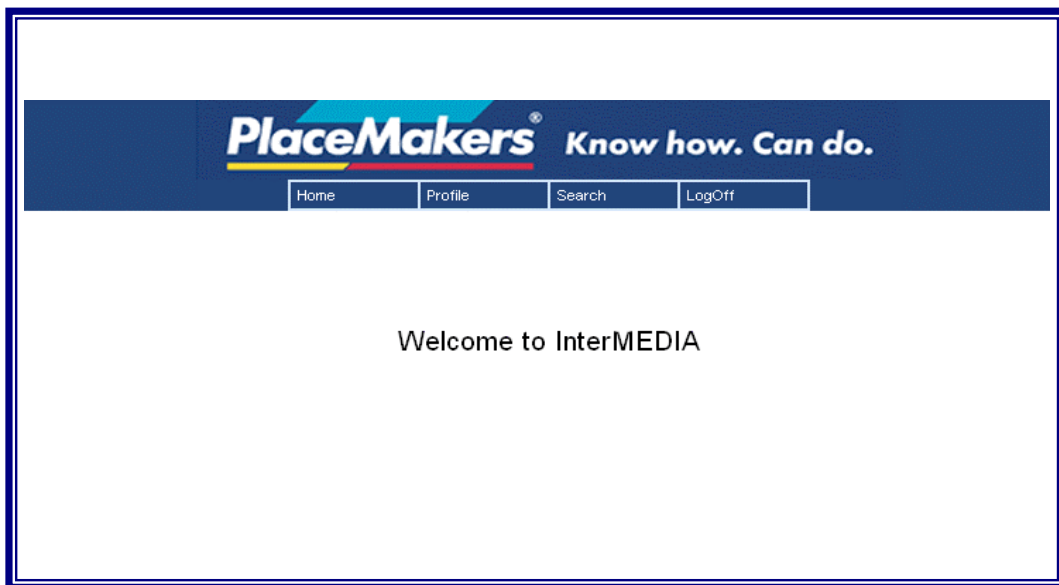


# PlaceMakers Customer Invoice and Statement Database



## A Users Guide

**This booklet will teach an authorised user how to search for and copy from the Internet, customer Statements and Invoices generated by the PlaceMakers sales system.**

**Queries and requests for assistance should be directed to the Credit Controller at the local PlaceMakers Branch**



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# PlaceMakers Invoice & Statement Database

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## Introduction

PlaceMakers stores copies of monthly statements and invoices for every customer in a database that is accessible from the Internet.

The intent of the facility is to provide a service to PlaceMakers customers that enables them to search for and print copies of their own statements and invoices as and when required, 24 hours of the day.

The database is secure and requires every user to have an individual and unique password so that they can only view and print copies of their own statements and invoices.

## Logons and Passwords

Customer's wishing to take advantage of this service should apply to the PlaceMakers Branch Credit Controller or Branch Accountant for approval to access the account information.

1. The logon is the customer's account code.
2. The initial Password will be advised by the Credit Controller and the user will be required to change it when logging on for the first time.
3. Passwords can be reset by the Branch Credit Controller at the request of the user. This could occur when the user leaves a customer's employ or the password has been forgotten.
4. Customers with more than one account at a PlaceMakers branch may request access to each of the accounts.
5. A customer can have more than one employee accessing the database but for security reasons each must have a different logon and password.

PlaceMakers will require a letter from the Customer authorising access if the person applying for access to the database is an employee of the customer.

## Support and Assistance

Customers experiencing difficulty with using the database may ring the Credit Controller at the local PlaceMakers branch and seek guidance.

The Credit Controller has access to a Help Desk and if unable to solve the problem should be able to get an answer within 24 hours.

