

# iShipdocs User Guide

11/8/2016

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### **About This Guide**

### **Purpose of this Guide**

This user guide is designed to provide user-friendly, detailed instructions for performing all tasks associated with **ishipdocs** application.

### Who should read this Guide

This guide is intended for the users who will work on **ishipdocs** application.

### How this Guide is organized

ishipdocs User Guide



This guide is divided into the following chapters:

- Chapter 1 Introduction explains the overview and objectives of ishipdocs application.
- **Chapter 2 Getting Started** explains how to send files if you are not a registered user, the process of new user registration, login to ishipdocs, the process of retrieving your password if you forget it, and understanding ishipdocs' user interface.
- Chapter 3 Computer Setup explains the process to setup browser compatibility and the Settings section.
- Chapter 4 Upgrading Account explains the process to upgrade your account as single user, business user, and enterprise user.
- Chapter 6 Functionality as a Personal User explains the functionalities ishipdocs users will enjoy as a personal user.
- Chapter 7 Functionality as a Business User explains the functionalities ishipdocs users will enjoy as a business user.

### **Typographical Conventions**

Before you start, it is important to understand the typographical conventions used in this guide.



This	Represents
Bold	Menu, any option on the menu, radio button, check box, command button or a link.
	A note, providing additional information about a certain topic.
	An important message not to be ignored.

### How to Get in Touch

The following section provides information on how to obtain support for documentation and software.

### **Documentation Support**

For any questions, comments or suggestions on the documentation, contact us by email at support@ishipdocs.com

### **Technical Support**

If you have any problems, questions or suggestions regarding this software, email us at support@ishipdocs.com. While contacting technical support, please have the following information ready:

ReferenceID (Which is Generated at the time of installation)

### For additional information

Please contact: ARC via email, and / or phone:

Email: support@ishipdocs.com

Phone: 1-855 Go iShip

### **Chapter 1: Introduction – ishipdocs**

In this chapter, you will learn about:

- Product Overview
- Features



### **Product Overview**

Cloud Store, Share, Send, Print Anywhere!!!

The above tag line says everything about ishipdocs. You need your documents somewhere else but don't have the time to ship them? Here comes the utility for ishipdocs, which enables the global distribution easy, fast, and green.

Cloud Printing is now ubiquitous and accepted as an integral part of most companies' document management infrastructure. For the last two years ARC with the cloud application ishipdocs, has been providing customers with Cloud Printing Services (CPS). ishipdocs users range from Global Enterprise to Single Users. All users have the desire to get large business documents anywhere, anytime, in the shortest amount of time.

The benefits of Cloud Printing Services are clear. Print hardware and software costs are reduced. The cost of print with CPS is based on measured usage, in a just in time model. And distribution costs are drastically reduced with digital delivery combined with local print, avoiding the "print here, overnight there" model that has built the overnight industry delivery.

ARC's CPS offers unique ability to securely share and distribute large files over the ishipdocs network of print service providers. This capability gives users powerful Managed File Transfer capabilities as well.

Managed File Transfer, or MFT, is the term given to the technology that's replacing FTP. More secure than FTP and easily accessed via the Internet, MFT is another document management technology, like CPS, that organizations see as a valuable and necessary element of their communication infrastructure. MFT gives organizations visibility into file transfers and helps them manage, monitor and govern file transfers proactively. ARC's ishipdocs is showcased as a powerful offering for companies looking for aligning MFT and CPS strategies.

### Features

- Provides faster and secure mode to distribute large files
- Transmits files up to 3 GB including large Architectural, Engineering, Marketing
- Advertising and Planning documents
- No printing limitations
- Reduce your document shipping costs
- Reduces the chances of losing document
- Have document management experts ensure your digital transmission and delivery
- Track your documents and get proof of the delivery
- Eliminates custom headaches at global locations
- Digitally ship domestically, too!
- Promotes green objectives



- Send files up to 3 GB
  - Track the file activity
- Manage users and set access permissions by a company, department or project team
- Turn any folder of content into a shared workspace and invite others to view, edit or add their own files
- Use your public folder for others to directly place their files into your workspace
- Store and back up your documents in the cloud
- Users can view previous versions of files even after changes are made and new versions are uploaded.
  - Can add comments to specific folder/files or exchange feedback with team members using discussion threads and notification via email

### **Chapter 2: Getting Started**

In this chapter you will learn about:

- How to send print enquiry to Global Distribution Center
- New user registration
- Logging to ishipdocs
- Forgetting your password
- Understanding ishipdocs' user interface



### Accessing iShipdocs Application

Enter the following URL on your browser address bar: www.ishipdocs.com

If you are a new user click on *Sign Up* to register.

Again, if you are an existing user click on *Sign In* button to log on to the application.

### **New User Registration**

If you are a new user and do not have ishipdocs account you need to register first to access ishipdocs application. Follow the given procedure to register.

After the page for ishipdocs is displayed, click **Sign up**. The Plans and Pricing page appears with the two new sign up models as **Personal User** and **Business User**.

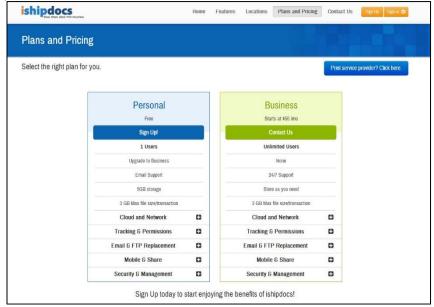


Figure 6: Plans & Pricing screen

- 1. Here, you can find two sign up models as Personal and Business.
- 2. Personal user is an independent user and is free.
- 3. Business user cannot be independent users, with a basic fee of \$50 per month.

In this section, we will see how to register both as a Personal User and as a Business user.



### **Personal User**

In order to register as a Personal User follow the steps given below:

1. Click *Sign up* under the Personal user column as shown in the image below:

	Personal	
	Free	
	Sign Up!	
	1 Users	
	Upgrade to Business	
	Email Support	
	5GB storage	
3 GE	3 Max file size/transaction	
Clo	ud and Network	0
Track	ing & Permissions	0
Email 8	FTP Replacement	•
M	obile & Share	Đ
Secur	ity & Management	0

2. A new screen will appear to enter details as shown in the image below:

first name	
ast name	
Email	
Login ID	
Password	
Confirm Pase	sword
Phone	
I have read an Nicy	d agreed to the ishipdocs Terms & Privac Create Account
Already h	ave an ishipdocs accou Sign in to your account.

- Enter your First Name, Last Name, Email, Password, Confirm Password and Phone Number in the respective text boxes. Your email will be taken as your Login ID automatically.
- Select the "I have read and agreed to the ishipdocs Terms and Privacy Policy" check box.
- 3. Click **Create Account** after you have finished entering your details, as shown in the image below:

John	
Austin	
johnaustin	@123.com
johnaustin	@123.com
99999999	
I have read	and agreed to the ishipdocs Terms & Privacy
	Create Account
Already	have an ishipdocs account
	Sign in to your account.

4. A new screen will appear with the Registration successful message. A confirmation email with all the login credentials will be sent to the email that you have provided. Click **Next**.



5. Enter the general information as well as contact information. You can reset your password if required. You can also opt to fill up the details later and start using ishipdocs. Click **Next**.

6. The Settings screen appears. Click Finish.



### **Business User**

Now that we have seen how to sign up as a Personal User let's see how to sign up as a business user:

To sign up as a Business user you need to Contact Us. A business user cannot sign up directly. Let's see the steps as given below:

1. Click Contact Us in the Business Column as shown in the image below:

Business Starts at \$50 /mo	
Contact Us	
Unlimited Users	
None	
24/7 Support	
Store as you need	
3 GB Max file size/transaction	
Cloud and Network	0
Tracking & Permissions	0
Email & FTP Replacement	0
Mobile & Share	0
Security & Management	Θ

- 2. The new Sign up for business screen appears.
  - Enter the details in the respective text boxes. Select the "I have read and agreed to the ishipdocs Terms and Privacy Policy" check box.
  - Click Contact Us.

John	
Austin	
Mr.	
California	
United States •	California
california	7000
ABC Pvt. Ltd.	
Company Size 4	
johnaustin@123.com	
999999	
Thank you!	
I have read and agreed to the folicy Conta Already have an is	act Us

3. The Registration Successful message will appear. Once your account is approved a notification mail will be sent to your registered email.

0	Registration Successful
	ome to ishipdocs! you for your interest johnaustin1@123.com
A busir	ness development executive will contact you within 24 hours
	ink you shipdocs



### Logging into ishipdocs

Follow the given procedure to log on to the ishipdocs application.

1. After the page for ishipdocs is displayed, click **sign in**. A pop screen will appear as shown in the image below:

ishipdocs	Home Features Locations Plans and Pricing	Contact Us Sign Up Sign in O
		Sign in to your account
	Next Generation Email	Username
		Password
	Send large documents directly from Microsoft Outlook.	Remember this sign in information?  Forgot your password? Get help!
		Sign in

- 2. Enter valid user name and password in the **username** and **password** text boxes respectively.
- 3. Click *Sign in*. The **Send Files** screen appears and you are logged in.

••••••  ] Remember this sign in informatio	johnaus	tin@123
] Remember this sign in informatio	•••••	
	Remem	ber this sign in informatio
orgot your password? Get help!	orgot your	password? Get help!
Contraction of the local division of the loc		Sign in

4. Select the "**Remember this sign in information?**" for the application to remember the credentials.



### Forgetting your password

-

If you forgot your password, follow the given procedure to retrieve it.

1. Under the sign in pop up box click "Forgot your password? Get Help!"

Username	9
Password	
Rememb	er this sign in information'
orgot your p	assword? Get help!
	Sign in

