STEP 3:

Under your search results shown above, there are several actions you can perform:

- **UPDATE:** Update the existing order (only available if the order has not begun processing)

This option takes you back through the ordering process and will allow you to update all portions of the order.

- **REORDERS:** Place a reorder for an existing account.

This option will take you through the steps of placing an order and will assign the next set of check numbers for the order.

- **STATUS:** Check the status of the order

This option allows you to see all the details of an order, including the tracking number if the order has shipped.

- **CANCEL:** Cancels the order (only available if the order has not begun processing)

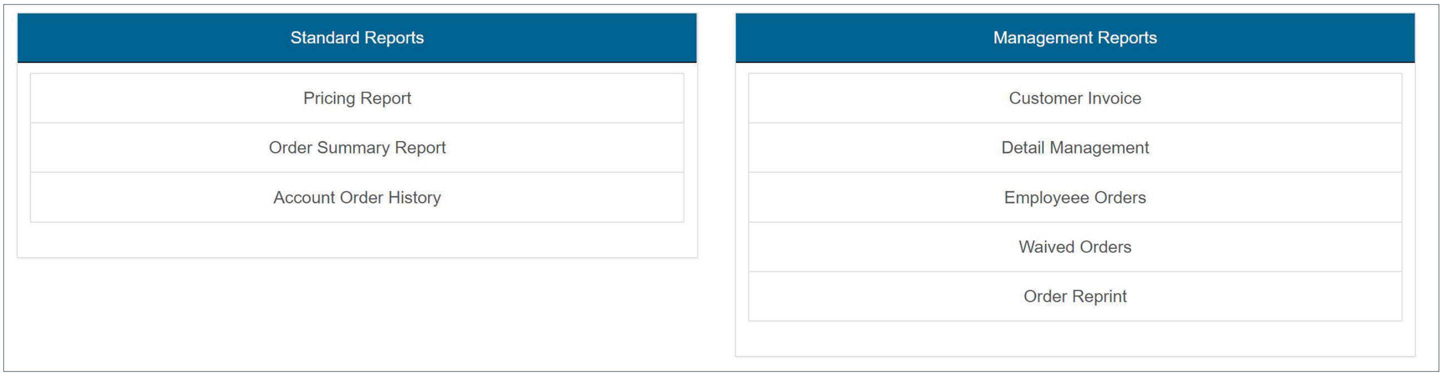
This option will allow you to cancel the order.

- **NAME ADDRESS UPDATE:** Update the name and address on record for the NEXT order placed.

Select this option to update the name and address information for the checks, Deposit tickets, stamps & shipping address. Simply update the information and select

REPORTING

Reports are located on the toolbar on the right under Reports icon.



Standard Reporting - The standard reports are available to every user and can be pulled on a daily, weekly or monthly basis.

