# checks.center Branch Reference Guide

Follow the steps below to perform the basic ordering functions using Harland Clarke's Internet Check Ordering program. This Reference Guide includes information on Getting Started, New Order, Quick Reorder, Reorder with Edits, Reruns, Delete Order, Update Order, Update Info and Return to Order History.

# GETTING STARTED – Ordering and Order Inquiry

1. When the Branch application is accessed, the system populates the **Client ID** and **Routing Number**.
2. Enter the customer's **Account Number**, press tab to advance to the Branch number field. Enter the branch number, and then click **Next.**


3. Note that the account number now appears in a protected field. If you wish to change it, you must click the **New Account Number** hyperlink found on the top of the screen (the Application Functions bar). If order history is not present, the system will prompt you to select an account plan (using the drop-down menu). Click **Next**.


## If History Exists

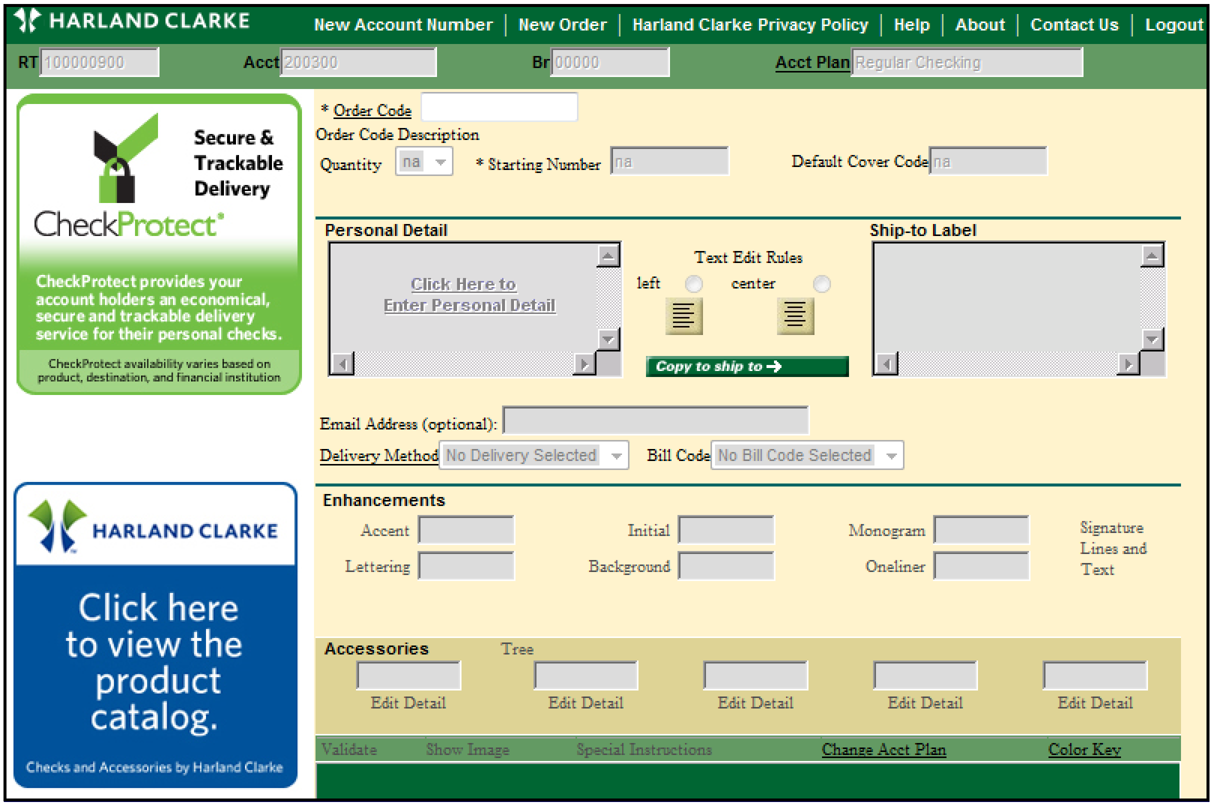
1. You can perform a Quick Reorder if no changes are needed. (See the Quick Reorder section for details.)
2. You can perform a Reorder with Edits if changes are needed or if you wish to view the specifics of the order before submitting. (See the Reorder with Edits section for details.)
3. You may Update the existing order or Update the customer's information for future orders. (See the Update Order section for details.)

## If No History Exists

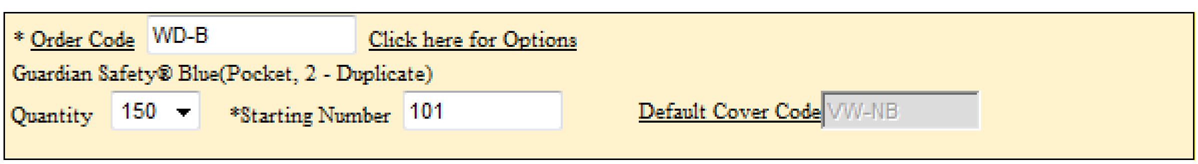
1. You must place a **New Order**. (See the **New Order** section for details).

# NEW ORDER

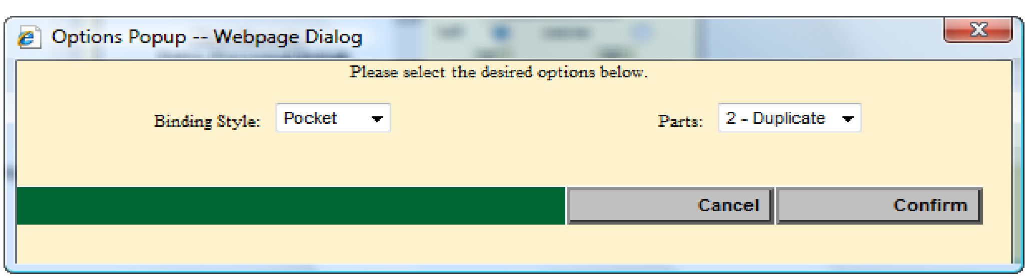
1. Enter the customer's account number and branch number, and click the **Next** button. Then select the account plan information, and click the **Next** button.
2. The Primary Page opens with the cursor appearing in the **Order Code** text box.



