



MyPromoOffice

Settings Explanation

If you have any difficulty with following the steps outlined in this help document, please don't hesitate to contact our help team by calling (02) 4302 0160 or via email at help@gunwebsystems.com.au

Document Overview

This document outlines and explains how to access and utilize the settings on your My Promo Office site. This document will run you through the following settings/Functions:

- System Options
- Global Variables
- Manage Status
- Manage Terms
- Manage Product Sizes
- Other Cost Types
- Manage Customer Industry
- Manage Shipping Line
- Manage Sub Jobs
- Developer Note

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Step 1.0

Hover your mouse over the settings tab, as seen highlighted in the image below.

Step 1.1

Click on “System Options” to view the tab.

The screenshot shows the GunWebSystems dashboard interface. At the top right, it says "Logged in as gunweb" and has a "LOGOUT" button. The navigation menu includes "Dashboard", "View Quotes", "Sales", "Job", "Purchase", "Reports", "Users", "Settings", and "Web Store". The "Settings" tab is highlighted in blue. A red arrow points from a callout box to the "Settings" tab. Another red arrow points from a second callout box to the "System Options" menu item that appears when the settings tab is hovered. The dashboard content includes a "Dashboard" section with job status updates, a "JOBS" section with a table of job counts and a bar chart, and a "JOB IN FOCUS" section with a search bar and customer selection options.

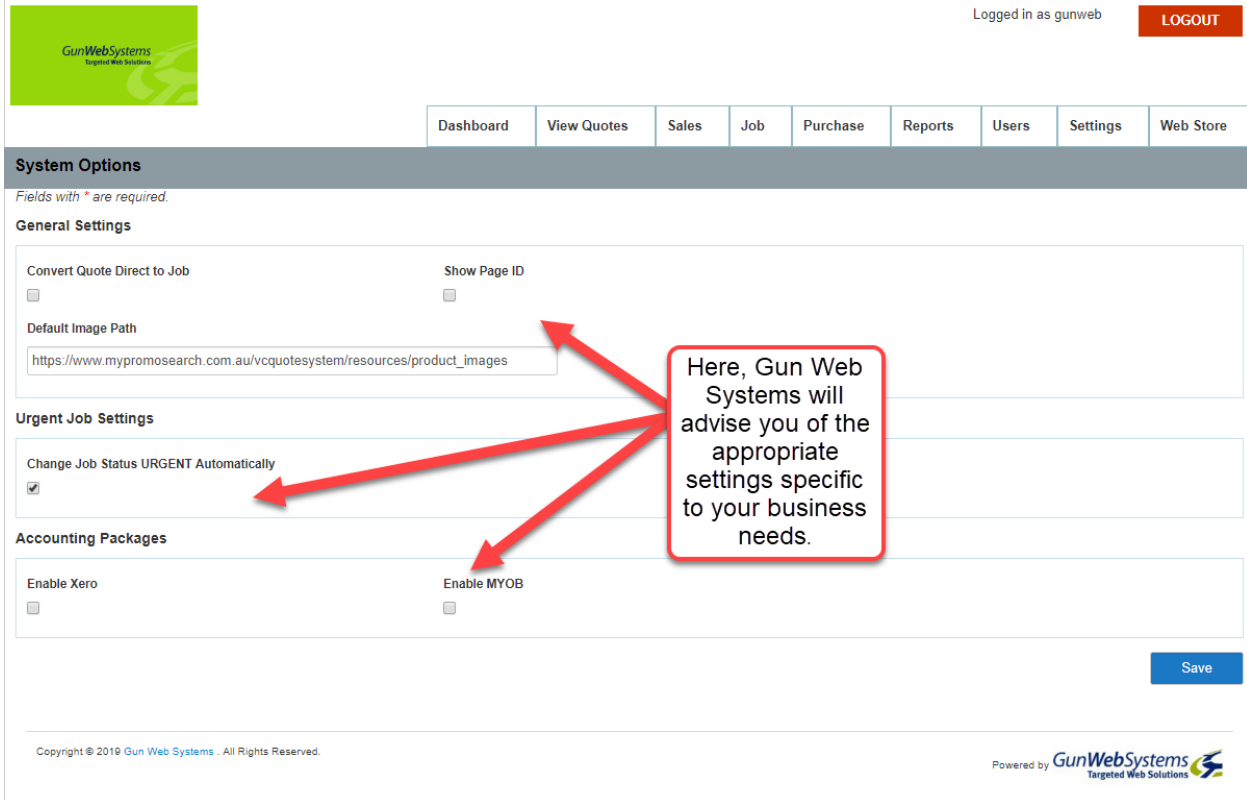
Category	Count
Urgent Jobs	17
Offshore Production	2
New Jobs	18
Jobs In Progress	24
Jobs Past Due Date	42
Total Outstandings	42
All Jobs	44
POs Past Due Date	52
Artwork Past Due Date	5

Period	Count
Last Month	8
Last Week	2
This Week	0
This Month	0

Period	Count
Last Month	8
Last Week	2
This Week	0
This Month	7

Step 1.2 – System Options

Within the System Options tab, there will be settings specific to your business needs that will need to be changed. Gun Web Systems



GunWebSystems
Targeted Web Solutions

Logged in as gunweb **LOGOUT**

Dashboard View Quotes Sales Job Purchase Reports Users **Settings** Web Store

System Options

*Fields with * are required.*

General Settings

Convert Quote Direct to Job Show Page ID

Default Image Path

Urgent Job Settings

Change Job Status URGENT Automatically

Accounting Packages

Enable Xero Enable MYOB

Save

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Here, Gun Web Systems will advise you of the appropriate settings specific to your business needs.

