

MAIN  STREET

Ordering

How To Successfully Navigate Through
The Order Entry System

2018 Edition

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INTRODUCTION

205.380.4000 | | REORDER CHECKS

MAIN STREET

HOME ABOUT SERVICES PRODUCTS CAREERS NEWS CONTACT CLIENT PORTAL

SERVICE MATTERS

Focus | Service | Simplicity | Cost Efficiency

MAIN STREET PROVIDES DATA-DRIVEN PRINT SOLUTIONS TO ENHANCE CUSTOMER RELATIONSHIPS

CHECK PRODUCTS
Exceptional service, program simplicity and low cost combine to help your check program run more efficiently.

ANALYTICS
Understand more about your current customers and how to grow by finding more customers like them.

DIRECT MAIL
Cost-effectively reach your existing and potential customers by utilizing our TargetSmart messaging capabilities.

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



Main Street Order Entry Login

It's not just checks; it's personal.

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

[Sign In](#)

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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

The screenshot shows the Main Street Home Screen with the following components and callouts:

- 1**: Points to the "Recent Messages" section, which displays a message: "Are you guys going to be closed in December?"
- 2**: Points to the "Notifications | News" section, which contains two items: "CLOSING DUE TO INCLEMENT WEATHER - December 8, 2017" and "Holiday Schedule - November 28, 2017".
- 3**: Points to the "Recent Orders - last 7 days" section, which includes tabs for "Townley Chattman Orders" and "Demo Bank".
- 3a**: Points to the "Demo Bank" tab.
- 3b**: Points to the "Order Number" column header in the table.
- 3c**: Points to the "Acct #" column header in the table.
- 3d**: Points to the search input field.

Order Number	Order Date	Ship Date	Acct #	First Name	Last Name
15738548	12/5/2017		1111111	FIRST NAME	LAST NAME
15738653	12/5/2017		1111112	TEST FIRST NAME	TEST LAST NAME

Showing 1 to 2 of 2 entries

- 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 screenshot shows a vertical menu with the following items:

- My Profile
- Contact Us
- Home
- Place Order
- User Admin
- Reports
- Messages
- Chex Systems
- Red Flag System
- Valued Customers
- Logout

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

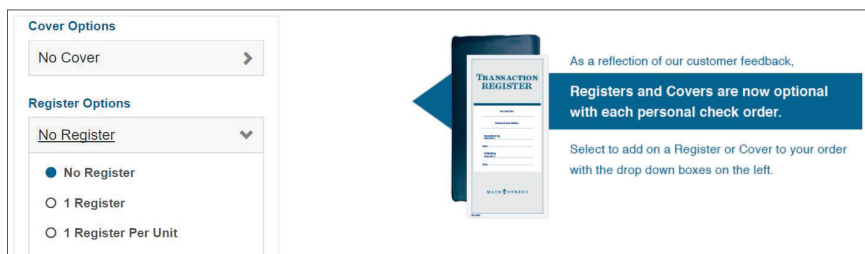
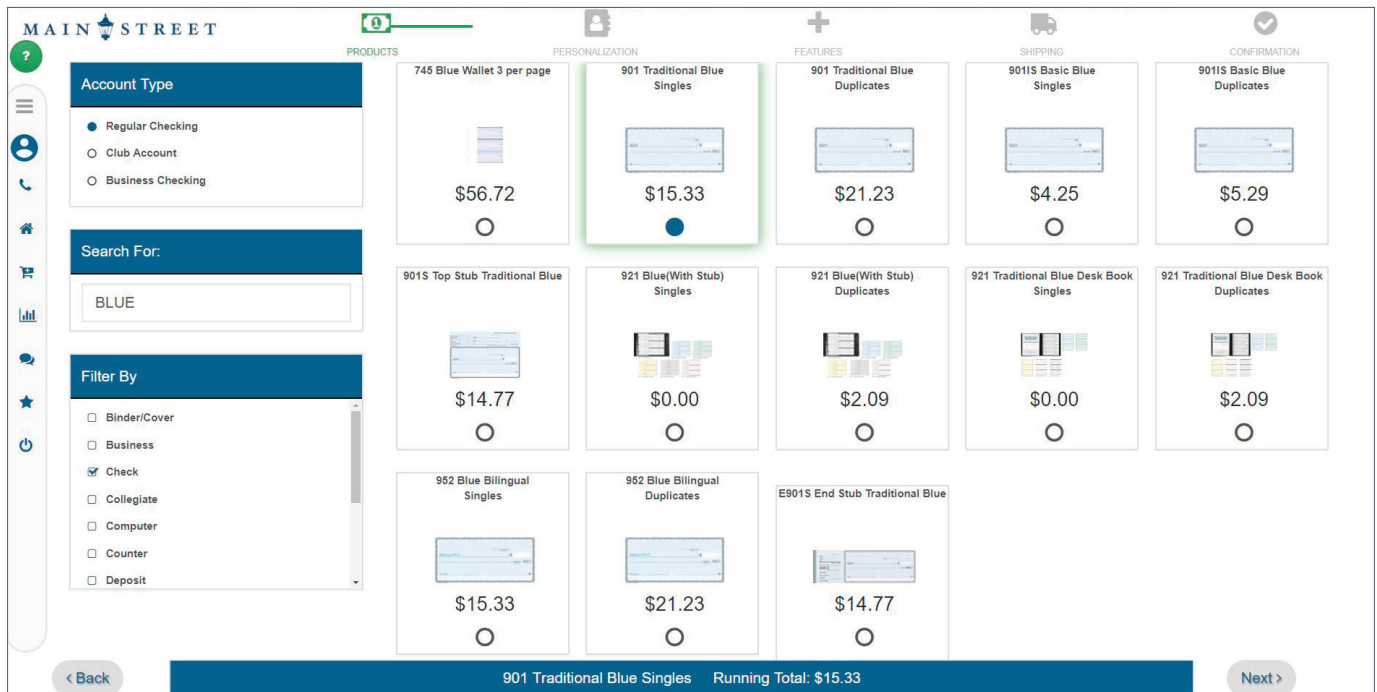


NEED HELP?