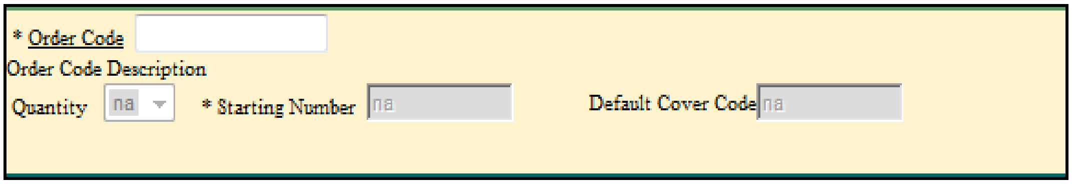

3. Enter an Order Code directly in the text box (if known) and press the TAB key. If the order code is unknown, you may access the Selection Tree by clicking the **Order Code** hyperlink to the left of the Order Code text box. Click the [+] boxes to expand the tree and load the images. Clicking on the product into the Order Code text box.



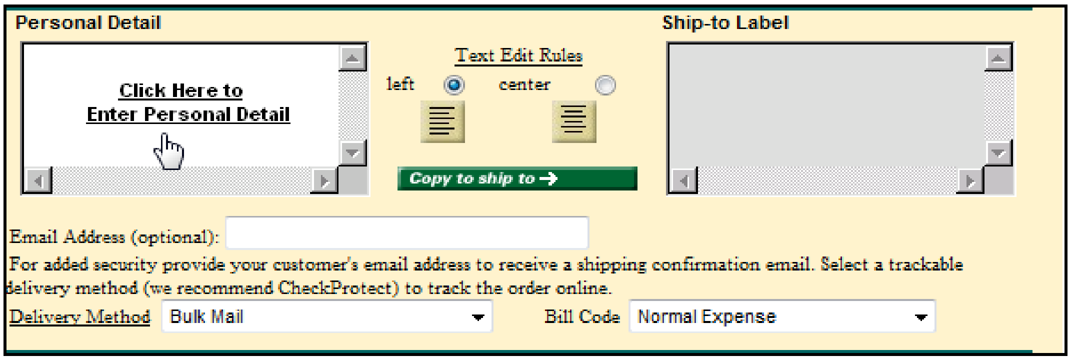

4. The order code defaults to a duplicate style of check when available. To customize the options related to the primary product (i.e., style, design, color, and parts) click the **Click here for Options** hyperlink to the right of the Order Code text box (if applicable).
5. The Click here for Options hyperlink opens a pop-up window where you may change the settings by clicking on the drop-down menus provided. Click the **Confirm** button to return to the Primary Page.



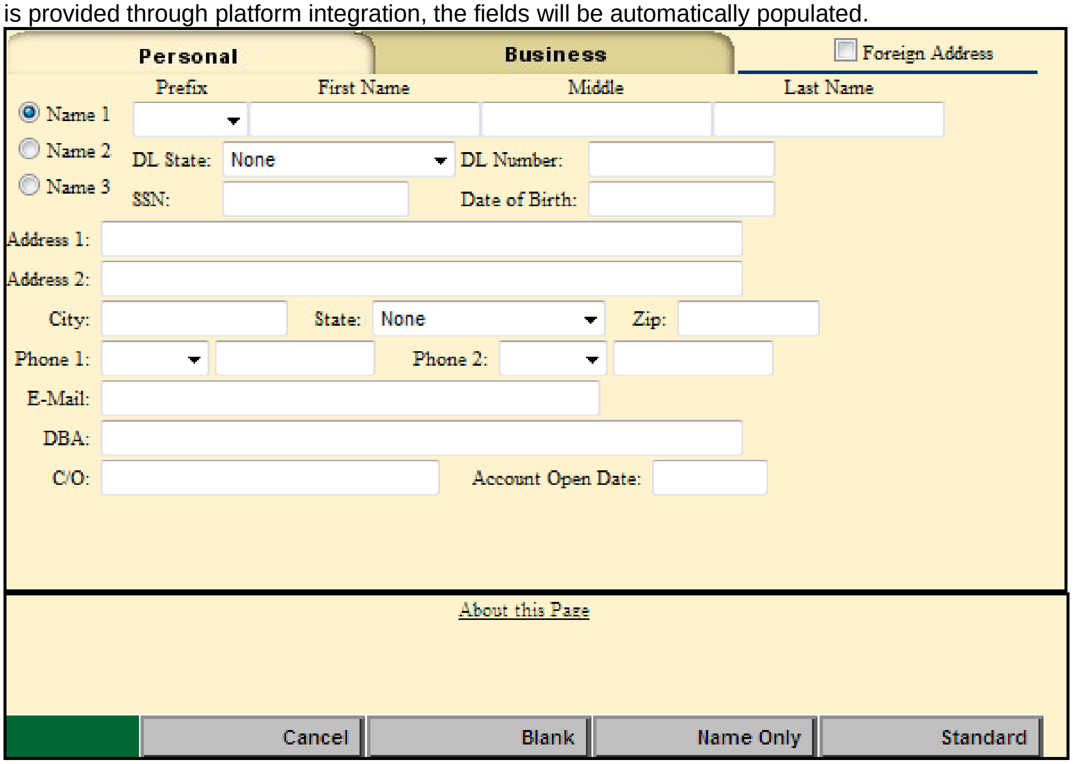
6. If there are no restrictions on the account plan, both the quantity and starting number can be modified.