Step 2.0 – Global Variables

Repeat step 1.0, click on Global Variables.

You will then be able to edit the variables before creating a quote. This can be done by clicking update.

Dashboard

- System Options
- Global Variables**
- Manage Status
- Manage Terms
- Manage Product Sizes
- Other Cost Types
- Other Cost Group
- Manage Customer Category
- Manage Customer Industry
- Manage Shipping Line
- Manage Sub Jobs
- Developer Note
- Web Service Data

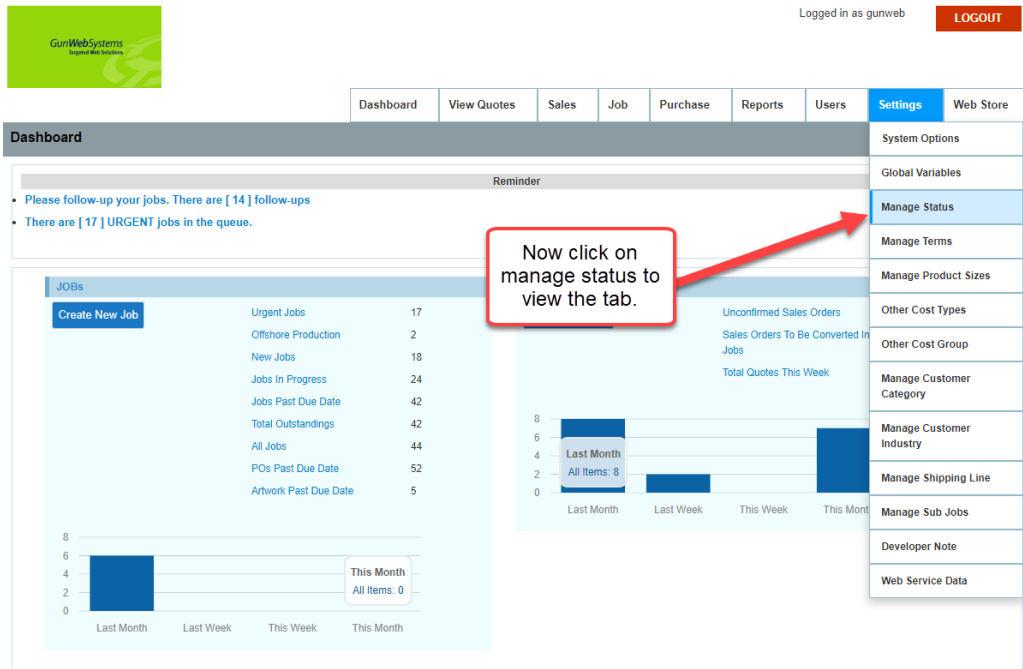
Manage Global Variables

Global Variable	Value	Created By	Created Date	Update
GST	1.1		20-05-2015 09:01:08	Update
AdminEmail	marc@gunwebsystems.com.au	marc	19-06-2016 16:57:55	Update
FollowInXDays	6		12-01-2016 14:20:28	Update
DueInXDays	14	marc	26-07-2016 06:04:54	Update
DateFormat	d-m-Y		12-01-2016 14:37:59	Update
InvoicePrefix	OG		14-01-2016 17:39:21	Update
SupplierMarkUp	1.5		22-04-2016 00:25:18	Update
RecordsViewPerPage	20		12-08-2016 00:00:00	Update
RoundingPrecision	2	marc	15-03-2017 05:29:33	Update
JobUrgentAutoPriorDate	3	rajaera	11-05-2017 00:00:00	Update
MasterPOPPrefix	MPO	rajaera	08-05-2018 00:00:00	Update
PurchaseOrderPrefix	OC		01-01-1970 00:00:00	Update