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

The screenshot shows the 'PERSONALIZATION' screen in the Main Street mobile app. The interface is divided into three main sections: 'PRODUCTS', 'CHECK PERSONALIZATION', and 'CHECK FEATURES'. The 'CHECK PERSONALIZATION' section is active and contains a 'Bold' toggle (checked) and five rows of text input fields. The first row is pre-filled with 'FIRST LAST'. The 'CHECK FEATURES' section contains a 'Supplemental' toggle (unchecked) and two rows of text input fields, one pre-filled with 'ALDL #: 123456789' and the other with 'PHONE: 800-482-2468'. At the bottom, a blue bar displays a 'Back' button, the text '901 Traditional Blue Singles: Running Total: \$16.86', and a 'Next >' button.

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.

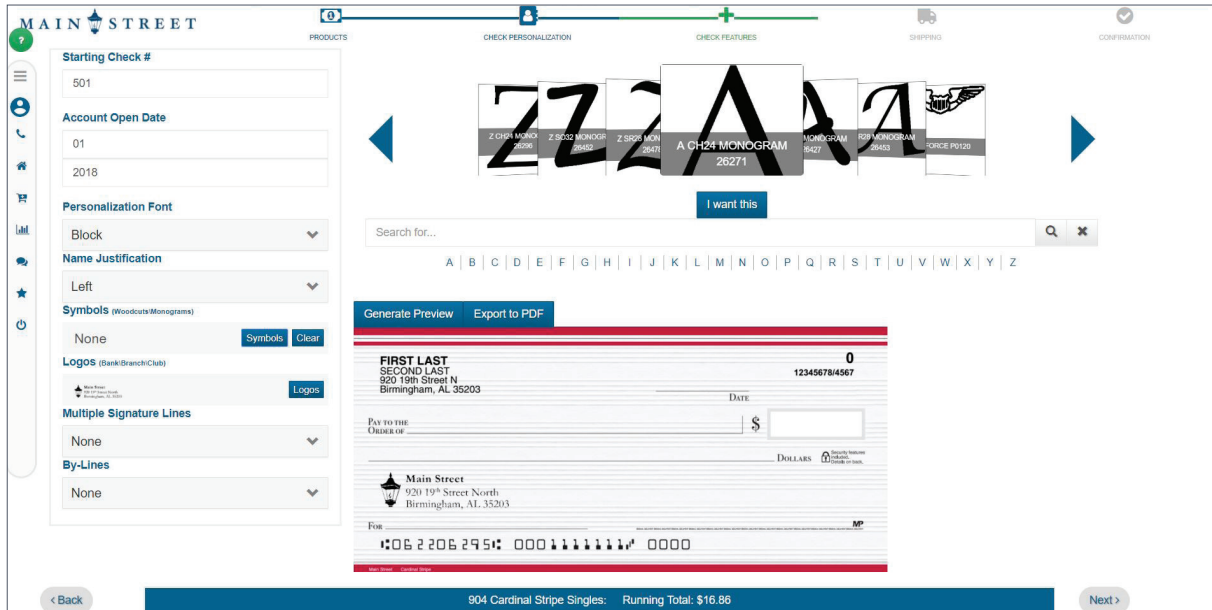
*NOTE: Each horizontal row across, i.e. the Personalization and the Supplemental Information combined, cannot exceed 44 characters (some products allow less than 44 characters per row). Any information entered as “Personalization” WILL print on the shipping label. See Supplemental Information to add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

FEATURES



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.