7. To add **Personal Details**, click the hyperlink in the Personal Detail text box.

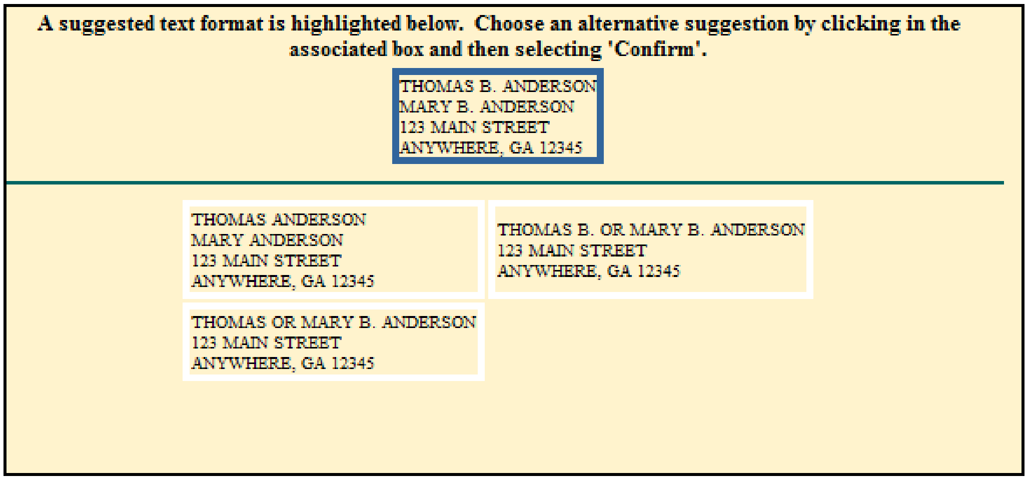



8. The Personal Detail fields display. Enter all relevant client information. If you wish to add a second or third name, click the buttons next to **Name 2** or **Name 3**. If this product is ultimately going to be shipped outside the United States, make sure the **Foreign Address** box in the top right corner is checked. (If the Personal Detail is provided through platform integration, the fields will be automatically populated.

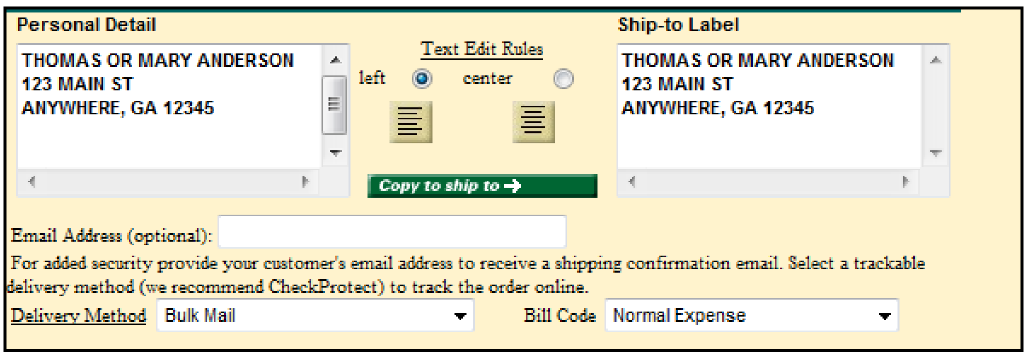



9. Once the customer's data has been entered, choose the desired format for printing by clicking on one of the buttons at the bottom of the screen: **Blank**, **Name Only**, or **Standard.**

10. If the customer's data is sufficient to allow formatting options, choose the desired format for printing. The selected format will appear in the top panel and will be highlighted in blue. Click the **Confirm** button to save this format.




11. The Personal Detail and Ship-to Label text boxes populate using the formatting option you chose. Any information that should not appear on the shipping label (e.g., phone number, driver license number) is automatically stripped.



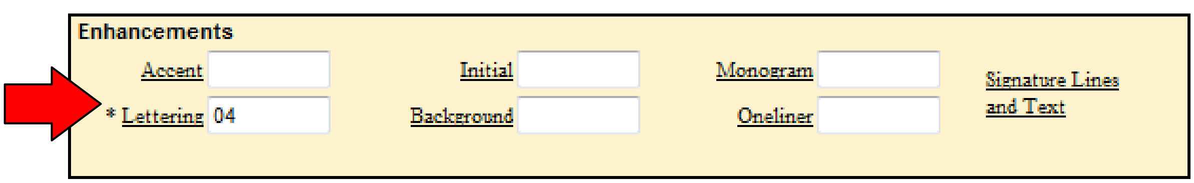

12. If you still wish to make changes to the Personal Detail, you may do so directly in the free-form text box. To update the Ship-to Label with the new changes, click the **Copy to ship-to** button.

13. To create an alternate shipping address, type the appropriate information into the **Ship-to Label** text box.

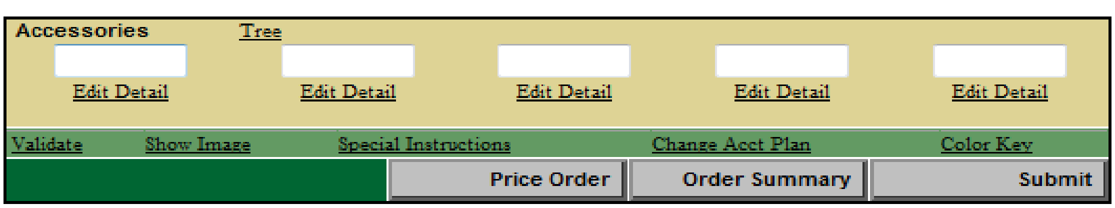
14. You may enter your customers email address and Harland Clarke will notify the customer when their order ships.

15. To change the **Delivery Method** and/or **Bill Code**, simply choose a new selection from the drop-down menus provided.

16. To add a check enhancement, click in one of the appropriate **Enhancement** text boxes and enter the catalog code **or** click an enhancement hyperlink to activate the Selection Tree. If a particular enhancement is not available for the primary product chosen, that enhancement field appears protected (grayed out).




17. To add an accessory, enter the appropriate order code in one of the **Accessory** text boxes or click the **Tree** hyperlink to activate the **Accessories** tree. To customize the Accessory, click the **Edit Detail** hyperlink under the appropriate text box.



