

## Contents

Getting Started	2
Logging In	3
Home Page	3
Viewing, Searching and Amending Cost Centres	4
Viewing, Searching and Amending the Stock Catalogue	6
Using the Artwork Gallery	9
Using the Shopping Basket to create a Requisition	10
Entering a Manual Requisition	11
Approving a Requisition	14
Business Cards	15
Creating Reports	16

## Getting Started

In your browser address area type the following: -

[www.davidrichards.co.uk/login.shtm](http://www.davidrichards.co.uk/login.shtm)

You will see the following screen...

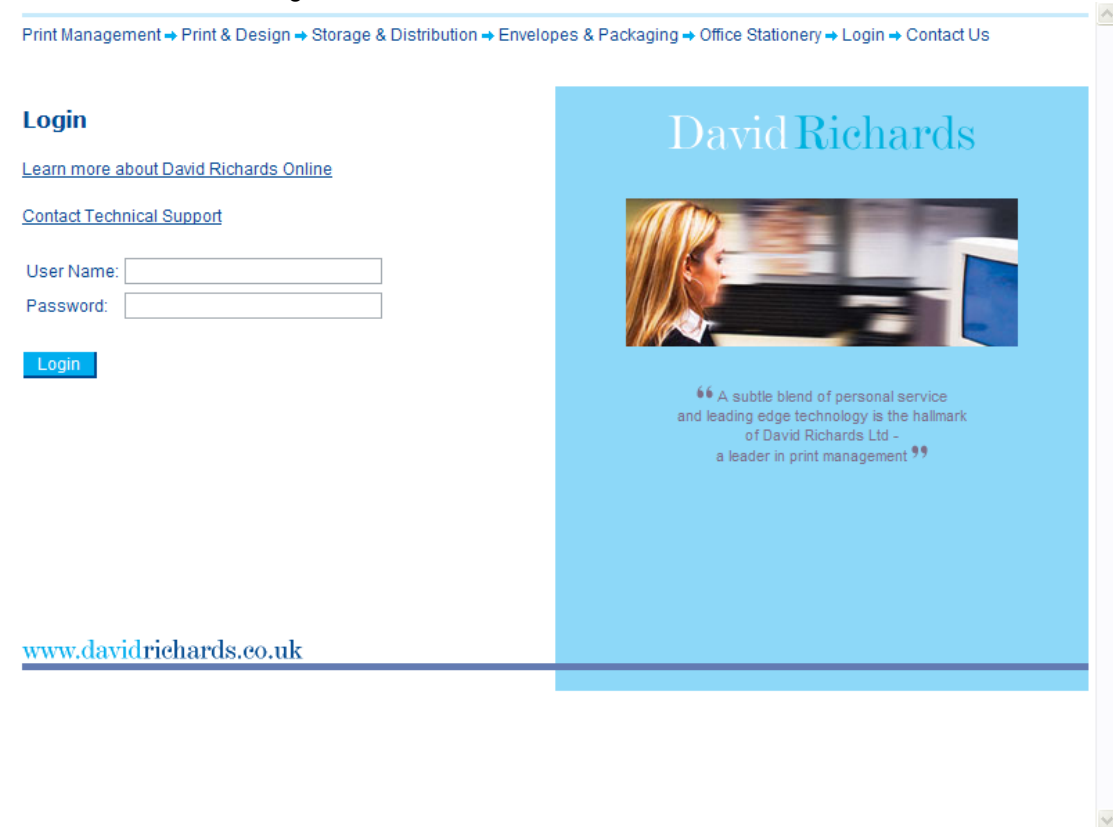


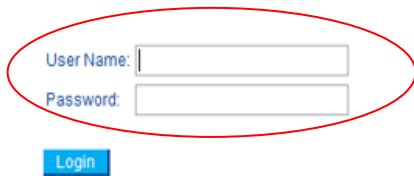
Figure 1: Login Page

At this stage it would be useful to make this page a “Favourite” within your browser. See the table below and use the appropriate instruction according to your browser: -

<u>Browser</u>	<u>Instruction</u>
Microsoft Internet Explorer	Select <b>Add to Favourites</b> from the <b>Favourites</b> menu
Mozilla Firefox	Select <b>Bookmark this Page</b> from the <b>Bookmarks</b> menu
NetScape Navigator	Select <b>Bookmark this Page</b> from the <b>Bookmarks</b> menu
Opera	Select <b>Add page here...</b> from the <b>Bookmarks</b> menu

## Logging In

You will have been given your User Name and Password either by David Richards or an administrator within your company. Enter these values in the correct fields and click **Login**.