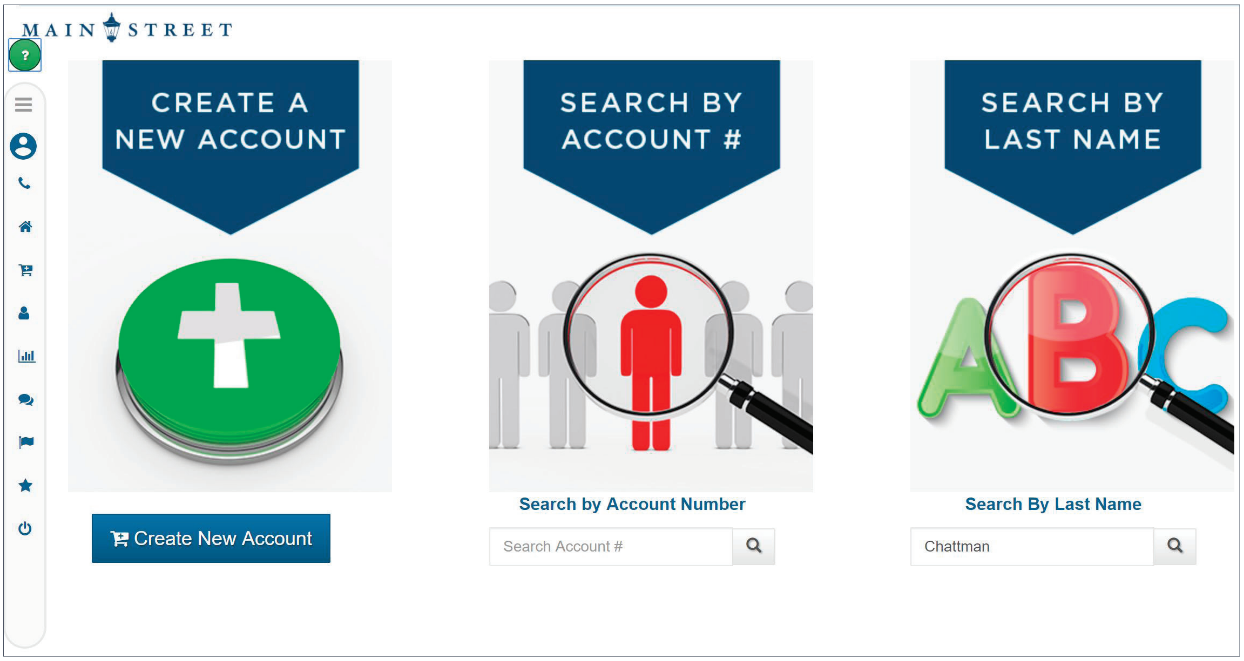
- **Pricing Report:** The pricing report will show you your prices for all products you selected to be offered. PLEASE NOTE: This report will not include the prices for any add on items like fonts and registers or covers.
- **Order Summary Report:** The order summary report allows you to pull a list of orders placed by date or by user.
- **Account Order History:** The account order history report will allow you to pull a list of orders for a specific account number.

Management Reports

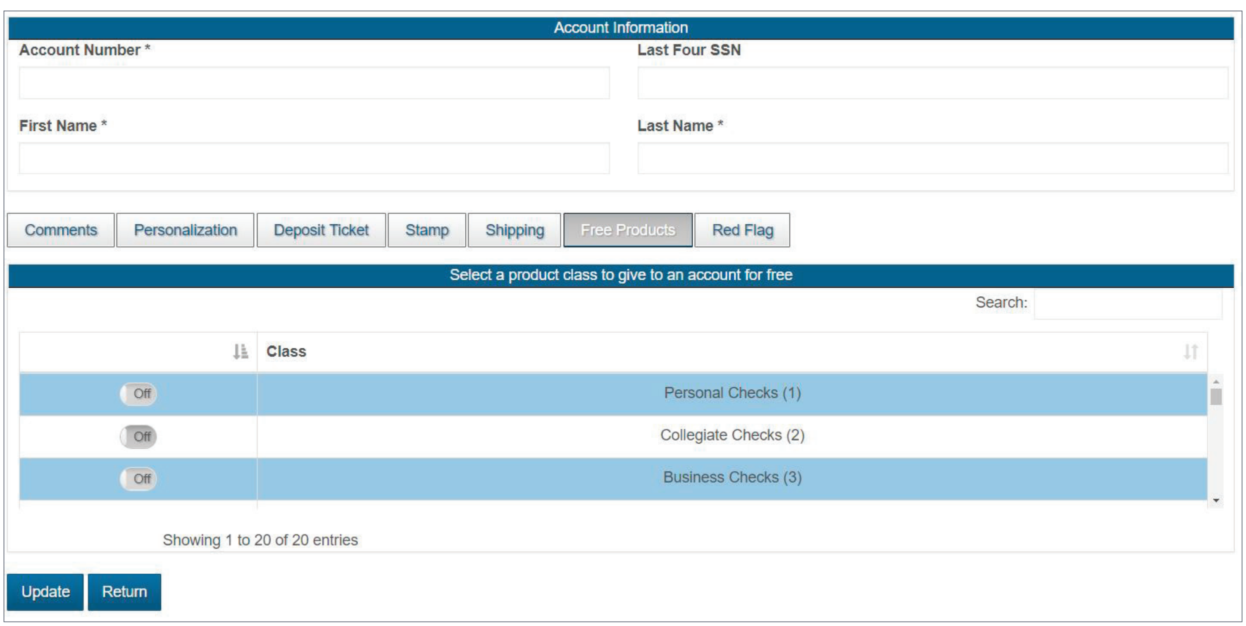
- **Customer Invoice:** The customer invoice reports to you the total amount that will be debit/credited to your account for the previous month's activity. PLEASE NOTE: The billing contacts will receive an e-mail each month letting them know their invoice is ready to view online. This invoice may not need any action on your part if your financial institution is setup automatic ACH.
- **Detail Management:** The detail management report displays a breakdown of all orders placed for a billing period.
- **Employee Orders:** The employee orders report displays a breakdown of all employee orders placed for a billing period.
- **Waived Orders:** The waived order report displays all orders that were waived and billed to your financial institution over your normal account type plans for a billing period.
- **Order Reprint:** The order reprint report displays all reprinted due to an error for a billing period.

