How to Request & Manage Signage

Step by step instructions on how to place a signage order and navigate the Signage InSights platform.

- **Manage Dashboard**

- **Select Account**

- **Add or Replace Signage**

- **Billing & Shipping**

- **Review Order**

GET STARTED!

Login to: beta.40visuals.com

enter your current username & password*

*contact us if you're drawing a blank as the "forgot password" link is not active

Manage Dashboard & Order Signage

After logging in, you will see your dashboard. For demonstration purposes we have chosen to use our own fictional brand 2Kool.

In this tutorial we will be focusing on placing an order. Explore the additional features on this homepage. Then click...

START A NEW ORDER >

Your Cart: pick up where you left off on any orders that are yet to be requested.

Main Navigation: dropdown menus to reporting tools. Access to your locations list, artwork gallery, personal and brand account settings. Log out or access your cart at any time.

Alerts & Notifications: Requests from salespeople and proofs needing approval create an "**Attention Needed**" notification. You'll also receive an email notification. Progress in order status will create a "**Status Update**" alert. "**Recently Shipped**" shows tracking for what has shipped within the last 10 days.

Your Account: manage where signage is being sent, what artwork is available to send, and what has been paid for.

Progress Bar: view current status of all orders in progress for your brand. Click each status title for a detailed list of orders.

Installations: view status of orders needing professional installation and see when they are scheduled to occur.

Budgets: monitor spending for all budgets available if this feature has been put in place.

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iPad screen content

●●●●○ BELL 🛜   4:21 PM   ✷ 22% 🔋

40VISUALS   HOME   REPORTS ▾   MY PROFILE ▾   Welcome (log out)   🛒 CART

🚚 **2**   🔔 **4**   💬 **3**

START A NEW ORDER >   **GET A QUICK QUOTE $**

Search by order #   🔍

Advanced Search

YOUR ACCOUNT ▾

2kool

Natalie Portman
Brand: 2Kool

🗺️ My Locations   🖼️ My Artwork   📄 My Invoices

PROGRESS BAR ▾

🚀 Requested 1
👁️ Submitted 3
✓ Processed 5
🖼️ Proofs 3
🖨️ Approved 3
🖼️ Printed 1
🚚 Shipped 4
📄 Invoiced 22

YOUR CART   5 ▾

🛒 5

Orders In Cart
Showing 1 - 5 of 78

🛒 2KL1207-00641
Luxor Las Vegas Las Vegas , NV

🛒 2KL1207-016047
Deborah's Daimonds , Boca Raton

🛒 2KL1207-015316
Diamonds Direct Charleston M...

🛒 2KL1207-013908
2Kool Bay of Fundy , Nova Scotia

🛒 2KL1207-013009
Macy's Herald Square , New York

VIEW ALL ORDERS

INSTALLATIONS ▾

SCHEDULED 2 ▾

🔧 2KL1207-013908
Bloomingdales , Virginia Beach

🔧 2KL1207-013978
Swiss Watch Gallery, San Diego

Showing 1 - 2 of 1. View Details

PENDING 5 ▸

YOUR OPEN ORDERS ▾

SUBMITTED 2 ▾

✓ 2KL1207-013982
Artisans Novi , MI
Placed by: Kelly Bailey

✓ 2KL1207-01472
THOMAS B GRAY INC - BARRIN...
Placed by: Kelly Bailey

Showing 1 - 2 of 2. View Details

PROCESSED 2 ▾
PROOFS 3 ▸
APPROVED 3 ▸
PRINTED 1 ▸
SHIPPED 4 ▸

TRAINING & SUPPORT ▸

BUDGETS 2 ▾

📊 2017 Region 1 Jan 01, 2017 - Dec 31, 2017

📊 2017 Co-Op Jan 17, 2017 - Dec 31, 2017

Attention Needed ✕

✉️ Order for HOUGHTONS J, placed by Richard Morgan on Jun 21, 2017, needs your approval.

✓ Proofs for All in the Family Jewelers have been sent and are awaiting approval.

✓ Proofs for 3rd Rock from the Sun have been sent and are awaiting approval.

Status Updates ✕

🖨️ Order for FINKS - CHESTERFIELD - 10 was sent to print on Jul 13, 2017.

🖨️ Order for FINKS - NORTHLAKE MALL - 16 was sent to proof on Jul 13, 2017.

✓ Order for THOMAS B GRAY INC - BARRINGTON,RI was processed on Jul 13, 2017.

🖨️ Order for ALBERT SMYTH was printed on Jul 13, 2017.

● Order for FINKS - CHESTERFIELD - 10 was submitted on Jul 13, 2017.

Recently Shipped ✕

🚚 Order for AFI's JEWELERS was shipped on Jul 13, 2017 (Tracking #1Z6TM1361394490723).