The screenshot shows a login form with two input fields: 'User Name:' and 'Password:'. Both fields are empty and are circled in red. Below the fields is a blue button labeled 'Login'.

Figure 2: Login values

## Home Page

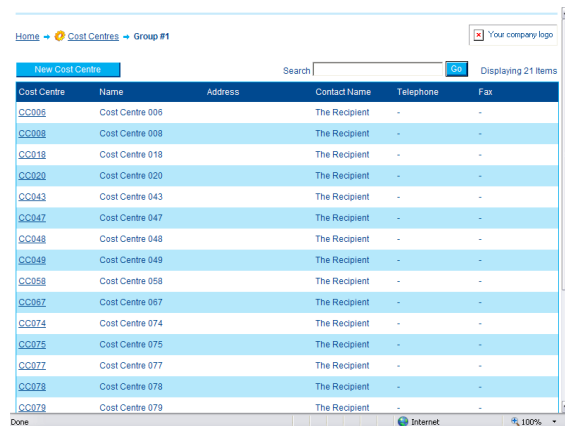
The Home Page is the page containing links to the main data areas. You should see the following links: -

- Cost Centres
- Stock Catalogue
- Stationery Catalogue
- Artwork Gallery
- New Requisition / Requisition List
- New Business Card / Business Card List
- New User / User List
- Reporting
- Change Password
- Logout



Figure 3: Home Page

## Viewing, Searching and Amending Cost Centres



Cost Centre	Name	Address	Contact Name	Telephone	Fax
CC006	Cost Centre 006		The Recipient	-	-
CC008	Cost Centre 008		The Recipient	-	-
CC018	Cost Centre 018		The Recipient	-	-
CC020	Cost Centre 020		The Recipient	-	-
CC043	Cost Centre 043		The Recipient	-	-
CC047	Cost Centre 047		The Recipient	-	-
CC048	Cost Centre 048		The Recipient	-	-
CC049	Cost Centre 049		The Recipient	-	-
CC058	Cost Centre 058		The Recipient	-	-
CC067	Cost Centre 067		The Recipient	-	-
CC074	Cost Centre 074		The Recipient	-	-
CC075	Cost Centre 075		The Recipient	-	-
CC077	Cost Centre 077		The Recipient	-	-
CC078	Cost Centre 078		The Recipient	-	-
CC079	Cost Centre 079		The Recipient	-	-

Figure 4: Cost Centres List

Clicking on the **Cost Centres** link on the Home Page will either display a list of Cost Centre Groups (if these have been created), or the complete list of your Cost Centres (as above) showing the Code, Name and Address details.

## Searching

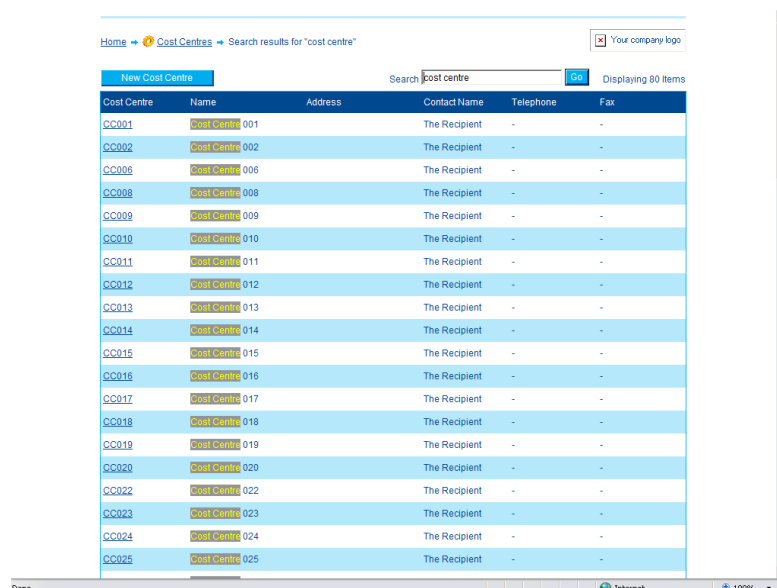


Figure 5: Search facility

To use the Search facility, enter a value and click on the “Go” button. The search will look for all or part of the value in the following fields;

- Cost Centre Code
- Cost Centre Name

Records that match the search criteria will be displayed and the fields that contain all or part of the value will be highlighted;