Valued Accounts Maintenance: The valued account tool is located on the toolbar on the right under the ★ Valued Customers icon. This tool allows you to add an account that does not need to be charged due to an agreement with your financial institution. This is often used to provide free items for charter members and IOLTA accounts.

PLEASE NOTE: This is not the option that you select to provide employees with free personal checks.



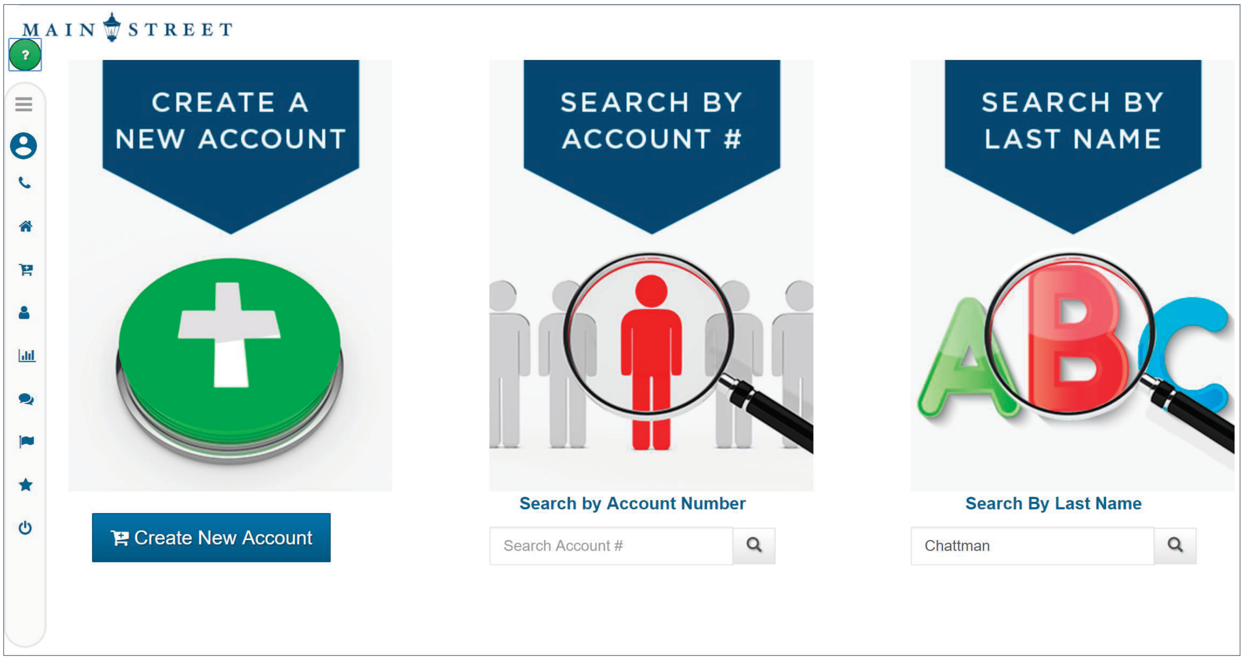
STEP 1: Add a new account or search for an existing account by Account Number or Last Name



STEP 2: Simply select the product category of the items that should always be free for this specific account.