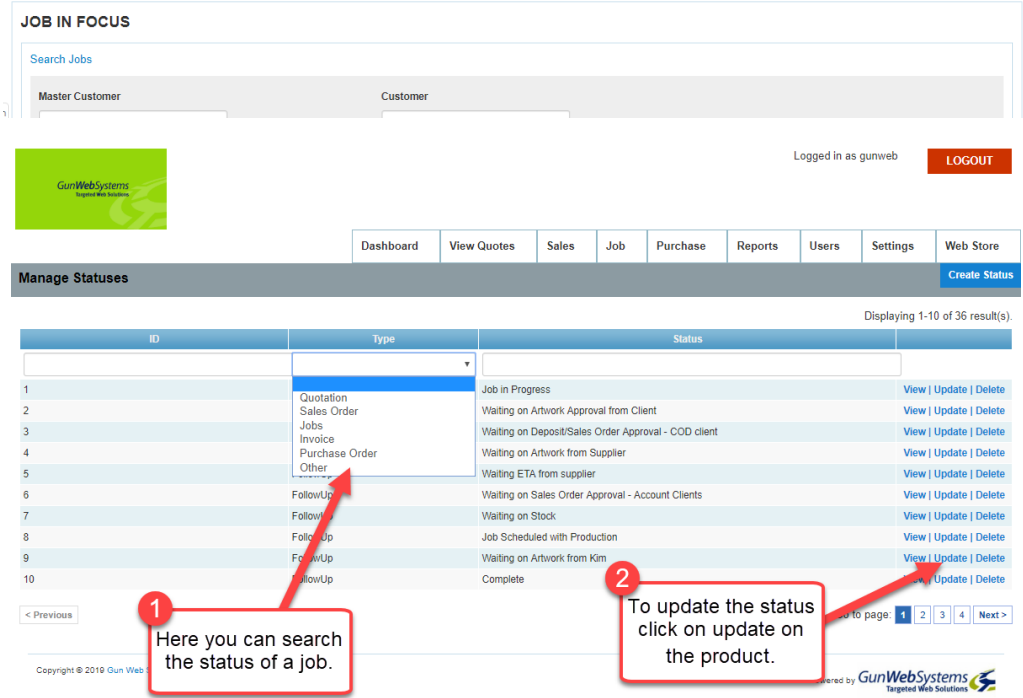
Step 3.0 – Manage Status

Repeat step 1.0, click on Manage Status.

You can update the status of a job by selecting a job and updating the status of the product.



Now click on manage status to view the tab.



Here you can search the status of a job.

To update the status click on update on the product.

ID	Type	Status	
1	Job In Progress	Job In Progress	View Update Delete
2	Quotation	Waiting on Artwork Approval from Client	View Update Delete
3	Sales Order	Waiting on Deposit/Sales Order Approval - COD client	View Update Delete
4	Jobs	Waiting on Artwork from Supplier	View Update Delete
5	Invoice	Waiting ETA from supplier	View Update Delete
6	Purchase Order	Waiting on Sales Order Approval - Account Clients	View Update Delete
7	Other	Waiting on Stock	View Update Delete
8	FollowUp	Job Scheduled with Production	View Update Delete
9	FollowUp	Waiting on Artwork from Kim	View Update Delete
10	FollowUp	Complete	View Update Delete

Step 4.0 – Manage Terms

Repeat step 1.0, click on Manage Terms.

Within the manage terms function you can create custom sign off terms and/or update the sign off terms on a particular job.

Dashboard | View Quotes | Sales | Job | Purchase | Reports | Users | **Settings** | Web Store

System Options
Global Variables
Manage Status
Manage Terms
Manage Product Sizes
Other Cost Types
Other Cost Group
Manage Customer Category
Manage Customer Industry
Manage Shipping Line
Manage Sub Jobs
Developer Note
Web Service Data

Now click on manage terms.

Dashboard | View Quotes | Sales | Job | Purch | **Settings** | Web Store

Manage Sign Off Terms [Create Sign Off Terms](#)

You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.

Advanced Search

Displaying 1-14 of 14 result(s).

ID	Sign Off Code	Sign Off	Type	Createddate	Createdby	
9	COD	This order is COD. A 40% deposit of \$___ is required for your dispatched or on collection of goods Approval _____ Date _____	SalesOrder	27-01-2016	lynn	View Update Delete
10	West Gosford	Deliver to GoodGear Unit 6/16 Justlute Drive West Gosford NSW 2250	PurchaseOrder	16-12-2015	kirsten	View Update Delete
11	tgraphics	Send directly to TJ Graphics	PurchaseOrder	16-12-2015	Admin	View Update Delete
12	7 Day Account	7 Day Account Full payment is due 7 days from invoice date. Please sign your approval to proceed if all details on the order are correct and you would like to proceed. Approval _____ Date _____	SalesOrder	16-12-2015	kirsten	View Update Delete
13	30 Day Account	30 Day Account Full payment is due 30 days from invoice date. Please sign your approval to proceed if all details on the order are correct and you would like to proceed. Approval _____ Date _____	SalesOrder	16-12-2015	kirsten	View Update Delete
14	30 DaysPurchase Order	30 Day Account Full payment is due 30 days from invoice date. Please sign your approval if all details on the order are correct. Please provide an official purchase order number for your order to proceed. Approval _____ Date _____	SalesOrder	16-12-2015	kirsten	View Update Delete
15	7 DaysPurchase Order	7 Day Account Full payment is due 7 days from invoice date. Please sign your approval if all details on the order are correct. Please provide an official purchase order number for your order to proceed. Approval _____ Date _____	SalesOrder	16-12-2015	kirsten	View Update Delete
16	Pick Up	Client Pick Up	DeliveryDocket	23-06-2016	rosa	View Update Delete
17	Artwork Sign off	YES. All of the attached details have been checked and are correct. I authorise the production of this order. SIGN _____ Print Name _____ Date _____	JobArtwork	13-07-2016	karen	View Update Delete
18	po-internal	Please Check Carefully	PurchaseOrder	31-01-2017	marc	View Update Delete
19	Pack-Indiv	Pack Individually	PurchaseOrder	27-02-2017	jacqui	View Update Delete
20	Longsprin	Long Screen Printing address details	PurchaseOrder	27-02-2017	jacqui	View Update Delete
21	GG Labels	Please use Goodgear Delivery labels provided Please advise weight/measurement of cartons for Goodgear to organise own courier.	PurchaseOrder	10-05-2017	tracy	View Update Delete
22	TEST	TEST SIGN-OFF	Quotation	17-05-2019	Admin	View Update Delete