2. A new screen appears. Enter the username in the text box. Click Retrieve Password.

F	Retrieve your password
Your	password will be emailed to you shortly.
ohnaustii	n@123.com
	Retrieve passwaord
	~~~~
	Need further help?
You can a	Need further help? always contact us or go through our FAQ section

- 3. A confirmation message appears stating that the password has been sent to the user's e-mail id which was provided by the user.
- 4. Open your e-mail account, you will receive your password in the e-mail instantly.



### Understanding ishipdocs user interface

To navigate successfully in ishipdocs, a proper understanding of the interface is essential. The following section illustrates the various parts of the ishipdocs interface and its uses.

tea to print shop and files to others accenter details to center details takes: Add I.Ferrert Calibria United States 54256 unret diet B.Cold Time: 1 <sup>th</sup> Agat. 2016 02:25 cold & destructor the Project C Poix	Files information Selected files from storage (0)           Drop files here or click select files below           Drop files here or click select files below
t conter details       Name:     DemoSA-DUNS       Advates:     Add : Femore California United Dates 54236       urrett date & local lime:     11 <sup>th</sup> August, 2016 02.23       sate & Add lime:     11 <sup>th</sup> August, 2016 02.23	Selected files from storage (0) At this bon bloop Drop files here or click select files below
Address: Add I, Premort California United Bates \$4538 urrent date & local time: 111- August, 2016 03.25 date & destination time:	Drop files here or click select files below
	CU SHEET
ndude delivery details	Total selected files 0
ing instructions	Imipdo:s global footprint
	B / Ⅱ ac (内) (P   少   注 )注
	Submit
ncl	ude delivery details

#### ishipdocs' user interface

The main menu section consists of the following menus:

- Send files: You can send files through e-mail to specific recipients.
- **Inbox:** You can view the details of the mails received from the Inbox menu.
- Sent items: You can view the details of the sent items from the sent items menu.
- Tracking: You can track files at the same time you can track print documents through this module.
- Share: From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement. You can share the folders to different ids as per your requirement.
- DropFiles: From this module you can give permission to the selected users to view the DropFiles in the store files.
- **Contacts:** From this module you can able to manage the address book. You may search, add contacts add groups as well as export/ import the list if required

### **Chapter 3: Computer Setup**

In this chapter, you will learn about:

- Settings section
- OS & Browser compatibility



### **Settings**

Configure the Settings section to setup browser compatibility, select uploading tool. Also, you can download tutorials and plug-ins from Settings.

1. Click settings from the menu bar. The Settings screen appears.

iship	Res Stars. Sord. Pirt Anywhere.		expiration	Welcome srinivas M sings   help center   what's new (30 <sup>th</sup> November, 2018   upgrade iShip   support@ishipdocs.com
	Settings			3.72% of 20 GB Used
send files	Browser compatibility		Utilities	
inbox	Browser Compatibility You are using a compatible browser.     PopUp Blocker You are allowing Pop-Ups for this site.		Sea Microsoft Outlook Plugin for Windows	Download
sent items	Download user guides		Java or HTML upload option for send files	
Q	ishipdocs user guide	Download	© Java	
tracking	ishipdocs tutorials	(2) Download		
	ishipdocs Outlook plugin user guide	Download		
cloud workspace	If you are using Safari and a Mac OS user, please refer to this document.	Download		
â				
dropfiles				
*** \$107				
contacts				•

2. Check the browser compatibility from the **Browser Compatibility** section. Green tick will be displayed if your browser is compatible with the application and pop-up blocker for the application is disabled in your browser.

- 3. Check the utilities from the **Utilities** section.
  - If the **Microsoft Outlook Plugin** is not installed click the **Download** button to install the Microsoft Outlook Plugin.
- 4. Select either **Java** or **HTML** upload option to enable Java or HTML upload of documents in the application, respectively.



### OS & Browser Compatibility

Operating System	Browser
Windows 2003 (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Window XP (SP2 & SP3)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Window XP (SP2 & SP3)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Windows VISTA (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
Windows 7 (32 bit & 64 bit)	IE 7, IE 8, Firefox 3.6 and above, Chrome 6.0 and above, Safari 5.0 and above
MAC (Snow Leopard)	Safari, Chrome, and Firefox



### **Chapter 4: Upgrading Account**

In this chapter you will learn about:

• Upgrading account package as Business User from a Personal user or existing single, lite or premium business user



### Upgrading account package as Business User

A new Personal user or existing single, lite, business or enterprise users can opt to upgrade their account to a business user. To do so, follow the steps given below:

1. Click **Upgrade** from the menu bar as shown in the image below:

iship	ore. Share. Send. Print Anywhere.	Welcome Durg personal         Personal           sign out   account   settings   help center   what's new         User           support: 1-855-Go iShip   support@ishipdocs.com         User
•	Send files	0.00% of 5 GB Used
send files		💁 Download Outlook plugin

2. The upgrade to business account screen appears. Click Contact Us.

Business	
Starts at \$50 /mo	
Contact Us	
Unlimited Users	
None	
24/7 Support	
Store as you need	
3 GB Max file size/transaction	
Cloud and Network	C
Tracking & Permissions	C
Email & FTP Replacement	C
Mobile & Share	C
Security & Management	œ

3. A new pop-up window appears. Enter the Company name and Company size in the respective text boxes. Click **Contact Now**.

du company	Details
Company I	Name: *
Compan	y Size: 4
Contact ishipdo	ocs sales
	1 AFF A 141
	: 1 855 Go iShip : indqaiship@planwell.com;ishipdocsdev@

Note: In case of an existing personal or business user the Company Name text box will not be present.

4. A message will appear and once approved a notification will be sent to your registered email. The message will look as under:

	upgrade request . A business cutive will contact you within 24
Add Company Det	ails
Company Name	e: asdfasd *
Company Size	€ 4 ▼
1	



### Chapter 5: Functionality as a Personal User

For Personal User the maximum file size per transaction is 3 GB, the storage capacity is 5 GB. You cannot share the file if you are a personal user. The DropFiles facility is not allowed if you are a personal user.

In this chapter you will learn about:

- How to send files
- How to view inbox
- How to view sent items
- How to track files
- How to share files
- How to manage contacts



### How to send files

You can send files via ishipdocs to specific recipients. The file size for the free user is 3 GB. The first transaction will be free of cost from second transaction onwards you will be charged \$ 5.

Click (send files icon) from the left hand panel. The Send Files screen appears with two tabs: Send files to print shop & Send files to others

### Send files to print shop

You can send files in bulk either from storage or directly uploaded files from your local system to the print shop.

In the Print order details section enter the **Project ID** and the **Purchase order number (PO#)** on the respective fields. Rest of the fields are automatically populated by the application.

### How to select files from storage for sending files to print shop

You can also add files from the cloud storage to send files to the print shop. To do so, follow the steps given below:

Note: This feature is only available for users associated with the Print Service Providers.

1. Click Add files from storage as shown in the image below:

Send files		0.22 GB Used
Send files to print shop Send files to others		Par Download Outlook plugin
Print center details	Files information	······
Name: ARC Abhijit Address: Kolkata, Kolakata West Bengal India 700082	Selected files from storage [0]	Add files from storage
	Selected files from storage (0)	Add files from storage

2. Select the files that you want to add and click Close.



My Documents		Document name	Rev.	File status	Last uploaded
Test Workspace		Jellyfish.jpg	1	2	6/5/2014 11:17:45 PM
test test	•	Koala.jpg	1	2	6/5/2014 11:16:59 PM
		Koalalogo.jpg	1	2	6/5/2014 11:16:42 PM
DropFiles		Lighthouse.jpg	1	2	6/5/2014 11:16:59 PM
brophies		Penguins.jpg	1	2	6/5/2014 11:17:16 PM
		Tree.jpg	1	8	6/6/2014 12:41:53 AM
		Tulips.jpg.jpg	1	2	6/5/2014 11:17:49 PM
		Tulipslogo.jpg	1	2	6/5/2014 11:17:17 PM
		William_HStewart,_photo_portrait_as_surgeon_general.jpc	1	2	6/6/2014 12:40:17 AM
	All	# a b c d e f g h i j k l m n o p q r s t u v v	vxyz		[1 - 9 of 9
		a bou organ jarma opqroture			[1 s si s]

3. The select files from storage will display the number of files that you have selected. You can then send these files to the print shop to print.

Files information		
Selected files from storage	<u>(3)</u>	Add more files from storage

### **Uploading Files for sending to Print Shop**

Under the **Send files to print shop** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,

Send file	es	
Send files to	print shop Send files to others	Sa Download Outlook
Print cen	nter details	Files information
S)	Name: ARC Abhijit Address: Kolkata, Kolakata West Bengal India 70008	Selected files from storage (0) Add biok from Morago
	t date & local time: 12 <sup>th</sup> May, 2016 17:24  & destination time:  Project ID:	
id bace	PO #:	Drop files here or click select files below
lies		Ditar Soliecthies
<b>b</b> cts		Total selected files 0
Includ	le delivery details	
Printing in	nstructions	ishipdocs global footprint
		B Z ∐ 444   *) (*   37   1≣ )≣

<u>Steps to select files for upload using HTML 5 Upload Tool:</u> ishipdocs User Guide



- Click on [Select Files] button to open the Document Selection window to select files/images from the local computer
- Select the files/images and then click on [Open] button on the Document Selection window to attach the files in the upload tool Alternatively
- Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page
- The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface. This is shown the screenshot below,

A1.2 Spec.pdf	×
A2.1 Plans.pdf	×
2 File(s) selected Selected File(s) Size 1498.804 KB	Select files
· · · · · · · · · · · · · · · · · · ·	
Total selected files 2	

• Click on [Clear] button to remove the selected files/images

After entering the relevant information user needs to click on **[Submit]** button to upload the files and then send the files along with the print order to the print shop.

Screenshot below displays successful upload and sending of files,

S	end files								0.00 GB 05eu
٢	Send files to print sh	op Send files to othe	5						Soution Contract Design
	Thank you for the o	rder. Your local print servic	e provider will contact you shortly. O	Order No: 162670 Due	Date: 14 <sup>th</sup> May, 2016				Send files to print shop
	Order Inform	nation							
		Order ID :	162670			Order By :	arc test 2		
		Order date :	13 <sup>th</sup> May, 2016		Orde	r due date :	14 <sup>th</sup> May, 2016 00:3	30 AM	
		Job Number :			P	O Number :			
	Sender Info	mation							
		Company name :	arctest2			City :	texas		
		Contact name :	arc test 2		St	tate/region :	Arizona		
		Address1 :	arc		Zip/;	oostalcode :	343433		
		Address2 :				Phone :	9999999		
		Country :	United States			Email :	arctest2@yopmail.c	com	
	Items	File Name			File Size		File Status		
	1	P5-Bridge_29_COWI.jpg			12.85 KB		Upload Success		



### **Including delivery details**

• Tick the checkbox **Include delivery details** to view and enter information delivery company information and any associated notes.

Include delivery details					
Company name:		First name:		Last name:	
Email:		Phone:	1	Mobile:	
Address:		Address:		City:	
Country:	United States •	State/region:	-select-	Zip/postalcode:	
Set delivery notes					
		B / U ARG	9 (°   🖋   🗄 🚝		

• In the end enter **Printing Instructions** and click **Submit** to send the documents to a print shop to be printed according to the given printing instructions

Note: Click ishipdocs global footprints to view ishipdocs global printing locations.

### Send files to others

You can send files in bulk either from storage or directly uploaded files from your local system to the others (person or entity) through email from the application. In this case, the files will be send as an attachment with the email

In the **Recipient details** section enter one or more email address of recipient(s) (or select multiple email address from the Contacts section of the application), enter the **Subject** and **Message** of the email.

**Note:** Like, during files to print shop files can be uploaded from storage, the same can be done in this case.

### **Uploading Files for sending to others**

Under the **Send files to others** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Send files to print shop Send files to others     Recipient details     (email addresses can be separated by a comma or a semi colon)     To     Subject     Subject     Message     B I I Asc I Recipient details        Files (Maximum 3 GB)              Files (Maximum 3 GB)        Selected files from storage (0)     Add hies hom storage         To     Select     Select         To        To                      B I I I Asc III Asc IIII Asc IIIIIIIIIIII	Send files	125
(email addresses can be separated by a comma or a semi colon) To Subject Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message Message	Send files to print shop Send files to others	S Download Outlook
To       Selected files from storage (0)       Add hies from storage         Subject       Selected files from storage (0)       Add hies from storage         Message       Drop files here or click select files below	Recipient details	Files (Maximum 3 GB)
Subject		
Message Drop files here or click select files below Clear Select files	Se	ect
Drop files here or click select files below Clear Select files	Subject	
Clear Select files	Message	
		Drop tiles here or click select tiles below
B I I ASC I → (* I I i = i = Total selected files 0		Clear Select files
	B 2 U ANI   "/ ("   V   ;=	
Ser Ser		Sen

### Steps to select files for upload using HTML 5 Upload Tool:

- Click on [Select Files] button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

#### Alternatively

• Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface.

• Click on [Clear] button to remove the selected files/images

After entering the relevant information user needs to click on **[Send]** button to upload the files and then send the files along with the print order to the intended recipients.

#### 'Cancel' button

A 'Cancel' button has been newly introduced under Send files to print shop tab on the Send Files screen. This button appears after user select files and enters all the relevant information and then clicks on the [Submit] button for sending the files for printing or for any other purpose.

#### **Reasons to use Cancel button**

- This button can be used to cancel transfer of files when the application displays error due to missing mandatory field data entry, wrong data entry etc. after clicking the **Submit** button
- This button can be used when user realizes after clicking **Submit** button that he/she would like to cancel file transfer

Screenshot below displays the **Cancel** button: ishipdocs User Guide



Send files to print shop Send files to others     Print center details     Name:   Address:   Kolikata, Kolakata West Bengal India 700082   Current date & local fime:   Project ID:   Po #   Po # Drop files here or click select files below   Citer or date & destination     Current date & destination time:     Project ID:   Po #   Drop files here or click select files below   Citer or date & destination time:   Drop files here or click select files below   Total selected files   Printing instructions Include delivery details Printing instructions			
Name: ARC Abhilit   Address: Kolikata, Kolakata West Bengal India 700082.   Current date & local time: 12th May, 2016 17:24   Due date & destination time: 12th May, 2016 17:24   Po: 10th Markowski May, 2016 17:24   Due date & destination time: 12th May, 2016 17:24   Due date & destination time: 12th May, 2016 17:24   Due date & destination time: 12th May, 2016 17:24   Po: 10th Markowski	Send files to print shop Send files to ot	vers	😢 Download Ou
Address: Kolikata, Kolikata, Kolikata, West Bengai India 70082   Current date & local time: 12 <sup>th</sup> May, 2016 17:24   Due date & destination time: 11 <sup>th</sup> Image: 10 <sup>th</sup>	Print center details		Files information
Due date & destination time:   ProjectilD:   Po #:   Drop files here or click select files below:   Clicar:   Solect liles:   Total selected files:   0		akata West Bengal India 700082	Selected files from storage (0) Add lifes from storage
Image: Construction of the second	Due date & destination time: Project ID:		
Total selected files 0			
Include delivery details			Clear Select files
			Total selected files 0
Printing instructions Ishipdocs global footprint	Include delivery details		
	Printing instructions		Ishipdocs global foo
			B / U AAC Ø (* ) <b>Ø</b>   🗄 1Ξ

### **How to View Inbox**

You can view the details of the mails received from the Inbox menu. Follow the given procedure to view the e-mails.

1. Click (Inbox icon) from the left hand panel. The Inbox screen appears. You can delete senders, download files, search files from this screen.

#### 2. Searching Files

- a) Click Search button from the action bar. The Search files window appears.
- b) From the Field drop-down list, select specific option. The options are: Sender, Subject, and Date Received. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.

	Field		Condition		Value
÷	Secider	191	E guata		michale d@mailinator.c
		31		×.	
-1		28		<u>w</u>	
-		1		*	
					Same Street, S

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Search files window

- c) Enter the value related to the field.
- d) Click **Go**. All the files related to the field are displayed in the inbox list.



You may reset the fields if required.

3. Show All



- Click **Show All** button from the action bar, the whole list of mails will get displayed.
- 4. Downloading Files
  - a) Click (Download Files icon) to download the file. The Download files window appears.

	Subject Official document			Copy to
	Recipient dipcust3@mailinator.co	m	S	Copy to torag
	Date Sent: 23rd May, 2011			
	Expiration: 2 <sup>oo</sup> June, 2011			
Dov	wnload files			
			•	
	Dow Please dick 'zip download'	Zip nload	oad file(s) in zip format.	
File r	<ul> <li></li></ul>		oad file(s) in zip format.	
File i	Plesse click 'zip download'	button to downl		Download

Download files window

b) Select the file(s) that you want to download. There are three options: Download, Zip Download, and Copy to Storage. By clicking Download you are allowed to select the file and download it as per your selection. Zip Download allows you to download all files in zip format and Copy To Storage allows you to copy the file to the existing storage.

### Download

- i. Select the file(s) that you want to download.
- ii. Click 🕑 (**Download** icon). The selected files will get downloaded.



You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.



### **Zip Download**

 Click Zip Download. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

### Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also

click (Copy to storage icon) from the main screen. The Copy to storage window appears.

Add tip to storage All individual  Folder name  Create folder by Tracking ID      Oreate folder by Trac	les	
C Create folder by Tracking ID  Work Space(s) of abc	🖷 Add zip to storage 🥤 Alf Ind	dkidual
D A My Work Space	older name	
Select an existing folder     OwnerVault1     Create New Folder	<ul> <li>Select an existing folder</li> </ul>	o 📸 My Work Space

Copy to storage window

- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.



### 5. Deleting Senders

- a) Select the sender from the list.
- b) Click **Delete** button from the action bar. The specific sender(s) gets deleted from the list.

### 6. Searching Files through Tracking Id

- a) Select the file that you want to view through tracking id.
- b) Click **Tracking Id**. The history window appears. You can view the detail of the file in the screen.

	From:	michale d@ma	ilinator.com	
0	Bubject. Official Docume			
Ma	ssage	Official docume	unt.	
Files				
			_	
Tile llame			file Stre	Status
American Reprograph	esi Comp	any India Pv1,adf	172217	Lipited Summa

history window