STEP 3: Select "Update" to save your changes.

Red Flag Maintenance: The red flag tool is located on the toolbar on the right under the Red Flag System icon. This option is used if you have an account number that should not be allowed to place orders due to fraud or account closure.



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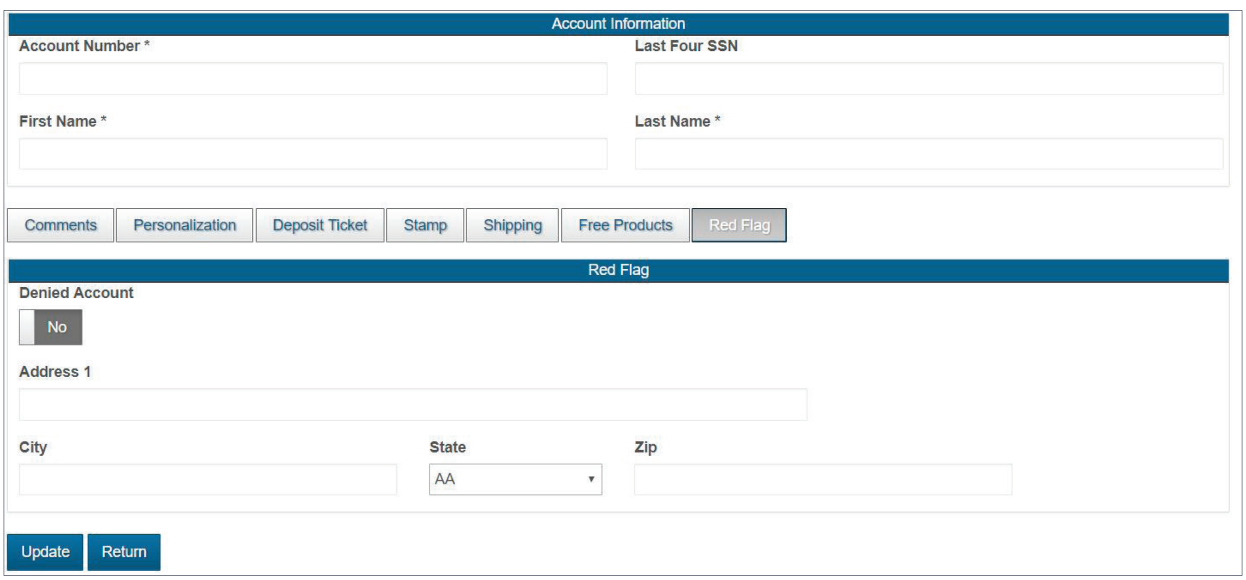
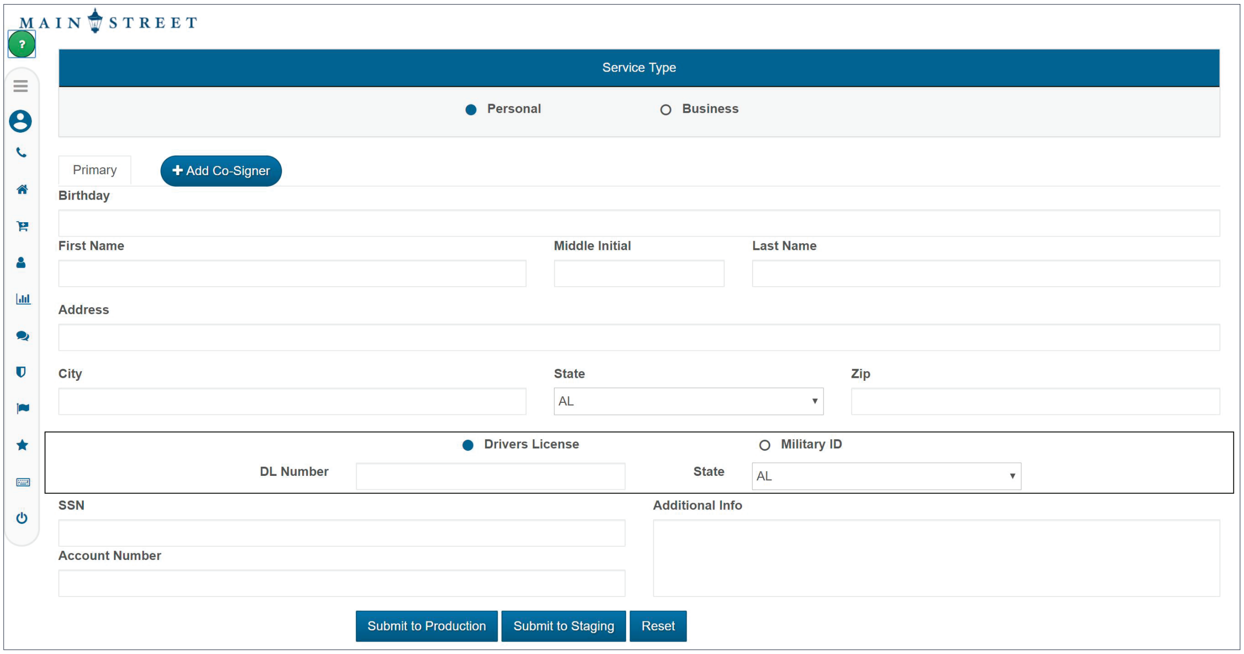