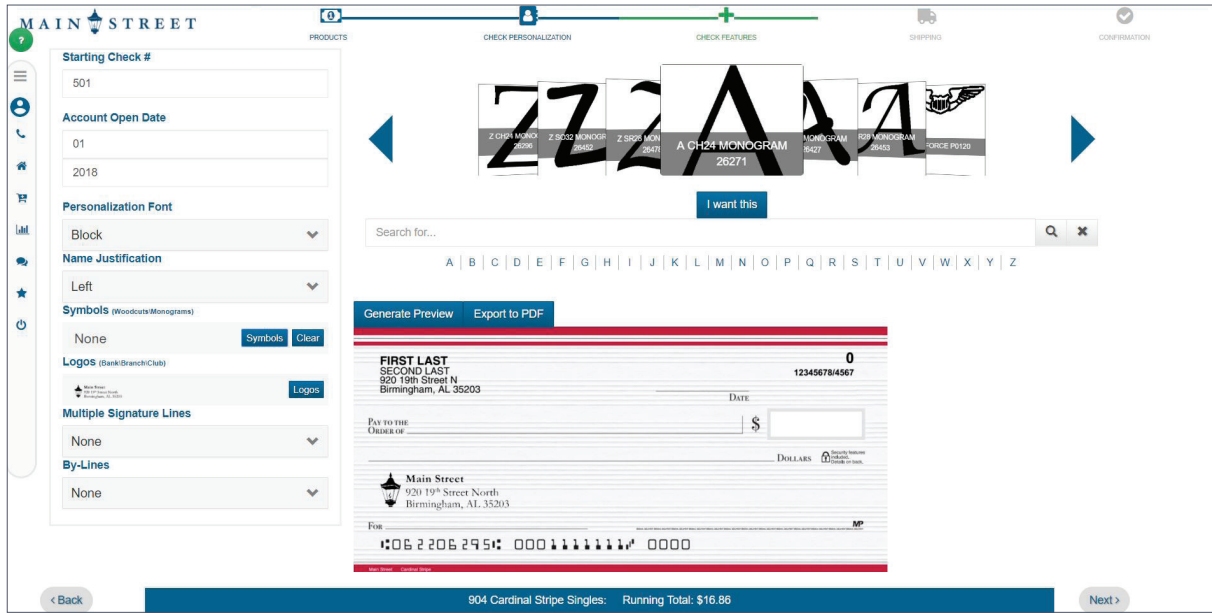
STEP 3: Name Justification

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.

FEATURES (continued)



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

MAIN STREET

Shipping Location

- Check Address - 920 19TH STREET NORTH BIRMINGHAM AL 35203
- Birmingham Main Office (205) 444-3800 - ATTN: FIRST LAST 920 19th St N Birmingham AL 35206
- Birmingham Main Office (205) 444-3800 (F) - ATTN: FIRST LAST 920 19th St N Birmingham AL 35206
- Birmingham Downtown Office (205) 326-2265 - ATTN: FIRST LAST 920 19th St N Birmingham AL 35203
- Birmingham Downtown Office (205) 326-2265 (F) - ATTN: FIRST LAST 920 19th St N Birmingham AL 35203

Selected Address

FIRST LAST

920 19TH STREET NORTH

BIRMINGHAM AL 35203

Most orders ship within 1 - 2 business days.

Shipping Method	Cost	Delivery Estimate
Handling + Standard Mail (USPS)	\$ 6.49	Standard Non-Trackable - average 10-15 business days
1st Class Flats (USPS)	\$ 6.80	1st Class Mail Flats, average 3-6 business days
Handling + FedEx Ground	\$ 15.31	FedEx Ground - average 3-6 business days
Handling + Priority Mail (USPS)	\$ 15.99	USPS Priority Mail Trackable - average 5-7 business days
Handling + 3 Biz Day Delivery (FedEx 2nd Day Air)	\$ 31.77	FedEx 2-Day Service
Handling + 2 Biz Day Delivery (FedEx Overnight)	\$ 40.78	FedEx Overnight Service - most expensive

904 Cardinal Stripe Singles: Running Total: \$16.86

Next >

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.

SHIPPING (continued)

Address Validation

Selected Address	Recommend Address
FIRST LAST	FIRST LAST
920 19TH STREET NORTH	920 19TH ST N
BIRMINGHAM AL 35203	BIRMINGHAM AL 35203-1002

[Use Selected Address](#) [Use Validated Address](#)

[Change Address](#)

Validation Messages

Success The address has been validated and has been changed.

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

Acct # 0000000 First Name FIRST Last Name LAST

Discounts

Employee Order Free Product Free Shipping Retail Discount \$ 0.00

Product Description
Regular Checking
904 Cardinal Stripe
Singles
Starting Check Number - 501
Register: 1 Register

Personalization
First Last
920 19 ST N
Birmingham,AL 35203

Quantity 1
Place Order
\$24.51

Shipping To
FIRST LAST
920 19TH ST N
BIRMINGHAM, AL 35203-1002

Shipping Method
1st Class Flats (USPS)
1st Class Mail Flats, average 3-6 business days

904 Cardinal Stripe Singles	\$15.33
Background	\$0.00
Byline	\$0.00
Woodcut	\$0.00
Font	\$0.00
Register	\$0.15
1st Class Flats (USPS)	\$6.80
Subtotal	\$22.28
Discount	(\$0.00)
Tax	\$2.23
Total	\$24.51

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.

ADDITIONAL DISCOUNTS

Retail Discount  

Retail Discount	
904 Cardinal Stripe Singles	\$15.33 <input type="checkbox"/>
Background	\$0.00 <input type="checkbox"/>
Byline	\$0.00 <input type="checkbox"/>
Woodcut	\$0.00 <input type="checkbox"/>
Font	\$2.69 <input checked="" type="checkbox"/>
Register	\$0.15 <input type="checkbox"/>
Shipping - 1st Class Flats (USPS)	\$6.80 <input type="checkbox"/>
Total Discount	\$2.69

[Close](#)

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

 **YOUR ORDER HAS BEEN RECEIVED.**
Thank you for your purchase!



Your Order number is 15817619

 View Order Status / Print Confirmation

 Place an Additional order for this Account

 I am done and log me out

Order Info Order Number: 16087216 Order Date: 2/5/2018 Account Number: XXXX0000 Account Type: Regular Checking Product: 504 Cardinal Stripe Singles Branch: 1 - Birmingham Main Office (205) 444-3800 Ordered By: Townley Chattman Starting #: 501 Ending #: 620 Qty: 1	Order Pricing Order Total: \$24.51 Invoice Date: ACH Date: ACH Total:
Personalization FIRST LAST 920 19TH STREET NORTH BIRMINGHAM AL 35203 ALDL#1234657	Shipping Info Ship Date: Ship Method: 1st Class Flats (USPS) Tracking Number: Shipped To: FIRST LAST 920 19TH ST N BIRMINGHAM, AL 35203-1002

FIRST LAST 01/20 920 19TH STREET NORTH BIRMINGHAM AL 35203 ALDL#1234657 DATE 501 123456784567 PAY TO THE ORDER OF \$ DOLLARS Main Street 920 19th Street North Birmingham, AL 35203 FOR	 
--	---