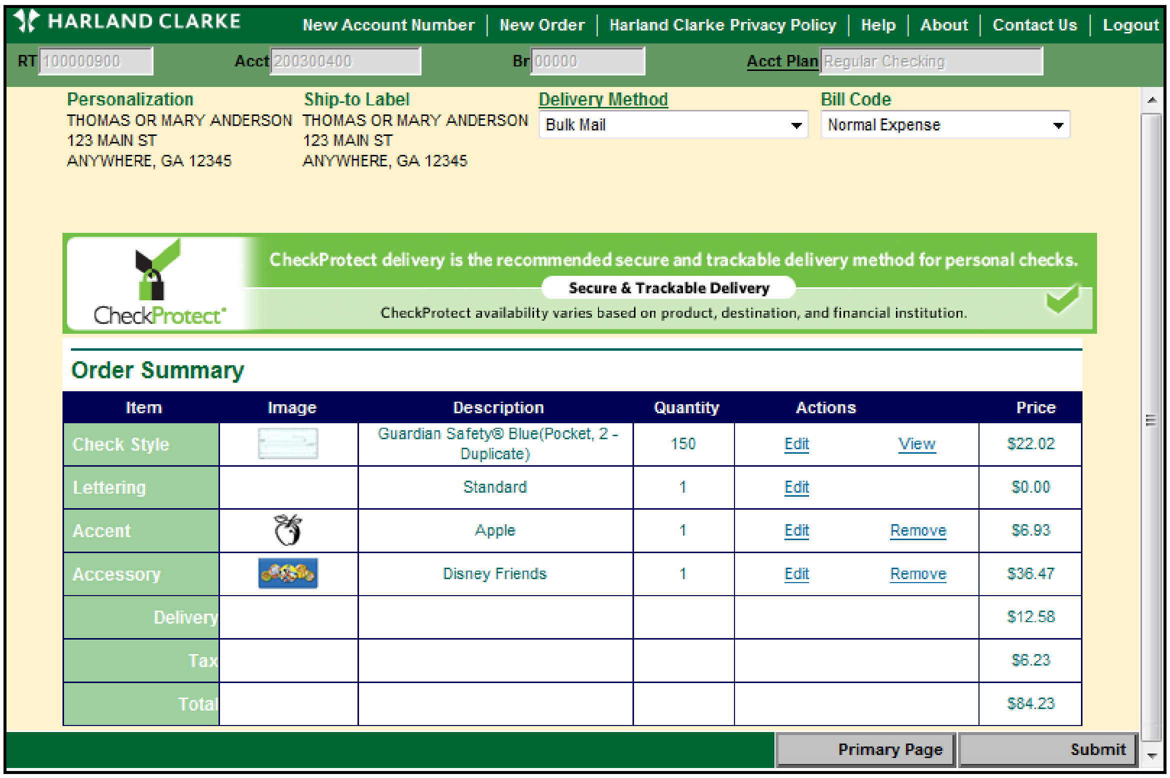
18. You may click the **Show Image** hyperlink to see a preview of the printed product.

19. Click the **Special Instructions** hyperlink to provide additional information (if necessary). ***Note:*** Special Instructions will cause a delay in production. Use sparingly to identify special printing needs. For Example: McNeal – uppercase M and N.

20. If an error is found, an explanation will appear under the **Notices** section of the Selection Tree. Notices that appear in **red** text must be updated or changed before submitting the order. Informational notices will appear in **blue** text. You may receive other periodic notices that appear as pop-up windows.

21. Once an error is corrected, click **Validate** to confirm that no further changes or corrections are needed.

22. After making the necessary changes, you may return to the Primary Page or click the **Order Summary** button. Reviewing the **Order Summary** is highly recommended. This screen provides an overview of the products and ordering instructions. To make product changes, click any of the **Edit** hyperlinks to be returned to the Primary Page. To remove an item, click the appropriate **Remove** hyperlink.




23. Select the **Price Order** button to initiate a pricing transaction. The **Order Summary** page will display pricing for each line item, Delivery, Tax, and the Total Price.

24. If everything appears correct, click the **Submit** button to send the order.

25. After submitting the order, a pop-up message displays indicating that your order was received successfully. Click the **OK** button to close the screen and return to the Account Entry screen.

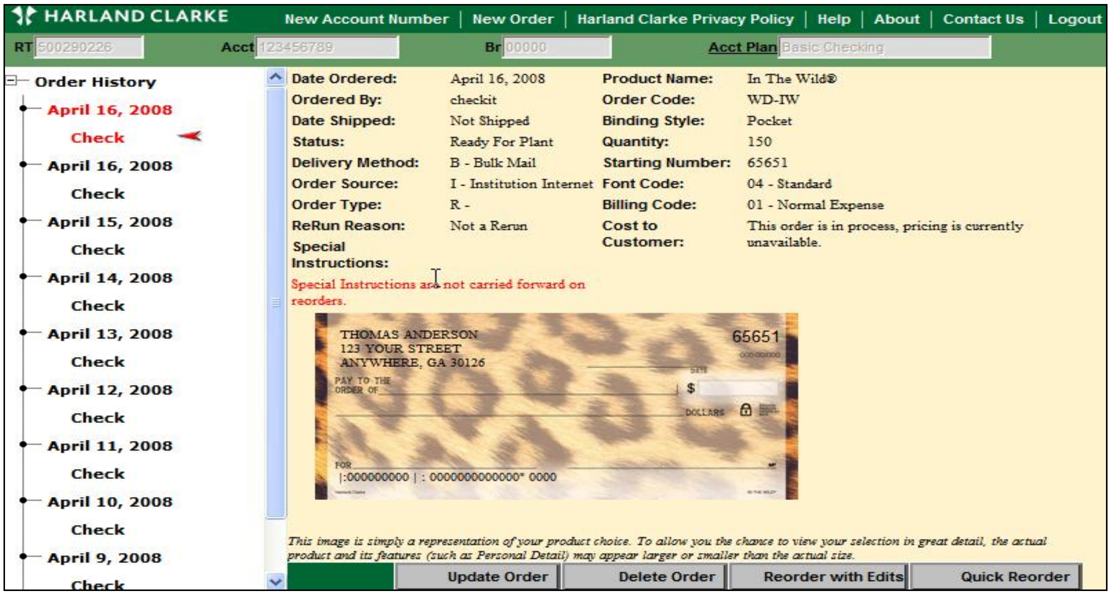
# QUICK REORDER

***Note:*** If any changes or Special Instructions are required, **DO NOT** use **Quick Reorder**. Instead use **Reorder with Edits.**

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Review the list of orders, and select the primary product you wish to reorder for the client. (The primary product is listed beneath each date. The most current order is at the top of the list)

3. Click the **Quick Reorder** button to submit the order. This will automatically advance the starting number based on the previous quantity.