🚚 Order for FINKS - CHESTERFIELD - 10 was shipped on Jul 13, 2017 (Tracking #789505515469).
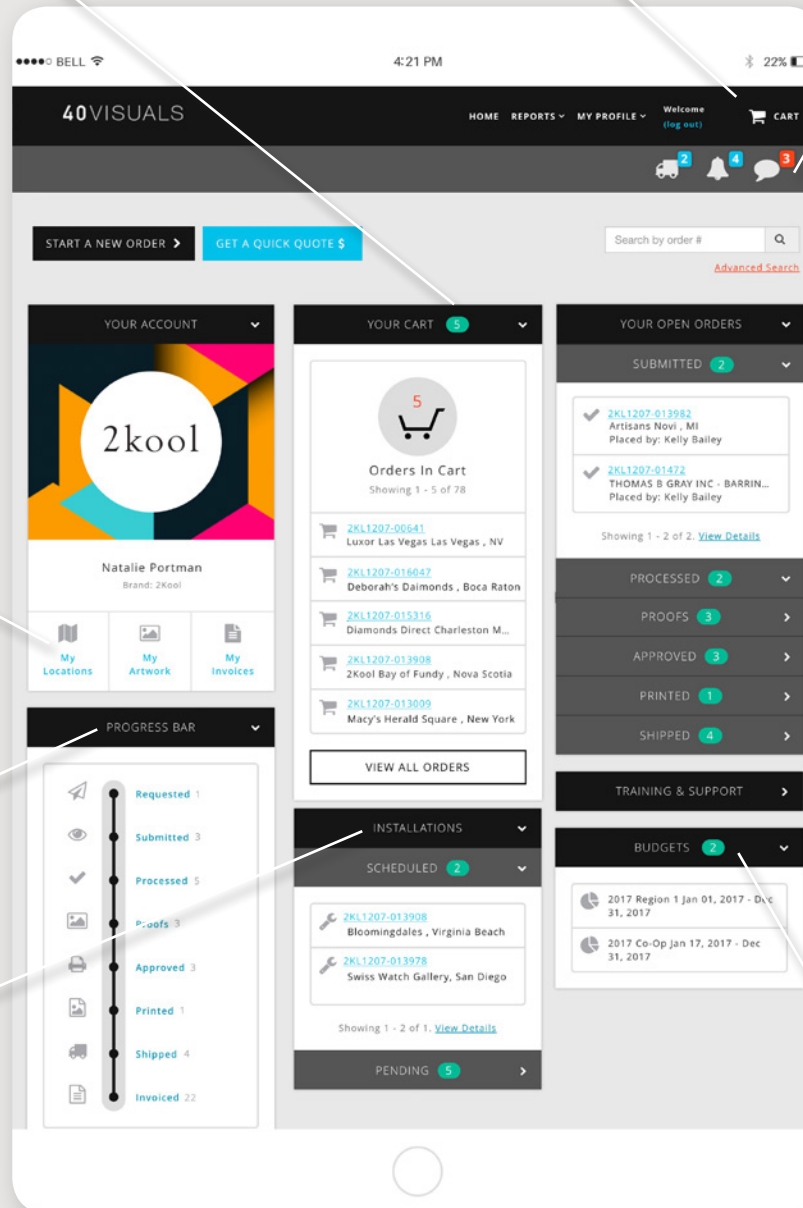
Account Profile: by selecting an account all signage information is saved for reordering and reporting