### **How to View Sent Items**

You can view the details of the sent items from the sent items menu. Follow the given procedure to view the details of the sent items.

- **A**
- 1. Click (sent items icon) from the left hand panel under the Toolbox. The Sent items screen appears. You can delete the items, display all the files, and search files from this screen.

			🗷 Re-opt	het	Search	回日	ow all	🗙 Delete
F	Recipient	Subject	Sent date	Expe	re døte	Tracking id	Download	Print cart
	shill prototy and	teel.	14" August, 2011	1"Sec	tarber, 2011	2111220		
Ê	ant statistic the	lest	24 <sup>e</sup> August, 2011	7* Set	tenber, 2011	HILLING	(1)	68
C	Suberis Scientel uni	PW/ Meeting Notes - 19th August	22" August, 2011	1*540	terber, 2011	1110000	۲	
F	atinde an see	Modified inhodocs user guide entitienpoios Qu	19 <sup>th</sup> August, 2011	29 <sup>10</sup> Au	quet, 2011	1111855	(3)	58
Ċ,	S deside man	Modified shodoca user guide and shipdoca Ou	19" August, 2011	29" 44	spat, 2011	1111955	۲	68
C	S awards on	Vodified shocks user guids and shocks Qu	19 <sup>#</sup> August, 2011	29 <sup>4</sup> Au	quet, 2011	1111055	۲	63
'n	CONDENSION	Hodified shipdocs user guide and shipdocs Qu	19 <sup>4</sup> August, 2011	29° 44	.g. 81, 2011	1111964	۲.	55
Ċ.	anal Section	Nodified imposes user guide and allocates Qu	19" August, 2011	257.40	p.et, 2011	2122984	1	68
-	Samad-musa.on	Modified shipdoos user guide and shipdoos Qu	19 <sup>#</sup> August, 2011	29° A.	gunt, 2011	1111964	(1)	62

Sent items screen

#### 2. Re-upload

- a) If in any case the upload is not completed, you can re-upload the file by clicking the **Re-upload** button.
- b) Select the recipient whose file is not uploaded. The **Re-upload** button will get enabled.
- c) Click the **Re-upload** button, the **Re-upload** screen appears.



BG0327000003.TIF	767.85 KB	To Be Uploaded
BG0327000001.TIF	1.27 MB	To Be Uploaded
BG0327000002.TIF	420.26 KB	To Be Uploaded

#### **Re-upload screen**

d) Select the files that you want to upload and click the **Submit** button. The uploading files screen appears as shown.

Uploading files					
Filename B6032700001 TF B6032700002 TF	8128 Date Status 1.27 ME 03/27/2000 11:09 Upleadin 420 26 VE 03/27/2000 11:07				
smoothin 15	The second s				
loading to inhipdocs Asia, In Close The window after uplo	dia, DC				

Uploading files screen

#### 3. Searching Files

a) Click Search button from the action bar. The Search files window appears.

	Field		Condition		Value
P	Sender 8	9	Expirate		michale d@mailmatur.c
÷.	3	9		×.	
F.	3	e.		*	
-		e l		*	
					San Present Class

#### Search files

- b) From the Field drop-down list, select the specific option. The options are: **Recipient**, **Subject**, and **Date Sent**. As soon as the field is selected the check box adjacent to the field and the condition get selected automatically. You may change the condition as per your requirement.
- c) Enter the value related to the field.
- d) Click Go. All the files related to the field are displayed in the inbox list.



You may reset the fields if required.

#### 4. Show All

• Click **Show All** button from the action bar, the whole list of the sent items get displayed.

#### 5. Deleting Items

- a) Select the check box adjacent to the recipient name from the list.
- b) Click the **Delete** button from the action bar. The selected item(s) gets deleted from the list

#### 6. Searching Files through Tracking Id

- a) Select the file that you want to view through tracking id.
- b) Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

Mail box			
Prom:	michale digina	sitrator com	
Bubject.	Official Docum	ent.	
Message	Official docume	ant	
Files			
Tile llame		file Size	Status
American Reprographics Comp	eny Didle Pv1,adf	172217	Liptoed Sutteme

history window

#### 7. Downloading Files

a) Select the recipient whose file you want to download. Click (Download Files icon) to download the file. The Download files window appears.

lownload files			
Subject: Print			
Recipient: michale.d@mailinator.	com		
Date Sent: 19 <sup>99</sup> May, 2011			
Expiration: 29 <sup>th</sup> May, 2011			
Download files			
Dow			
Please dick zip download	button to downl	cad file(s) in zip format.	
			Download

#### **Download files**

b) Select the file(s) that you want to download. There are three options: Download, Zip Download, and Copy to Storage. By clicking Download you are allowed to select the file and download it as per your selection. Zip Download allows you to download all files in zip format and Copy to storage allows you to copy the file to the existing storage.



#### Download

- i. Select the file(s) that you want to download.
- ii. Click (Download icon). The selected files will get downloaded.



You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

#### **Zip Download**

 Click Zip Download. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

#### Copy to Storage

- i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (Copy to storage icon) from the main screen. The **Copy to storage** window appears.
- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- Create New Folder: Here you may create a folder and name it in the text box below and click Done. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.



### How to track files

You can track files at the same time you can track print documents through this module.

Follow the given procedure to track files.

# 1. Click

Click (Tracking icon) from the left hand panel. The File Tracking screen appears. You can track files as well as print the tracked file through this module.

rack	king					3	.72% of 20 GB U
File tra	racking Order tr	acking Print tracking					
0.5	Show all user items					Search 🖉 Export	E Show a
	ID	Recipient	Subject	File expiry date	Status	Last download	Downloads
	<u>16111653</u>	abc@mailinator.com	test	20 <sup>th</sup> August, 2016	Ready to Download		0
	<u>16106935</u>	manidipa.chakrabarti@e-arc.com	test	8 <sup>th</sup> August, 2016	Ready to Download		0
	<u>16103718</u>	manidipa.chakrabarti@e-arc.com	test	4 <sup>th</sup> August, 2016	Ready to Download		0
	<u>16103053</u>	madhu.prasad@e-arc.com	doc	31 <sup>st</sup> July, 2016	Download Completed	22 <sup>nd</sup> July, 2016	1
	16102373	vishal.khosla@e-arc.com	PST file	31 <sup>st</sup> July, 2016	Download Completed	21 <sup>st</sup> July, 2016	4

File tracking screen

2. File Tracking

#### a) Searching Files

- i. Enter the tracking id of the file that you want to search in the **Tracking ID#** text box. You can also select the Recipient option and track files accordingly.
- ii. Click the **Search** button from the action bar. The specific file will be displayed in the grid section. You can see the status of the file, the recipient's name, the expiry date everything related to the file.

#### b) Exporting the lists

i. Click the **Export** button from the action bar. The **Export** window appears.

Export page: Current Page 💌
Export Clos

Export window



- ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.
- iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.
- c) Show All
  - Click the **Show All** button from the action bar, the entire list of the files with the tracking id are displayed in the grid section.
- d) Deleting Items
  - i. Select the file that you want to view through tracking id.
  - ii. Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

Mail box			
To	michale d@mailinato	c.com	
Subject	Pont		
Hessage	Print		
Files			
File Name		File Size	Status
Plani/iel_Collaborate,	Onine_Guide.pdf	825755	Uplated Success

History window

#### e) Copying To Storage

i. Click (Copy to storage icon). The Copy to storage window appears.

Files	
<ul> <li>Add zip to storage</li> <li>All inc</li> </ul>	Skidual
Folder name	
Create folder by Tracking ID     Select an existing folder     Create New Folder	work Space(s) of abc     with the space of the space
Done	

Copy to storage window

- ii. From the Files section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the Folder Name section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

#### 3. Print Tracking

o Click Print Tracking tab, the Print tracking screen appears.

							C Search	Export .	Show a
	0nler#	Email	945	Order date	Oue date	Hodified on	Order State	s Paymen Status	Delivery details
c	11895 11895	ante Seu 🖻	W unte D umi	12 <sup>47</sup> Mary, 2013	20 <sup>0</sup> Hey, 2011	12 <sup>47</sup> Hey, 2011	Upload Comple	bel:	
c	( <b>1</b> 15830	in ente internationalista (Contentionalista (Con	atte 🕅	12 <sup>0</sup> May, 2011	20 <sup>10</sup> May, 2011	12 <sup>0</sup> Mey, 2011	Quarterborn Sude	nted <b>and</b>	
c	( <b>2</b> 115752	ente Rest	atte 🕅	12 <sup>17</sup> May, 2011	16 <sup>10</sup> May, 2011	12 <sup>0</sup> May, 3011	Peyment Succe		
c	( <b>1</b> 15386	ente.	Carte ante	12 <sup>#</sup> May, 2013	25 <sup>th</sup> Play, 2011	12 <sup>m</sup> Hey, 2011	Next Outliefur:	Вери	

Print tracking screen

#### a) Searching Files

i. Click Search button from the action bar. The Search orders window appears.

	Field	Condition	Value
•	Order#	Equals 💌	115842
Г			
Г			
Г	×		1

Search orders window

- ii. Select the field from the Field drop-down list. The options are: **Order #**, **Order** date, **Due date**, **Modified on**, and **Status**. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.
- iii. Enter the value related to the field.
- iv. Click **Go**. All the files related to the field are displayed in the Print Tracking grid section. You can see the status of the file, the recipient's name, the order date, the due date, the modification date, the status and the delivery details everything related to the files.
- b) Exporting the lists



i. Click the **Export** button from the action bar. The **Export orders** window appears.

Export to:	Excel	~
Export page:	Current Page	~
	Export	CI

Export window

- ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.
- iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.
- iv. Click Export. The page(s) gets exported.
- c) Show All
  - Click the **Show all** button from the action bar, the entire list of the files with the Order Id are displayed in the Print Tracking list.
- d) Copying to Storage
  - i. Click (Copy to storage icon). The Copy to storage window appears.



Copy to storage window

- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click Done and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.
- e) Sending Email
  - i. Click write adjacent to *list* for which tracking id you want to send an email. The Write Email window appears.

From :	michale.d@mailinator.com
from.	
To:	gdc@ishipdocs.com
cc:	
BCC:	
Subject:	Regarding ishipdocs order # 116353
Message:	
	Send Close P

Write Email

- ii. Enter the mail id of the person whom you want to send an email in the **To** text box. You may enter ids in **CC** and **BCC** text boxes as well.
- iii. Subject will come automatically. You may change the subject if required.
- iv. Enter the message in the **Message** text box.
- v. Click Send.
- vi. Click **Close** after sending the email. The window will close automatically. You may also print the email by clicking the **Print** button.
- f) Sending SMS
  - i. Click write adjacent to for which tracking id you want to send a SMS. The Write SMS window appears.

From	michale.d@mailinator.com	
	gdc@ishipdocs.com	
cc		
BCC		
Subject	Regarding ishipdocs order # 116353	
Message		
		Close Print
		Close Print

Write SMS window

- ii. Enter the phone number whom you want to send a SMS in the **To** text box.
- iii. **Subject** will come automatically. You may change the subject if required, but you have to keep in mind number of characters allowing for SMS is 70 only.
- iv. Enter the message in the **Message** text box.
- v. Click Send.
- vi. Click **Close** after sending the SMS. The window will close automatically. You may also print the SMS by clicking the **Print** button.

**1** 

You can track the order by viewing the status of the order and when the delivery completes (Delivery info icon) appears for the particular order. Click (Delivery info icon). You will get the delivery information from the Delivery Information Details window.

Note: Another tab 'Order Tracking' is similar to 'Print Tracking' but it shows tracks of customer print orders from a PSP whereas personally logged-in user print orders are displayed under the 'Print Tracking' tab.



### How to add files in Storage

From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement.

Follow the given procedure to store your files.



Click (cloud workspace icon) from the left hand panel. The cloud workspace screen appears.

👛 Cloud Workspace 🔻 📮 Folder 🔻 🛫	Files						
dia Cloud Workspace(s) of ARC     dia My Work Space	☐ File ▼ Count per page: 200 ▼						
🗴 🧰 My Documents	Document name	Rev.	File status	File size	Last uploaded	$\nabla$	Share fi
🛚 💼 Test workspace	Tulips, jpg	1	2	606.34 KB	7/25/2013 04:36 AM		0
🕈 🤠 DropFiles 🛯 🚃 Shared by others	🗆 🖲 🗋 Log.txt	1	2	178.90 MB	4/5/2013 01:54 AM		Q
	🗆 🖲 🗋 Copy of Chrysan themum.jpg	1		858.78 KB	4/5/2013 01:12 AM		1

#### **Cloud Workspace**

#### Adding Workspace

Follow the given procedure to add workspace.

- 1. Place the cursor in the downward arrow of Cloud Workspace . Three options will appear in the drop-down list: Add/Edit work space, Remove work space and Set alert.
- 2. Select (Add/Edit work space icon). Make sure that the Work Space(s) of some company name is selected at the time you want to add another work space. The Add/Edit Work Space Item window pops up. The window has three tabs: Work

cloud workspace item			
eate new cloud workspace Cloud workspace information	Permission	Statistics	
* Name: Description:	T CTILISSION	Juliando	
			.::
			Save Close

Add Work Space Item

#### 3. In the Work space Information tab:

- a) Enter the name of the work space in the **Name** text box. This field is mandatory.
- b) Enter the work space description if required in the **Description** text area.
- 4. Click **Create**. The confirmation message appears.

Cloud workspace cre	ated successfully.
	ОК

#### Confirmation message

- 5. Click **OK**. The Workspace is created automatically.
- 6. Click **Close** to close the window.
- 7. Select the workspace that you have created to upload files.
- 8. Click Add/Upload files. The Upload Document window appears.



9. Click Select Files. The Open dialog box appears.

200 - 200 201 - 200	1000		
Look in	Sample Pict		
My Recent Documents	Due Tals Surged Water Heat Water Heat		
Desktop			
3			
My Documents			
1214			
My Computer			
-			
	-		T and
My Network Places	Flenatie	"Weiter pg" "Elue hile pg" "Sunset pg" "Weit 💌	Open
	Files of type:		Cancel

Open dialog box

- 10. Select the file that you want to upload from the particular location.
- 11. Click **Open**. The files get inserted in the **Upload Document** window.
- 12. Click **Upload**. The files get uploaded in the workspace or the folder that you have selected.
- 13. Click **Close** to close the screen.
- 14. Click Add/Edit Work Space.
- 15. If you click **Add/Edit Work Space**, the **Edit Work Space Item** screen appears as shown.

Edit Work Space Item screen

16. Click Statistics. All the operational occurrences will be displayed as shown.

	ice name: Test		
and the second second second	kspace information	Permission	Statistics
r r. r.	<u> </u>		
Date	Category	Activity by	Description
3/22/2013 02:3	4 AM New Cloud Workspa	ice Manidipa Chakral	ba New Cloud Workspace added by Manidipa Chakrabarti on cloud

#### Statistics tab

17. Click Close to close the screen.

#### **Removing Work space**

Follow the given procedure to remove workspace.

- 1. Select the work space you want to remove and place the cursor in the downward arrow of Work Space
- 2. Click the second icon (**Remove work space** icon). A warning message appears.
- 3. If you are confirmed that you want to delete the work space then click **OK**. The confirmation message appears stating "Selected work space deleted successfully".
- 4. Click **OK** and the selected work space gets deleted from the tree.

#### **Setting Alerts**

Follow the given procedure to set alerts.

- 1. Select the work space for which you want to set alert.
- 2. Place the cursor in the downward arrow of Cloud Workspace V
- 3. Click the third icon (Set alert icon). The Alert Settings window popped up. There are lots of options.

Select all	
Add file to work space	
Delete file from work space	
Add folder to work space	
Delete folder from work space	
Change work space	
☑ Delete work space	
Notification type: 🗹 Email	

Alert Settings window

- For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting Select All check box. The File Alert Subscription section consists of the following options:
  - Add file to work space: If you select this check box, any file added to workspace will be notified.
  - **Delete file from work space:** If you select this check box, any file gets deleted from the workspace will be notified to other members.
  - Add folder to work space: If you select t this check box, any folder gets added to workspace will be notified to other members.
  - Delete folder from work space: if you select this check box, any folder gets deleted from the workspace will be notified to other members.
  - **Change work space:** If you select this check box, any change in work space will be notified to other members.
  - **Delete work space:** If you select this check box, any work space gets deleted from the list will be notified to the members.
- 5. Select e-mail as a mode of notification.
- 6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 7. Click **OK**.
- 8. Click Close to exit from the Alert Settings window.
- If you want to set alert for all the options directly select Select All check box. All the
  options get selected automatically. You can also select individual options as per your
  requirement.



- 10. Select Email in the Notification Alert Type.
- 11. Click Set Alerts. The confirmation message appears.
- 12. Click OK.
- 13. Click **Close** to close the window.

#### **Folders**

#### **Adding Folders**

Follow the given procedure to add folders.

- 1. Select the folder or work space where you want to add another folder.
- 2. Click the downward arrow of

. Different options will appear.

3. Click the first option (Add Folder icon). The Add Work Space Item window pops up. The window has two tabs: Folder information and Statistics. The Folder information is displayed by default.

eate new folder		
Folder information	Statistics	
* Folder Name		

Add Work Space Item

- 4. Enter the folder name in the **Folder Name** text box.
- 5. Click **Create**. A confirmation message appears.





Confirmation message

- 6. Click **OK**. The folder will be created.
- 7. Click Add/Upload from the Files drop-down list. The Upload Document window appears.
- 8. Click Select Files. The Open dialog box appears.
- 9. Select the file(s) that you want to upload from a particular location.
- 10. Click Open. The file(s) get selected in the Upload Document window.
- 11. Click **Upload**. The file(s) get uploaded in the **Files** section in the right hand panel.
- 12. Click **Close** to close the window.

#### **Editing Folder**

Follow the given procedure to edit folder.

- 1. Select the folder or vault that you want to modify.
- 2. Click the downward arrow of Folder . Different options will appear.
- 3. Click the second option (Edit Folder icon). The Edit Work Space Item window pops up.

it work appice /Iem	
Folder information Statistics	
." Folder Name folder_1	

Edit Work Space Item window

- 4. Modify the information in the **Folder information**.
- 5. Click **Statistics** tab. All the operational activities are displayed in the **Statistics** tab as shown.

Folder name: folder	Û.			
Folder informat	Son Statistics	6		
Date.	Eategory	Activity by	Description	
8/24/2011 05:09 AM	New Work Space folder	Primas stephen	New Work Space folder added by thomas step	sheri on work space item f
8/04/2011 05:11 AM	Fiew document uploader	thomas stephen	Work Space item 860327000002.70F new doo	ument uploaded by thome
8/24/2011-05:11 AM	New document uploades	thomes stephen	Work Space flem \$60327000004 TJF new doo	ument uploaded by thome
8/24/2011 05(11 AM	New document uploader	thomas stephen	Viork Space item 800327000003.70P new doc	ument uploaded by thome
8/24/2011 05:12 AM	New document uploader	fromes stephen	Work Spece new 8G0327000001.73* new doo	ument uploaded by thome
<				28

Statistics tab

6. Click **Save**. A confirmation message appears and the folder gets updated successfully.

#### **Deleting Folder**

Follow the given procedure to delete folder.

- 1. Select the folder that you want to delete.
- 2. Click the downward arrow of Folder . Different op

Different options will appear.



- 3. Click the third option (Delete Folder icon). A warning message pops up asking whether you are sure that you want to delete the folder.
- 4. Click OK, if you really want to delete the folder. Your folder gets deleted from the list.

#### **Setting Alert**

Follow the given procedure to set alert.