## Acrobat Reader

Acrobat Reader must be installed on the user's PC in order to view the documents in the database. Acrobat Reader can be downloaded free from [www.adobe.com](http://www.adobe.com)

# Logging on to the PlaceMakers Account Database

## Two access methods

The InterMEDIA database may be accessed in either of two ways:

1. Go to the PlaceMakers Internet Website at [www.placemakers.co.nz](http://www.placemakers.co.nz) and click the InterMedia Logo on the home page.
2. Type the following in the URL Address bar of the internet browser and press enter. <https://media.mgnz.co.nz/PlaceMakers/logon/logon.aspx> See example below.



## Logon procedure

Step	Comment	Screen Display
1	<p><b>Logon Field</b> Type your logon name.</p> <p><b>Password Field</b> Type the initial password supplied by PlaceMakers</p> <p>Click <b>Logon</b> to enter the database.</p> <p>Click <b>Reset</b> to delete your password and enter a new one</p>	
2	<p>If this is the first time you have logged on you will be prompted to change the password</p> <p><b>Old password:</b> Type the password issued by PlaceMakers</p> <p><b>New Password:</b> Type a new password that is unique to you.</p> <p><b>Verify:</b> Type the new password again.</p>	

# Change your profile and password

## Introduction

This function allows the user to change the details of the logon such as the phone number, the e-mail address and password etc.

## The procedure

Step	Comment	Screen Display
1	Once you have logged on, click PROFILE	
2	<p>You may change any of the fields shown, should it be necessary.</p> <p>If you wish to retain your current password leave the PASSWORD and VERIFY fields blank then click UPDATE.</p> <p>If you elect to change the password, click RESET, type the new password, verify it by retyping it and then click UPDATE.</p>	<p style="text-align: center;"><b>Edit My Profile</b></p> <p>User Name jbrown          User Level USER          Branch BOWEN BUILDING SUPPLIES LTD</p> <p>Full Name <input type="text" value="James Brown"/>          -mail Address <input type="text" value="jbrown@pradiso.net"/>          Phone No. <input type="text" value="07 1234567"/>          New Password <input type="text"/>          Verify <input type="text"/></p> <p>Leave empty to preserve their existing password</p> <p style="text-align: center;"><input type="button" value="Update"/> <input type="button" value="Reset"/></p>

# Searching for an invoice or statement

## Introduction

This function allows the user to search for an invoice or statement for a time period commencing from August 1<sup>st</sup> 2004 until the current date.

## Notes:

Invoices are updated weekly in most locations (this depends on the branch setting). Statements are available on the 2<sup>nd</sup> or each month.

## The procedure for searching

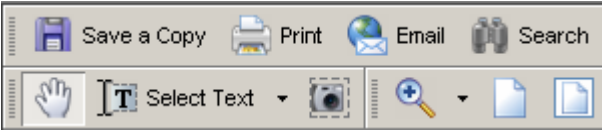
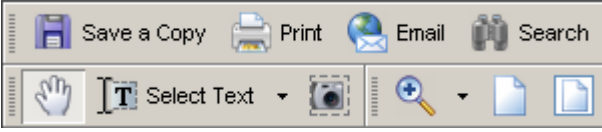
Step	Comment	Screen Display
1	Once you have logged on, click SEARCH	
2	<p>There are 4 options</p> <p><b>Customer Code:</b> Enter the account code required and click SEARCH.</p> <p><b>Document Number</b> If you know the exact number enter it in this field and click SEARCH</p> <p><b>Customer Name:</b> Type the name of the account, one word will do. Eg. Action will display Action Coating Ltd etc.</p>	<div style="border: 1px solid black; padding: 5px;"> <p><b>Customer Search</b></p> <p>Customer Code <input type="text" value="ACTCA"/></p> <p>Document Number <input type="text"/></p> <p>Branch <input type="text" value="P383 - Bowen Building Supplies Ltd"/></p> <hr/> <p><i>Left side of the screen</i></p> <p>Customer Name <input type="text"/></p> <p>Customer Reference <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Reset"/></p> <hr/> <p><i>Right side of the screen</i></p> </div>