purposes. Account information can be edited, photos or PDF documents can be uploaded. All products and artwork currently available to reorder are displayed and can be edited here.
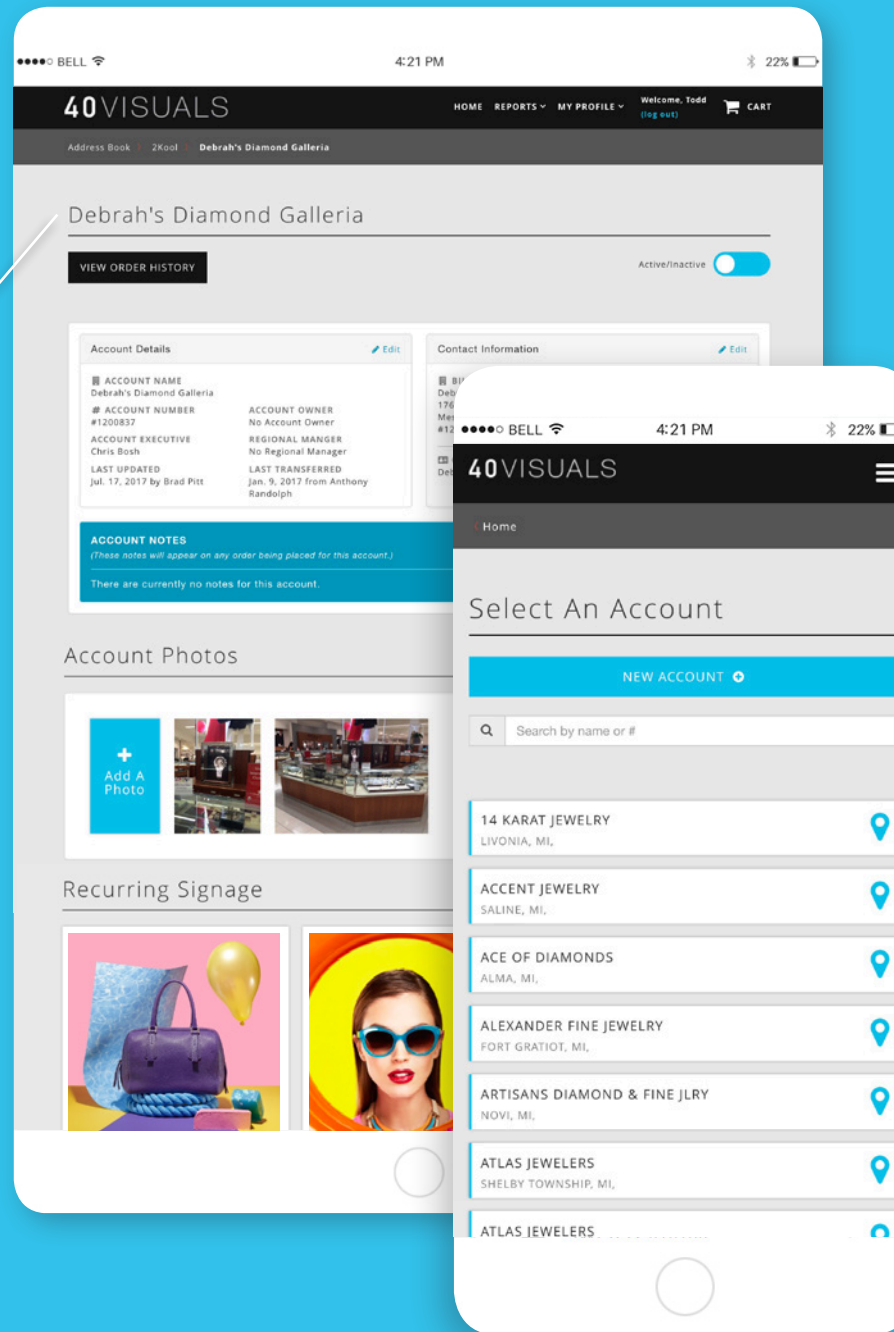
Select Account