- 1. Select the folder for which you want to set the alert.
- 2. Click the downward arrow of Folder . Different options will appear.
- 3. Click the fourth option (Set Alert icon). The Alert Setting window pops up. There are lots of options.

Select all		
Add file to folder		
Delete file from folder		
Add folder		
Delete folder		
Change folder		
Notification type: 🗹 Email		

Alert Setting window

- For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting Select All check box. The File Alert Subscription section consists of the following options:
  - Add file to folder: If you select this check box, any file added to folder will be notified.
  - **Delete file from folder:** If you select this check box, any file gets deleted from the folder will be notified to other members.
  - Add folder: If you select t this check box, any folder gets added will be notified to other members.
  - **Delete folder:** If you select this check box, any folder gets deleted will be notified to other members.



- **Change folder:** If you select this check box, any change in folder will be notified to other members.
- 5. Select e-mail as a mode of notification.
- 6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 7. Click OK.
- 8. Click **Close** to exit from the **Alert Settings** window.

#### **Refreshing the Page**

Follow the given procedure to refresh page.

Click (**Refresh** icon). The Work Space section gets refreshed.

#### Files

#### **Adding Files**

*Silverlight Upload Tool* has also been replaced with *HTML 5 Upload Tool* for uploading file in **Cloud Workspace**.

Go to **Cloud Workspace** > Click on the Folder where you would like to upload the file(s) from the lefthand panel > Click on **File** drop-down > Click on **Upload Files** menu item

Screenshot below highlights the Upload Files menu item on the Cloud Workspace screen,

Sto	De Share. Send. Pint Anywhere.	sign out   account   settings   help center   what's new expiration:15 <sup>th</sup> July, 2016   support:1-855-Go iShip   support@ishipdocs.com	
nd files	Cloud Workspace	0.00 Files Print C	) GB Us
inbox titiems titiems titiems titiems	<ul> <li>Cloud Workspace (s) of arctest2</li> <li>Cloud Workspace(s) of arctest2</li> <li>My Work Space</li> <li>My Documents</li> <li>DropFiles</li> <li>Shared by others</li> </ul>	File       Count per page:       15         Upbad folders files       Rev.       File status       File size       Last upboaded       V Share file         Upbad folders files       Rev.       File status       File size       Last upboaded       V Share file         Ownbad       Oory       Move       History       Delate       V Link       Export         Export       Export       Add to print cart       Y       Y	2
		All # a b c d e f g h i j k l m n o p q r s t u v w x y z [0 of 0]	

The **HTML 5 Upload Tool** will now open up instead of the **Silverlight Upload Tool**. This screen is shown below,

ishipdocs User Guide

In case of duplicat	e document :	Create New Copy		
		Create New Copy Create New Revision		
	Drop	files here or click select	t files below	
			Upload now Clear	Select files

#### Steps to demonstrate upload of files:

- Click on [Select Files] button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on [Open] button on the *Document Selection window* to attach the files in the upload tool *Alternatively*
- Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

The selected file is shown in the screenshot below,

hipdocs store stare sand, cloud pris.	Upload docum
Target: 'My Documents'	
In case of duplicate document : Create New Copy T	
Bridge_Building.jpg	×
1 File(s) selected Selected File(s) Size 106.886 KB Upload now	Clear Select files
1 File(s) selected Selected File(s) Size 106.886 KB Upload now      Close after operation completes.	Clear Select 1
fter operation completes.	Close

- Click on [Upload Now] button to start the uploading process
- *Optionally:* Tick the checkbox **Close after operation completes** will automatically close the open Upload Tool window after the completion of upload
- Optionally: Select the option Create New Copy, if an already existing file in the application is being uploaded again. This will create a new copy of the already existing file. Select the option ishipdocs User Guide
   64 of 207



**Create New Revision** if a new revised version of the document with the same name is being uploaded again. Below screenshot displays the successfully uploaded file on the Upload Tool interface:

ishipdocs over theme wind cloud print.	Upload document
Target: 'My Documents'	
In case of duplicate document : Create New Copy	
Bridge_Building.jpg	
1 File(s) selected Selected File(s) Size 106.886 KB Upload now Clea	r Select files
Close after operation completes.	Close

- Is needed: Click [Clear] button to remove the selected files
- After the completion of successful upload, click [Close] to close the window

Screenshot below displays the successfully uploaded file under the target folder:

	ve. Send. Print Anywhere.				Welcom   settings   help cent expiration: 855-Go iShip   support	ter   what 15 <sup>th</sup> July, 2	's new 2016	Business User
C	loud Workspace						0.0	00 GB Used
send files	🗄 Cloud Workspace 🔻 📄 Folder 🔻 🕏	Files					Print	Cart 😐
	🖶 Cloud Workspace(s) of arctest2 🖶 🎳 My Work Space	☐ File ▼ Count per page: 15 ▼						2
	Wy Documents     DropFiles     Shared by others	Document name     S  Bridge_Building.jpg	Re v.	File status	Last uploaded 5/13/2016 05:07 AM	⊽ si	hare file	
sent items	nared by others							
tracking								
cloud workspace								
dropfiles		All # a b c d e f g h i j k l m n o p q r s t	uvwx	y z			[1 of	1]

#### **Copying Files**

Follow the given procedure to copy files.

1. Select the files that you want to copy from one folder to another folder.

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- 2. Click the downward arrow of
  - . Different options will appear.
- 3. Click (Copy files icon). The Select Folder window popped up.

Select folder	
🛢 🤠 Work Space(s) of	
🔹 🤠 My Work Spac	e
📴 👼 OwnerVault1	
	Clos

Select folder window

- 4. Select the folder where you want to copy the files. A warning message appears stating whether the user is sure to copy the file in that particular location.
- 5. Click **OK** if you are sure to copy that file in that particular location.
- 6. Click **Close** to close the window. The file will be copied to the folder as per your choice.

#### **Moving Files**

Follow the given procedure to move files.

- 1. Select the files that you want to move from one folder to another folder.
- 2. Click the downward arrow of Different options will appear.
- 3. Click (Move files to other folder icon). The Select Folder window popped up.
- 4. Select the folder where you want to move the files. A warning message appears stating whether the user is sure to move the file in that particular location.
- 5. Click **OK** if you are sure to copy that file in that particular location.
- 6. Click **Close** to close the window. The file will be moved to the folder as per your choice.



#### **Viewing History**

Follow the given procedure to view history.

- 1. Click the downward arrow of \_\_\_\_\_\_. Different options will appear.
- 2. Click (View file history icon). The File History window popped up, where you can see the files history.

File	e: serveranimation.gif				
	Change Set	Category	User Name	Change Type	Modify
۲	113351 [ New file uploaded ]	Add	DipankarTest Cust (	Comp New file uploaded to w	ork st 4/11/201

File History window

3. Click **Close** to close the File History window.

#### **Deleting Files**

Follow the given procedure to delete files.

- 1. Click the downward arrow of \_\_\_\_\_\_. Many options will appear.
- 2. Click (Delete files icon). A warning message pops up asking whether you are sure that you want to delete the file(s).
- 3. Click **OK**. A confirmation message appears stating "Selected documents successfully deleted".
- 4. Click **OK**. The document(s) gets deleted from the selected folder.



#### **Linking Files**

Follow the given procedure to link files.

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Click the downward arrow of \_\_\_\_\_\_. Different options will appear.
- 3. Click the sixth option (Link files icon). The Document Download Link(s) window popped up. The link of the download link is displayed by default.

	collaborate/CabinetDocumentDownloader.ashx?Key=6141zIOLaES_
☐ Add expiration date	

#### Document Download Link(s)

- 4. You may or may not want to add expiry date. Adding expiry date implies that the file can be downloaded before the expiry date only and if the date exceeds due to any reason you won't be able to find out the file.
  - a) Select Add expiry date check box to add the expiry date.
  - b) Click 🕮 (**Calendar** icon) to add the expiry date from the calendar.
  - c) To remove the expiry date, deselect the **Remove expiration date** check box. This means there is no stipulated time frame for downloading the package.
  - d) Click Individual Expiration Date to create your own expiry date.
- 5. Click **Create Link** and the link gets added under **Document Package Download** Link(s) text area.



- 6. Click **Copy to Clipboard**. The confirmation message appears stating links get successfully added to the clipboard.
- 7. Click **Close**. The link gets copied to the clipboard.

#### **Setting Alert**

Follow the given procedure to set alert.

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Select the file(s) from the list for which you want to set alert.
- 3. Click the downward arrow of \_\_\_\_\_\_. Different options will appear.
- 4. Click the seventh option (Subscribe for alert icon). The Alert Settings window popped up. The selected documents get displayed under Selected Documents section.

Document Name	Desciption	
Copy of ExportedConta	a .	
Select all		
Delete file		
Sharing file with	another user	
	ked from another user	
L Snanng file revol	ked from another user	

Alert Settings window

- 5. For setting notification for the file(s), select the appropriate options. The **File Alert Subscription** section consists of the following options:
  - **Delete File:** If you select this option, any file deleted will be notified.
  - **Sharing file with another user:** If you select this option, any file shared to some other person will be notified to other members.



- **Sharing file revoked from another user:** If you select this option, any file sharing cancelled or withdrawn from someone will be notified to other members.
- 6. Select E-mail as a mode of notification.
- 7. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 8. Click OK.
- 9. Click **Close** to exit from the **Alert Settings** window.

#### **Exporting the List of Files**

Follow the given procedure to export the list of files.

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Click the downward arrow of

🗋 File 🔻

. Many options will appear.

3. Click the eighth option *(Export icon)*. The **Export Data** window popped up.

Format E	vcel v	
ronna.		
Export	Close	

Export Data window

- Select the type of format from the Format drop-down list. The options are Excel, CSV, and XML. Selecting specific option will enable the list of files to get exported according to that particular format.
- 5. Click Export. The File Download dialog box appears.
- 6. Click **Open** to view the document that gets exported then save it to a particular location or else click **Save**. The **Save As** dialog box appears. Select the specific location where you want to save the document and click **Save**. The document gets saved into that particular location and the confirmation message appears.
- 7. Click Close to close the Export Data window.

### **Refreshing the Page**

Follow the given procedure to refresh the files section.

Click (**Refresh** icon). The Files section gets refreshed.

#### **Downloading File**

Follow the given procedure to download file.

- 1. Select the folder or workspace. The list of files within the folder is displayed.
- 2. Select the file from the list that you want to download.
- 3. Click (Download icon). The File Download dialog box appears.
- 4. Click **Open** to view the file or **Save** to save the file in a particular location in your machine.



### **How to Manage Contacts**

From this module you can able to manage the address book. You may search, add contacts, add groups as well as export the list if required.

Follow the given procedure to manage contacts.



Click (Contact icon) from the left hand panel. The Contacts screen appears. The screen has two tabs List view and Card view. The List view tab displays all the contact in form of a list and the Card view tab displays all the contacts in form of cards.

List view	/ Card view		_			
Search:	in Contact N	lame 👿 🝳	Ə 허 🐝 🋸			
	Contact Name	Company Name	Email	Phone Work	Edit	
	8 (403) 266-5954 Labban Buckley	Trial Expired	elbuckley@carboncopyc		~	
	8 +35314263700 fitzpatrick	Trial Expired	fitz@craftprint.ie		0	
	8 +61893210877 Kougianos	Trial Expired	westperth@clockwork.c		•	
	8 +81-3-5791-4080 Kondo	Trial Expired	hrio@fisnet.co.jp		~	
	8 +94777259673 Rajawasan	Trial Expired	sales@print2digital.com			
	8 +94777377618 Serasinha	Trial Expired	indusera@gmail.com		0	
	8 009477340421 Gunawardana	Trial Expired	imac@sltnet.lk		~	
	8 00962-795547441 KHALIL	Trial Expired	m_nos@go.com.jo		~	
	8 0122909989 Maman	Trial Expired	samson@triform.com.m			
	8 022-28574133 patel	Trial Expired	bhagirathdigital@gmail.(		~	
	8 33143538734 GRES	Trial Expired	a.gres@demaille.fr		~	
	8 353667128671 Drumm	Trial Expired	sales@copylobby.com		~	
	8 36205695515 Sódar	Trial Expired	gysodar@copygeneral.l		0	

#### **Contacts screen**

#### **List view**

#### **Searching Contacts**

Follow the given procedure to search contacts.

- 1. Enter the search item in the **Search** text box.
- 2. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.
- 3. Click (Search icon). The specific option is displayed in the List view screen.



4. You may also click All / # / alphabets to search the contacts.



#### **Adding New Contact**

Follow the given procedure to add new contact.

1. Click (Add New Contact icon) from the action bar. The Add Contact window appears.

	* Indicate Mano	latory Field		
First Name*			Notes	
Last Name*				
Job Title			Notification Mode:	Email
Company Name*			the second second second	- Alexan
Address Line 1				erence is not selected, the conta
Address Line 2			will not receive an	ny notifications from ishipdocs.
Country	USA	2		
State/Province*	Select State Province			
TimeZana*	(GMT-12:00) Internation 😪			
City				
Postal Code:				
Phone Work:				
Extension				
Mobile Phone				
Pager				
Fax				
Email				
Company Website				
Business	Architecture 🔍			

Add Contact window

- 2. Fill up all the specific fields of the Contact Information section. The fields with the red stars are to be considered as mandatory fields, therefore you need to fill up at least those specific fields.
- 3. Click **Close** to close the window.



You can click **Save & Close**. This will save the information and close the window automatically. You need not have to click **Save** and then **Close** separately.



#### **Editing Contacts**

Follow the given procedure to edit contact.

- 1. Click (Edit Contact icon) from the Edit section adjacent to the contact name. The Edit Contact window appears. Modify the fields as per your requirement.
- 2. Click Save. A confirmation message appears if updated successfully.
- 3. Click **Close** to close the window.

#### **Removing Contacts**

Follow the given procedure to remove contact.

- 1. Select the contact(s) that you want to remove from the contact list.
- 2. Click (Remove Contact icon) from the action bar. The Confirmation window appears.

Delete the	contact(s) and remove them from	all communications
	/ind1//	

Confirmation window

- 3. If you are sure to delete it from the list select **Delete the contact(s) and remove them from all communications** from the drop-down list.
- 4. Click **Confirm**. A confirmation message appears if deleted successfully.
- 5. Click **OK** to continue.



#### **Importing/Exporting Contacts**

Follow the given procedure to import/export contact.

1. Click (Import/Export Contacts icon) from the action bar. The Import/export contact window appears.

	export contact	
Import	Contacts	<b>X</b>
	Cancel	

Import/export contact window

- 2. Select **Import Contacts** if you want to import the contacts or **Export Contacts** if you want to export contacts from the drop-down list.
- 3. Click OK.
- 4. Importing Contacts:
  - i. Select **Import Contacts** from the drop-down list in the IMPORT/EXPORT CONTACT window.
  - ii. Click OK. The Import Contacts Step 1 window appears.

shipdocs			Import (	Contac
Import Contacts: Step 1 of	3			
Source file type:	Microsoft Excel	~		
Select file for import:		Browse		
or	Download Standard Contact template	1		
Column Header Present:	V			
Duplicate Records (First, Last, Company name & Email):	Overwrite Obisallow			
			Next>>	Clos

Import Contacts Step 1 window

- iii. Select the source file type from the **Source file type** drop-down list.
- iv. Click Browse to locate the file to import in the Select file for import field.



Or,

- v. Click to download the standard contact template.
- vi. Select the **Column Header Present** check box to make the column header available.
- vii. You can overwrite the records with the same name or disallow the duplicate one. Click to select the appropriate option for the **Duplicate Records**.
- viii. Click Next to continue. The Import Contact Step 2 window appears. The Import Contact Step 2 window displays the records available in the file. The top 20 records are displayed for your perusal. If you want to modify certain fields, please select the appropriate option to do so.

	100	_					_	Import Con	
wet new	z of z								
	File Man	Bubit sea		Commit Type: application of genuedlineary effortunent spectrometry see					
Total Badant: 33				Headler Low Present Inst (R)					
The Non 1075				Facer Dark Dress Barrer   Black (2)					
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free lanes."					- Salach's Print				
Case Name*					Latitions				
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Noneurriche			Printer at	Passedure	Dill min Garrel nere	Articipal	Said lints	Access of the local division of the local di	
		11's months			a protibilation.	Auctions	Francia		
			-						

Import Contacts Step 2 window

ix. Click **Next** to continue. The file gets imported and the import summary is displayed in the **Import Summary** window.

sport Kurrenery			
TANK CONTACTS	G	The Senattrial	1
the Carles	8	disations in	
Party Trainers	R.	Toplian Colari	4
07% 04010.00	1	Fair Quei To Required Plate	34
TITLE PALLANE		- 25 1000	

Import Summary window

- x. Click **Close** to close the window.
- 5. Exporting Contacts:



- i. Select **Export Contacts** from the drop-down list in the **Import/Export Contact** window.
- ii. Click OK. The Export Contacts window appears.

ishipdocs	Export	Contact
Choose Export Format		
	Export	Close

Export Contact window

- iii. Click to select the export format. You can export either excel sheets or the CSV files.
- iv. Click Export. The File Download dialog box appears.
- v. Click Open to open the file or click Save to save the file in a particular location

#### **Card View**

Click the Card View tab the Card View screen appears.

Saarch	in ContactN	ame 🕜 🔍 🗭 🖶 🖡	
5954 Tital Er	n Buckley, 1463(296) gired - er@carboncep,digital.com	fitzpetrick.+35314253700 Trial Experied- Itz@crafprintie	Kougianos, +61993216877 Trial Expred- westpath@clochapik.com a
Man Abert	. 3	V No Dublin	💓 🍋 . Viestem Australia
	+81-3-5791-4080 pited -	Rajawasan, +94777299673 7nal Excited -	Serabisha, +94777377618 Thai Expired -
htogi	snet co (p	sales@print2dig#al.com	indusera@gmail.com
V to Tokyo		V to Western	🕡 🍋 Western
Guore Trai Er		KHALIL, 00962-795547441 Trial Expired -	Maman, 0122909589 Trial Expiratio
macg	stnet R	m_nas@ga.com.ja	samson@tiform.com.m)
west	in T	1 to	Selangor

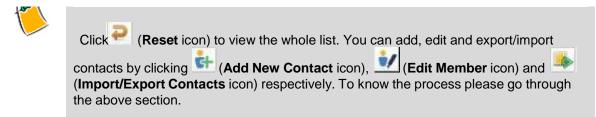
Card view screen



#### **Searching Contacts**

Follow the given procedure to search contacts.

- i. Enter the search item in the **Search** text box.
- ii. Select the required option with which you want to search in the adjacent in text box. The options are: **Contact Name**, **Contact Last Name**, **Company Name**, **Email**, and **Phone**.
- iii. Click (Search icon). The specific option is displayed in the Card view screen.
- iv. You may also click All / # / alphabets to search the contacts.



#### **Downloading VCard**

Follow the given procedure to download VCard.

- i. Click (Download VCard icon). The File Download dialog box appears.
- ii. Click **Save** to save the VCard or just click **Open** to view the Vcard. The VCard details are displayed as shown.

De Hone -	······································	una una a
Cartest	mont . Parised Test	
