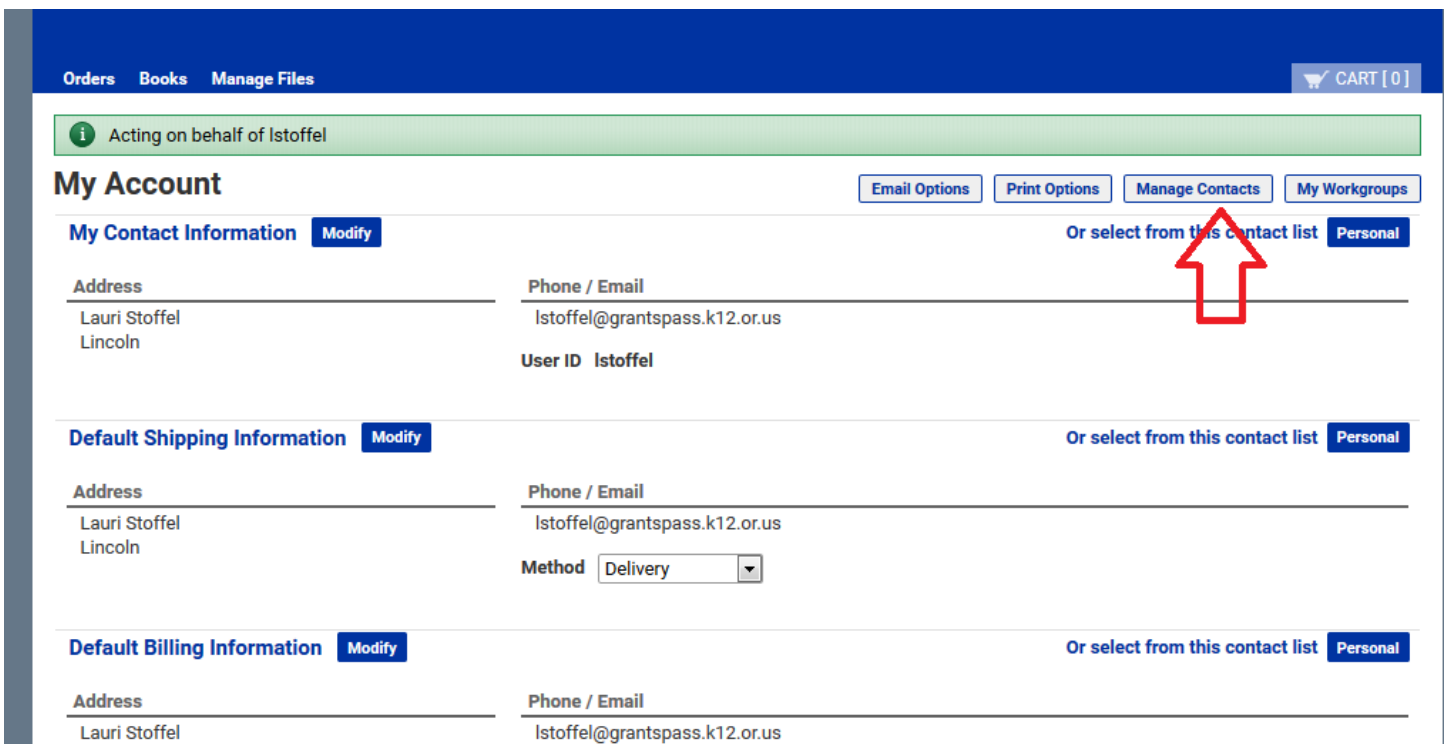


How to Manage your Contacts and Create Distribution Lists

Go to 'My Account':



From here, select 'Manage Contacts':



Here we can see all our contacts. And in the top right we can see that there is an 'Add Contact' button for adding new contacts, as well as a 'Dist. Lists' button to manage your distribution lists.

Orders Books Manage Files CART [0]

Acting on behalf of Istoffel

Manage My Contacts

Contacts are used to assign shipping and billing addresses during checkout. You can add, modify, and delete contacts on this page.