Select the location where the graphic being ordered will be displayed. Accounts listed here have been previously provided. Each account has its own profile page. All information entering during the order process will be saved to this page for future use, and can be accessed from **"Your Accounts"**.

❗ **Very important! Be sure that an account is not already created before creating a "New Account" to avoid duplicates.**

Locate the account you wish to place an order for by scrolling or typing in the name or store number. Click on the account name to continue.

◄ SELECT ACCOUNT TO CONTINUE

👁 **Note:** the account selected will appear in the upper right corner for the remainder of the order process.

40VISUALS.com

📢 Something not making sense? Tell us! We are ready and waiting to help, just dial **800-962-3119**.

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Add or Replace Signage

Once an account is selected you'll see all items currently on display at the location. From here you can quickly "**Replace**" the artwork for a particular item, or "**Order A New Item**".

ⓘ Please note: Items available to replace have been imported from order history placed within the last year. If an account was not selected from the address book when placing a previous request, items where not saved and will not be available here. As you place orders items will be saved for easy future replacement.

First we will click...

⟳ REPLACE

(If the account selected has no Recurring Signage items please jump to page 5)

Mobile friendly: replacing artwork is very easy to do on a mobile device as all product information has been entered there is no need to type! Just select new artwork and order!
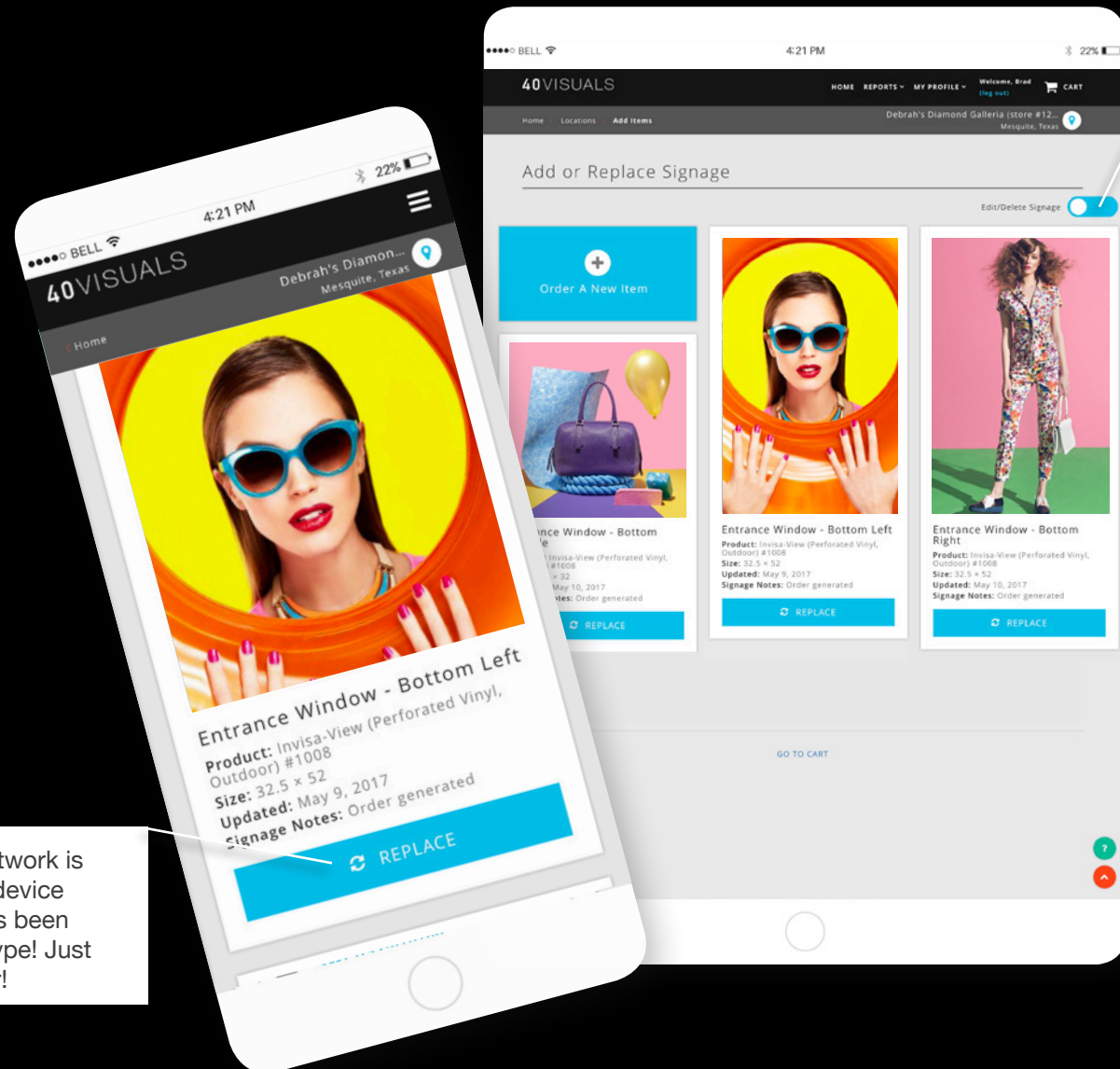
Clicking "**Replace**" will bring you to the artwork selection page. Click...

⊕ Add Visual

This will bring up the artwork gallery. Choose a graphic from the "**Find artwork by title**" or "**Find artwork by category**" drop down or click on the graphic thumbnail in the artwork image gallery.

Select a graphic from the gallery or choose to "**Use a custom image**". Then review the selection. Click the magnifying glass to view the image larger. Click the green button in the center to select a different image. Or add any notes about changes needed in the layout for our graphics team.

⊖ Please note: the artwork thmbnail is a preview image and does not represent the actual print file or final product.

Once your satisfied with your artwork selection click...

SAVE & ADD ❯

Custom Artwork: please send files for custom artwork layout via **www.40VISUALS.WeTransfer.com**