STEP 2: Make sure that the address information is updated and set the "Denied Account" option to "YES" to prevent orders.

STEP 3: Select "Update" to save your changes.

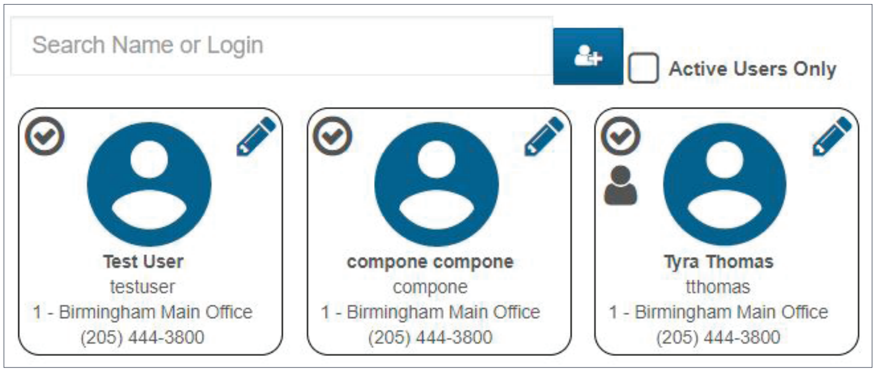
CHEX Systems: The Chex System tool is located on the toolbar on the right under the Chex Systems icon. ChexSystems is a check verification service and consumer credit reporting agency owned by the eFunds subsidiary of Fidelity National Information Services. It provides information about the use of deposit accounts by consumers.