[Add Contact](#) [Dist. Lists](#)


Contacts Search Last name contains Rows Per Page 100

 Location contains

Name ▼	Location ▼▲	Address ▼▲	City, State ▼▲	
Lauri Stoffel	Lincoln		, Oregon	Modify Delete

[1-1] of [1]

[Delete All Unlinked Contacts](#)



These are effectively just text fields that get populated with names + addresses, that can be used to split an order among recipients.

Let's click on Add Contact

You will create a contact for each person you will share jobs with. We just need the first name, last name and Location. That's it.

Now let's click on the 'Dist. Lists':

We can see my fictional 'Art Department' list. And we can see below that we can type in the name of a new list and hit the 'new' button to create a new list. Let's do that:

Roles Ordering Proxy Home | My Account | Help | Logout

Orders Books Manage Files CART [1]

Manage Distribution Lists

Order for multiple recipients by using a distribution list. You can add, modify, and delete a list from this page.

[My Contacts](#)

List name contains Rows Per Page 100

[Name ▼▲](#)

Art Department	Modify Delete
----------------	---

New List

[1-1] of [1]

© 2001-2017 Rochester Software Associates, Inc. All rights reserved.

You can see that our 'Dist list' has been made, and we can modify it now. Click on Modify. It displays ALL of your contacts in the Distribution list Detail page, and you can select which contacts should be in the list. You can also setup the default quantities for each contact. So if a user has 26 kids in their class this year, you could set their default to 26. **Don't select yourself in the list.** You are the order placer and will put your quantity in your cart.

Acting on behalf of BDANIELS

Distribution List Detail

Select contacts for the list: **Class Counting Sheet**
Specify a quantity for each if desired.

Last name contains Location contains Rows Per Page 100

Quantity	Name ▼	Location ▼▲	Address ▼▲	City, State ▼▲
<input checked="" type="checkbox"/> 34	Kim Beggs	Allen Dale 5th		, Oregon
<input checked="" type="checkbox"/> 28	Shelly Brandes	Allen Dale 2nd		, Oregon
<input checked="" type="checkbox"/> 23	Leslie Bruckner	Allen Dale 1st		, Oregon
<input type="checkbox"/> 0	Barbara Daniels	Allen Dale		, Oregon
<input checked="" type="checkbox"/> 19	Gail Elder	Allen Dale Explorations		, Oregon
<input checked="" type="checkbox"/> 28	Maddy Higgins	Allen Dale 2nd		, Oregon
<input checked="" type="checkbox"/> 24	Pam Hill	Allen Dale Kinder		Oregon

Selecting your contacts/Distribution list in an order

When in the cart page, if your order will be getting split amongst multiple recipients (let's say you are ordering a job for yourself + 2 other teachers). You will want to click '**Add Address**' in the Shipping Information section of the cart page:

Shipping Information

I would like my order shipped by: Wednesday, February 07, 2018
Please select an appropriate shipping date for your order using the calendar above.

Heather McBride
Printshop

Select a Shipping Method
Delivery

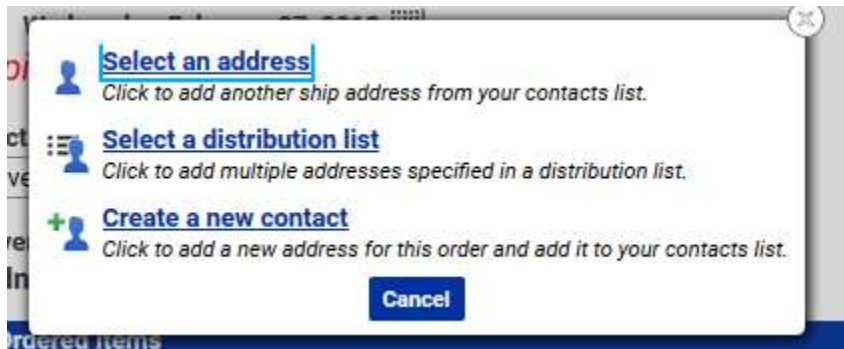
Delivery Estimate
Wednesday, February 07, 2018

Ordered Items	Quantity
1 Special Order Item	0

[Enter shipping instructions for this recipient](#)