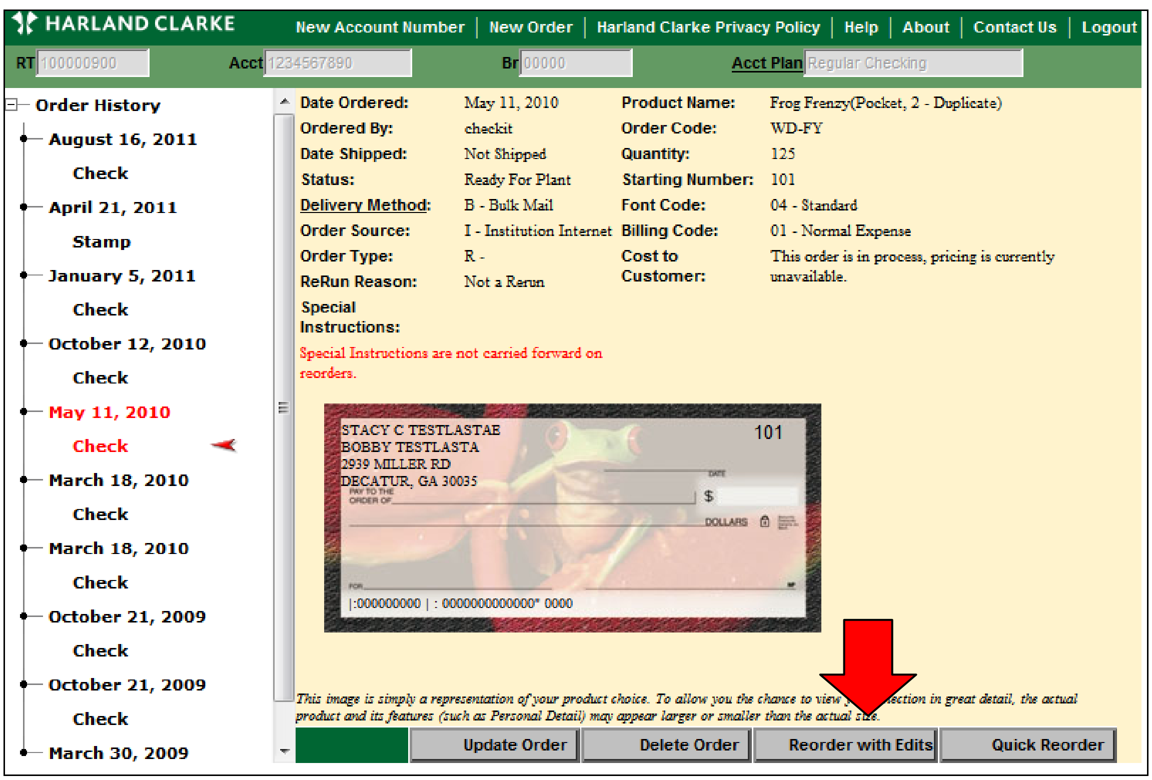

4. You will receive confirmation that your order was submitted successfully.

   **NOTE:** Special Instructions or accessories listed on the previous order will **NOT** be part of this reorder. If you must add these features, do **NOT** use the Quick Reorder button. Instead use the **Reorder with Edits** button.

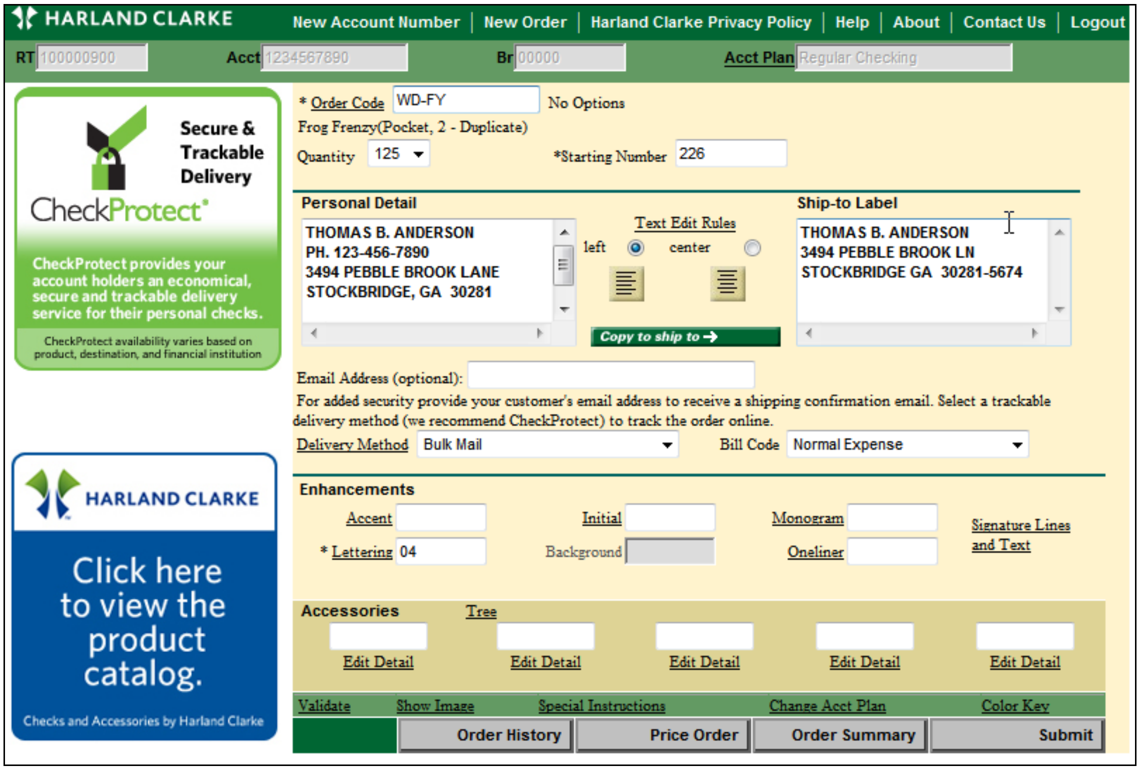
# REORDER WITH EDITS

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Click the **Reorder with Edits** button, which will direct you to the Primary Page.




3. The Primary Page displays all the details for the primary product. Note that the Starting Number advances to reflect the next sequence.