Order Confirmation

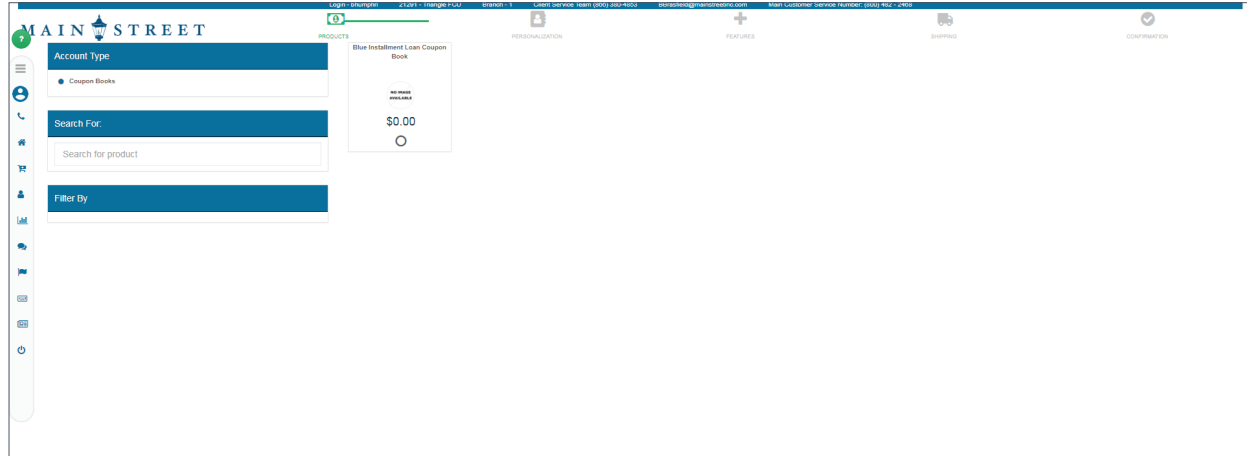
- View Order Status/Print Confirmation – Select this option to print and order summary page for the order:
- If another order is being placed for same account number, click “Place an Additional order for this Account”.
- If you are done with placing orders for this account, click “I am done”.

Congratulations!

You have successfully placed an order!

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

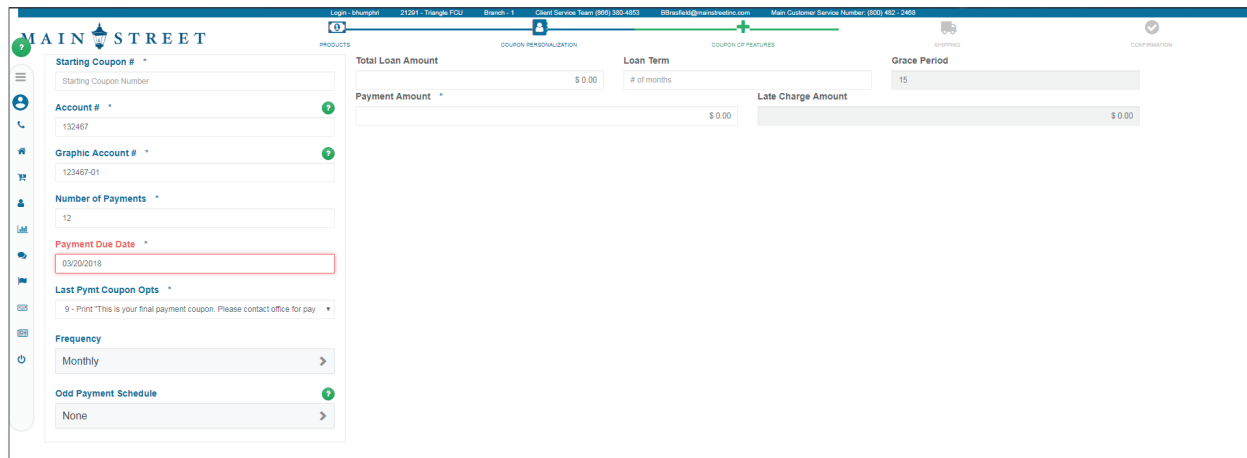
ORDERING COUPON BOOKS



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.

ORDERING COUPON BOOKS (continued)

The screenshot displays the 'COUPON PERSONALIZATION' step in the Main Street system. The interface is divided into two main sections: a left sidebar for coupon details and a right main area for loan parameters. The sidebar includes fields for 'Starting Coupon #', 'Account #', 'Graphic Account #', 'Number of Payments', 'Payment Due Date', 'Last Pymt Coupon Opts', 'Frequency', and 'Odd Payment Schedule'. The main area contains fields for 'Total Loan Amount', 'Loan Term', 'Grace Period', 'Payment Amount', and 'Late Charge Amount'. The 'Payment Due Date' field is highlighted with a red border. The bottom of the screen shows a blue bar with a 'Back' button, the text 'Blue Installment Loan Coupon Book : Running Total: \$0.00', and a 'Next >' button.

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

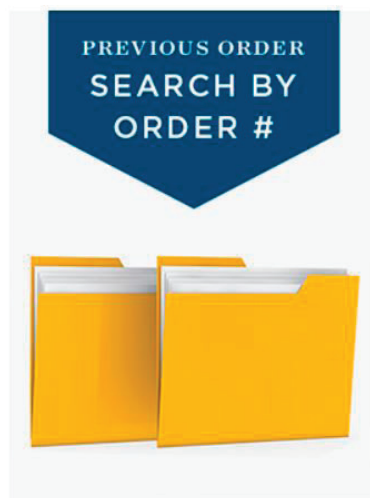
Enter the payment amount.