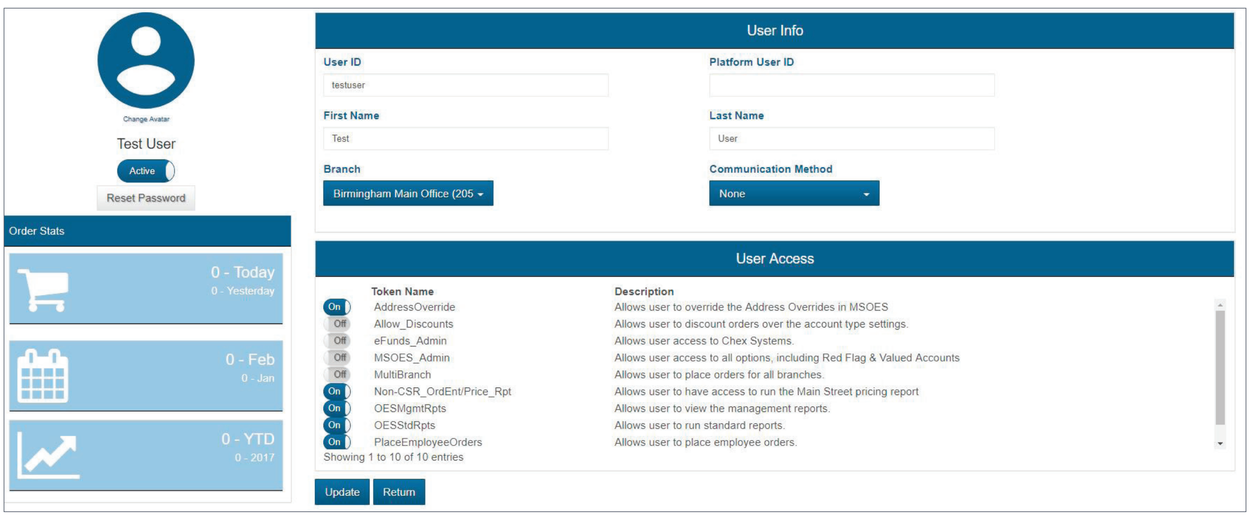
STEP 1: Enter all information shown on the screen.

STEP 2: Select “Submit to production” and a screen will pop up with your results.

User Administration: The user administration tool is located on the toolbar on the right under the User Admin icon. This option is used by the administrator to add, edit or make users inactivate, as well as reset passwords.



STEP 1: Select the icon.



STEP 2: Enter a user name, their first and last name and their home branch.

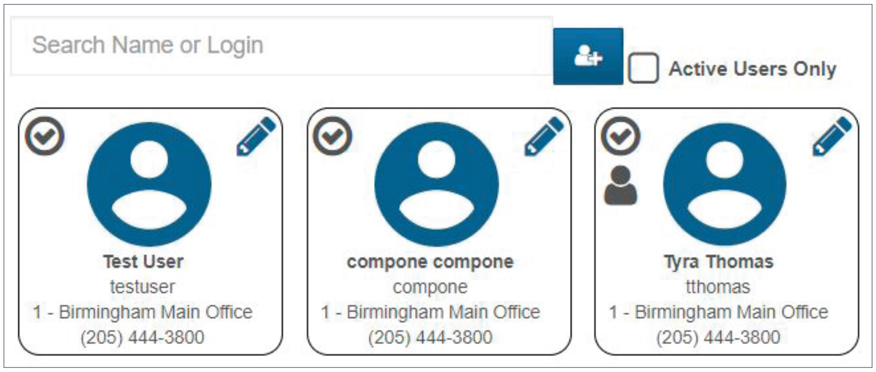
STEP 3: Select their preferred form of communication

STEP 4: Select their rights in the system.

STEP 5: Select "Update" to save changes.

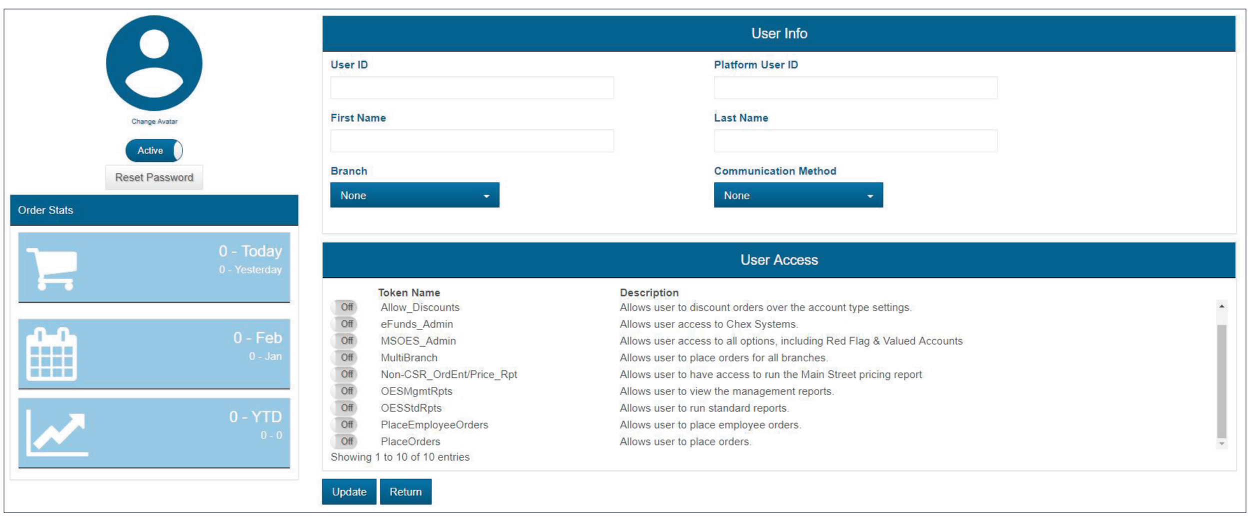
Please note: Everyone's password defaults to your Main Street customer ID number if they are a new user or if you reset their password.