	E-mail Report Fail and Barry State	Concerta Con
Partient	-4181020821 Feogramme	+61893210877 Kooglanus
Cargery	Triat Expires	Trial Expred
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VCard details



# Chapter 6: Functionality of ishipdocs application as a Business user

For Business User the maximum file size per transaction is 3 GB, the storage capacity is 20 GB. You are capable of using all the facilities available if you are Business User.

In this chapter you will learn about:

- Creating new seats
- How to send files
- How to view inbox
- How to select files from storage for send files to print shop
- How to view sent items
- How to track files
- How to share files
- How to send DropFiles invitation
- How to manage contacts



### **Creating new seats**

You can avail three seats as a business user. To create more users follow the given procedure.

- 1. Click **account** from the action bar. The **My account** screen appears.
- 2. Click the User Management tab. The User Management screen appears.

My account					
Profile Payment (in	story User management				
Total seats: 3	Seals in use: 2	Available seals: 1			And Usibe
Reme	Tedephone	Tmail	LoginID	Status	Definite
entraz curton	7638799 Ext - Mati -	tab 32 @mailmatar.com	adu12@mailmator.com	(Attre)	
Amoute	955 45 45 45 5x2 - 1456 - 7080 768006	acreg@reikrator.com	ang Brainno' con	In-Active	0
Mag Donasta	7777798889 Exc - Nob -56765757-	mac@mailmator.com	mac@mellinator.com	A214	×

User Management screen

3. Click Add User. The Add User screen appears.

Jaer contact details	Login ID & password
First Barner	To the Dealer of Land
Lost Name	Lagin ID (
Lotati	Haskwordt
Telephone	Rate po Pasaword :
Talaphontol 200	Time Kind
Mathe	

Add User screen

Enter the following details and click Save. The confirmation message appears and the user gets added in the user's list. You can delete the user by clicking (Delete icon) as well as activate the user by clicking (Activate icon) if required.



## How to send files

You can send files via ishipdocs to specific recipients. The file size for the free user is 3 GB. The first transaction will be free of cost from second transaction onwards you will be charged \$ 5.

Click (send files icon) from the left hand panel. The Send Files screen appears with two tabs: Send files to print shop & Send files to others

### Send files to print shop

You can send files in bulk either from storage or directly uploaded files from your local system to the print shop.

In the Print order details section enter the **Project ID** and the **Purchase order number (PO#)** on the respective fields. Rest of the fields are automatically populated by the application.

#### How to select files from storage for sending files to print shop

You can also add files from the cloud storage to send files to the print shop. To do so, follow the steps given below:

Note: This feature is only available for users associated with the Print Service Providers.

4. Click Add files from storage as shown in the image below:

Send files		0.22 GB Use
Send files to print shop Send files to others		Download Outlook plugin
Print center details	Files information	*
Name: ARC Abhijit Address: Kolkata, Kolakata West Bengal India 700082	Selected files from storage (0)	Add files from storage
	Filename State Size Progress	11

5. Select the files that you want to add and click Close.



My Documents		Document name	Rev.	File status	Last uploaded
Test Workspace		Jellyfish.jpg	1	2	6/5/2014 11:17:45 PM
ត test	•	Koala.jpg	1	2	6/5/2014 11:16:59 PM
test1		Koalalogo.jpg	1	2	6/5/2014 11:16:42 PM
DropFiles		Lighthouse.jpg	1	2	6/5/2014 11:16:59 PM
brophies		Penguins.jpg	1	2	6/5/2014 11:17:16 PM
		Tree.jpg	1	8	6/6/2014 12:41:53 AM
		Tulips.jpg.jpg	1	2	6/5/2014 11:17:49 PM
		Tulipslogo.jpg	1	2	6/5/2014 11:17:17 PM
		William_HStewart,_photo_portrait_as_surgeon_general.jpc	1	2	6/6/2014 12:40:17 AM
	All	# a b c d e f g h i j k l m n o p q r s t u v v	vxyz		[1 - 9 of 9
		a bou organ jarma opqroture			[1 s si s]

6. The select files from storage will display the number of files that you have selected. You can then send these files to the print shop to print.

Files information		
Selected files from storage	<u>(3)</u>	Add more files from storage

### **Uploading Files for sending to Print Shop**

Under the **Send files to print shop** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,

Send file	es	
Send files to	print shop Send files to others	Sa Download Outlook
Print cen	nter details	Files information
S)	Name: ARC Abhijit Address: Kolkata, Kolakata West Bengal India 70008	Selected files from storage (0) Add biok from Morago
	t date & local time: 12 <sup>th</sup> May, 2016 17:24  & destination time:  Project ID:	
id bace	PO #:	Drop files here or click select files below
lies		Ditar Soliecthias
<b>b</b> cts		Total selected files 0
Includ	le delivery details	
Printing in	nstructions	ishipdocs global footprint
		B Z ∐ 444   *) (*   37   1≣ )≣

<u>Steps to select files for upload using HTML 5 Upload Tool:</u> ishipdocs User Guide



- Click on [Select Files] button to open the Document Selection window to select files/images from the local computer
- Select the files/images and then click on [Open] button on the Document Selection window to attach the files in the upload tool Alternatively
- Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page
- The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface. This is shown the screenshot below,

A1.2 Spec.pdf	×
A2.1 Plans.pdf	×
2 File(s) selected Selected File(s) Size 1498.804 KB	Select files
Total selected files 2	

• Click on [Clear] button to remove the selected files/images

After entering the relevant information user needs to click on **[Submit]** button to upload the files and then send the files along with the print order to the print shop.

Screenshot below displays successful upload and sending of files,

S	end files								0.00 GB 05eu
٢	Send files to print sh	op Send files to othe	5						Soution Contract Design
	Thank you for the o	rder. Your local print servic	e provider will contact you shortly. O	Order No: 162670 Due	Date: 14 <sup>th</sup> May, 2016				Send files to print shop
	Order Inform	nation							
		Order ID :	162670			Order By :	arc test 2		
		Order date :	13 <sup>th</sup> May, 2016		Orde	r due date :	14 <sup>th</sup> May, 2016 00:3	30 AM	
		Job Number :			P	O Number :			
	Sender Info	mation							
		Company name :	arctest2			City :	texas		
		Contact name :	arc test 2		St	tate/region :	Arizona		
		Address1 :	arc		Zip/;	oostalcode :	343433		
		Address2 :				Phone :	9999999		
		Country :	United States			Email :	arctest2@yopmail.c	com	
	Items	File Name			File Size		File Status		
	1	P5-Bridge_29_COWI.jpg			12.85 KB		Upload Success		



#### **Including delivery details**

• Tick the checkbox **Include delivery details** to view and enter information delivery company information and any associated notes.

Include delivery details					
Company name:		First name:		Last name:	
Email:		Phone:	1	Mobile:	
Address:		Address:		City:	
Country:	United States •	State/region:	-select-	Zip/postalcode:	
Set delivery notes					
		B / U ARG	9 (°   🖋   🗄 🚝		

• In the end enter **Printing Instructions** and click **Submit** to send the documents to a print shop to be printed according to the given printing instructions

Note: Click ishipdocs global footprints to view ishipdocs global printing locations.

### Send files to others

You can send files in bulk either from storage or directly uploaded files from your local system to the others (person or entity) through email from the application. In this case, the files will be send as an attachment with the email

In the **Recipient details** section enter one or more email address of recipient(s) (or select multiple email address from the Contacts section of the application), enter the **Subject** and **Message** of the email.

**Note:** Like, during files to print shop files can be uploaded from storage, the same can be done in this case.

#### **Uploading Files for sending to others**

Under the **Send files to others** tab on the **Send files** screen, there is the **HTML 5 Upload Tool**. This is shown in the screenshot below,



Send files	125
Send files to print shop Send files to others	💁 Download Outook
Recipient details	Files (Maximum 3 GB)
(email addresses can be separated by a comma or a semi colon)	Selected files from storage (0) Add hies from storage
Subject Message	zt l
	Drop files here or click select files below Clear Select files
B Z ∐ ASC   🤊 (№   🖋   🗄 ]∃	Total selected files 0
	Senc

#### Steps to select files for upload using HTML 5 Upload Tool:

- Click on [Select Files] button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on **[Open]** button on the *Document Selection window* to attach the files in the upload tool

#### Alternatively

• Open any folder on the local computer, drag and then drop the selected files/images in the space provided in the upload tool on the application page

The selected files/images will be displayed on the Upload Tool interface. The count of the selected files will also be displayed on the Upload tool interface.

• Click on [Clear] button to remove the selected files/images

After entering the relevant information user needs to click on **[Send]** button to upload the files and then send the files along with the print order to the intended recipients.

#### 'Cancel' button

A 'Cancel' button has been newly introduced under Send files to print shop tab on the Send Files screen. This button appears after user select files and enters all the relevant information and then clicks on the [Submit] button for sending the files for printing or for any other purpose.

#### **Reasons to use Cancel button**

- This button can be used to cancel transfer of files when the application displays error due to missing mandatory field data entry, wrong data entry etc. after clicking the **Submit** button
- This button can be used when user realizes after clicking **Submit** button that he/she would like to cancel file transfer

Screenshot below displays the **Cancel** button: ishipdocs User Guide



Send files			1.2
Send files to print shop Send files to others			😢 Download Outloo
Print center details	Files in	formation	
Name: ARC Abhijit Address: Kolkata, Kolakata West E		ted files from storage (0)	Add files from storage
Current date & local time: 12 <sup>th</sup> May, 2016 17:24 Due date & destination time: Project ID:			
PO#		Drop files here or click sele	t files below
			Clear Selectfiles
	Total	selected files 0	
Include delivery details			
Printing instructions			ishipdocs global footprin
	B / U 444	9 (e) 🥑 🖂 🖂	



Click (Download Outlook plugin button) to download Outlook plugin.



### How to View Inbox

You can view the details of the mails received from the Inbox menu. Follow the given procedure to view the e-mails.

1. Click (Inbox icon) from the left hand panel. The Inbox screen appears. You can delete senders, download files, search files from this screen.

Inl	box					0.17	7% of 20.00
				Search	II Sh	ow an	× Delete
.1"	Sender	Subject	Received date	Expire date	Tracking id	Downkiad	Print cart
D,	🖉 paci2dealexter.com	test	17" August, 2011	27° August, 2011	101032	(B)	68
Ċ	Sab510mailmator.co	Print	26" July, 2011	5" August, 2011	110978	۲	60
D	anytestümnänotot.e	test files	11 <sup>m</sup> July, 2011	21" July, 2011	318793		68
0	aub 12 grade uter. unt	test digital download storage files	5 <sup>e</sup> 3./v, 2011	15° 3.4v, 2011	JINTEL C	۲	68
D	🕼 radiale digenetration and	test	5° 349, 2011	15 <sup>th</sup> July, 2011	101126	۲	68
Ð	tanubs/ @mailinator.	test	4" July, 2011	14 <sup>th</sup> July, 2011	I.LEBANN	۲	68
m	Sab22@elaikintor.com	test	27 <sup>4</sup> June, 2011	7 <sup>m</sup> 3.8y, 2011	110.000	۲	68
D	anti anti Caralinatar.anti	test	27" 3,ne, 2011	7" 3.0y, 2011	LINES	۲	
0	Sabt20maluator.co	test	26" June, 2011	6" July, 2011	110231	۲	68
C	Canadau 7 Decalement com	test	24 <sup>4</sup> June, 2011	4 <sup>#</sup> 3.Jy, 2011	218177	۲	68
ņ	🕞 tatulu/dinakiana.com	test	23" June, 2011	3 <sup>19</sup> July, 2011	IIIIIII	۲	68
0	ant.22.0mmittat.com	test	22" June, 2011	2 <sup>re</sup> 3,6y, 2011	118092	۲	
10	ssb12@malcatur.com	test	22 <sup>10</sup> June, 2011	2" 3.4y, 2011	1 jonts 7	13	68

Inbox screen

#### 2. Searching Files

- a) Click **Search** button from the action bar. The **Search files** window appears.
- b) From the Field drop-down list, select specific option. The options are: Tracking ID, Sender, Subject, and Date Received. As soon as the field gets selected the check box and the condition related to the field get selected automatically.

	Field		Condition		Value
÷	Secider	191	E guraita		michale d@mailmatur.c
÷		31		æ	
F.		20		*	
-		1		*	
					Gil Wealt Chief
					San Present College

Search files window



- c) Enter the value related to the field.
- d) Click Go. All the files related to the field are displayed in the inbox list.



You may reset the fields if required.

#### 3. Show All

- Click **Show All** button from the action bar, the whole list of mails will get displayed.
- 4. Downloading Files
  - a) Click (Download Files icon) to download the file. The Download files window appears.

Subject	Official document			Conv to
Recipient	dipcust3@mailinator.c	om	S	Copy to torag
Date Sent	23 <sup>ro</sup> May, 2011			
Expiration	2 <sup>nd</sup> June, 2011			\$
Download files	8			
	Dow			
	Dow	Zip Inload	cad file(s) in zip format.	
File name :	<ul> <li>Comparison (1)</li> </ul>		oad file(s) in zip format.	
File namé :	<ul> <li>Comparison (1)</li> </ul>	button to downl		Download

Download files window

b) Select the file(s) that you want to download. There are three options: Download, Zip Download, and Copy to Storage. By clicking Download you are allowed to select the file and download it as per your selection. Zip Download allows you to download all files in zip format and Copy To Storage allows you to copy the file to the existing storage.

#### Download



- i. Select the file(s) that you want to download.
- ii. Click (Download icon). The selected files will get downloaded.



You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

#### **Zip Download**

• Click **Zip Download**. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

#### Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (Copy to storage icon) from the main screen. The **Copy to storage** window appears.

Files	
<ul> <li>Add zip to storage</li> <li>All inc</li> </ul>	Rvidual
Folder name	
Create folder by Tracking ID     Select an existing folder     Create New Folder	Mork Space(s) of abc     My Work Space     My Work Space     DwnerVault1
Done	

Copy to storage window

- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:



- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

#### 5. Deleting Senders

- a) Select the sender from the list.
- b) Click **Delete** button from the action bar. The selected sender(s) gets deleted from the list.

#### 6. Searching Files through Tracking Id

- a) Select the file that you want to view through tracking id.
- b) Click **Tracking Id**. The history window appears. You can view the detail of the file in the screen.

Mail box					
Fr	am:	michale d@ma	mos sofeniti		
Bubj	9(Z.)	Official Docum	ent.		
Messa	ige:	Official docume	ant.		
Files					
Tile llame			file Size	Status	
American Reprographics (	Camp	ery India Pv1,adf	172217	Liptoed Summer	

history window



### **How to View Sent Items**

You can view the details of the sent items from the sent items menu. Follow the given procedure to view the details of the sent items.

1. Click (sent items icon) from the left hand panel under the Toolbox. The Sent items screen appears. You can delete the items, display all the files, and search files from this screen.

			🙁 Re-upk	het	Search	[] a	ow all	🗙 Delete
Ē	Recipient	Subject	Sent date	topi	re døte	Tracking id	Download	Print cart
	shill protection care	1mel .	24 <sup>®</sup> August, 2011.	1"Sec	tarber, 2011	2111209		
Ē	ant statistic the	lest	24" August, 2011	74 Set	tenber, 2011	1111117	(1)	68
C	Subscriptioned Lat	PW/ Reeong Notes - 19th August	22" August, 2011	1*540	teriber, 2011	1110000	۲	
F	addede an an	Modified amprices user guide entral amprices Qu	19 <sup>th</sup> August, 2011	29 <sup>10</sup> Au	quat, 2011	1111855		58
-	(B staniate street)	Modified shootco user pulde and shiptors Ou	19" August, 2011	29" 44	sp.st, 2011	1111955	۲	68
c	S awaster water on	Vodified shocks user puids and shocks Ou	19 <sup>#</sup> August, 2011	29 <sup>4</sup> Au	quer, 2011	1111055	۲	68
h	Conde es una	Hodified shipdocs user guide and shipdocs Qu	19 <sup>4</sup> August, 2011	29 <sup>10</sup> -44	g.8t, 2011	1111964	۰	55
Ċ,	anal Statut	Nodified amprices user guide and arhodocs Qu	19" August, 2011	257.40	p.et, 2011	1111984	۲	68
-	Samad-musia.on	Modified shipdoos user guide and shipdoos Qu	19" August, 2011	29 <sup>10</sup> Au	gunt, 2011	1111969	(1)	62

Sent items screen

### 2. Re-upload

- e) If in any case the upload is not completed, you can re-upload the file by clicking the **Re-upload** button.
- f) Select the recipient whose file is not uploaded. The **Re-upload** button will get enabled.
- g) Click the **Re-upload** button, the **Re-upload** screen appears.

81	( <u>)</u>
	Submit

#### **Re-upload screen**

h) Select the files that you want to upload and click the **Submit** button. The uploading files screen appears as shown.

	Uploading files	
Filename BG032700001 TF B00327000003 TF	Busel Diate   Stat 1.27 MB 03/27/2000 11.09 Uploa 420 26 KB 03/27/2000 11.07	
loading to inhipdocs Asia, In Cross The window after uple		

Uploading files screen

### 3. Searching Files

a) Click **Search** button from the action bar. The **Search files** window appears.

	Fiola		Condition		Value
÷	Secider	191	Equate	<u>.</u>	michale d@mailmahor.c
-		9		<b>M</b>	
- 1		я		*	
-		M		*	
					Can Present Celliner

#### Search files

- b) From the Field drop-down list, select the specific option. The options are: Recipient, Subject, and Date Sent. As soon as the field is selected the check box adjacent to the field and the condition get selected automatically. You may change the condition as per your requirement.
- c) Enter the value related to the field.
- d) Click Go. All the files related to the field are displayed in the inbox list.



You may reset the fields if required.

#### 4. Show All

• Click **Show All** button from the action bar, the whole list of the sent items get displayed.

#### 5. Deleting Items

- a) Select the check box adjacent to the recipient name from the list.
- b) Click the **Delete** button from the action bar. The selected item(s) gets deleted from the list

#### 6. Viewing Files through Tracking Id

- a) Select the file that you want to view through tracking id.
- b) Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

Mail box			
From:	From: michale dgm		
Bubject.	Official Docum	ent.	
Message	Official docume	unt.	
Files			
Tile llame		file Stre	Status
American Reprographics Corp	any India Pv1,adf	172217	Liptoed Success

History window

#### 7. Downloading Files

a) Select the recipient whose file you want to download. Click (Download Files icon) to download the file. The Download files window appears.

lownload files			
Subject: Print			
Recipient: michale.d@mailinator.	com		
Date Sent: 19 <sup>99</sup> May, 2011			
Expiration: 29 <sup>th</sup> May, 2011			
Download files			
Dow			
Please dick zip download	Soutton to downl	cad file(s) in zip format.	
			Download

#### **Download files**

b) Select the file(s) that you want to download. There are three options: Download, Zip Download, and Copy to Storage. By clicking Download you are allowed to select the file and download it as per your selection. Zip Download allows you to download all files in zip format and Copy to storage allows you to copy the file to the existing storage.



#### Download

- i. Select the file(s) that you want to download.
- ii. Click (Download icon). The selected files will get downloaded.



You may search the file by entering the file name and clicking **Find** button. You may also click **Show all** button to view all the files.

#### **Zip Download**

 Click Zip Download. All the files will get downloaded in zip format. The Non IE users can only use the Zip Download process.

#### Copy to Storage

i. Click **Copy To Storage**. The **Copy to storage** window appears. You can also click (Copy to storage icon) from the main screen. The **Copy to storage** window appears.

Files	
🧖 Add up to storage 🥤 All inc	Inadual
Folder name	
Create folder by Tracking ID     Select an existing folder     Create New Folder	Work Space(s) of ARC     My Work Space     My Work Space     Morkspace 1     My Work space 2     My Work space 3     My Work space 5
Dane	Workspace 4     Morkspace 4



- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:



- **Create folder by Tracking ID:** You may create folder on the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.