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

ORDER LOOKUP/ACTIONS



Search orders by account number

Load a previous order

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)

The screenshot displays the 'MAIN STREET' software interface. At the top, a blue banner reads: 'We have found more recent orders for this account. Please choose a newer order to reorder from.' Below this, a dark blue header indicates 'Recent Orders: Account # 45612356'. The main content area shows a card for 'Order #15613802 Status - FI Entered' placed on 11/13/2017. The card details include: Branch - 1, Regular Checking, 904 Cardinal Stripe Singles, Townley Chattman, 920 19th Street North, Birmingham AL 35203, and Control # 9WW3U6M. An 'Actions' dropdown menu is open, listing: Update, Reorder, Status, Cancel, and Name Address Update. At the bottom, a progress bar shows the order status: 'FI Entered' (yellow), 'MS Entered' (light blue), 'Reprint' (orange), and 'Manufacturing' (grey).

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 Reports	Management Reports
Pricing Report	Customer Invoice
Order Summary Report	Detail Management
Account Order History	Employee Orders
	Waived Orders
	Order Reprint

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.

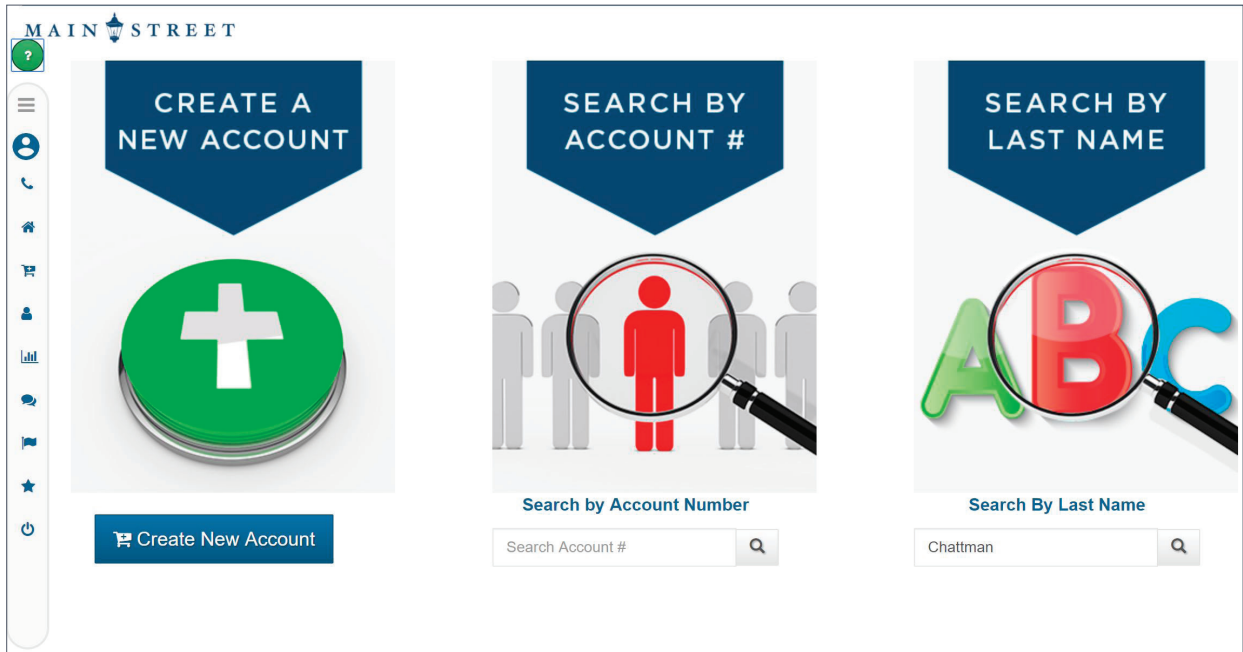
Management Reports

- **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.

ADMINISTRATIVE FUNCTIONS

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

The screenshot shows the 'Account Information' form with the following fields:

- Account Number *
- Last Four SSN
- First Name *
- Last Name *

Below the fields are tabs for: Comments, Personalization, Deposit Ticket, Stamp, Shipping, Free Products, and Red Flag. The 'Free Products' tab is selected, showing a table with the following data:

Select a product class to give to an account for free	
Class	
Personal Checks (1)	<input type="checkbox"/>
Collegiate Checks (2)	<input type="checkbox"/>
Business Checks (3)	<input type="checkbox"/>