Cost Centre	Name	Address	Contact Name	Telephone	Fax
CC001	Cost Centre 001		The Recipient	-	-
CC002	Cost Centre 002		The Recipient	-	-
CC006	Cost Centre 006		The Recipient	-	-
CC008	Cost Centre 008		The Recipient	-	-
CC009	Cost Centre 009		The Recipient	-	-
CC010	Cost Centre 010		The Recipient	-	-
CC011	Cost Centre 011		The Recipient	-	-
CC012	Cost Centre 012		The Recipient	-	-
CC013	Cost Centre 013		The Recipient	-	-
CC014	Cost Centre 014		The Recipient	-	-
CC015	Cost Centre 015		The Recipient	-	-
CC016	Cost Centre 016		The Recipient	-	-
CC017	Cost Centre 017		The Recipient	-	-
CC018	Cost Centre 018		The Recipient	-	-
CC019	Cost Centre 019		The Recipient	-	-
CC020	Cost Centre 020		The Recipient	-	-
CC022	Cost Centre 022		The Recipient	-	-
CC023	Cost Centre 023		The Recipient	-	-
CC024	Cost Centre 024		The Recipient	-	-
CC025	Cost Centre 025		The Recipient	-	-

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If you click on the Cost Centre Code, which is the first column, the Cost Centre detail screen will appear:

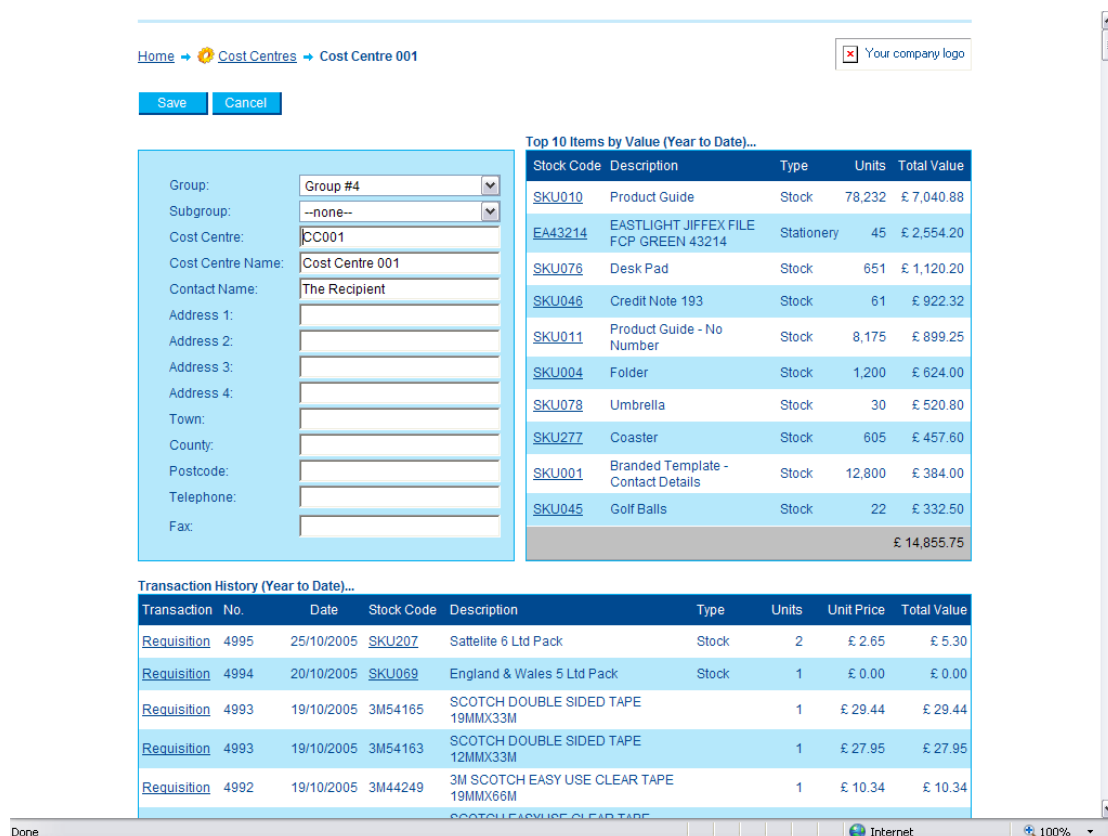


Figure 6: Cost Centre Detail

You may use this screen to amend the address details and view any transactions made under this Cost Centre. A useful feature on this screen is the **Top 10 Items by Value** where you are able to gauge the high value requisitions placed by this centre.