📢 Something not making sense? Tell us! We are ready and waiting to help, just dial **800-962-3119**.
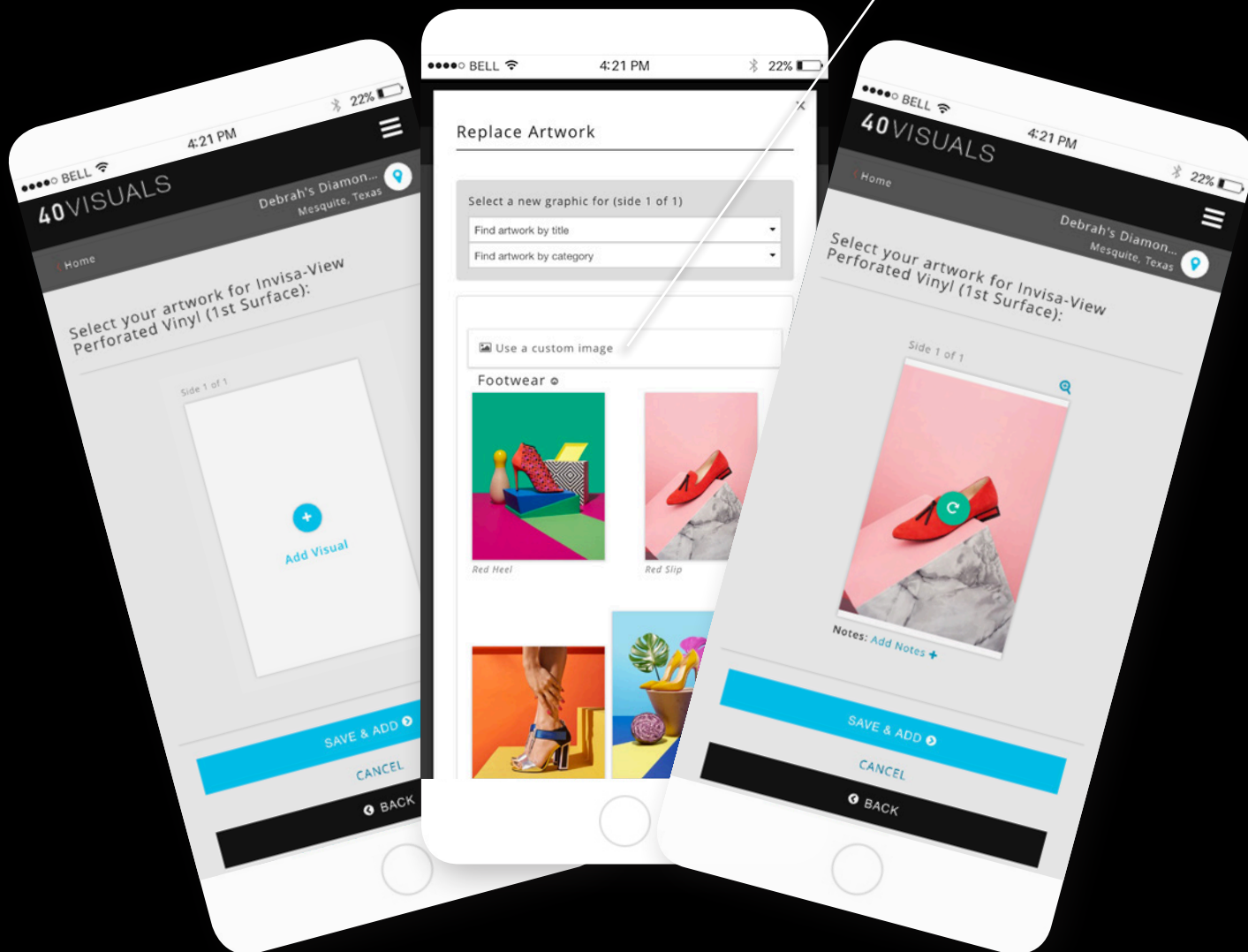
The item has now been added to the order with the new artwork. At this point you can review any product or artwork details if mistakes were made. If everything is correct click the "**Continue**" button. Or in this case we are going to choose to add another product by clicking...

+ ADD ITEM

This will take us back to a familiar page to "**Add or Replace Signage**" This time instead of replacing the artwork for an existing piece of signage, we are going to click...