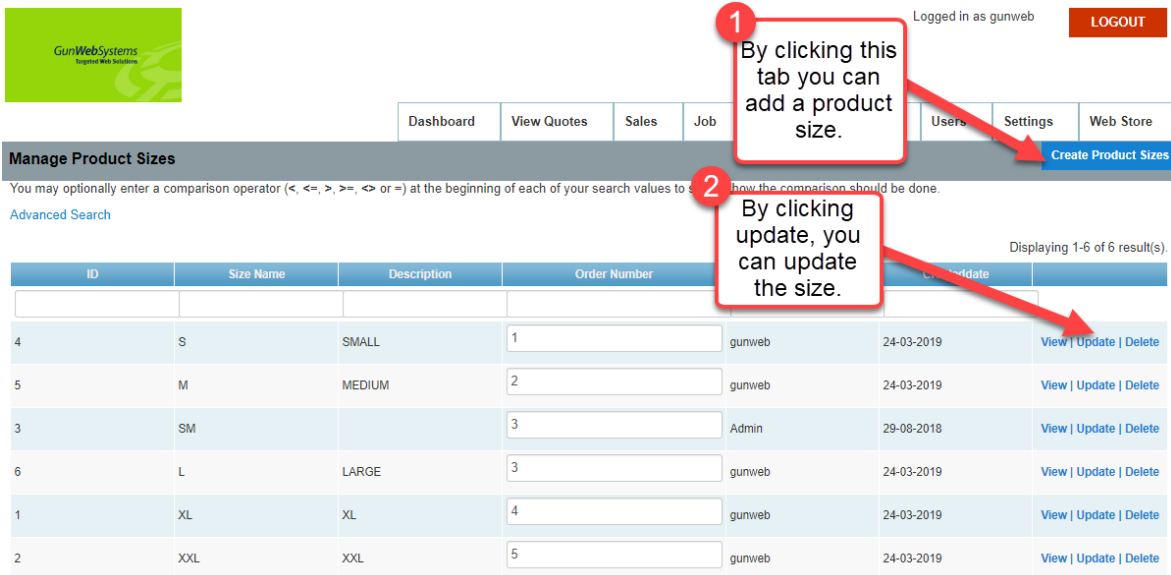
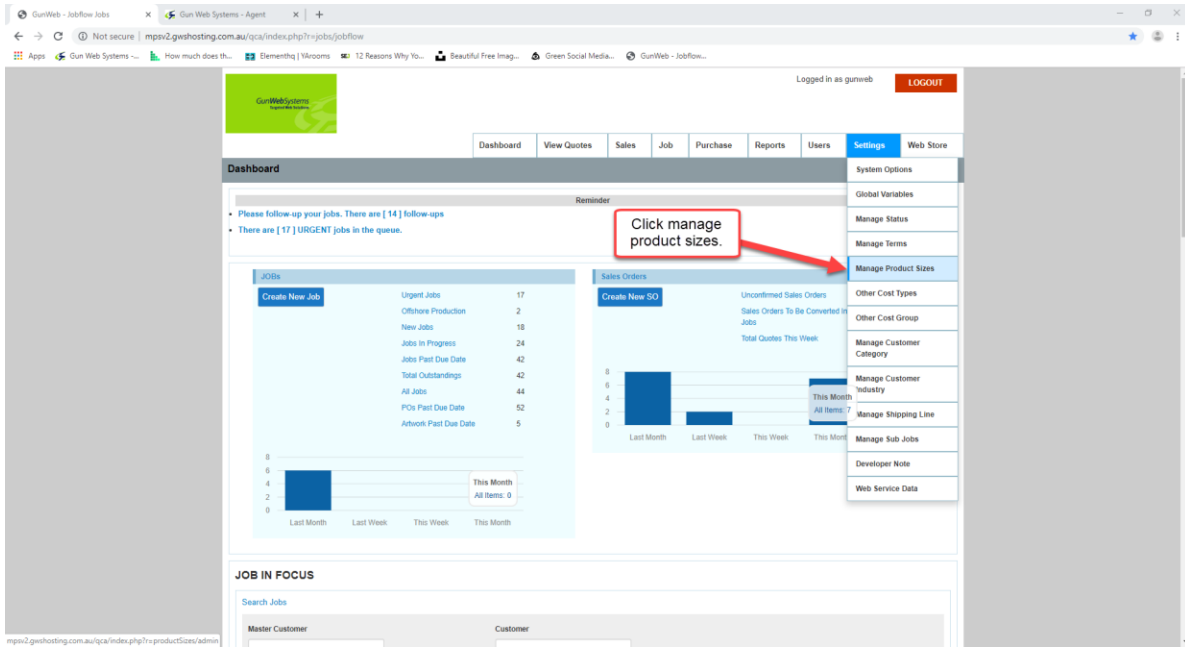
1 If you click on this tab you can create a custom sign off term.

2 If you click update you can update the sign off terms on a particular job.

Step 5.0 – Manage Product Sizes

Repeat step 1.0, click on Manage Product Sizes.

Within the manage product sizes function you can add a product size and/or update the sizes available for existing products.



Step 6.0 – Other Cost Types

Repeat step 1.0, click on Other Cost Types.

Within the other cost types function you create another cost type and/or update a current cost type.

The screenshot shows the GunWebSystems dashboard. The 'Settings' menu is open, and 'Other Cost Types' is selected. A red box with an arrow points to this menu item with the text: "Now click on other cost types."

Below the dashboard, the 'Manage Other Cost Types' page is shown. A red box with an arrow points to the 'Create Other Cost Type' button with the text: "By clicking this tab it enables you to create another cost type."

Another red box with an arrow points to the 'Update' link in the table's action column with the text: "By clicking update it enables you to update the current cost type."