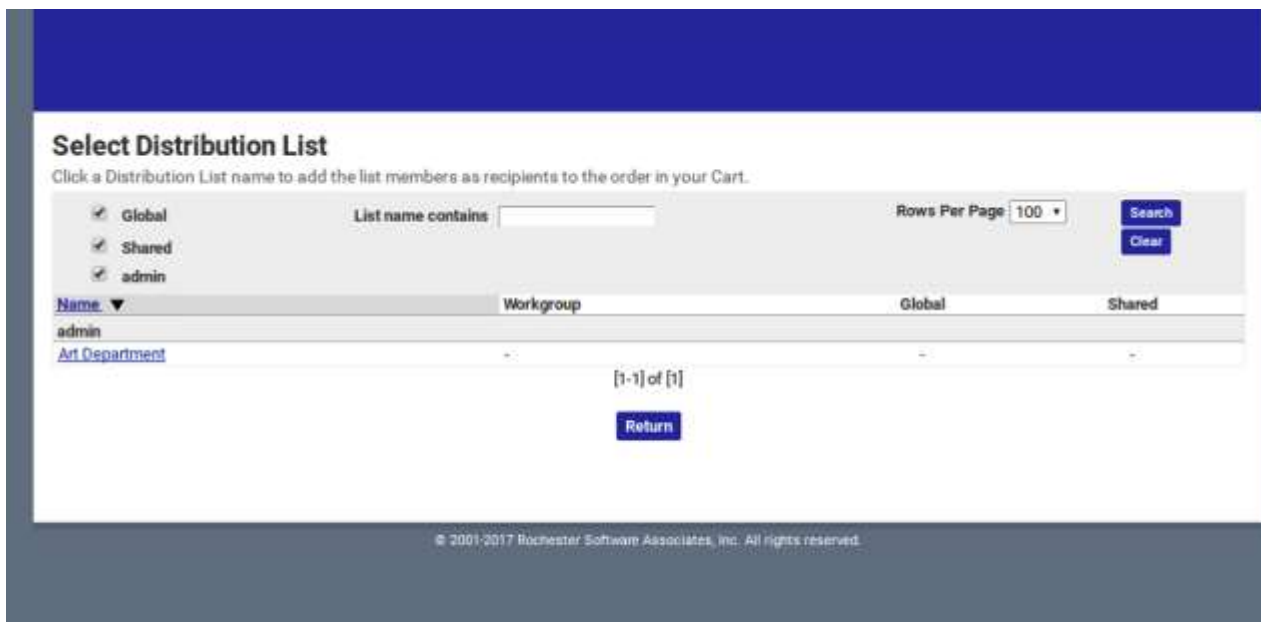
You will then see there are 3 options.

1) [Select an Address](#) - This will allow you to choose a contact from your contact list in WebCRD.



2) [Select a distribution List](#) - This will allow you to choose a distribution list. A distribution list is a pre-made list of contacts that can contain multiple contacts. This is useful if you order jobs for the same group of people often. You can make a distribution list, and just select that instead of adding every recipient separately.

Once the distribution list is selected, you can see that all the users from the list have been added at once. This particular list has default values of '40' copies per recipient (except the order placer they only get 1 copy):



Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	1

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

[Enter shipping instructions for this recipient](#)

Select a Shipping Method

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.00

3) [Create a New Contact](#) - This will allow you to create a new contact and add them as a recipient of the order. When adding them, there is an option to also add that contact to your contact / address book. Generally if you will have future orders for this recipient, you will want them added so you can re-use them without having to type their information in again.


Roles Ordering Proxy Home My Account Help Logout

1/ Cart

Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Cart ID: 27

Order name: Order 27 (Reorder of Order 26) Order Estimate: \$9.64

Item 1 Replace File Continue Shopping



Your Selected Price

[Preview / Change](#)

[Enter special instructions](#)

Shipping Information

I would like my order

1 **RSA Admin**
HQ
RSA
Administrator
69 Cascade Drive
Knowlton Building
Suite 201
Rochester, NY
United States

2 **RSA Admin**
HQ
RSA
Administrator
69 Cascade Drive
Knowlton Building
Suite 201
Rochester, New York 14614
United States

3 **John Davis**
New York
United States

RSA Test - 4 page.pdf

New Shipping Address

First name * ⊗ First name is a required field. Email

Middle name Job title

Last name * Department

Location Work #

Company Mobile #

Street 1 Fax #

Street 2 Home #

Street 3 URL

City

State

Zip

Country

Fields with an * are required at all times, fields with an * are required to submit an order.