You may “Drill-Down” to related transactions by clicking on the Transaction; alternatively, clicking on the Stock Code will take you across to the Catalogue record.

<i>Field Name</i>	<i>Description</i>	<i>Max. Length</i>
Cost Centre	A unique code to attribute to this record	16
Cost Centre Name	A name used to describe the Cost Centre	48
Address 1 - 4	The first four lines of the address (excluding Town, County and Postcode)	48
Town	The Postal Town of the address	48
County	The Postal County of the address	48
Postcode	Postal Code	9
Telephone	Main contact Telephone number	16
Fax	Main fax number	16

## Viewing, Searching and Amending the Stock Catalogue

Depending on the configuration of your Stock Catalogue, clicking on the **Stock Catalogue** link on the Home Page, will either display a list of Catalogue Groups (if these have been created), or the complete list of items.

### Searching



Figure 7: Search facility

To use the Search facility, enter a value and click on the “Go” button. The search will look for all or part of the value in the following fields;

- Stock Code
- Description

Records that match the search criteria will be displayed and the fields that contain all or part of the value will be highlighted, the following screen illustrates a search for “LETTERHEAD”;

Home → Stock Catalogue → Search results for "LETTERHEAD" Your company logo

View Basket (empty) Search: LETTERHEAD Go Displaying 7 Items

Stock Code	Description	Unit of Issue	Minimum Units	Avg. Monthly Usage	Months Remaining	Units on Order	Units Available
SKU070	HQ <b>Letterheads</b>	Letterheads (2,000)	15	-	.00	-	20,779
SKU126	Satellite <b>Letterheads</b> Ltd	Letterheads (2,000)	5	-	.00	-	7
SKU132	Plain <b>Letterhead</b> / Continuation Sheet	Letterhead	2,500	-	.00	-	4,500
SKU133	Satellite <b>Letterheads</b>	Letterheads (1,575)	15	-	.00	-	4,357
SKU135	Version 2 <b>Letterhead</b> - With 0845 Tel No.	Letterhead	15,000	-	.00	-	52,490
SKU136	Version 2 <b>Letterhead</b> - Premier Product	Letterhead	15,000	-	.00	-	40,091
SKU322	Satellite <b>Letterheads</b> (Without Backs)	Letterheads (2,000)	4	-	.00	95	77

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Figure 8: Stock Catalogue List

Home → Stock Catalogue → Plain Letterhead / Continuation Sheet Your company logo

Save Cancel

Group:	3 - Stationery	Notes:	<div style="background-color: yellow; width: 100px; height: 100px;"></div>
Subgroup:	3.1 - Letterhead		
Stock Code:	SKU132	Centre Price:	£ 0.00
Description:	Plain Letterhead / Continuation Sheet	Centre Value:	£ 0.00
Revision:		Client Price:	£ 0.00
Unit Type:	Letterhead	Client Value:	£ 0.00
Unit of Issue:	1	VAT Rate:	S
Units Available:	4,500	Obsolete?	<input type="checkbox"/>
Units in Stock:	4,500	Date Obsolete:	00/00/00
Minimum Units:	2,500	Replacement:	-
Reorder Units:	0	Back Referral:	-
Avg. Monthly Usage:	-		
Months Remaining:	.00		
Restrictions:	1000 per box		

Figure 9: Stock Catalogue Detail

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You are able to amend a number of fields on the catalogue; some however, require Administration access. As with the Cost Centre detail page, a complete list of transactions and helpful summaries are displayed lower down the page.

<i>Field Name</i>	<i>Description</i>	<i>Max. Length</i>
Group	A popup list of custom groups	16
Stock Code	A unique code to attribute to this record	26
Description	The description of this record	80
Revision	A revision code, if required, to signify a version number or period, to differentiate old and current stock	80
Unit Type	An indicator of the type of unit. E.g. Letterhead, Envelope, Brochure	16
Unit of Issue	The numeric quantity making up 1 unit	9
Units Available	The current available stock level. If this figure is negative, then Back Orders will exist	9
Units in Stock	The current physical number of units in stock	9
Minimum Units	The trigger value for an item to be designated as a low stock item. When the item reaches the minimum, it will be included on low stock reports.	9
Maximum Units	A level you may use to monitor the maximum ceiling of the units to stock	9
Avg. Monthly Usage	The average number of units requested each month. <i>Calculated by taking the years usage and dividing by twelve. If the item has not been in stock for a year, the usage is calculated on the number of months the item has been in stock.</i>	9
Months Remaining	Based on the average monthly usage, the calculated number of months supplies left in stock.	9
Restrictions	A text value indicating any requisition restrictions, which apply.	32, 000
Cost Centre (Owner)	Used for re-charging purposes. The Cost Centre, which owns the catalogue item, will be credited when the Cost Centre Charge (Journals) report is created.	16
Control	A free text field which may contain user-defined values	32
Notes	Any relevant notes	32, 000
Centre Value	Calculated on the Centre Price x Units in Stock	9
Client Price	The unit price	9
Client Value	Calculated on the Client Price x Units in Stock	9
VAT Rate	The appropriate VAT Rate;	