ID	Other Cost Group	Name	Default Cost	Divide By Quantity	Created By	Created Date	Action
5	Product	01. Decoration 1	0.00	NO	GuestUserBLA	2019-04-30	Update Delete
6	Product	02. Decoration 2	0.00	NO	GuestUserBLA	2019-04-30	Update Delete
7	Product	03. Packing 1	0.00	NO	GuestUserBLA	2019-04-30	Update Delete
8	Product	04. Packing 2	0.00	NO	GuestUserBLA	2019-04-30	Update Delete
9	Freight	05. Freight from Supplier	0.00	YES	GuestUserBLA	2019-04-30	Update Delete
10	Freight	06. Freight to & from Decorator	0.00	YES	GuestUserBLA	2019-04-30	Update Delete
11	Artwork	07. Artwork	0.00	YES	GuestUserBLA	2019-04-30	Update Delete
12	Product	08. A4 or A3 Film	0.00	YES	GuestUserBLA	2019-04-30	Update Delete
13	Product	09. Setup or Die Charge	0.00	YES	GuestUserBLA	2019-04-30	Update Delete
14	Product	10. Others - gift box, emb of ind name, pocket sewn	0.00	NO	GuestUserBLA	2019-04-30	Update Delete
15	Freight	11. Delivery to Client	0.00	YES	GuestUserBLA	2019-04-30	Update Delete

Step 7.0 – Other Cost Group

Repeat step 1.0, click on Current Cost Group.

Within the other cost group function, you can update a current cost group or create a new cost group.

Logged in as gunweb LOGOUT

Dashboard | View Quotes | Sales | Job | Purchase | Reports | Users | **Settings** | Web Store

Dashboard

Reminder

- Please follow-up your jobs. There are [14] follow-ups
- There are [17] URGENT jobs in the queue.

JOB

Create New Job

Urgent Jobs	17
Offshore Production	2
New Jobs	19
Jobs In Progress	24
Jobs Past Due Date	42
Total Outstandings	43
All Jobs	45
POs Past Due Date	52
Artwork Past Due Date	5

Sales Orders

Create New SO

Unconfirmed Sales Orders
Sales Orders To Be Converted
Jobs
Total Quotes This Week

Bar chart showing Sales Orders: Last Month (8), Last Week (2), This Week (1), This Month (1).
Bar chart showing Total Quotes: Last Month (8), Last Week (2), This Week (1), This Month (1).

Settings

- System Options
- Global Variables
- Manage Status
- Manage Terms
- Manage Product Sizes
- Other Cost Types
- Other Cost Group**
- Manage Customer Category
- Manage Customer Industry
- Manage Shipping Line
- Manage Sub Jobs
- Developer Note
- Web Service Data

JOB IN FOCUS

Search Jobs

Master Customer | Customer

Now click other cost group.

1 By clicking this tab you are able to create another cost group

2 To update a cost group simply click update.

Logged in as gunweb LOGOUT

Dashboard | View Quotes | Sales | **Other Cost Group** | Users | Settings | Web Store

Manage Other Cost Groups

You may optionally enter a comparison operator (<, <=, >, >=, <=> or =) at the beginning of each search value to specify how the comparison should be done.

Advanced Search

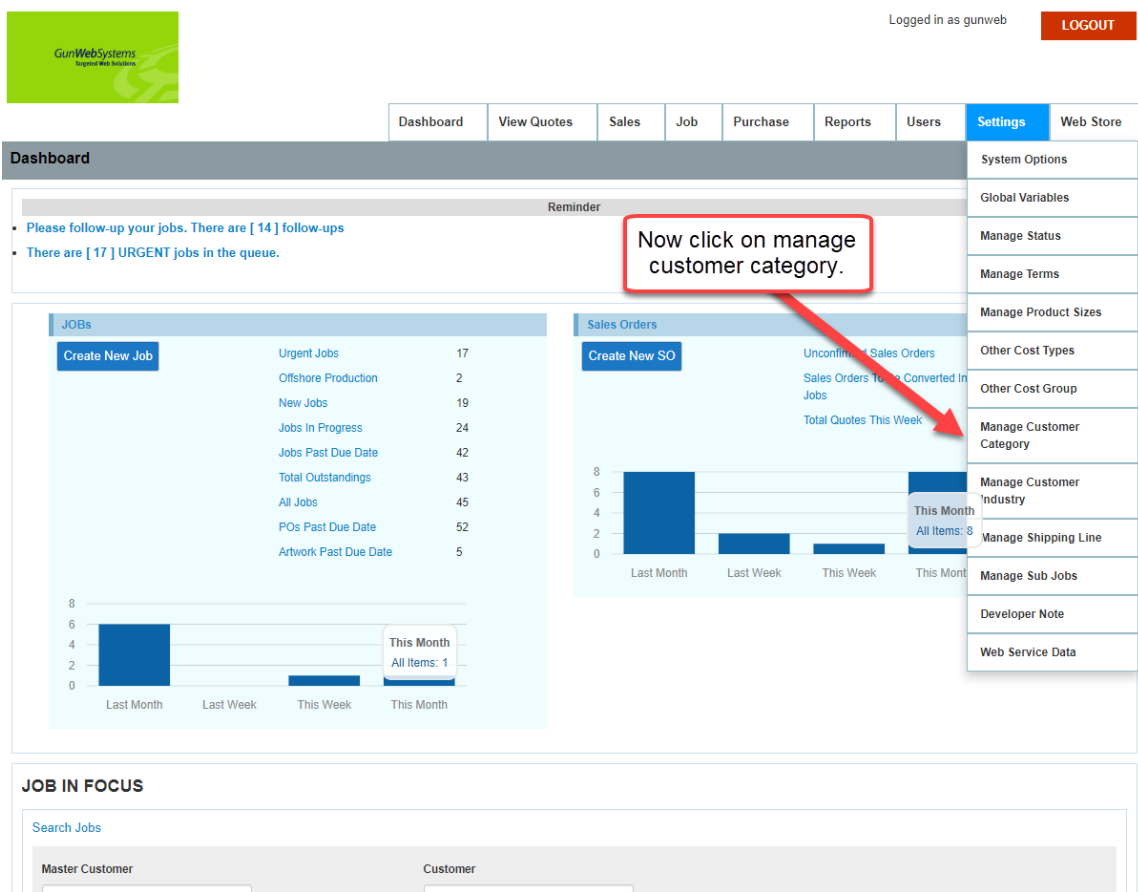
Displaying 1-3 of 3 result(s).