# How to track files

You can track files at the same time you can track print documents through this module.

Follow the given procedure to track files.

# Click

1. Click (**Tracking** icon) from the left hand panel. The **Tracking** screen appears. You can track files as well as print the tracked file through this module.

Trac	kin	g					3	3.72% of 20 GB Use
File	tracki	ing Order tra	cking Print tracking					
	Shov	v all user items					Search Export	Show all
		ID	Recipient	Subject	File expiry date	Status	Last download	Downloads
0		16111653	abc@mailinator.com	test	20 <sup>th</sup> August, 2016	Ready to Download		0
E		16106935	manidipa.chakrabarti@e-arc.com	test	8 <sup>th</sup> August, 2016	Ready to Download		0
C		16103718	manidipa.chakrabarti@e-arc.com	test	4 <sup>th</sup> August, 2016	Ready to Download		0
E		16103053	madhu.prasad@e-arc.com	doc	31 <sup>st</sup> July, 2016	Download Completed	22 <sup>nd</sup> July, 2016	1
E		<u>16102373</u>	vishal.khosla@e-arc.com	PST file	31 <sup>st</sup> July, 2016	Download Completed	21 <sup>st</sup> July, 2016	4

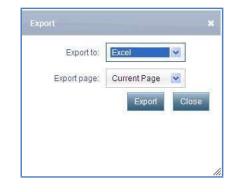
### 2. File Tracking

#### a) Searching Files

- i. Enter the tracking id of the file that you want to search in the **Tracking ID#** text box. You can also select the **Recipient** option and track files accordingly.
- ii. Click the **Search** button from the action bar. The specific file will be displayed in the grid section. You can see the status of the file, the recipient's name, the expiry date everything related to the file.

#### b) Exporting the lists

i. Click the Export button from the action bar. The Export window appears.



Export window

- ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.
- iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.
- c) Show All
  - Click the **Show All** button from the action bar, the entire list of the files with the tracking id are displayed in the grid section.
- d) History screen
  - i. Select the file that you want to view through tracking id.
  - ii. Click **Tracking Id**. The **history** window appears. You can view the detail of the file in the screen.

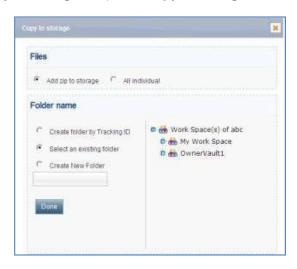
To Print Message Print	
Message Print	
les	
File Name File Size Status	
ter/Vel_Coleborete_Onine_Gude.pdf 825755 Upload Success	

History window

e) Copying To Storage



i. Click (Copy to storage icon). The Copy to storage window appears.



Copy to storage window

- ii. From the Files section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the Folder Name section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Create New Folder:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.



After the file(s) get included in the storage a confirmation message appears and if the storage limit exceeds a warning message appears.

#### 3. Print Tracking

• Click **Print Tracking** tab, the **Print tracking** screen appears.

							C Seatch	Export	E Show a
	0nler#	Email	-945	Order date	Oue date	Hodified on	Order Stat	as Paymes Status	Delivery details
c	1189 C	ente Dues	Winte Dum	12 <sup>47</sup> Mary, 2011	25 <sup>0</sup> May, 2011	12 <sup>47</sup> Mey, 2031	Upload Compl	ebd	
c	11 11 11 11 11 11 11 11 11 11 11 11 11	in ente inter (1)	ante. E una	12 <sup>0</sup> May, 2011	20 <sup>10</sup> May, 2011	12 <sup>0</sup> Hey, 2011	Quartedor: Sul	tentted	
c	🕼 115782	atria 🕑	Wenter Dumi	12 <sup>17</sup> May, 2011	16 <sup>10</sup> May, 2011	12 <sup>0</sup> May, 2011	Peynent Suc	anaful.	
c	11 <u>5796</u>	diete.	Car unite Car unite	12 <sup>#</sup> May, 2013	25 <sup>th</sup> Play, 2011	12 <sup>m</sup> Hay, 2011	these Questiede	c.Beau	

Print tracking screen

### f) Searching Files

i. Click Search button from the action bar. The Search orders window appears.

	Field	Condition	Value
•	Order#	Equals 💌	115842
Г			
Г			
Г			

Search orders window

- ii. Select the field from the Field drop-down list. The options are: Order #, Order date, Due date, Modified on, and Status. As soon as the field gets selected the check box and the condition related to the field get selected automatically. You may change the condition as per your requirement.
- iii. Enter the value related to the field.
- iv. Click **Go**. All the files related to the field are displayed in the Print Tracking grid section. You can see the status of the file, the recipient's name, the order date, the due date, the modification date, the status and the delivery details everything related to the files.
- g) Exporting the lists



i. Click the **Export** button from the action bar. The **Export orders** window appears.

Export to:	Excel	~
Export page:	Current Page	~
	Export	Clos

Export window

- ii. Select your preference from the **Export to** drop-down list. The options are **Excel**, **CSV**, and **XML**.
- iii. Select the page you want to export from the **Export page** drop-down list. You may select **Current Page** or **All Pages**.
- iv. Click **Export**. The page(s) gets exported.
- h) Show All
  - Click the **Show all** button from the action bar, the entire list of the files with the Order Id are displayed in the Print Tracking list.
- i) Copying to Storage
  - i. Click (Copy to storage icon). The Copy to storage window appears.



Files	
<ul> <li>Add zip to storage</li> <li>All inc</li> </ul>	Ridual
Folder name	
Create folder by Tracking ID     Select an existing folder     Create New Folder	Work Space(s) of abc     My Work Space     My Work Space     Omega OwnerVault1
Done	

Copy to storage window

- ii. From the **Files** section select **Add zip to storage** or **All individual**. The add zip to storage will allow you to store the zipped file and all individual option will allow to store the files individually.
- iii. From the **Folder Name** section there are three options:
- **Create folder by Tracking ID:** You may create folder in the right hand panel by selecting a cabinet or a folder. Click **Done** and the files will get included within the selected cabinet or the folder.
- Select an existing folder: In this case you may select an existing folder from the right hand panel and click **Done**. The files will get included in the selected folder.
- **Other:** Here you may create a folder and name it in the text box below and click **Done**. The folder will be created and the files will get included in that folder.
- j) Sending Email
  - i. Click write adjacent to for which tracking id you want to send an email. The Write Email window appears.

From :	michale.d@mailinator.com
To :	gdc@ishipdocs.com
cc÷	
BCC :	
Subject:	Regarding ishipdocs order # 116353
Message :	
	Send Close Prin

Write Email

- ii. Enter the mail id of the person whom you want to send an email in the **To** text box. You may enter ids in **CC** and **BCC** text boxes as well.
- iii. Subject will come automatically. You may change the subject if required.
- iv. Enter the message in the **Message** text box.
- v. Click Send.
- vi. Click **Close** after sending the email. The window will close automatically. You may also print the email by clicking the **Print** button.
- k) Sending SMS
  - i. Click write adjacent to for which tracking id you want to send a SMS. The Write SMS window appears.

Nrite SMS		
From :	michale d@mailinator.com	
To :	gdc@ishipdocs.com	
CC:		
BCC:		
Subject :	Regarding ishipdocs order # 116353	
Message :		1
		Close Print

Write SMS window

- ii. Enter the phone number whom you want to send a SMS in the **To** text box.
- iii. **Subject** will come automatically. You may change the subject if required, but you have to keep in mind number of characters allowing for SMS is 70 only.
- iv. Enter the message in the **Message** text box.
- v. Click Send.
- vi. Click **Close** after sending the SMS. The window will close automatically. You may also print the SMS by clicking the **Print** button.

**100** 

You can track the order by viewing the status of the order and when the delivery completes (Delivery info icon) appears for the particular order. Click (Delivery info icon). You will get the delivery information from the Delivery Information Details window.

**Note:** Another tab **'Order Tracking'** is similar to **'Print Tracking'** but it shows tracks of customer print orders from a PSP whereas personally logged-in user print orders are displayed under the 'Print Tracking' tab.



# How to share files

From this module you can able to store files in different folder. You can create your own folder or you can keep the files in the existing folders as per your requirement.

Follow the given procedure to store your files.



(Share icon) from the left hand panel. The Share screen appears.

Work Spaces			Files				
👼 Work Space 🔻	Folder 🔻	2	🗋 File 💌				11
🛚 🤠 Work Space(s) 🛢 📸 My Work Spa			Document Name	Rev.	File Status	File Size	La
My Docum			Copy of ExportedContacts.xls	1	2	17 KB	4/9
🛛 🚔 My Dropbo	ox	2	Section Contacts.xls	1	8	17 KB	4/8
합 🤠 OwnerVault1 메루 Shared by othe							
			T Jur				3

Share screen

#### Workspace

#### **Adding Workspace**

-		
	Vork Space	•

- 1. Place the cursor in the downward arrow of . Three options will appear in the drop-down list: Add/Edit work space, Remove work space and Set alert.
- 2. Select (Add/Edit work space icon). Make sure that the Work Space(s) of some company name is selected at the time you want to add another work space. The Add/Edit Work Space Item window pops up. The window has three tabs: Work space Information, Permission, and Statistics. The Work space information tab is displayed by default.

Work Space Infor	nation Par	elasion Statistic	\$	
Number				
* Narrat:				
Description				

Add Work Space Item

- 3. In the **Work space Information** tab:
  - a) Enter the name of the work space in the Name text box. This field is mandatory.
  - b) Enter the work space description if required in the **Description** text area.
  - c) Click Create. The confirmation message appears.
- 4. Click the **Permission** tab, the **Permission** screen appears. You can give permission to specific users who have availed the seats.

Work Space Information	Permission	Statistic	5		
Selected User(s)			Permission		
	Add	Remove	Permission	Allow	Deny
Users					
- All					

Permission screen

5. To select the user(s)/user role(s), click **Add**, the **User List** appears.

Ц	Users	
	Mac Donalds	

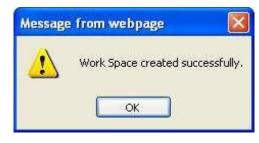
**User List** 

- 6. Select the users from the drop-down list. The User/User Roles list appears.
- 7. Select the user and click Add. The Permission screen pops up.

eate new work space					
Work Space information	erminion	Statistic			
Selected User(s)			Permission of Mac De	onalds	
	Add	Ramove	Permission	Allaw	Denny
			Pul Carbai	10	E
Users			Read Work Space	Full-Contrie	
🖓 🧌 Mac Donalda			Dopinibed Files	0	0
			Upload Files	E.	E
			Create/Lodate Folder	0	0
			Orante/Update Work Spece	2	E

Permission tab

- 8. Select the type of permission you want to provide to the users from the right hand panel.
- 9. Click **Create**. The confirmation message appears.



Confirmation message

10. Click **OK**. The number is created automatically.

Nork Space Inf	demation	Permission	Statistics	
Number N	NSP_11152	Ð		
* Nama:	Workspace.	4		
Description				

Number created in Edit Work Space Item

- 11. Click **Close** to close the window.
- 12. Select the workspace that you have created to upload files.
- 13. Click Add/Upload files. The Upload Document window appears.
- 14. Click Select Files. The Open dialog box appears.

1	Sample Pic	tani	20	₫ (7 🖽•	
My Flecont Documents	Surger Wyter Heri				
Desktop	The second				
3					
My Documents					
My Computer					
-					

- 15. Select the file that you want to upload from the particular location.
- 16. Click **Open**. The files get inserted in the **Upload Document** window.

	To uses of shaphings		IN (TILD 28 ME):	
Galania	There is a state		Program	w
anter des	Periliog	103.07 -0	1	
tue Hile and	Familing	27.85.18		
paset (pg	Pending	69.52.48		
tatar likes gig	Fenting	81.8348	C	
Netr-4	Spinalest 2 48			-

109 of 207

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ishii	pdocs	User	(Huide
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- 17. Click **Upload**. The files get uploaded in the workspace or the folder that you have selected.
- 18. Click **Close** to close the screen.
- 19. Click Add/Edit Work Space.
- 20. If you click **Add/Edit Work Space**, the **Edit Work Space Item** screen appears as shown.

	Sector Sector	Permission	Statistics		
Number W	212720				
* Name: V	Norkspace 4				
Description					

Edit Work Space Item screen

21. Click Statistics. All the operational occurrences will be displayed as shown.

A supply operating of a fact, sign as the design of		sion Sum	Nice -
	and a second	ancessed.	
Date	Category	Activity by	Description
6/27/2011 03:13 4M	ev Work Space folder	\$8032.024	New Work Space folder added by sab32 guite on work space item Fol
6/27/2011 03:19 AM	lork Space folder mod	seb32 guine	Work Space Folder modified by seb32 guhe on work space item Polder
6/27/2011 03:23 AM	en document uploader	sab32 guine	Work Space item B503270000 LS-TIP new document uploaded by sab
6/27/2011 03:23 AM	evi document uploader	sab32 pune	Work Space dem 850327000010.TJF new document uploaded by sab
6/27/2011 03:25 AM	ev document volgeder	seb72 guhe	Work Space item 800327000011.70* new document uploaded by sab
<		100-1	2

Statistics tab

22. Click Close to close the screen.

Removing Work space ishipdocs User Guide



1. Select the work space you want to remove and place the cursor in the downward

		ANDU	ohara	•
arrow of <b>l</b>	100000	I Contractor	unessenada.	1.00

- 2. Click the second icon 2. (Remove work space icon). A warning message appears.
- 3. If you are confirmed that you want to delete the work space then click **OK**. The confirmation message appears stating "Selected work space deleted successfully".
- 4. Click **OK** and the selected work space gets deleted from the tree.

#### **Setting Alerts**

- 1. Select the work space for which you want to set alert.
- 2. Place the cursor in the downward arrow of
- 3. Click the third icon (Set alert icon). The Alert Settings window popped up. There are lots of options.

Select all	
Add file to work space	
Delete file from work space	
Add folder to work space	
Delete folder from work space	
Change work space	
Delete work space	
Notification type: 🗹 Email	

Alert Settings window

- 4. For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting **Select All** option. The **File Alert Subscription** section consists of the following options:
  - Add file to work space: If you select this check box, any file added to workspace will be notified.
  - **Delete file from work space:** If you select this check box, any file gets deleted from the workspace will be notified to other members.
  - Add folder to work space: If you select t this check box, any folder gets added to workspace will be notified to other members.
  - Delete folder from work space: if you select this check box, any folder gets deleted from the workspace will be notified to other members.



- **Change work space:** If you select this check box, any change in work space will be notified to other members.
- **Delete work space:** If you select this check box, any work space gets deleted from the list will be notified to the members.
- 5. Select e-mail as a mode of notification.
- 6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 7. Click **OK**.
- 8. Click **Close** to exit from the **Alert Settings** window.
- 9. If you want to set alert for all the options directly select **Select All** check box. All the options get selected automatically. You can also select individual options as per your requirement.
- 10. Select Email in the Notification Alert Type.
- 11. Click **Set Alerts**. The confirmation message appears.
- 12. Click **OK**.
- 13. Click **Close** to close the window.



#### **Folders**

#### **Adding Folders**

- 1. Select the folder or work space where you want to add another folder.
- 2. Click the downward arrow of

Many options will appear.

3. Click the first option (Add Folder icon). The Add Work Space Item window pops up. The window has two tabs: Folder information and Statistics. The Folder information is displayed by default.

older information	Permission	Statistics		
Folder Name				
				Save (

Add Work Space Item

- 4. Enter the folder name in the Folder Name text box.
- 5. Click the **Permission** tab, the **Permission** screen appears. You can give permission to specific users who have availed the seats just like the Workspace section.
- 6. To select the user(s)/user role(s), click Add, the User List appears.
- 7. Select the users from the drop-down list. The User/User Roles list appears.
- 8. Select the user and click Add. The Permission screen pops up.
- 9. Select the type of permission you want to provide to the users from the right hand panel.



Folder Information	Permission	ŝ	tatistics				
Selected user(s)				Permission of Asmi	guha		
	10	da	Remove	Permission	Allow	Deny	
			10	Full Control	8	C	
Users				Read Folder	v	101	
8 Aprilipuha				Dovriond Pies	8	15	
				Upload Files	R.	武	
				Create/Update Folder	R	П	

Add Work space item screen

10. Click **Save**. The confirmation message appears.



Confirmation message

- 11. Click **OK**. The folder will be created.
- 12. Click **Add/Upload** from the **Files** drop-down list. The **Upload Document** window appears.
- 13. Click Select Files. The Open dialog box appears.
- 14. Select the file(s) that you want to upload from a particular location.
- 15. Click **Open**. The file(s) get selected in the **Upload Document** window.
- 16. Click Upload. The file(s) get uploaded in the Files section in the right hand panel.
- 17. Click **Close** to close the window.

## **Editing Folder**

- 1. Select the folder or vault that you want to modify.
- 2. Click the downward arrow of Folder . Different options will appear.



3. Click the second option (Edit Folder icon). The Edit Work Space Item window pops up.

older name Folder_1			
Folder information	Permission	Statistics	
* Falder Name: Falder	_1		
			Sava Cio

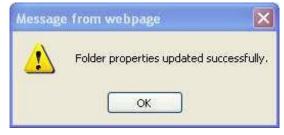
Edit Work Space Item window

- 4. Modify the information in the **Folder information**.
- 5. You may add or remove permission from the **Permission** tab.
- 6. Click **Statistics** tab. All the operational activities are displayed in the **Statistics** tab as shown.

Folder informa	fon Permiss	sion Statistics	
Date	Category	Activity by	Description
8/24/2011 02:28 4/4	New Work Space 1	Nider sab32 guina	New Work Space folder added by sab32 guha on work space new Folder
8/24/2011 02:31 AM	Work Space folder	nodi seb32 guhe	Work Space folder modified by satural guns on work space item Folder_
8/24/2011 02:34 AM	New document up	loader sa032 guhs	Work Space item 660327000002.70F new document uploaded by sab32
8/24/2011.02:34 AM	New document up	kander seb32.guha	Work Space Item 860327000004.70# new document uploaded by sab32
8/24/2011 02:34 AM	fanyi document up	loade: sab32 guine	Work Space Item 600327000003.73F new document upbaded by sab32
¢			3

Statistics tab

7. Click **Save**. A confirmation message appears and the folder gets updated successfully.



**Confirmation message** 

8. Click **OK** and click **Close** from the main window.

## **Deleting Folder**

- 1. Select the folder that you want to delete.
- 2. Click the downward arrow of Folder . Different options will appear.
- 3. Click the third option (Delete Folder icon). A warning message pops up asking whether you are sure that you want to delete the folder.
- 4. Click **OK**, if you really want to delete the folder. Your folder gets deleted from the list.

## **Setting Alert**

- 1. Select the folder for which you want to set the alert.
- 2. Click the downward arrow of Folder . Different options will appear.
- 3. Click the fourth option (Set Alert icon). The Alert Setting window pops up. There are lots of options.

Select all		
Add file to folder		
Delete file from folder		
Add folder		
Delete folder		
Change folder		
Sharing folder with another user		
Folder sharing revoked from another user		
Notification type: 🗹 Email		
volincation type is Email		
		-
	Set alerts	Close

Alert Setting window

- For setting notification for the file(s), select the appropriate options or you can select the options altogether by selecting Select All check box. The File Alert Subscription section consists of the following options:
  - Add file to folder: If you select this check box, any file added to folder will be notified.
  - **Delete file from folder:** If you select this check box, any file gets deleted from the folder will be notified to other members.
  - Add folder: If you select t this check box, any folder gets added will be notified to other members.
  - **Delete folder:** If you select this check box, any folder gets deleted will be notified to other members.
  - **Change folder:** If you select this option, any change in folder will be notified to other members.