Showing 1 to 20 of 20 entries

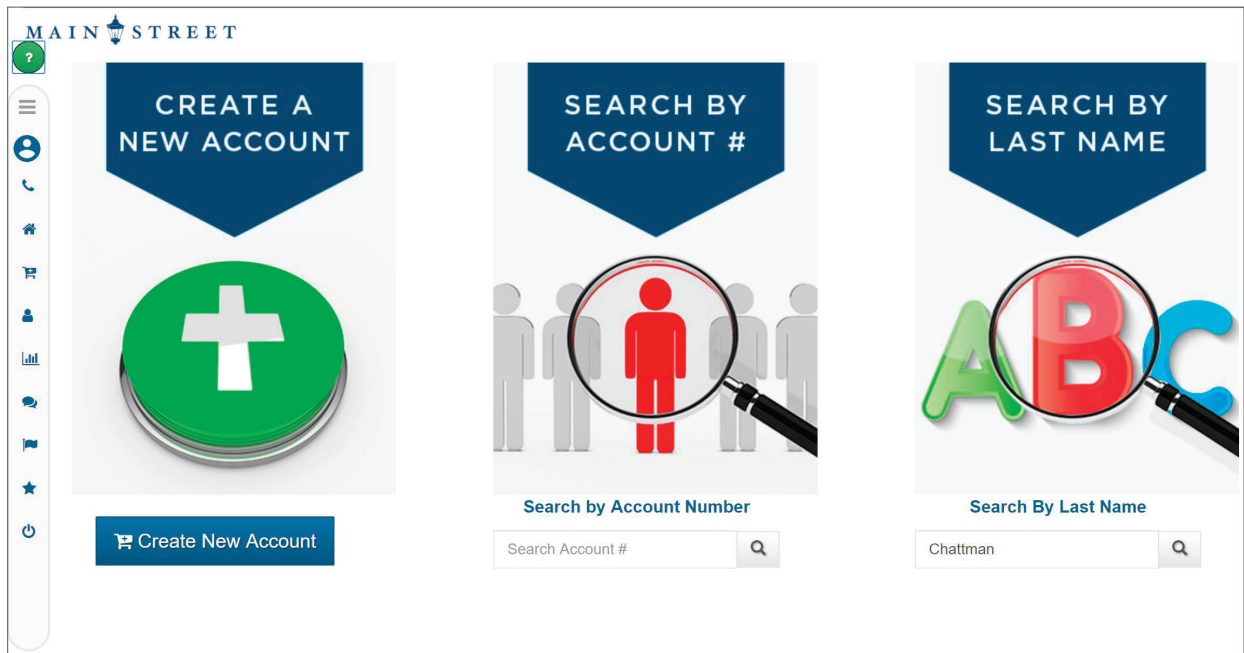
Buttons: Update, Return

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.

ADMINISTRATIVE FUNCTIONS (continued)

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.




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

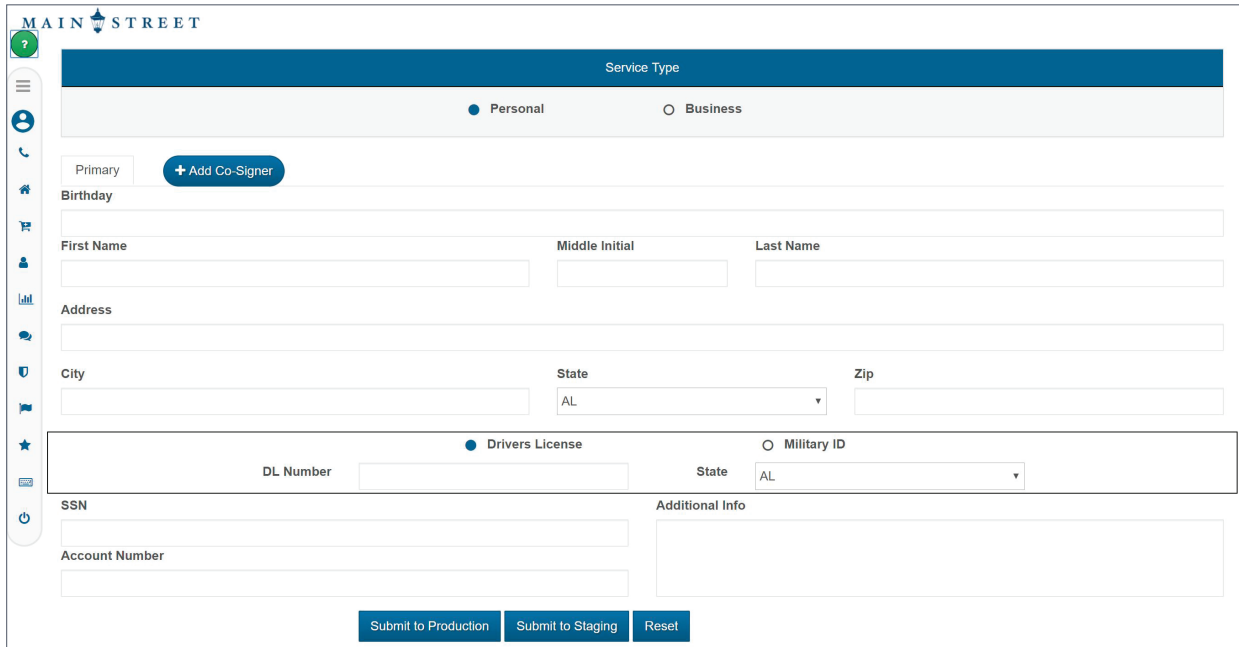
Account Information		
Account Number *	Last Four SSN	
<input type="text"/>	<input type="text"/>	
First Name *	Last Name *	
<input type="text"/>	<input type="text"/>	
<input type="button" value="Comments"/>	<input type="button" value="Personalization"/>	
<input type="button" value="Deposit Ticket"/>	<input type="button" value="Stamp"/>	
<input type="button" value="Shipping"/>	<input type="button" value="Free Products"/>	
<input type="button" value="Red Flag"/>		
Red Flag		
Denied Account		
<input type="button" value="No"/>		
Address 1		
<input type="text"/>		
City	State	Zip
<input type="text"/>	AA	<input type="text"/>
<input type="button" value="Update"/>	<input type="button" value="Return"/>	

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.

ADMINISTRATIVE FUNCTIONS (continued)

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.