ID	Name	
4	Product	Update Delete
5	Artwork	Update Delete
6	Freight	Update Delete

Step 8.0 – Manage Customer Category

Repeat step 1.0, click on Manage Customer Category.

Within the manage customer category function, you can create a customer category and/or update a current customer cate



Logged in as gunweb LOGOUT

Dashboard | View Quotes | Sales | Job | Purchase | Reports | Users | **Settings** | Web Store

Dashboard

Reminder

- Please follow-up your jobs. There are [14] follow-ups
- There are [17] URGENT jobs in the queue.

JOBs

Create New Job

Urgent Jobs	17
Offshore Production	2
New Jobs	19
Jobs In Progress	24
Jobs Past Due Date	42
Total Outstandings	43
All Jobs	45
POs Past Due Date	52
Artwork Past Due Date	5

Sales Orders

Create New SO

Unconfirmed Sales Orders
Sales Orders To Be Converted In
Jobs
Total Quotes This Week

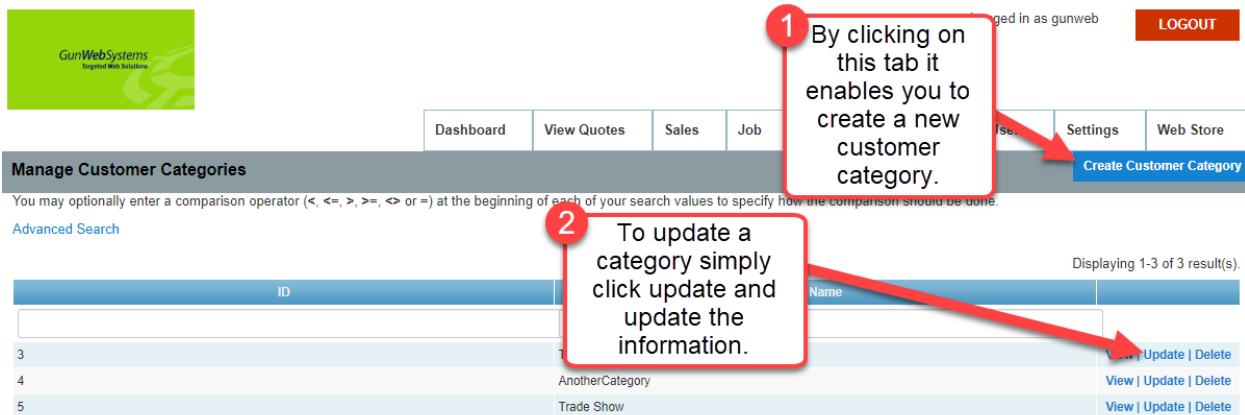
This Month All Items: 8

JOB IN FOCUS

Search Jobs

Master Customer | Customer

Now click on manage customer category.



Logged in as gunweb LOGOUT

Dashboard | View Quotes | Sales | Job | Purchase | Reports | Users | **Settings** | Web Store

Manage Customer Categories

Create Customer Category

You may optionally enter a comparison operator (<, <=, >, >=, <=, >=) at the beginning of each of your search values to specify how the comparison should be done.

Advanced Search

Displaying 1-3 of 3 result(s).

ID	Name	Update Delete
3		View Update Delete
4	AnotherCategory	View Update Delete
5	Trade Show	View Update Delete

1 By clicking on this tab it enables you to create a new customer category.

2 To update a category simply click update and update the information.

Step 9.0 – Manage Customer Industry

Repeat step 1.0, click on Manage Customer Industry.

Within the manage customer industry function, you can create a customer industry and/or update a current customer industry.