  - **Sharing folder with another user:** If you select this check box, any folder shared with another user will be notified to other members.
  - Folder sharing revoked from another user: If you select this check box, any folder sharing cancelled or withdrawn from someone will be notified to other members.
- 5. Select e-mail as a mode of notification.
- 6. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 7. Click OK.



8. Click **Close** to exit from the **Alert Settings** window.

## **Sharing Folder**

- 1. Select the folder that you want to share.
- 2. Click the downward arrow of Folder . Different options will appear.
- 3. Click the fifth option (Share Folder icon). The Share Work Space Folder window pops up. The folder name section displayed the folder name that you want to share.

	ipinco foldor		
Folder name	Print Document		
Create in	ritation Shared list (3)		
	(email addresses can be separated by a comma or a semi colon)		
To	sabamig@planwell.com		Select contacts
Expiration:	03/16/2012		
Permission:	O View () Edit		
. Message	Please accept this invitation.		
	в / ц ни   • <mark>7</mark> №   • <mark>7</mark>   I≣ I≣	end	Close

Share Work Space Folder window

- 4. The window has two tabs: Create invitation and Shared list. The **Create invitation** screen is displayed by default.
- 5. Create invitation:
  - a) Enter the email address of the person whom you want to share. You can share folders with the same account users as well. To do so, enter the email id of the account user in the **To** text box of the **Create invitation** screen.
  - b) If you want to share the folder with the existing contacts, click the Select Contacts button adjacent to the To text box. The Contacts screen will appear. It displays the list of existing contacts.

Search:	in Contac	tt Name 🛛 🔽 🤾	P ¢ł		
	Contact Name	Company Name	E	nail	
D	Bipul Mondal	checkshare 19	che	ck_share@yahoo.in	2
	8 bipul m	ARC	bip	ulm@planwell.com	
	Bipul PSP Customer User	ARC	CUS	tomer@mailinator.co	
	B Dipti Pradhan	Demo-Qa-ARC	dip	tirp101@yahoo.com	
	Rac Johnson	SDC company	ma	cjohnson@mailinator	
	8 mac Johnson	ARC	ma	:123@mailinator.com	
	8 Manash Dutta	Demo-Qa-ARC	der	noqabm3@gmail.com	
	8 manasis m	ARC	ma	nasism@planwell.com	8
All # a	ı b c d e f g h i j k l m n o ı	pqrstuvwxyz	<u>r</u>	[14	of 14]
			Add	Add & Close	Close

**Contacts screen** 

- i. Select the specific contact(s) from the list whom you want to share the folder.
- ii. Click Add & Close or click Add and Close separately to close the window.



You can search specific contact, add new contacts and delete existing contacts from the list by clicking (Search icon), (Add New Contact icon) and (Delete Contact icon) respectively. Click (Reset icon) to reset the contacts. To know more about Adding New Contact please go through How To Manage Contacts.

- c) To select the expiration date, click (Calendar icon). The calendar will be displayed, select the date from the calendar.
- d) Select the View option or the Edit option from the Permission field. The view option will allow the selected contacts to view and download the shared files within the folder and the edit option will allow the selected contacts to add/upload the files within the folder and delete the files uploaded by the user.
- e) Write down a message in the Message text field.

### 6. Shared list

a) Click the Shared list tab. The Shared list screen appears. The shared list displays the list of invitees to whom you have already sent invitation to view or modify the folder.

a the second state of the	rhaced Fat [2]						
Search	in -Select one	- Re	aat Ra-in	rta Re	000 in 1	Esport	
Tmail or name	Statue	Shared date	Expiry slate	Permission	tdif anvitate information	Add In contacts	Show Hessay
samrat doji	Active	1/90/2012	2/29/2012	Verv		NAME AND ADDRESS OF ADDRE	-0
mec Johnson	Adlve	2/1/2012	3/2/2012	Vev			ä
T Boul PSP Customer Liter	Actor	1/31/2012	3/5/2012	Veri	•		-

### Shared list screen

b) To search the contact from the shared list, enter the search string in the Search text

box, select the search criteria from the **in** drop-down list and click **Search** icon). The particular contact will be displayed in the grid section. Clicking **Reset** button will erase the search string from the **Search** text box.

- c) To re-invite any contact(s) from the shared list, select the invitee(s) and click the **Re-invite** button. The invitation will be again sent to the specific invitee(s) and a confirmation message will be displayed after successful invitation.
- d) To remove invitee(s) from the Shared list, select the invitee(s) and click the **Remove** button. The selected invitee(s) will be removed from the shared list and a confirmation message will be displayed after successful deletion.
- e) To export the existing invitee list, click the **Export** button. The **Export invitee** list window appears.

For	nat: Excel 🐱	
it son		

Export invitee list window



- i. Select the file format in which you want to export the invitee list from the **Format** drop-down list.
- ii. Click the **Export** button. The list of invitees will be exported in the selected format.
- iii. Click the **Close** button to close the window.
- f) To modify the existing invitee, click (Edit invitee information icon). The Edit invitee information window pops up.

Invitee:	samrat	dcpl@gm;	ail.com
Status:	Active	*	
Expiry:	2/29/2	012	t
		Save	Close

Edit invitee information window

- i. Select the status of the invitee from the **Status** drop-down list. There are two options: **Active** and **Inactive**.
- ii. To select the expiry date, click [10] (Calendar icon). The calendar will be displayed, select the date from the calendar.
- iii. Click **Save**. The information is saved.
- g) To view the invitation message for specific invitee, click (Show Message icon). The Invitee Message window pops up showing the invitation message.

Invitee Message	
Please check this folder.	
	M

Invitee Message window



- 7. To send the invitation to specific contacts, click the **Create invitation** tab first and then click the **Send** button from the screen. The confirmation message appears if the share invitation is successfully sent.
- 8. Click Close button to close the Share workspace folder screen.



New users have to accept the invitation and register to ishipdocs application to view or modify the shared folder. For registered users the above process is not mandatory, they can access files and folders without accepting the invitation shared by other users.

## Viewing shared list

- 1. To view the list of invitees for a particular folder, select the folder.
- 2. Click the downward arrow of Folder . Different options will appear.

3. Click the sixth option (Shared list icon). The View shared list screen appears which displays the list of invitees for that particular folder.

Shared Rid (A)	_									
Search	at -54	Nect one		Q Ret	et l	Reimite	R	emove	Export	
🗇 fmaf or name		Status	Shar	rod data:	Expany d	late	Prevenation	falt insta adormati		Show Hessage
Sanvat dopi	A	19.23	1/30/2	012	2/24/2012		vieri.			0
Boul PSP Customer User	Å	c5ye	1/31/2	510	3/1/2012		View			DODD
E Boul Hondal	4	chie	2/9/20	iz	3/10/2013		Ver	2		03
E bipulm	A	ctre .	2/9/20	17	3/10/2012		THEY.			60
										1997

View shared list screen

4. To search the invitee from the shared list, enter the search string in the Search text

box, select the search criteria from the **in** drop-down list and click **Search** icon). The particular invitee will be displayed in the grid section. Clicking **Reset** button will erase the search string from the **Search** text box.



- 5. To re-invite any contact(s) from the shared list, select the invitee(s) and click the **Re-invite** button. The invitation will be again sent to the specific invitee(s) and a confirmation message will be displayed after successful invitation.
- 6. To remove invitee(s) from the Shared list, select the invitee(s) and click the **Remove** button. The selected invitee(s) will be removed from the shared list and a confirmation message will be displayed after successful deletion.
- 7. To export the existing invitee list, click the **Export** button. The **Export invitee** list window appears.

For	nat Excel 🖌	

Export invitee list window

- a) Select the file format in which you want to export the invitee list from the **Format** drop-down list.
- b) Click the **Export** button. The list of invitees will be exported in the selected format.
- c) Click the **Close** button to close the window.
- 8. To modify the existing invitee, click (Edit invitee information icon). The Edit invitee information window pops up.

Invitee:	samrat	dcpl@gma	ail.com
Status:	Active	~	
Expiry:	2/29/2	012	
		Save	Close

#### Edit invitee information window

a) Select the status of the invitee from the **Status** drop-down list. There are two options: **Active** and **Inactive**.



- b) To select the expiry date, click <sup>[10]</sup> (Calendar icon). The calendar will be displayed, select the date from the calendar.
- c) Click Save. The information is saved.
- 9. To view the invitation message for specific invitee, click (Show Message icon). The Invitee Message window pops up showing the invitation message.

Invitee Message	*
Please check this folder.	
	11

Invitee Message window

10. Click the **Close** button to close the **View shared list** screen.

# **Refreshing the Page**

Click (**Refresh** icon). The Work Space section gets refreshed.

### **Files**

## **Adding Files**

Go to **Cloud Workspace** > Click on the Folder where you would like to upload the file(s) from the left-hand panel > Click on **File** drop-down > Click on **Upload Files** menu item

Screenshot below highlights the **Upload Files** menu item on the **Cloud Workspace** screen,



ishipdocs Store. Share. Send. Pitrt Arywhere.	Welcome a sign out   account   settings   help center   expiration:15 <sup>th</sup> support: 1-855-Go iShip   support@is	what's new User July, 2016
send files	Files	0.00 GB Used
Image: Solution of a content of a	File       Count per page:       15         Upbad files       Upbad files       Rev. File status       File size       Last upboaded         Upbad folders /files       Rev.       File status       File size       Last upboaded         Ownhoad       Copy       Move       History       Link       Set alert       Export         Add to print cart       Image: Set alert       Image: Set alert       Image: Set alert       Image: Set alert	▼     Share file
dropfiles	All # a b c d e f g h i j k l m n o p q r s t u v w x y z	[0 of 0]
tps://www.arctechh.com/ishipdocscabinet/Cabinet/CabinetEditor.aspx?TAppID=uA	SZ3Y1AXM=#	

The **HTML 5 Upload Tool** will now open up instead of the **Silverlight Upload Tool**. This screen is shown below,

ishipdocs store, share. send. cloud print.	Upload document
Target: 'My Documents'	
	Create New Copy Create New Copy Create New Revision Create New Revision es here or click select files below
Close after operation completes.	Upload now Clear Select files

### Steps to demonstrate upload of files:

- Click on [Select Files] button to open the *Document Selection window* to select files/images from the local computer
- Select the files/images and then click on [Open] button on the *Document Selection window* to attach the files in the upload tool
   *Alternatively*
- Open any folder on the local computer, drag and then drop the selected files/images in the
  - space provided in the upload tool on the application page

The selected file is shown in the screenshot below,

Upload docu
•
×
Upload now Clear Select files
Upload now Clear Select files

- Click on [Upload Now] button to start the uploading process
- *Optionally:* Tick the checkbox **Close after operation completes** will automatically close the open Upload Tool window after the completion of upload
- Optionally: Select the option Create New Copy, if an already existing file in the application is being uploaded again. This will create a new copy of the already existing file. Select the option Create New Revision if a new revised version of the document with the same name is being uploaded again. Below screenshot displays the successfully uploaded file on the Upload Tool interface:

hipdocs	prinž.				Upload docu
Target: 'My Docum	ents'				
In case of duplicat	e document :	Create New Copy	•		
Bridge_Build	ing.jpg				
1 File(s) selected	Selected File(s	) Size 106.886 KB	l	Jpload now Cl	ear Select files
Close after operation	on completes.				Close

- Is needed: Click [Clear] button to remove the selected files
- After the completion of successful upload, click [Close] to close the window

Screenshot below displays the successfully uploaded file under the target folder:

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<mark>iship</mark> ₅₀	The Share. Send. Print Anywhere.		Welcome arc test 2 sign out   account   settings   help center   what's new expiration:15 <sup>th</sup> July, 2016   support: 1-855-Go iShip   support@ishipdocs.com	User
	Cloud Workspace			0.00 GB Used
send files	👶 Cloud Workspace 🔻 🗎 🗎 Folder 🔻	z	Files Pri	nt Cart 0
$\searrow$	e- 📸 Cloud Workspace(s) of arctest2 ॑e- 🍓 My Work Space		☐ File ▼ Count per page: 15 ▼	2
inbox	e- My Documents e- 👬 DropFiles e- 🚃 Shared by others		Document name         Rev.         File status         File status         Last uploaded         ▼         Share fil           ③         ③         ①         Bridge_Building.jpg         1         憂         106.99 KB         5/13/2016 05:07 AM         ①	le
sent items				-
tracking				
cloud workspace				
-				
			All # a b c d e f g h i j k l m n o p q r s t u v w x y z [1	of 1]
dropfiles				



# 10. Creating Revised Document

- a) If you want to modify the existing document, click (Download icon). The file gets downloaded.
- b) Modify the file.
- c) Click **Add/ Upload** from the **File** drop-down list. The **Upload Document** window appears.
- d) Select Create New Revision from the In case of duplicate document drop-down list.
- e) Click **Select Files** and upload the modified file.
- f) Refresh the page. The file will display as **Revised 2** as shown.

Document Name	Rev.	File Status	File Size	L
Blue hills, jpg	1	8	28 KB	6/:
Sunset.jpg	1	8	70 KB	6/:
🕲 🗍 Water lilies.jpg	2	8	82 KB	6/:
(S) 🗍 Winter, jpg	1	2	103 KB	6/:

## **Revised document**

11. Click **History** from the **File** drop-down list. You can see both the files, the original one as well as the revised one. You can download the files as per your requirement.



# **Copying Files**

- 1. Select the files that you want to copy from one folder to another folder.
- 2. Click the downward arrow of \_\_\_\_\_\_\_. Different options will appear.
- 3. Click (Copy files icon). The Select Folder window popped up.

Select folder	
🛢 👬 Work Space(s) d	of abc
🟮 🤠 My Work Spa	ce
🛯 👼 OwnerVault1	
	Close

Select folder window

- 4. Select the folder where you want to copy the files. A warning message appears stating whether the user is sure to copy the file in that particular location.
- 5. Click **OK** if you are sure to copy that file in that particular location.
- 6. Click **Close** to close the window. The file will be copied to the folder as per your choice.

## **Moving Files**

- 1. Select the files that you want to move from one folder to another folder.
- 2. Click the downward arrow of File . Di

Different options will appear.

- 3. Click (Move files to other folder icon). The Select Folder window popped up.
- 4. Select the folder where you want to move the files. A warning message appears stating whether the user is sure to move the file in that particular location.
- 5. Click **OK** if you are sure to copy that file in that particular location.
- 6. Click **Close** to close the window. The file will be moved to the folder as per your choice.



## **Viewing History**

1. Click the downward arrow of

. Different options will appear.

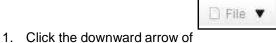
2. Click (View file history icon). The File History window popped up, where you can see the files history.

٤	Change Set 113351 [New file uploaded ]	Category	User Name	Change Type	Modify
3	1122E1 I New Flaundard 1				
	TTOODT [ Mew use abloaded ]	Add	DipankarTest Cust Comp	New file uploaded to work s	¢ 4/11/201

File History window

3. Click **Close** to close the File History window.

## **Deleting Files**



- . Different options will appear.
- 2. Click (Delete files icon). A warning message pops up asking whether you are sure that you want to delete the file(s).
- 3. Click **OK**. A confirmation message appears stating "Selected documents successfully deleted".
- 4. Click **OK**. The document(s) gets deleted from the selected folder.

# **Linking Files**

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Click the downward arrow of \_\_\_\_\_\_. Different options will appear.
- 3. Click the sixth option (Link files icon). The Document Download Link(s) window popped up. The link of the download link is displayed by default.

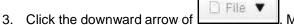
	orate/CabinetDocumentDownloader.ashx?Key=6141zIOLaES
740	5
Add expiration date	

Document Download Link(s)

- 4. You may or may not want to add expiry date. Adding expiry date implies that the file can be downloaded before the expiry date only and if the date exceeds due to any reason you won't be able to find out the file.
  - a) Select Add expiry date check box to add the expiry date.
  - b) Click (Calendar icon) to add the expiry date from the calendar.
  - c) To remove the expiry date, deselect the **Remove expiration date** check box. This means there is no stipulated time frame for downloading the package.
  - d) Click Individual Expiration Date to create your own expiry date.
- 5. Click **Create Link** and the link gets added under **Document Package Download** Link(s) text area.
- 6. Click **Copy to Clipboard**. The confirmation message appears stating links get successfully added to the clipboard.
- 7. Click Close. The link gets copied to the clipboard.

# **Setting Alert**

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Select the file(s) from the list for which you want to set alert.



Many options will appear.



4. Click the seventh option (Subscribe for alert icon). The Alert Settings window popped up. The selected documents get displayed under Selected Documents section.

Document Name	Desciption	
Copy of ExportedCon	ta	
Select all		
Delete file		
Sharing file with	n another user oked from another user	

Alert Settings window

- 5. For setting notification for the file(s), select the appropriate options. The **File Alert Subscription** section consists of the following options:
  - **Delete File:** If you select this check box, any file deleted will be notified.
  - **Sharing file with another user:** If you select this check box, any file shared to some other person will be notified to other members.
  - Sharing file revoked from another user: If you select this check box, any file sharing cancelled or withdrawn from someone will be notified to other members.
- 6. Select E-mail as a mode of notification.
- 7. Click **Set Alerts** to set the notification alert as per your selection. The confirmation message appears to confirm successful settings.
- 8. Click **OK**.
- 9. Click **Close** to exit from the **Alert Settings** window.



## **Exporting the List of Files**

- 1. Select the folder or cabinet from the Cabinets section. The files within the folder those are uploaded are displayed in the Cabinet Files list.
- 2. Click the downward arrow of \_\_\_\_\_\_. Many options will appear.
- 3. Click the eighth option *(Export icon)*. The **Export Data** window popped up.

Format: E	vcol w	
Export	Close	

Export Data window

- Select the type of format from the Format drop-down list. The options are Excel, CSV, and XML. Selecting specific option will enable the list of files to get exported according to that particular format.
- 5. Click **Export**. The **File Download** dialog box appears.
- 6. Click Open to view the document that gets exported then save it to a particular location or else click Save. The Save As dialog box appears. Select the specific location where you want to save the document and click Save. The document gets saved into that particular location and the confirmation message appears.
- 7. Click **Close** to close the Export Data window.



# **Refreshing the Page**

Click (**Refresh** icon). The Files section gets refreshed.

## **Downloading File**

- 1. Select the folder or workspace. The list of files within the folder is displayed.
- 2. Select the file from the list that you want to download.
- 3. Click (Download icon). The File Download dialog box appears.
- 4. Click **Open** to view the file or **Save** to save the file in a particular location in your machine.

# **Share Workspace document**

- 1. Select the file that you want to share.
- 2. Click (Share File icon). The Share work space document window appears. At the top of the window the name of the document that you are sharing will appear.