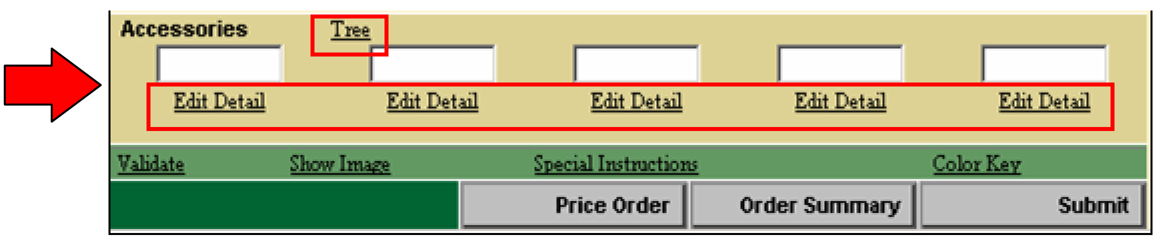



4. The **Personal Detail** and **Ship-to Label** fields populate using data retrieved from history. To make changes, click in the appropriate text fields and update the information

5. Enhancements included on the prior order will appear in the appropriate Enhancement field. You may Add/Change/Delete as needed.

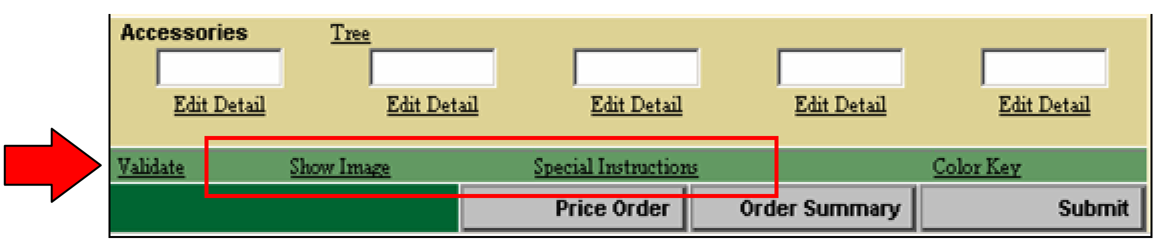
6. To add an accessory, enter the appropriate order code in one of the Accessory text boxes or click the Tree hyperlink to activate the Accessories tree.

7. To customize the Accessory, click the Edit Detail hyperlink under the appropriate text box.




8. You may click the **Show Image** hyperlink to see a preview of the printed product.

9. Click the **Special Instructions** hyperlink to provide additional information (if necessary). ***Note:*** Special Instructions will cause a delay in production. Use sparingly to identify special printing needs. For Example: McNeal – uppercase M and N.




10. If an error is found an explanation will appear under the **Notices** section of the Selection Tree. Notices that appear in **red** text must be updated or changed before submitting the order. Informational notices will appear in **blue** text only and will not prevent the order from being submitted.

11. You may receive other periodic notices that appear as pop-up windows.

12. Once an error is corrected, click the **<u>Validate</u> hyperlink** to confirm that no further changes or corrections are required.

13. To review the details of the order, click the **Order Summary** button.

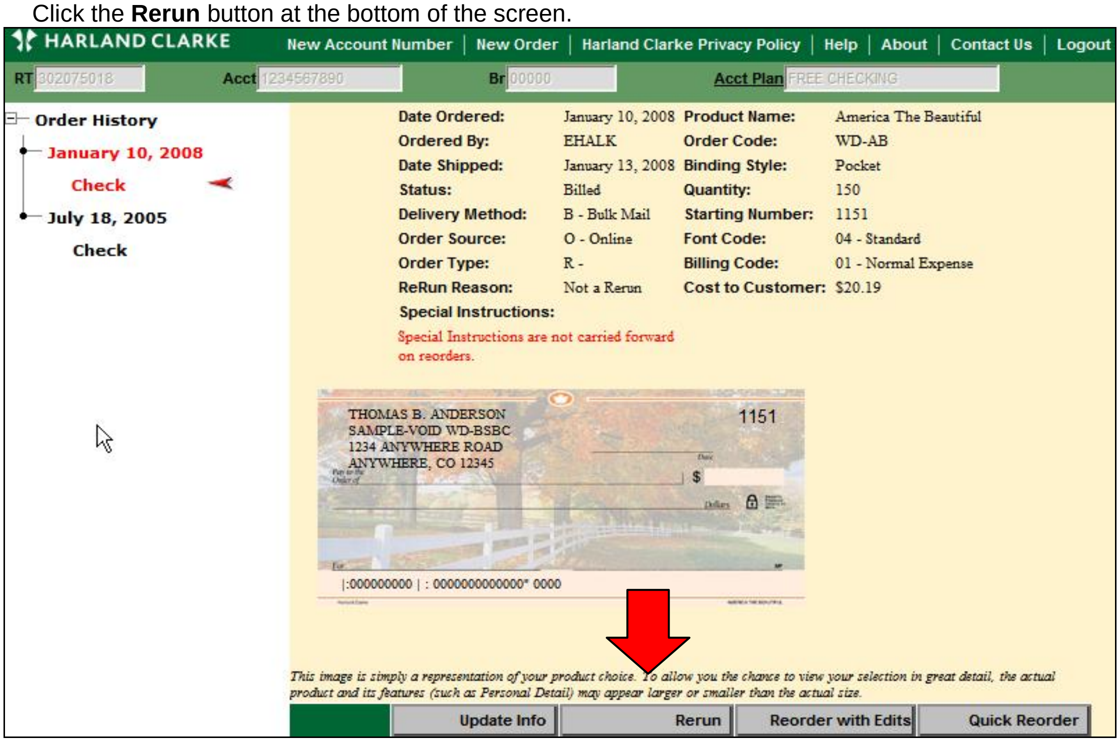
14. Select the **Price Order** button to initiate a pricing transaction. The **Order Summary** page will display pricing for each line item, Tax, Delivery, and the Total Price.