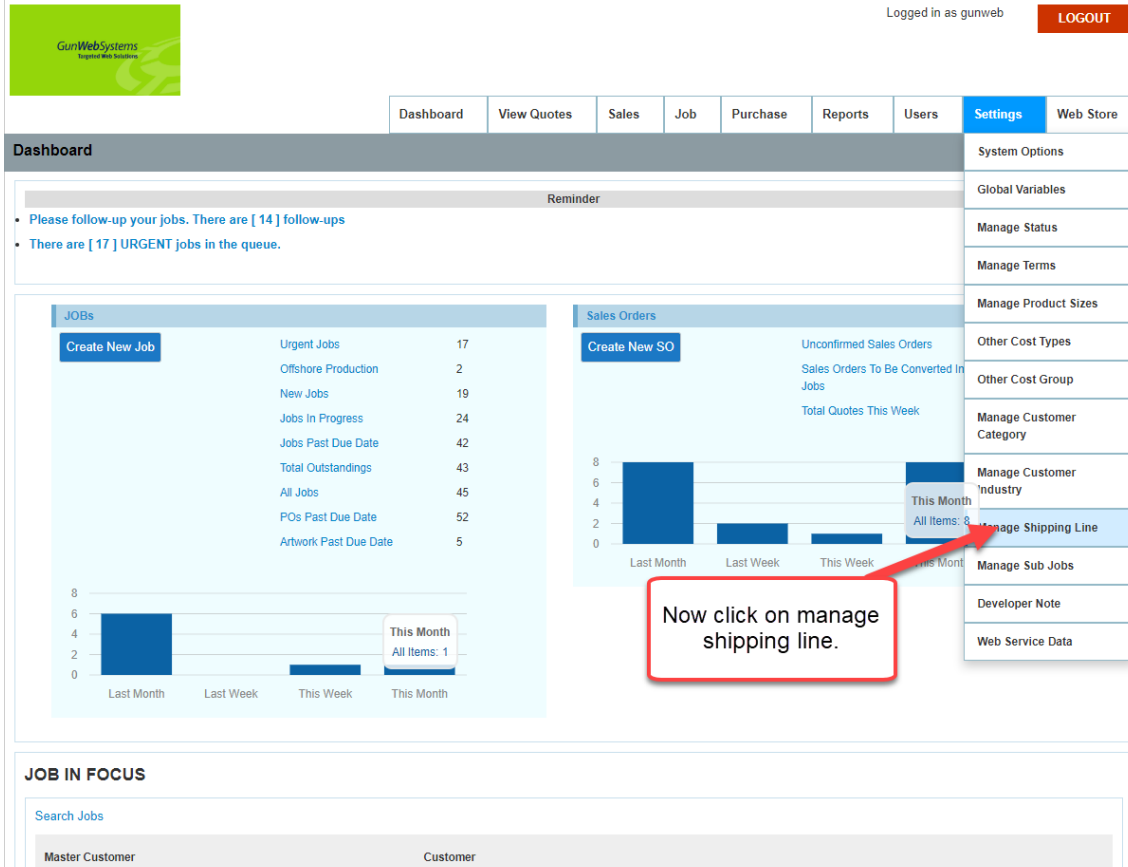
The screenshot shows the GunWebSystems dashboard. At the top right, it says "Logged in as gunweb" and has a "LOGOUT" button. The navigation menu includes Dashboard, View Quotes, Sales, Job, Purchase, Reports, Users, Settings, and Web Store. The "Settings" menu is open, showing options like System Options, Global Variables, Manage Status, Manage Terms, Manage Product Sizes, Other Cost Types, Other Cost Group, Manage Customer Category, **Manage Customer Industry**, Manage Shipping Line, Manage Sub Jobs, Developer Note, and Web Service Data. A red box highlights "Manage Customer Industry" with an arrow pointing to it.

The screenshot shows the "Manage Customer Industries" page. At the top right, it says "Logged in as gunweb" and has a "LOGOUT" button. The navigation menu includes Dashboard, View Quotes, Sales, Job, Purchase, Reports, Users, Settings, and Web Store. The "Settings" menu is open, and the "Create Customer Industry" button is highlighted. Below the menu, there is a search bar and a table of customer industries. A red box with the number "1" points to the "Create Customer Industry" button with the text "By clicking on this it enables you to create a new customer industry." Another red box with the number "2" points to the "Update" button in the first row of the table with the text "Click update to update a current customer industry." The table has columns for ID, Name, and Actions. The first row shows ID 3, Name "Bank", and Actions "View | Update | Delete". The second row shows ID 4, Name "Sport Club", and Actions "View | Update | Delete". The third row shows ID 5, Name "Mining", and Actions "View | Update | Delete".

Step 10.0 – Manage Shipping Line

Repeat step 1.0, click on Manage Shipping Line.

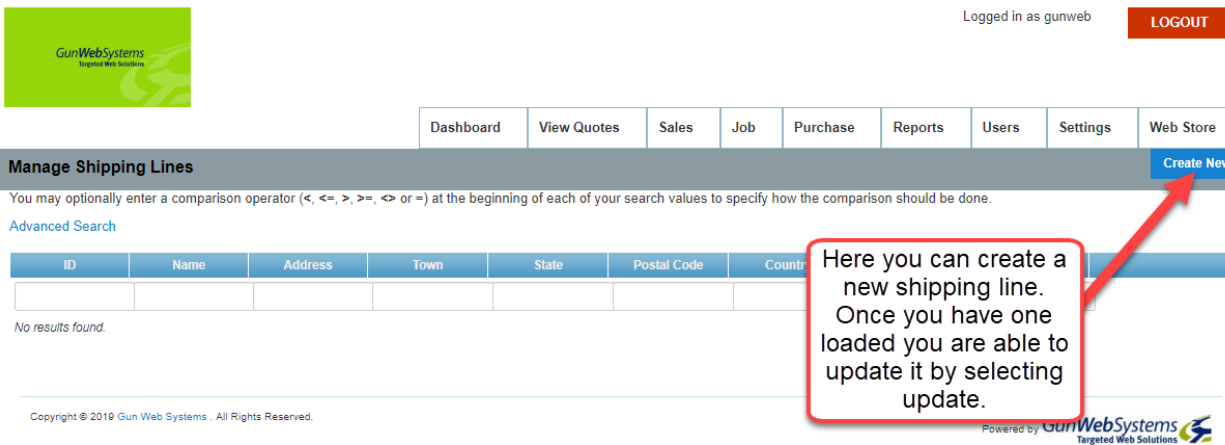
Within the manage shipping line function you can create a new shipping line and/or update a current shipping line.