⊕ Order a New Item

📢 Something not making sense? Tell us! We are ready and waiting to help, just dial **800-962-3119**.
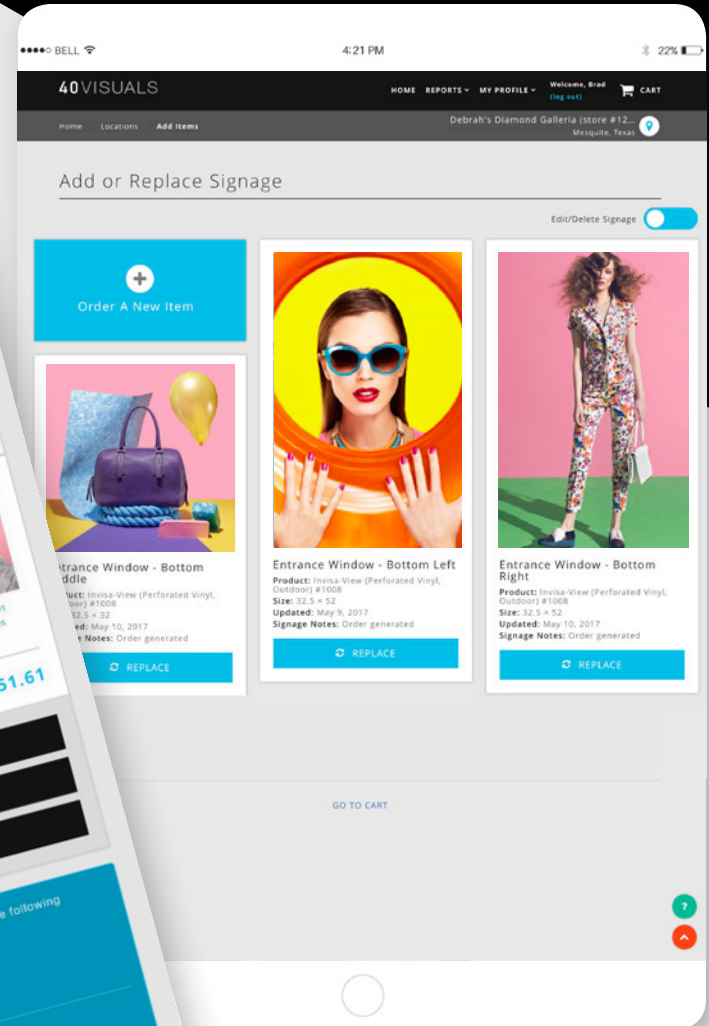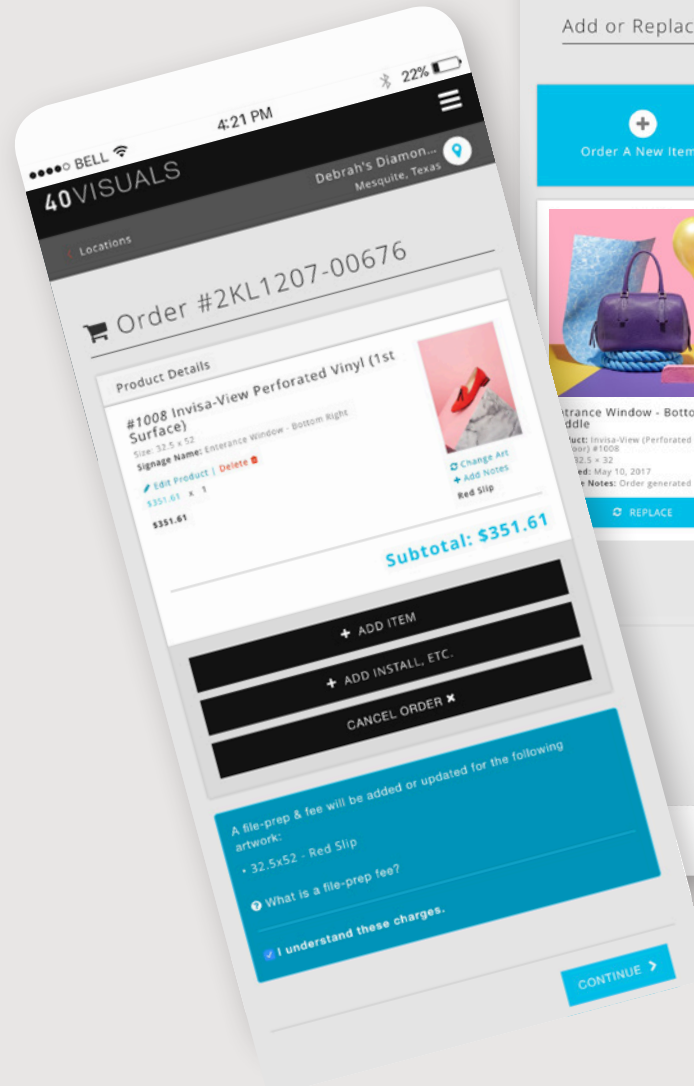
Start shopping for the product you would like to add for your account. Products are organized by category and are able to be browsed by "**Product Type**", by "**Material**", or by "**Placement**". Or click any "**See All Products**" button to view all products available.

🔍 **Tip: Use the search field in the upper right corner to quickly find a product by name. Please note products may have a more simplified name than referred to in the past. Call us if you're unable to find a product or are unsure of the name.**

For this demo we are going to choose the category...

PRINT MEDIA

You can now shop through the more visual experience of selecting products. Scroll through the options or type the product name if you know exactly what you're looking for. Lets choose...

Invisa-view Perforated Vinyl (1st Surface)

Search Products: To quickly find a product, type the name in the search field. If you're not finding what you're looking for in this category, use the dropdown to jump to a new category.

Visual Shopping Experience: Each product is accompanied by an image of the material on display.