MAIN STREET

Service Type

Personal Business

Primary

Birthday

First Name Middle Initial Last Name

Address

City State Zip

DL Number Drivers License Military ID State AL

SSN


Account Number

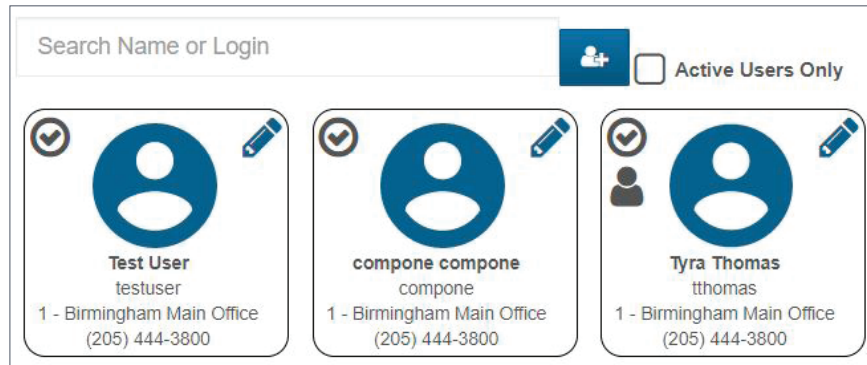
Additional Info

STEP 1: Enter all information shown on the screen.

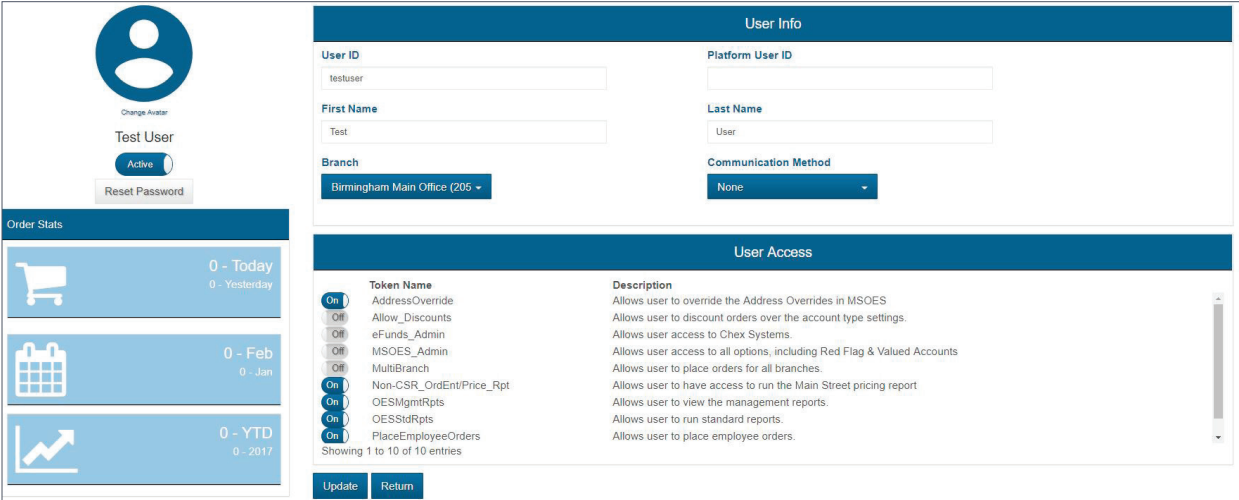
STEP 2: Select “Submit to production” and a screen will pop up with your results.

ADMINISTRATIVE FUNCTIONS (continued)

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 inactive, as well as reset passwords.



STEP 1: Select the  icon.



The screenshot shows the user administration form. On the left, there is a user profile card for "Test User" with an "Active" toggle and a "Reset Password" button. Below this is an "Order Stats" section with three cards: "0 - Today" (0 - Yesterday), "0 - Feb" (0 - Jan), and "0 - YTD" (0 - 2017). The main form area is divided into two sections: "User Info" and "User Access".

User Info

User ID testuser	Platform User ID
First Name Test	Last Name User
Branch Birmingham Main Office (205 -)	Communication Method None

User Access

Token Name	Description
<input checked="" type="checkbox"/> AddressOverride	Allows user to override the Address Overrides in MSOES
<input type="checkbox"/> Allow_Discounts	Allows user to discount orders over the account type settings.
<input type="checkbox"/> eFunds_Admin	Allows user access to Chex Systems.
<input type="checkbox"/> MSOES_Admin	Allows user access to all options, including Red Flag & Valued Accounts
<input type="checkbox"/> MultiBranch	Allows user to place orders for all branches.
<input checked="" type="checkbox"/> Non-CSR_OrdEnt/Price_Rpt	Allows user to have access to run the Main Street pricing report
<input checked="" type="checkbox"/> OESMgmtRpts	Allows user to view the management reports.
<input checked="" type="checkbox"/> OESStdRpts	Allows user to run standard reports.
<input checked="" type="checkbox"/> PlaceEmployeeOrders	Allows user to place employee orders.

Showing 1 to 10 of 10 entries

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


STEP 3: Select their preferred form of communication

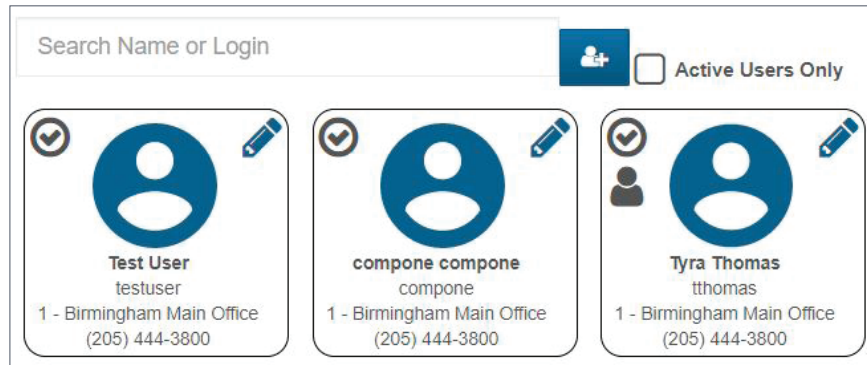
STEP 4: Select their rights in the system.