Modify Information For

This order only

This order; and create a new contact in my Contacts list.

Make this my Default Shipping Address

Cancel **Save**

Unit Price: \$0.04

Quantity: 241

Add Address

2 **RSA Admin** Select a Shipping Method

HQ
RSA
Administrator
69 Cascade Drive
Knowlton Building
Suite 201
Rochester, New York 14614
United States

Delivery

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	.40

[Enter shipping instructions for this recipient](#)

So, let's say you've added the 2 other teachers to the cart as recipients. The cart page should now look something like this:

Order name Order 27 (Reorder of Order 26)

Order Estimate \$0.12

Item 1

[Replace File](#) [Continue Shopping](#)



RSA Test - 4 page.pdf
4 Pages
8.50x11.00 Inches

Unit Price \$0.04

Quantity 3

Your Selected Print Options

Print B/W, 1-Sided, 8.5x11 White Bond, Scale Down Only



[Preview / Change Options](#)

[Enter special instructions for this item.](#)

Provide a sample of the document before processing my order.

Shipping Information

[Add Address](#)

I would like my order shipped by: Thursday, August 10, 2017 *Note: Only dates when the print center is open may be selected.*

1 RSA Admin
HQ
RSA
Administrator
69 Cascade Drive
Knowlton Building
Suite 201
Rochester, New York 14614
United States

Select a Shipping Method

Delivery

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	1

[Enter shipping instructions for this recipient](#)

2 Teacher 1 Teacher 1
New York
United States

Select a Shipping Method

Delivery

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	1

[Enter shipping instructions for this recipient](#)

3 Teacher 2 Teacher 2
New York
United States

Select a Shipping Method

Delivery

Delivery Estimate
Monday, August 14, 2017

Ordered Items	Quantity
1 RSA Test - 4 page.pdf	1

[Enter shipping instructions for this recipient](#)

By default, every recipient will have just a quantity of '1'. Let's say that each teacher will need 30 copies of the job. We can select the '1' under 'Quantity' to change the quantity like this:

Cart
 Select print options, quantity per recipient and billing information. Click **Place Order** to submit your order. Cart ID: 27

Order name: Order 27 (Reorder of Order 26) Order Estimate: \$0.12

Item 1 [Replace File](#) [Continue Shopping](#)

RSA Test - 4 page.pdf Unit Price: \$0.04
 4 Pages Quantity: 3
 8.50x11.00 Inches

Your Selected Print Options Print: B/W, 1-Sided, 8.5x11 White Bond, Scale Down Only
[Preview / Change Options](#)

[Enter special instructions for this item.](#) Provide a sample of the document before processing my order.

Shipping Information [Add Address](#)

I would like my order shipped by: Thursday, August 10, 2017

Recipient	Shipping Method	Delivery Estimate	Ordered Items	Quantity
1. RSA Admin HQ RSA Administrator 65 Cascade Drive Knowlton Building Suite 201 Rochester, New York 14614 United States	Delivery	Monday, August 14, 2017	1 RSA Test - 4 page.pdf	1
2. Teacher 1 Teacher 1 New York United States	Delivery	Monday, August 14, 2017	1 RSA Test - 4 page.pdf	1
3. Teacher 2 Teacher 2 New York United States	Delivery	Monday, August 14, 2017	1 RSA Test - 4 page.pdf	1

This page is pretty nice, you can enter a value and then hit 'tab' and it will take you to the next recipient. So you can type:

30 TAB 30 TAB 30

And you will have filled in values of 30 for each recipient, and it only takes a second!

At that point, you can place your order and the Printshop will know that the order is 90 copies, with 30 going to each person.

Click Save and Place your order.