15. Once you are sure that all information is correct, click the **Submit** button to send the order.

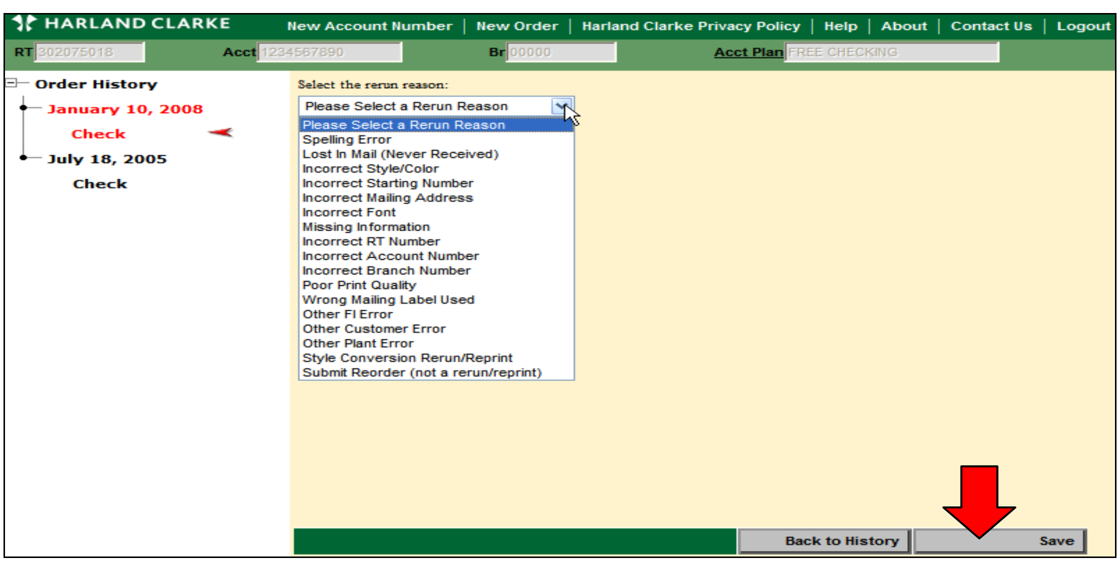
## RERUNS - Any order requiring a reprint due to an Error or due to being Lost in the Mail.

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Click the **Rerun** button at the bottom of the screen.




3. A new screen opens and prompts you to select a rerun reason from the drop-down list.




4. Click the **Save** button to submit your choice or click the **Back to History** button to cancel it.

5. If you choose to save the rerun reason selected, you will be directed to the Primary Page where you can review the details of the order, make the necessary changes and re-Submit the order for processing.

   ***NOTE:*** When requesting a rerun, the system retains the same Starting Number as the previous order except when the order is flagged as Lost in Mail. Orders Lost in Mail will begin with the next appropriate Starting Number.

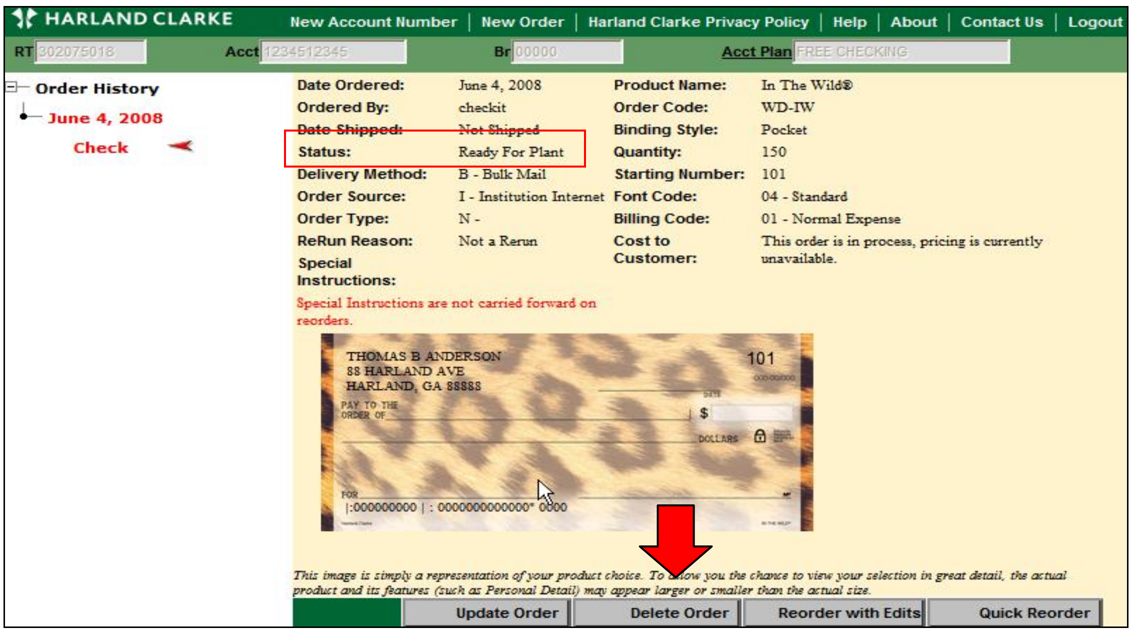
# DELETE ORDER

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Locate the appropriate order on the Order History screen. If the order status is **Ready For Plant,** then the order may be deleted from the system.

3. Click the **Delete Order** button to cancel the order. This order will not be produced.

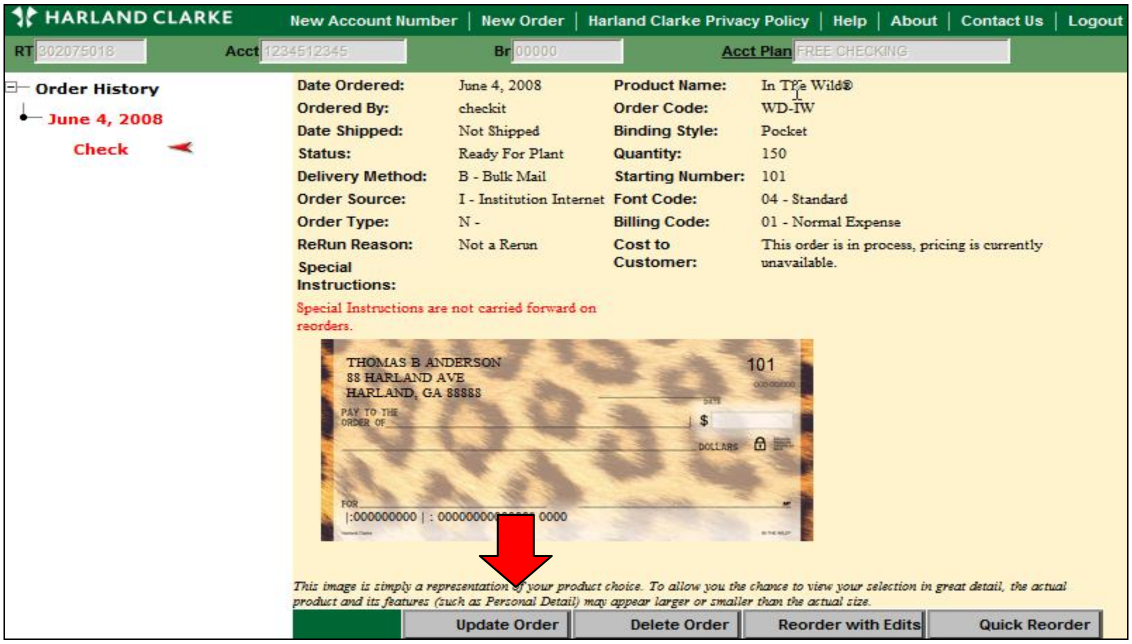
   ***NOTE:*** If the order status has changed to any status other than Ready for Plant, the **Delete Order** button will not be visible**.**