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.

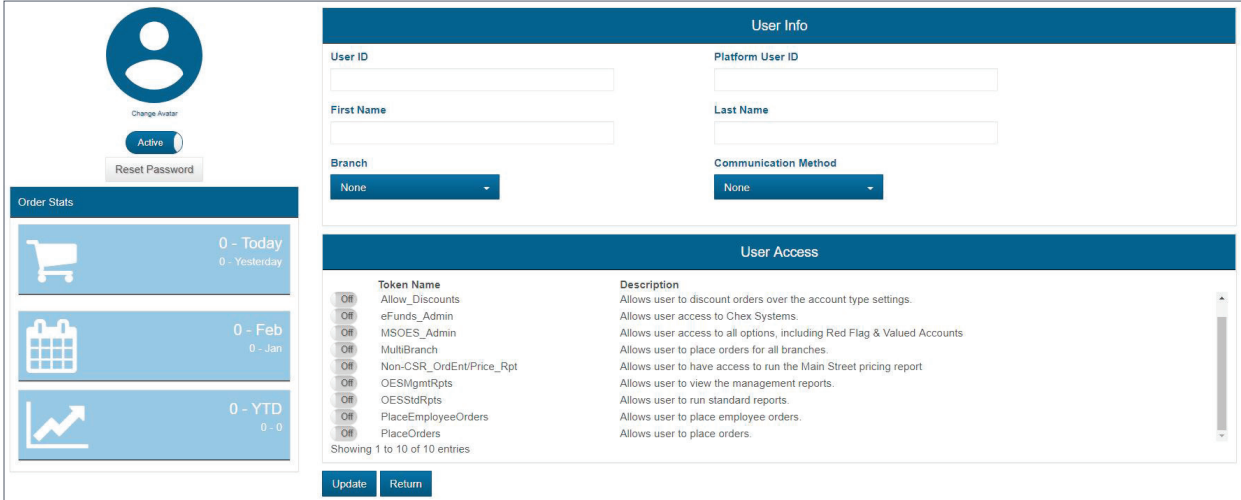
ADMINISTRATIVE FUNCTIONS (continued)

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 inactive, as well as reset passwords.



Adding a New User:

STEP 1: Select the  icon.



The screenshot shows the "User Info" form for adding a new user. On the left, there is a sidebar with a "Change Avatar" button, an "Active" toggle, and a "Reset Password" button. Below this is an "Order Stats" section with three cards: "0 - Today" (0 - Yesterday), "0 - Feb" (0 - Jan), and "0 - YTD" (0 - 0). The main form has two sections: "User Info" and "User Access".

User Info	
User ID	Platform User ID
First Name	Last Name
Branch	Communication Method

User Access	
Token Name	Description
<input type="checkbox"/> Allow_Discounts	Allows user to discount orders over the account type settings.
<input type="checkbox"/> eFunds_Admin	Allows user access to Chex Systems.
<input type="checkbox"/> MSOES_Admin	Allows user access to all options, including Red Flag & Valued Accounts
<input type="checkbox"/> MultiBranch	Allows user to place orders for all branches.
<input type="checkbox"/> Non-CSR_OrdEnt/Price_Rpt	Allows user to have access to run the Main Street pricing report
<input type="checkbox"/> OESMgmtRpts	Allows user to view the management reports.
<input type="checkbox"/> OESStdRpts	Allows user to run standard reports.
<input type="checkbox"/> PlaceEmployeeOrders	Allows user to place employee orders.
<input type="checkbox"/> PlaceOrders	Allows user to place orders.

Showing 1 to 10 of 10 entries

Update **Return**

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.

ADMINISTRATIVE FUNCTIONS (continued)

The screenshot displays a user management interface. On the left, there is a user profile for 'Test User' with an active status and a 'Reset Password' button. Below this is an 'Order Stats' section with three cards: '0 - Today' (Yesterday), '0 - Feb' (Jan), and '0 - YTD' (2017). The main area is divided into two sections: 'User Info' and 'User Access'. The 'User Info' section contains fields for User ID (testuser), Platform User ID, First Name (Test), Last Name (User), Branch (Birmingham Main Office (205)), and Communication Method (None). The 'User Access' section is a table with columns for Token Name and Description. The table lists 10 tokens, with the first five being 'On' and the last five being 'Off'. The 'Update' and 'Return' buttons are at the bottom.

Token Name	Description
<input checked="" type="checkbox"/> AddressOverride	Allows user to override the Address Overrides in MSOES
<input type="checkbox"/> Allow_Discounts	Allows user to discount orders over the account type settings.
<input type="checkbox"/> eFunds_Admin	Allows user access to Chex Systems.
<input type="checkbox"/> MSOES_Admin	Allows user access to all options, including Red Flag & Valued Accounts
<input type="checkbox"/> MultiBranch	Allows user to place orders for all branches.
<input checked="" type="checkbox"/> Non-CSR_OrdEnt/Price_Rpt	Allows user to have access to run the Main Street pricing report
<input checked="" type="checkbox"/> OESMgmtRpts	Allows user to view the management reports.
<input checked="" type="checkbox"/> OESStdRpts	Allows user to run standard reports.
<input checked="" type="checkbox"/> PlaceEmployeeOrders	Allows user to place employee orders.

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.