	S = Standard Rated Z = Zero Rated	
Obsolete	When an item is no longer current, you should tick this field to indicate that the item should no be requested	9
Date Obsolete	Where an item is made obsolete (above), you should indicate the date on which the change took place.	9
Replacement	If the item is obsolete and has been superseded by a replacement stock code, you should enter this value here	9
Back Referral	When looking at a catalogue record that is a replacement for an obsolete item, the Back Referral will contain the stock code of the obsolete item.	9
Reorder Units	The number of units to reorder when a low stock situation occurs.	9
Automatic	Reorder automatically via e-mail	9

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## Using the Artwork Gallery

The Artwork Gallery offers Clients a centralised storage facility for digital media. We do not impose any storage size limits and we strongly recommend you take advantage of this facility to collaborate over proofing and for document version control.

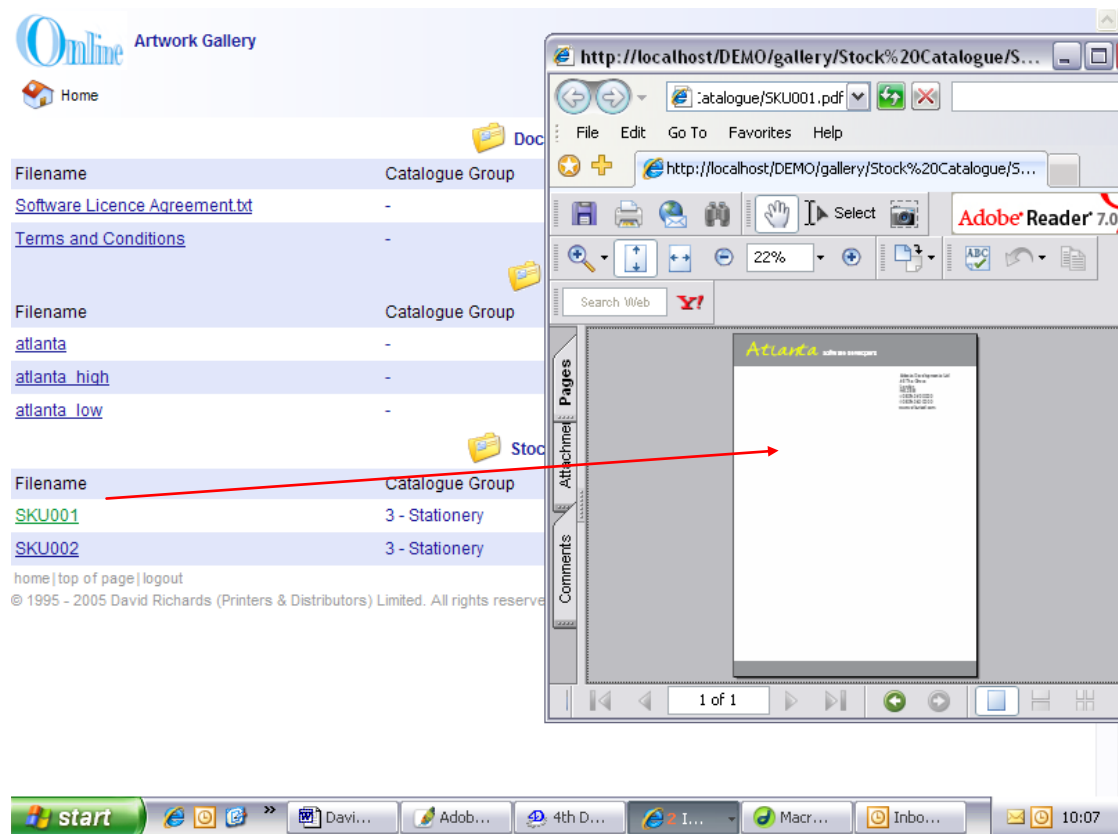


Figure 10: Artwork Gallery / PDF Viewer

Here are some of the more common file types that may be stored in the Gallery...