📢 Something not making sense? Tell us! We are ready and waiting to help, just dial **800-962-3119**.
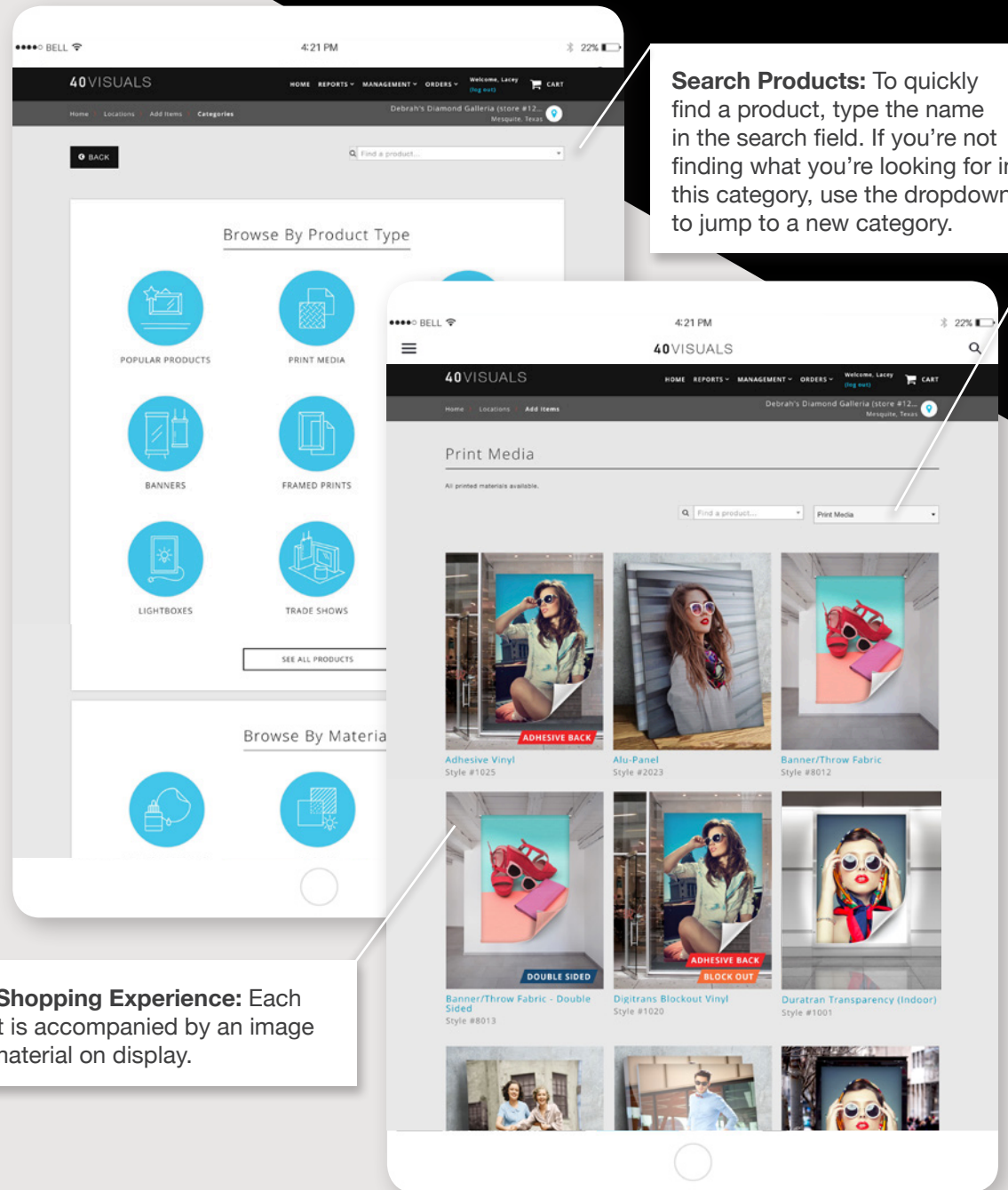
Selecting a product will bring you to the product configuration page. Review the description of the product here to ensure you made the correct selection. Then enter the product details such as width, height and quantity. If there are any options available for the product those choices will be made here as well. Go ahead and enter any desired dimensions.

Check to "**Set a View Size**" only if the item it going into a space or hardware that will block substantial areas of the print. 40 VISUALS will always keep all important graphics and text at least 1 inch away from the graphic edge or more depending on your artwork guidelines.

💡 **Tip: You'll notice the graphic indicating if the dimensions entered are vertical (V) or horizontal (H) changes to visually confirm the orientation given.**

Then give this signage product a descriptive name and intended placement in the "**Recurring Signage Details**" area. This information will be saved for this account to make reordering replacement prints easier in the future. Any notes included here will show up on the order anytime this item is requested.

Add any information you like, then click...

❯ NEXT

You will then be asked to make an artwork selection for this product. *(See page 4)*

Products Tags: Images of items are flagged with key qualities to note such as:

24" x 36" - size, if item has a set size

LAMINATED - item includes lamination

+ HARDWARE - item includes hardware

2ND SURFACE - material application

DOUBLE SIDED - artwork on front & back

ADHESIVE BACK - adhesive properties

REPLACEMENT PRINT - print item only for replacement with specific hardware

📢 Something not making sense? Tell us! We are ready and waiting to help, just dial **800-962-3119**.

The item has now been added to the order and will be available for reordering when this account is selected in the future.