Dashboard View Quotes Sales Job Purchase Reports Users **Settings** Web Store

System Options
Global Variables
Manage Status
Manage Terms
Manage Product Sizes
Other Cost Types
Other Cost Group
Manage Customer Category
Manage Customer Industry
Manage Shipping Line
Manage Sub Jobs
Developer Note
Web Service Data

Now click on manage shipping line.



Dashboard View Quotes Sales Job Purchase Reports Users Settings **Web Store**

Manage Shipping Lines [Create New](#)

You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done.

Advanced Search

ID	Name	Address	Town	State	Postal Code	Country
No results found.						

Here you can create a new shipping line. Once you have one loaded you are able to update it by selecting update.

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Step 11.0 – Manage Sub Jobs

Repeat step 1.0, click on Manage Sub Jobs.

Within the manage sub jobs function you can create a new sub artwork job and/or update an existing sub artwork job.

The screenshot shows the GunWebSystems dashboard. At the top right, it says "Logged in as gunweb" with a "LOGOUT" button. The navigation menu includes Dashboard, View Quotes, Sales, Job, Purchase, Reports, Users, Settings, and Web Store. The "Settings" menu is open, showing options like System Options, Global Variables, Manage Status, Manage Terms, Manage Product Sizes, Other Cost Types, Other Cost Group, Manage Customer Category, Manage Customer Industry, Manage Shipping Line, **Manage Sub Jobs**, Developer Note, and Web Service Data. A red box with an arrow points to "Manage Sub Jobs" with the text "Now click manage sub jobs." Below the navigation menu, the "Dashboard" section contains a "Reminder" box with two items: "Please follow-up your jobs. There are [14] follow-ups" and "There are [17] URGENT jobs in the queue." There are two main data sections: "JOBS" and "Sales Orders". The "JOBS" section has a "Create New Job" button and a table of job statistics: Urgent Jobs (17), Offshore Production (2), New Jobs (19), Jobs In Progress (24), Jobs Past Due Date (42), Total Outstandings (43), All Jobs (45), POs Past Due Date (52), and Artwork Past Due Date (5). Below this is a bar chart showing job counts for "Last Month", "Last Week", "This Week", and "This Month" (All Items: 1). The "Sales Orders" section has a "Create New SO" button and a table of sales order statistics: Unconfirmed Sales Orders, Sales Orders To Be Converted In Jobs, and Total Quotes This Week. Below this is a bar chart showing sales order counts for "Last Month", "Last Week", "This Week", and "This Month" (All Items: 8). At the bottom, there is a "JOB IN FOCUS" section with a search bar and tabs for "Master Customer" and "Customer".

The screenshot shows the "Manage Sub Artwork Jobs" page. At the top right, it says "Logged in as gunweb" with a "LOGOUT" button. The navigation menu includes Dashboard, View Quotes, Sales, Job, Purchase, Reports, Users, Settings, and Web Store. The "Web Store" menu is open, showing a "Create New" button. Below the navigation menu, the "Manage Sub Artwork Jobs" section has a "Create New" button. Below this is a search bar with the text "You may optionally enter a comparison operator (<, <=, >, >=, <> or =) at the beginning of each of your search values to specify how the comparison should be done." There is an "Advanced Search" section with a table for "Job Category" and "Product Category". Below this is a search bar with the text "No results found." At the bottom, there is a footer with "Copyright © 2019 Gun Web Systems . All Rights Reserved." and "Powered by GunWebSystems Targeted Web Solutions". A red box with an arrow points to the "Create New" button with the text "To create a new sub artwork job, click create new. A job can be updated by clicking update."

Step 12.0 – Developer Note

Repeat step 1.0, click on Manage Shipping Line.

Within this function, you can create a new developer note and/or update a current developer note.

Now click on developer note.

1 To create a new developer note click the "Create Developer Note" tab.

2 To update a current developers note. Simply click update.

ID	Ticket Number	Developer	Description	Status	Datetime	
33	00000033	gunweb	Customer to salesperson relationship	TO_DO	2019-07-03 11:38:16	View Update Delete
32	00000032	EP	option to save images to folder on web service	DONE	2019-06-14 13:36:40	View Update Delete
31	00000031	Admin	error on quote status report	FIXED	2019-06-13 06:39:45	View Update Delete
30	00000030	Admin	test 2	TO_DO	2019-06-09 11:05:15	View Update Delete
29	00000026	Admin	test 1	TO_DO	2019-06-09 11:04:18	View Update Delete
25	Xxx	Tharanga / Eranga	Send image from front end to back end system	not started	2019-06-08 20:28:59	View Update Delete
24	xxx	EP	Delivery notes - Print option in create view	DONE	2019-06-06 10:02:42	View Update Delete
23	xxxx	EP	multiple delivery notes - check qty	DONE	2019-06-06 10:02:06	View Update Delete
21	xxx	EP	Group Quote items	DONE	2019-05-22 03:45:24	View Update Delete
22	XLM import	EP	XML Customer Import new file type	DONE	2019-05-20 05:53:37	View Update Delete

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