<i>File Type</i>	<i>Description</i>	<i>Typical Viewer Application</i>
EPS	Encapsulated PostScript	Various Graphic Applications
GIF	Graphical Interchange File	Internet Explorer
JPG/JPEG	Joint Photographic Experts Group	Internet Explorer
PDF	Portable Document Format	Adobe Acrobat Reader
PFB/PFM	PostScript Font	Windows/MacOS Font Viewer
TIF/TIFF	Tagged Image File Format	Various Graphic Applications
TTF	TrueType Font	Windows/MacOS Font Viewer
TXT	Text File	Windows Notepad/MacOS TextEdit
XQD	Quark XPress Document	Quark XPress

## Using the Shopping Basket to create a Requisition

Every time you login, an empty Shopping Basket is created for you. You may be familiar with the term "Shopping Basket" from other sites you have visited.

Figure 11: Adding a Stock Catalogue item to your Basket

Home → Stock Catalogue → Search results for "LETTERHEAD" ✕ Your company logo

[View Basket \(empty\)](#) Search   Displaying 7 Items

Stock Code	Description	Unit of Issue	Minimum Units	Avg. Monthly Usage	Months Remaining	Units on Order	Units Available
SKU070	HQ Letterheads	Letterheads (2,000)	15	-	.00	-	20,779
SKU126	Sattelite Letterheads Ltd	Letterheads (2,000)	5	-	.00	-	7
SKU132	Plain Letterhead / Continuation Sheet	Letterhead	2,500	-	.00	-	4,500
SKU133	Sattelite Letterheads	Letterheads (1,575)	15	-	.00	-	4,357
SKU135	Version 2 Letterhead - With 0845 Tel No.	Letterhead	15,000	-	.00	-	52,490
SKU136	Version 2 Letterhead - Premier Product	Letterhead	15,000	-	.00	-	40,091
SKU322	Sattelite Letterheads (Without Backs!)	Letterheads (2,000)	4	-	.00	95	77

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To add an item to your basket, click on the Shopping Basket icon at the far left of the Stock Catalogue listing. To indicate an item is successfully in your basket, the icon will change to a Tickmark.

Home → Stock Catalogue → Search results for "LETTERHEAD" ✕ Your company logo

[View Basket \(1 item\)](#) Search   Displaying 7 Items

Stock Code	Description	Unit of Issue	Minimum Units	Avg. Monthly Usage	Months Remaining	Units on Order	Units Available
SKU070	HQ Letterheads	Letterheads (2,000)	15	-	.00	-	20,779
SKU126	Sattelite Letterheads Ltd	Letterheads (2,000)	5	-	.00	-	7
SKU132	Plain Letterhead / Continuation Sheet	Letterhead	2,500	-	.00	-	4,500
SKU133	Sattelite Letterheads	Letterheads (1,575)	15	-	.00	-	4,357
SKU135	Version 2 Letterhead - With 0845 Tel No.	Letterhead	15,000	-	.00	-	52,490
SKU136	Version 2 Letterhead - Premier Product	Letterhead	15,000	-	.00	-	40,091
SKU322	Sattelite Letterheads (Without Backs!)	Letterheads (2,000)	4	-	.00	95	77

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Figure 12: Removing a Stock Catalogue item from your Basket

If you need to remove an item, click on the Tickmark icon, the item will be removed and the icon will revert back to standard.

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When you need to view all the items in your basket (or checkout), click on **View Basket** at the top right of the screen. You will be presented with a screen similar to the one below...

Home → Requisitions → New Your company logo

Stock Code	Description	Unit of Issue	Required	Available	Sent	Bk. Order	Charge
SKU126	Sattelite Letterheads Ltd	Letterheads (2,000)	1	7	1	0	£ 0.00
<input type="text"/>	(enter stock code)	-	<input type="text"/>	-	-	-	-

£ 0.00

Cost Centre:

Deliver To...

Contact Name:

Company Name:

Address 1:

Address 2:

Address 3:

Address 4:

Town:

County:

Postcode:

Reference:

Delivery Notes:

Consignments...

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Figure 13: Viewing your Basket (before adding Cost Centre)

You will need to enter the **Units Required** for each item you have added.

For more information on the Requisition screen and how it works, please see the chapter relevant to the type of items you are requisitioning.