User Administration: The user administration tool is located on the toolbar on the right under the User Admin icon. This option is used by the administrator to add, edit or make users inactivate, as well as reset passwords.



Adding a New User:

STEP 1: Select the icon.



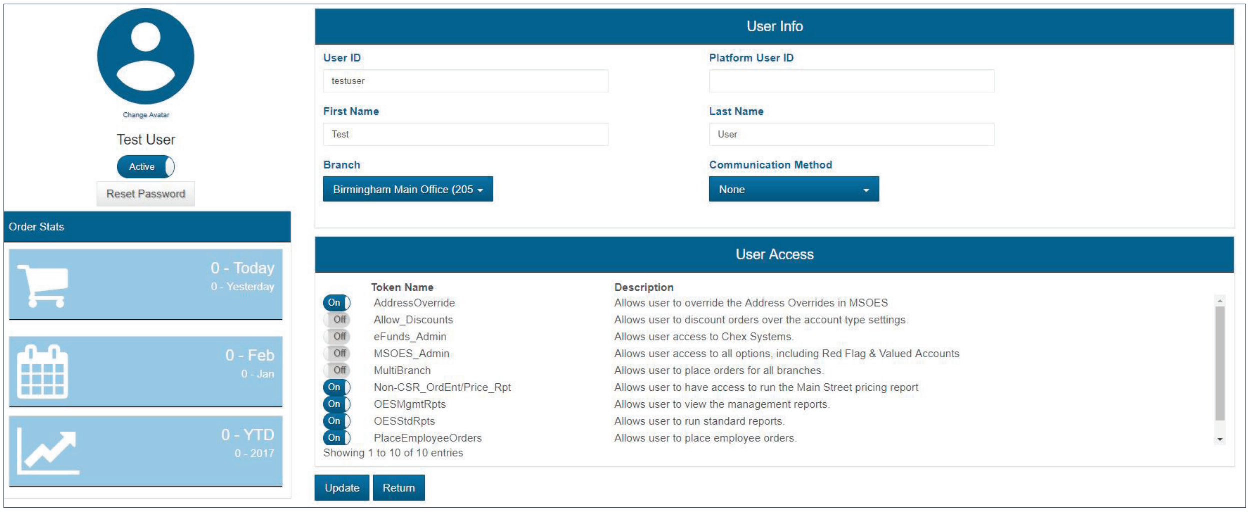
STEP 2: Enter a user name, their first and last name and their home branch.

STEP 3: Select their preferred form of communication

STEP 4: Select their rights in the system.

STEP 5: Select "Update" to save changes.

Please note: Everyone's password defaults to your Main Street customer ID number if they are a new user or if you reset their password.



Updating a User:

STEP 1: Select the  icon next to the user you want to update.

STEP 2: Modify the rights you want to change.

- If you want to deactivate a user, select the 'Inactive" option right below the user's name in the left hand corner of the screen.
- If you want to reset the password, select "Reset Password" option right below the user's name in the left hand corner of the screen. Their password will be set to your Main Street Customer ID.

STEP 3: Select "Update" to save changes.