Expeription: 09/26/2011		Wessage			
		B / U **	<b>9 6 9</b> 18 15 15	Stare	Cios
nvitee list					
Add multiess Remove initial	46)				
Email or name	Status	Expire date	Edit invitee information	Add to contacts	

Share work space document window

- 3. In the **Share Info** section:
  - Click (Calendar icon) to select the expiry date of the shared document.
  - Write down a message in the **Message** text field.
- 4. In the **Invitee list** section:
  - a) Click **Add Invitees** from the **Invitees List** section. The **Add Invitees** window pops up.

Email	vitee email			edd to mittee								
Select	from contacts							-				
Search	h in Cont		act Hame 🔗	me 😠 🔍 Ə 🤃 🗙								
	Contact Name		17.8	Company Name			Email					
15	B spri guta			ARC		asmig @mailriator.com						
17	R Asti guha			ARC esting Britelinetor.com ARC nec@mailmetor.com			com.					
Ū.	R Mac Donalda						In the company of the second sec					
0	8 seb 32 guite											
0	B seberni puble			ARC sab34@mailnator.c				2011				
0	8 ugan mba			ARC		11	genê	etal	inator,	com		
All # (	bcdetghij	k L m	n o 1	arstuvw	x v z						16	af 6]

Add invitees window

- b) Enter the email in the **Email** text box.
- c) Click Add to invitee. If the e-mail id is new then a confirmation message appears stating that the e-mail is successfully added. You can view the mail id within the invitees list.
- d) If you want to add contacts from the My Contacts section, select the contact name from the list and click Add. A confirmation message appears stating "invitees successfully added". You can view the contacts within the invitees list.
- e) Click OK.
- f) Click Add & Close or click Add and Close separately to close the window.



You can add new contacts and delete existing contacts from the list by clicking

(Add New Contact icon) and (Delete Contact icon) respectively. Click (Reset icon) to reset the contacts. To know more about Adding New Contact please go through How To Manage Contacts.

### 5. Removing Invitees:

a) Select the invitee(s) whom you want to remove from the invitee list.



- b) Click **Remove Invitees**. A confirmation message appears stating "Selected Invitee(s) successfully deleted".
- c) Click **OK**. The invitee(s) gets deleted from the list.
- 6. Editing Invitee Information:
  - a) Click . The Edit invitee information window pops up.

Invitee:	mac@m	ailinator.o	com					
Status:	Active	~						
	9/28/20	9/28/2011						
		Save	Clos	e				

Edit invitee information window

- b) Select the status from the **Status** drop-down list. There are two options: **Active** and **Inactive**.
- c) Click to select the expiry date.
- d) Click **Save**. A confirmation message appears stating "Invitee information successfully saved".
- e) Click OK to continue.
- 7. Click **Share**. A confirmation message appears stating "Selected item successfully shared".
- 8. Click **OK** to continue.

0

9. Click it to close the window.

## Adding Comment

1. Click (Comment icon). The **Comments** window appears.

Enter your comment here	Add comment		

Comments window

- 2. Enter the comment in the Enter your comment here text box.
- 3. Click Add Comment. A confirmation message appears.



Confirmation message

4. Click **OK** to continue.



You can delete the comment by clicking <sup>(2)</sup> (**Delete** icon). You can also edit the comment if required and add more comments to it.



# **How to Send DropFiles Invitation**

From this module you can give permission to the selected users to view the DropFiles in the store

files. Follow the given procedure to share the DropFiles.



Click (**DropFiles** icon) from the left hand panel. The **My DropFiles** screen appears.

DropFiles	
DropFiles configuration	
() Your DropFiles size	is not yet specified. So, you can use the available storage space.
Allocated DropFiles space	e: 0 Bytes
Used DropFiles space:	0 Bytes
DropFiles Invitation	
Send DropFiles invitation	I Show invitee list

**DropFiles screen** 

## **DropFiles Info**

The **DropFiles Info** section consists of the following information: Available Storage Capacity, DropFiles storage capacity, DropFiles occupied size, Current DropFiles name, and the url of the location of your DropFiles. You can change the DropFiles Storage Capacity and the Current DropFiles Name.

A DropFiles screenshot is shown below,

Drop	Files configuration									
Acco	ount					User				
Avail	lable storage/DropFiles space: 18.42 GB					Allocated DropF	iles space: 1 GB			
Occu	upied DropFiles space: 19.98 MB					Used Drop Files	space: 19.98	3 MB		
	ocate space									
rop	Files Invitation									
Sen	nd DropFiles invitation Show invite e list									
nvit	tee list									
eard	ch: inSelect one	• Q Reset	Re-ir	vite Remove	invitees Cour	ntperpage: 50	•			
	Invitee	Change DropFiles		Expire date	File count	Last upload date	Status	Edit	Add to contacts	
	srinivas@ mir rorplus.com	Srinivas@mirrorplus.co	2	7/31/2015	3	6/19/2013	Active		÷.	
	Srinivas. Mukkamala@e-arc.com	My DropFiles	1	6/1/2018	0		Active			
							Active		÷.	
	rahul@e-arc.com	Rah ulD ropFiles	Ń	10/31/2013	0		Active			
	rahul@e-arc.com manidipac@planwell.com	Rah ulD ropFiles My DropFiles		10/31/2013 2/27/2014	0 <u>13</u>	9/27/2013	Active		0-	
						9/27/2013				
	man idipac @plan well.c om	My DropFiles	1		13	9/27/2013	Active			
	man idipac @plan well.com man idipac @plan well.com	My DropFiles Manidipa	1 U		<u>13</u> 0	9/27/2013	Active Active			
	man idipac @plan well.c om man idipac @plan well.c om man idipac @plan well.c om	My DropFiles Manidipa ie11 test	12 12 12	2/27/2014	<u>13</u> 0 0	9/27/2013	Active Active Active			

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To change the DropFiles capacity, follow the given procedure.

- a) Enter the DropFiles storage capacity in numerical number in the DropFiles Storage Capacity text box.
- b) Select the capacity from the adjacent drop-down list. The options are **Byte**, **KB**, **MB**, **GB**, and **TB**.
- c) Click **Save**. A confirmation message appears stating "Dropbox information successfully saved".
- d) Click OK.
- e) You can allocate DropFiles size to the individual user. Click **Allocate user DropFiles size** button. The **Allocate user DropFiles size** window appears.

Select user:	sab32 guha	*	
opbox storage capacity:	1	GB	×
)ropbox occupied size: !	9.01 MB		
	Save	CI	ose

Allocate user DropFiles size window

- f) Select user from the Select user drop-down list.
- g) Enter the DropFiles storage capacity.
- h) DropFiles occupied size is given.
- i) Click **Save**. A confirmation message appears.

DropFiles size for selected use	r is saved successfully.
	ОК

Confirmation message



## **Invitee List**

From this section you may send invitation to the persons who can able to view the documents in your DropFiles. Follow the given procedure to invite the persons to view the documents within the DropFiles.

1. Select **Show invitee list** check box. The Invitation list will be displayed below the checkbox.

Drop	pFiles Invitation											
Se	end DropFiles invitation	🔽 Sho	w invitee list									
Invi	itee list											
Sea	irch:	in	Select one	Q	Reset	Re-i	nvite Rer	nove invitees	Count per page:	15 💌		
	Invitee			Chan folde	ge DropFile r	5	Expire date	File count	Last upload date	Status	Edit	Add to contact:
	manidipac@gmail.com			test		Z		0		Active	•	ů.
	manidipac@gmail.com			My Dro	oFiles	-V		2	8/20/2013	Active		<b>0</b> -

Invitee list section

### 2. Searching Invitees

If the invitee already exists you may search the invitees. To do so, follow the given procedure.

- a) Enter the search item in the **Search** text box.
- b) Select the particular option from the **in** drop-down list. The options are: **Email or Name** and **Expiry**.
- c) Click (Search icon). The specific option is displayed in the Invitee list.
- d) You may also click All / # / alphabets to search the contacts.

#### 3. Inviting Members

To invite the members follow the given procedure.

 a) Click Send DropFiles invitation button adjacent to the Show invitee list checkbox. The Send DropFiles Invitation window pops up. The window has two tabs: Invitation and DropFiles Folder.

Invitation	DropFiles folder	
	(email addresses can be separated by a comma or a semi colon)	
To:	jh.	Select contacts
Subject:		
Massage		
Message: Expiration:	B I U 444 → ℃ → ↓ 등 1= 9/21/2013 mm Drop folder creation mandatory	
Message: Expiration:		

Send DropFiles Invitation window

b) Invitation tab:

		<b>;</b>	
		Select	
i.	Click	contacts	to add invitees. The <b>Add Invitees</b> window pops up.

Search	in Co	ntact Name 🛛 🔍	P C+ #x	
	Contact Name	Company Name	Email	
0	R (403)266-5954 Labban Buddey	Trial Expired	ebuckley Doarboncopyr	
0	8 +35314263700 Trapatrick	Thisl Expired	ftz@oaftprnt.le	
Ξ.	R +61893210677 Kaugahos	Titel Expired	weiterth@dockvark.c	
D.	8 +81-3-5791-4080 Kondo	Trial Expired	hrio@fsnet.co.jp	
0	8+94777299673 Rajawasan	Thial Expired	sales@print2digtal.com	
G	8 +64777377638 Serasirina	Trial Expired	Inducera @gmail.com	
10	8 009477140421 Gonewardana	Trial Expired	mac@shret.R	
100		Contraction of the		

Add Invitees window



- ii. Select the contact name from the list of contacts.
- iii. Click Add. A confirmation message appears.



Confirmation message

## • Searching Invitees

- i. Enter the search item in the **Search** text box.
- ii. Select the particular option from the in drop-down list. The options are: Contact Name, Contact Last Name, Company Name, Email, Phone.
- iii. Click (Search icon). The search member will be displayed in the grid section.
- iv. Select the member and click Add him/her in the invitee list.
- v. Click **Close** to close the window.



Click **Reset** button to reset the setting.

### a) DropFiles Folder tab

i. Click the **DropFiles Folder** tab. The following screen appears.

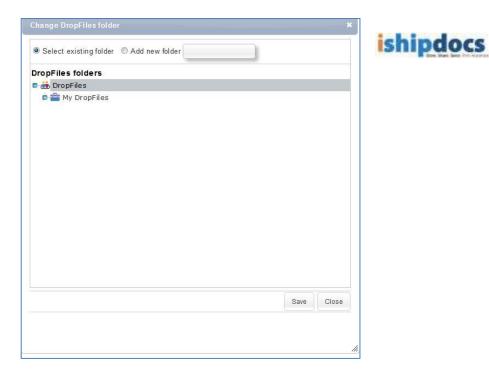
Calant aviating faldes      Add new falder			
Select existing folder O Add new folder			
DropFiles folders			
🛡 🤠 DropFiles			
💩 🕋 My DropFiles			
		Save	Close
		Save	Close

DropFiles Folder tab

- ii. You can select either **Select Existing Folder** option or you can create a new folder by selecting **Add New Folder** option.
- iii. If you select existing folder option you can select a folder from the existing folder list and the person will be invited in that particular folder. If you do not select any folder the files will be dropped in to My DropFiles folder by default.
- iv. Select Add New Folder option and enter the folder name in the Add New Folder text box.
- v. Click Save. A new folder will be created.
- vi. Click **Close** to close the window.

## 4. Changing DropFiles Folder

- a) Select the one for whom you want to change the DropFiles.
- b) Click to change the DropFiles. The **Change DropFiles Folder** window pops up.



Change DropFiles Folder window

- c) You may select an existing folder or can create a new folder and click **Save** and the folder will be saved as per your requirement and the person will be invited in that particular folder from then onwards.
- d) Click **Close** to close the window.

## 5. Editing Invitee Information

a) Click to edit the invitee information. The **Edit Invitee Info** window pops up.

nvitee	samson(	@triform.c	com.my	
Status:	Active	~		
Expiry:	6/24/20	11	<b>111</b>	
5		Save	Close	

#### Edit Invitee Info window

b) You can change the status from the Status drop-down list. The options are Active and Inactive. If the option is active the person will be able to upload his files in the selected time frame and if it is inactive the person won't be able to upload his file in that time frame.



- c) Click to modify the expiry date. You may extend the date or curtail the date as per your requirement.
- d) Click **Save** to save the invitee information. A confirmation message appears.
- e) Click **OK** and the information gets modified.

## 6. Add to Contacts

- a) If the contacts are not added to the contact list (Add to Contacts icon) appears adjacent to that particular contact.
- b) Click (Add to Contacts icon). The Add Contact window appears.

	* Indicate Shand	atory Field	1	
First Name*			Notes	
Last Name*				
Jub Title			Notification Mede	Email
Company Name*			Therefore and the family of	
Address Line 1:				erence is not selected, the conta
Address Line 2			will not receive a	ny potifications from lahipdocs.
Country	USA	*		
State/Province*	Select State/Province	2		
TimeZone*	(GMT-12:00) Internation 💌			
City				
Postal Code:				
Phone Work:				
Extension				
Mobile Phone				
Pager				
Fair				
Enalt				
Company Website				

#### Add Contact window

- c) Fill up all the specific fields of the following sections: Contact Information and Other Important Information. The fields with the red marks are to be considered as mandatory fields so you have fill up at least those specific fields.
- d) Click **Save**. The confirmation message appears at the top of the screen if added successfully.



e) Click **Close** to close the window. You can see the contact added under Contact/Group Name list.



You can click **Save & Close**. This will save the information and close the window automatically. You need not have to click **Save** and then **Close** separately.

## 7. Re-inviting the Contacts

- a) Select the contact members whom you want to re-invite.
- b) Click the **Re-invite** button. A confirmation message appears.
- c) Click **OK** to continue.

## 8. Removing invitees

- a) Select the contact members whom you want to remove from the list.
- b) Click Remove Invitees. A confirmation message appears.
- c) Click **OK** and the contact member gets deleted from the list.



# **How to Manage Contacts**

From this module you can able to manage the address book. You may search, add contacts, add groups as well as export the list if required.

Follow the given procedure to manage contacts.



Click **Contact** icon) on the left hand panel. The **Contacts** screen appears. The screen has two tabs List view and Card view. The List view tab displays all the contact in form of a list and the Card view tab displays all the contacts in form of cards.

ontac	513					0.01% of 20.00 GB
List view	Card view					
Search:	in Contact N	ame 👿 🝳	Ə 허 🐝 🋸			
	Contact Name	Company Name	Email	Phone Work	Edit	
	8 (403)266-5954 Labban Buckley	Trial Expired	elbuckley@carboncopyc		~	2
	8 +35314263700 fitzpatrick	Trial Expired	fitz@craftprint.ie		~	
	8 +61893210877 Kougianos	Trial Expired	westperth@clockwork.c			
	8 +81-3-5791-4080 Kondo	Trial Expired	hrio@fisnet.co.jp			
	8 +94777259673 Rajawasan	Trial Expired	sales@print2digital.com			
	8 +94777377618 Serasinha	Trial Expired	indusera@gmail.com			
	8 009477340421 Gunawardana	Trial Expired	imac@sltnet.lk		~	
	8 00962-795547441 KHALIL	Trial Expired	m_nos@go.com.jo		~	
	8 0122909989 Maman	Trial Expired	samson@triform.com.m			
	8 022-28574133 patel	Trial Expired	bhagirathdigital@gmail.(			
	8 33143538734 GRES	Trial Expired	a.gres@demaille.fr		~	
	8 353667128671 Drumm	Trial Expired	sales@copylobby.com		~	
	8 36205695515 Sódar	Trial Expired	gysodar@copygeneral.l		0	

#### **Contacts screen**

#### List view

List View screen is displayed by default, but if you want to come from Card View screen click the **List View** tab. The **List View** screen will be displayed automatically.

## **Searching Contacts**

- 1. Enter the search item in the **Search** text box.
- Select the required option with which you want to search in the adjacent in text box. The options are: Contact Name, Contact Last Name, Company Name, Email, and Phone.



- 3. Click (Search icon). The specific option is displayed in the List view screen.
- 4. You may also click All / # / alphabets to search the contacts.



Click 🤗 (Reset icon) to reset the setting.

## **Adding New Contact**

1. Click (Add New Contact icon) from the action bar. The Add Contact window appears.

	* Indicate Man	datory Field		3
First Name*			Nates	
Last Name*				
Job Title			Notification Mode 😡	Email
Company Name*				- ARMAN
Address Line 1				erence is not selected, the contac
Address Line 2			will not receive an	y notifications from ishipdocs.
Country	USA	2		
State/Province*	Select State/Province	×		
TimeZone*	(G447-12:00) Internation 🐸			
City				
Postal Code:				
Phone Work:				
Extension				
Mobile Phone				
Pager				
Fax				
Email*				
Company Website				
Business	Architecture			

Add Contact window

- 2. Fill up all the specific fields of the Contact Information section. The fields with the red stars are to be considered as mandatory fields so you have fill up at least those specific fields.
- 3. Click **Close** to close the window.



You can click Save & Close. This will save the information and close the window



automatically. You need not have to click **Save** and then **Close** separately.

## **Editing Contacts**

- 1. Click **Contact** icon) from the Edit section adjacent to the contact name. The **Edit Contact** window appears. Modify the fields as per your requirement.
- 2. Click Save. A confirmation message appears if updated successfully.
- 3. Click **Close** to close the window.

## **Removing Contacts**

- 1. Select the contact(s) that you want to remove from the contact list.
- 2. Click (Remove Contact icon) from the action bar. The Confirmation window appears.

Delete the	contact(s) and remove them from a	Il communications
	20-10-20-20-20-20-20-20-20-20-20-20-20-20-20	

Confirmation window

- 3. If you are sure to delete it from the list select **Delete the contact(s) and remove them from all communications** from the drop-down list.
- 4. Click **Confirm**. A confirmation message appears if deleted successfully.
- 5. Click **OK** to continue.

# **Importing/Exporting Contacts**

1. Click (Import/Export Contacts icon) from the action bar. The Import/Export contact window appears.



IMPORT/EXPORT CONTACT window

- 2. Select **Import Contacts** if you want to import the contacts or **Export Contacts** if you want to export contacts from the drop-down list.
- 3. Click OK.
- 4. Importing Contacts:
  - i. Select **Import Contacts** from the drop-down list in the **Import/export contact** window.
  - ii. Click **OK**. The **Import Contacts Step 1** window appears.

Shipdocs			Impo	ort Contac
Import Contacts: Step 1 of	3			
Source file type:	Microsoft Excel	~		
Select file for import:		В	rowse	
OF	Download Standard Contact tem	plate		
Column Header Present.	~			
Duplicate Records (First, Last, Company name & Email):	Overwrite ODisallow			
			Next	>> Close

Import Contacts Step 1 window

- iii. Select the source file type from the **Source file type** drop-down list.
- iv. Click Browse to locate the file to import in the Select file for import field.

Or,

Click to download the standard contact template.



- v. Select the **Column Header Present** check box to make the column header available.
- vi. You can overwrite the records with the same name or disallow the duplicate one. Click to select the appropriate option for the **Duplicate Records**.
- vii. Click **Next** to continue. The Import Contact Step 2 window appears. The **Import Contact Step 2** window displays the records available in the file. The top 20 records are displayed for your perusal. If you want to modify certain fields, please select the appropriate option to do so.

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Import Contacts Step 2 window

viii. Click **Next** to continue. The file gets imported and the import summary is displayed in the **Import Summary** window.

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Import Summary window

ix. Click **Close** to close the window.

## 5. Exporting Contacts:

i. Select **Export Contacts** from the drop-down list in the **Import/export contact** window.



ii. Click **OK**. The **Export Contact** window appears.

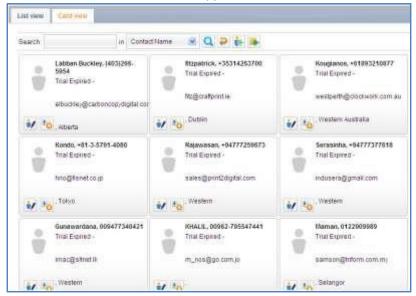


Export Contact window

- iii. Click to select the export format. You can export either excel sheets or the CSV files.
- iv. Click Export. The File Download dialog box appears.
- v. Click **Open** to open the file or click **Save** to save the file in a particular location.

## **Card View**

Click the Card View tab the Card View screen appears.



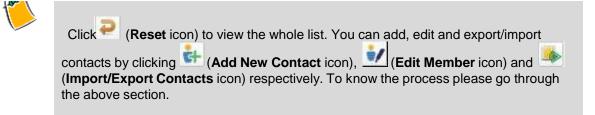
Card view screen

## **Searching Contacts**

i. Enter the search item in the **Search** text box.



- ii. Select the required option with which you want to search in the adjacent in text box. The options are: Contact Name, Contact Last Name, Company Name, Email, and Phone.
- iii. Click (Search icon). The specific option is displayed in the Card view screen.
- iv. You may also click All / # / alphabets to search the contacts.



## **Downloading VCard**

- i. Click 🖲 (Download VCard icon). The File Download dialog box appears.
- ii. Click **Save** to save the VCard or just click **Open** to view the Vcard. The VCard details of the Vcard are displayed as shown.

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	and Alexander Star 19 5 2 9	Banar a 🍄 🕼
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