## Viewing Requisitions

Home → Requisitions → Search results for "cc001" Your company logo

New Requisition | Current Requisitions | Search: cc001 | Go | Displaying 757 items

No.	Date	Cost Centre	Contact Name	Reference	Type	Total Charge
<a href="#">4995</a>	25/10/2005	CC001 - Cost Centre 001	The Recipient	My Reference	Stock	£ 5.30
<a href="#">4994</a>	20/10/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	-
<a href="#">4993</a>	19/10/2005	CC001 - Cost Centre 001	The Recipient	-	Stationery	£ 57.39
<a href="#">4992</a>	19/10/2005	CC001 - Cost Centre 001	The Recipient	-	Stationery	£ 25.66
<a href="#">4988</a>	28/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 0.04
<a href="#">4961</a>	27/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 654.63
<a href="#">4958</a>	27/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stationery	£ 61.62
<a href="#">4909</a>	20/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 122.39
<a href="#">4908</a>	20/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 508.74
<a href="#">4888</a>	18/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 1,710.00
<a href="#">4887</a>	18/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 399.30
<a href="#">4879</a>	15/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 4.50
<a href="#">4857</a>	14/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	£ 5.50
<a href="#">4835</a>	14/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stock	-
<a href="#">4803</a>	13/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stationery	£ 76.05
<a href="#">4801</a>	13/07/2005	CC001 - Cost Centre 001	The Recipient	-	Stationery	£ 230.52

Figure 14: Requisitions List

Clicking on the **Requisitions** link on the Home Page will display all Requisitions you have entered for the current month (if you are given Administration rights, you will see ALL Requisitions, regardless of who has created them). If you click on the Requisition number, the details of the items requested will appear together with the Cost Centre and Delivery Address details.

## Entering a Manual Requisition

Home → Requisitions → New

Your company logo

Checkout Cancel

Stock Code	Description	Unit of Issue	Quantity	Charge
	(enter stock code)	-		-

£ 0.00

Cost Centre:

Deliver To...

Contact Name:

Company Name:

Address 1:

Address 2:

Address 3:

Address 4:

Town:

County:

Postcode:

Reference:

Delivery Notes:

Consignments...  
N/A

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Figure 15: New Requisition

Click on the **New Requisition** link at the top of the list to enter a Requisition.


To begin, enter the Stock Code of the item you are requesting and press the **TAB** key. The Description, Unit of Issue, Unit Type and Units Available will all be displayed. Enter the Units Required and press the **TAB** key. Continue this procedure for any other Stock Codes you need to enter, providing they are all going to the same Cost Centre and Delivery Address. You should take note of any Description containing **PURPLE** text; these relate to Restrictions against the item and should be adhered to. Should you need to view your Stock Catalogue at any stage, either to check a Stock Code or make an enquiry, click on the Stock Code link.

When you have entered all the items, enter the Cost Centre code and amend the delivery address if needed.

Click **Save** to complete the Requisition.

### Approving a Requisition

If required, you may control the requisitioning of items using the Approval procedure. You are then able to let your users request stock via David Richards Online, and appoint an Approver to login to the system and approve the contents of each Requisition before we send it out.

1. From the Home Page click on Requisitions
2. From the top of the Requisitions list, click Unapproved Requisitions
3. Click on each Requisition Number in the list and then click the  Approve button.
4. Enter your login Password and then click Approve.

If you would like to use the Approval feature then please contact us.

## Business Cards

### Listing

Clicking on the **Business Cards** link on the Home Page will display a listing of “current” business cards. Cards are removed from this list (but still available under the Search facility) once they have been invoiced and paid for. To view individual card details, click on the “No.” field.

### Entering cards

To enter a new card, click on the “New Card” button at the top left of the listing.

### Proofing

To view the PDF proof, enter the relevant information for the card such as Name, Job Title, Telephone, Fax and Email. Click on the “Update PDF” button to transfer the details you have entered onto the PDF visual.

### Approving

If the card requires approval from a source other than the person entering the card, enter the approvers email address in the “Approver Email” field, separate multiple addresses with a comma. Click on the “Email Approver” button to send an email to the addresses. The email will contain a link to the latest PDF version of the card.

When the card has been approved, click on the “Proof Agreed” checkbox to commit the card to print.

### Searching

Search

To use the Search facility, enter a value and click on the “Go” button. The search will look for all or part of the persons name.

Records that match the search criteria will be displayed and the fields that contain all or part of the value will be highlighted;

## Reports

Click on the **Report Template** dropdown list to view the available reports and search criteria you may use when creating the report. To view the selected report click “Run Report”.