Review all details of the product and artwork. If you've mistakenly chosen the wrong product, click the gray pencil icon to edit. If you would like to select a different image, click the "**Replace**" link. If special artwork instructions are needed click the "**Add**" link to add notes.
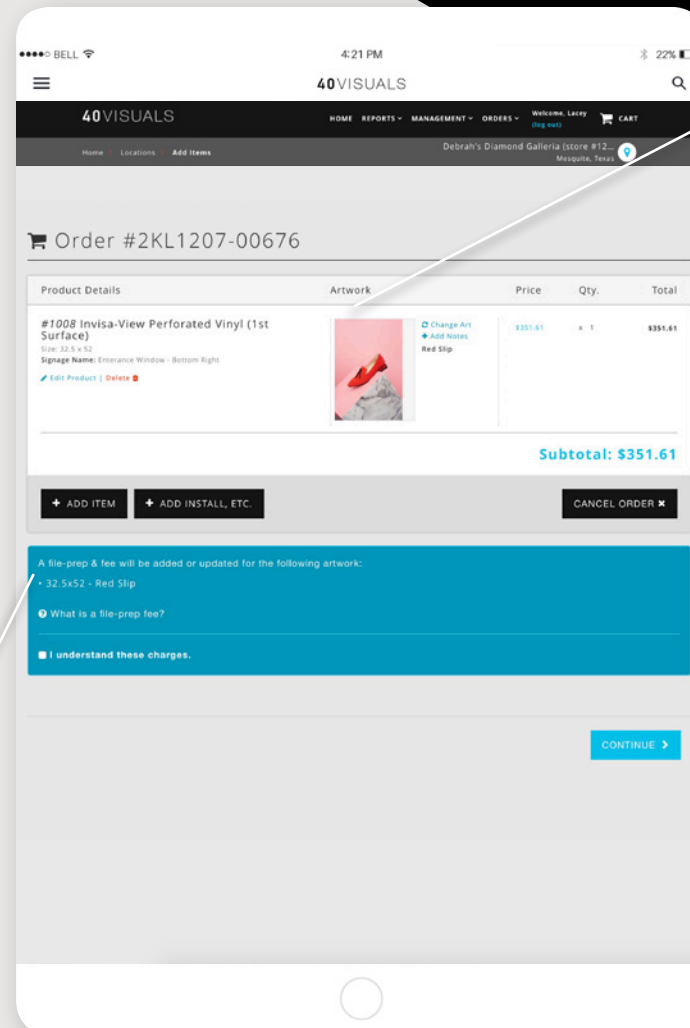
At this point you can choose to add additional items, or cancel the order if needed. You can also "**Add Install**" to request that an item be professionally installed. We will then quote installation through our nationwide network of installers when processing the order.

Once all items have been added click...

CONTINUE >

Review the fine details: Click the artwork to review the image up close. Click the edit links to correct or add any information needed.

Order Notes & Instructions:
Information regarding any applicable file-prep or rush fees will display here. Click the ❓ icon for more details about these fees and how to avoid them.

PO Number: choose to use a PO# for your billing dept to reference.

Budget: select which budget to subtract the order from, if utilizing this feature.

Delivery Date (Rush Orders): if an order must reach it's destination by a specific date, enter it here. A Rush Fee will only be applied if the order is submitted within 1-2 business days of the due date. Please note, indicating a delivery date may result in higher shipping fees to guarantee delivery.

Email proofs to: email address of the person who will be approving the graphic layout/s for the order.

Ship to: the address the order is to be received at. See note, as this can be an address other than the account location if desired.

Shipping Carrier, Method, & Account: ground is the usual default shipping method. Update this section to correspond with the rush delivery date if needed. If you have a FedEx or UPS number on file, this will display here.

Email Tracking to: email addresses of those to receive tracking messages from carrier. Limit 3.

This is for a Trade Show: if this is true, check this box and fill in the specific trade show information. This flag will be helpful for reporting purposes.

Order Notes: anything, such as if traveling you may want us to write on a package "Hold for hotel guest".

Billing & Shipping

Most of the information here has been prepopulated. Review that the information is correct.

🚚 **Note: The shipping address does not need to match the account address in order to keep the order information tied to the account.** *Ex: If you would like items shipped to you to hand deliver to the store. Enter your home address here.*

Fill in or verify that all information is correct then continue to...

REVIEW ORDER ›

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Review Order

Give the account, shipping, and product information once last look through. Then to send the order on to 40 VISUALS and to begin the process through the system as discussed on page 1, click...

Review Your Order: give all information a thorough check. If changes need to be made, click the edit link next to the information.

Status Timeline: check the bottom of your order at any time for updates on the order status. Click "**+ View Timeline**" for full details as the order progresses.

SUBMIT

This will update the page. You'll see the staus area at the bottom of that page change confirming the order has been submitted. If you would like to print a copy of the order for your records, click "**Print**" at the top of the screen.

Continue to track the order along the order process from this point on any desktop, tablet, or mobile device. Click "**+ View Timeilne**" to view order status details, or reivew status notifications as they happen from the dashboard.

You're done!

Approve Proofs: after proofs have been reviewed via email, mark the order as approved. This will send 40 VISUALS a notification to proceed to production. *(This is an optional step, if responding with approval via email is prefered.)*

Thanks, hope you enjoy!

For more in depth tutorials please visit our website. To schedule a live 1-on-1 demo please contact us!