Step	Comment	Screen Display						
	<p><b>Customer Reference:</b> Type the customer's PO number or part of it and click SEARCH (Inv. only)</p>							
<p>3</p>	<p>If the Account Code is used a list of invoices and statements will be displayed after highlighting the result Customer line.</p> <p>A maximum of 5 lines are displayed.</p> <p>If more than five lines are on file, the number of screens available to display them is shown at the right side of the screen, In the example circled there is only 1 document available.</p>	<p><b>Customer Search</b></p> <p>Customer Code <input type="text" value="ACTCA"/></p> <p>Document Number <input type="text"/></p> <p>Branch <input type="text" value="P383 - Bowen Building Supplies Ltd"/></p> <table border="1"> <thead> <tr> <th>Branch Code</th> <th>Customer Code</th> <th>Customer Name</th> </tr> </thead> <tbody> <tr> <td>P383</td> <td>ACTCA</td> <td>ACTION COATING LTD</td> </tr> </tbody> </table> <p><input type="button" value="Search"/> <input type="button" value="Reset"/></p> <p><b>Customer Address</b></p> <p>P O Box 420</p> <p style="text-align: right;">1</p>	Branch Code	Customer Code	Customer Name	P383	ACTCA	ACTION COATING LTD
Branch Code	Customer Code	Customer Name						
P383	ACTCA	ACTION COATING LTD						

Step	Comment	Screen Display
4	<p>This screen is displayed.</p> <p>Go to step 5 for more details</p>	
5	<p>In the example only 1 statement has been found.</p> <p><b>Date Fields:</b> The screen shows the last 40 days only, 14 lines max. Change the date range if a wider time period is required. (See step 6)</p> <p>If all invoices and statements are to be listed, click the tick box for ALL DATES</p> <p><b>Filters:</b> You can sort or filter the data so that only one type of document is displayed.</p> <p>The primary filters run across the screen. Click the blue button to sort by: <b>Statement, Invoice, Credit Note, or Cash Sales.</b></p> <p>The secondary filters sort by the distribution method. The blue buttons run down the screen and are:  <b>Mail:</b> sent by NZ Post  <b>Email:</b> sent by email  <b>Fax:</b> sent by fax  <b>BTO:</b> Do not print.  <b>DNP:</b> Do not print.</p>	<p><b>Left side of the screen</b></p> <p><b>Date:</b> The date shown as 2004-10-31 has to be in this format to enable the search engine to filter the data correctly.</p> <p><b>Right side of the screen</b></p> <p><b>Note:</b> The column titles (white text on the light blue background) can be clicked to sort the documents.</p>

## Searching for an invoice or statement *continued*

Step	Comment	Screen Display
6	<p>Extending the date range.</p> <p>Click the Icon at the right hand end of the date field to display a calendar.</p> <p>Select and click a date and it will be reset.</p>	
7	<p>To view the Statement or invoice double click the listing (yellow line starting with the date).</p>	
8	<p>The document will take a few moments to download and display.</p> <p>Acrobat Reader or an alternative PDF Reader must be installed on the users PC in order to display the document.</p> <p>Go to: <a href="http://www.adobe.com">www.adobe.com</a> to download and install a free version of <b>Acrobat Reader 6.0</b> that has the e-mail function.</p> <p><i>Continued over leaf</i></p>	

Step	Comment	Screen Display
9	<p>Choose “Save a copy” And save the document to a folder on your Hard Drive.</p> <p>If you wish to e-mail the document to some one else go to step 10 below.</p>	
10	<p>Open the saved document from the folder on the Hard Drive.</p> <p>Click the Email Icon</p>	 <p><b>Hint:</b> Do not waste time trying to email a copy of the image displayed while in the database. It is not a file. It is simply a screen image built up from data stored in various places in the database. Saving the image to a folder on the hard drive converts it to a PDF file that can be e-mailed.</p>