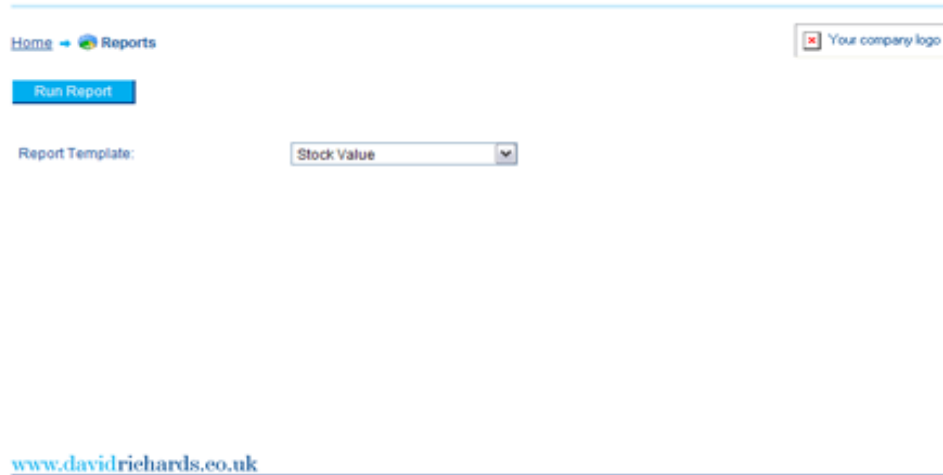


Figure 16: Reports

The screenshot shows a table of back orders. The table has the following columns: Stock Code, Description, Requisition, Date, Cost Centre, and Units. The data is as follows:

Stock Code	Description	Requisition	Date	Cost Centre	Units
SKU075	Customer Service Charter	4959	27/07/2005	CC002	1,000
SKU075	Customer Service Charter	4907	20/07/2005	CC002	145
SKU154	Training & Development Pack	4439	29/04/2005	CC002	2
SKU280	England & Wales 1 Ltd Pack	4884	18/07/2005	CC041	14
SKU280	England & Wales 1 Ltd Pack	4907	20/07/2005	CC002	320
SKU280	England & Wales 1 Ltd Pack	4959	27/07/2005	CC002	320
SKU280	England & Wales 1 Ltd Pack	4938	25/07/2005	CC030	100

Figure 17: Reports – Back Orders

The screenshot shows a detailed table of stock value. The table has the following columns: Stock Code, Description, Cost Centre, Unit, Type, Units in Stock, Client Price, and Client Value. The data is as follows:

Stock Code	Description	Cost Centre	Unit	Type	Units in Stock	Client Price	Client Value
SKU001	Branded Template - Contact Details	-	1	Sheet	17,206	0.03	516.18
SKU002	Branded Template - Non-conforming	-	1	Sheet	353	0.02	7.06
SKU003	1st Case Labels	-	1,666	Pack	3	0.00	0.00
SKU004	Folder	-	1	Folder	63	0.52	32.76
SKU005	A1 Poster	-	1	Poster	37	6.38	236.06
SKU006	A3 Poster	-	1	Poster	198	0.71	140.58
SKU007	A2 Poster	-	1	Poster	181	0.71	128.51
SKU009	Satellite Comp/Version 3nt Slip	-	1	Comp Slip	27,009	0.03	810.27
SKU010	Product Guide ()	-	1	Guide	135,410	0.09	12,196.90
SKU011	Product Guide (Packager) - No Number	-	1	Guide	183,780	0.07	12,864.60
SKU012	Application Form	-	1	Form	42,674	0.23	9,815.02
SKU013	Baby Block	-	1	Pad	798	1.64	1,308.72
SKU014	Direct Debit Form - Instruction To Bank	-	1	Form	8,157	0.03	244.71
SKU016	Registration Form	-	500	Forms	2	232.00	464.00
SKU017	Submission Form	-	1	Form	3,939	0.07	275.73
SKU018	C4 Window Envelope - 2 Ltd	-	1	Envelope	420	0.00	0.00
SKU019	Rules - 2 Ltd	-	1	Booklet	2,334	0.61	1,423.74
SKU020	Misc Manual Part 2 - 2 Ltd	-	1	Form	320	0.00	0.00
SKU021	Notice Of Deposit Of Life Policy - 2 Ltd	-	1	Form	320	0.00	0.00
SKU022	Notice Of Assignment/Leasehold Property - 2 Ltd	-	1	Form	320	0.00	0.00
SKU023	Deeds Schedule - 2 Ltd	-	1	Form	320	0.00	0.00

Figure 18: Reports – Stock Value