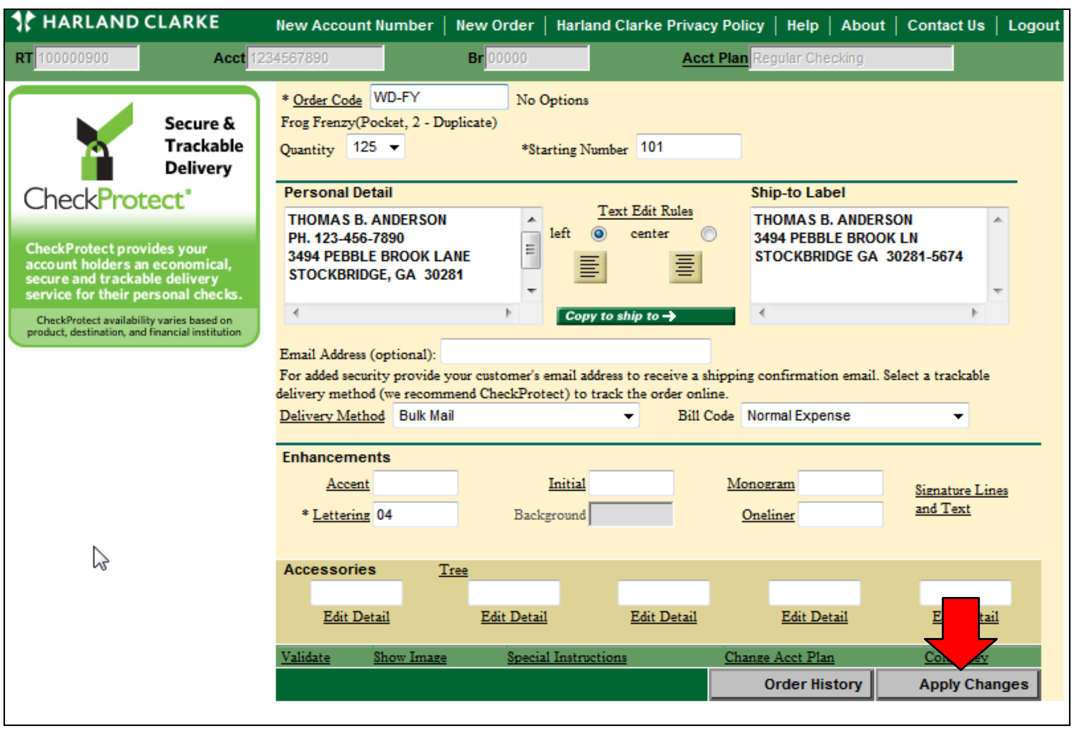

# UPDATE ORDER

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Locate the appropriate order on the Order History screen. If the Order Status is **Ready For Plant**, click the **Update Order** button to change the order information for the current order. If the Order Status is anything other than **Ready For Plant**, this order may not be changed. Click the **Update Info** button to store changes for future orders.



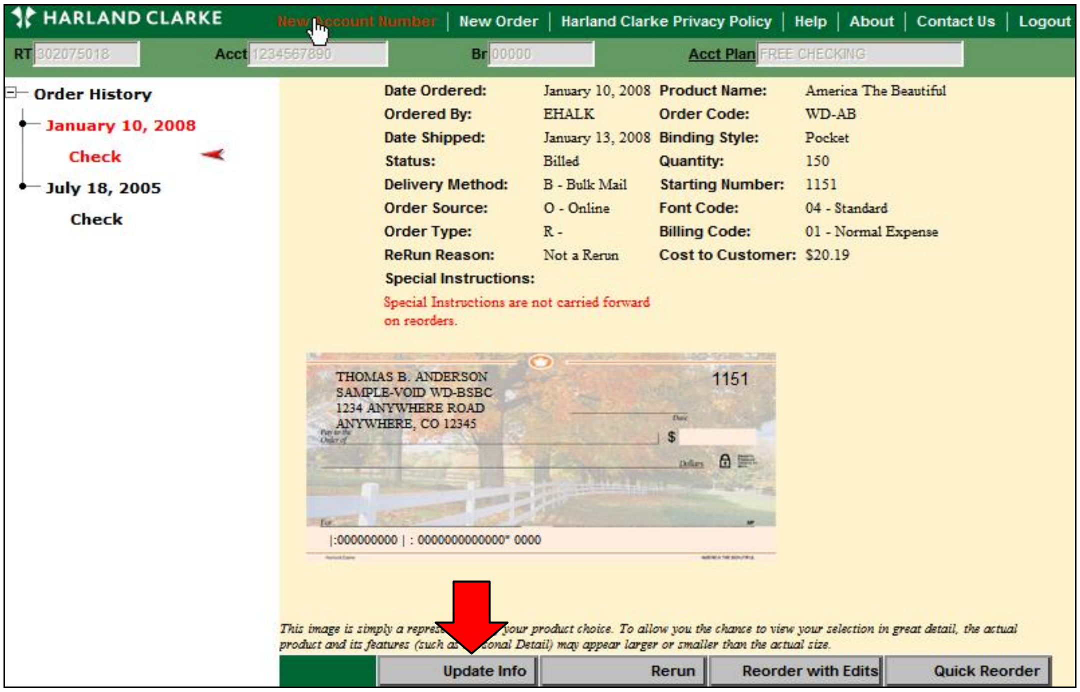
3. Make the needed changes to the order, and click the **Apply Changes** Button.



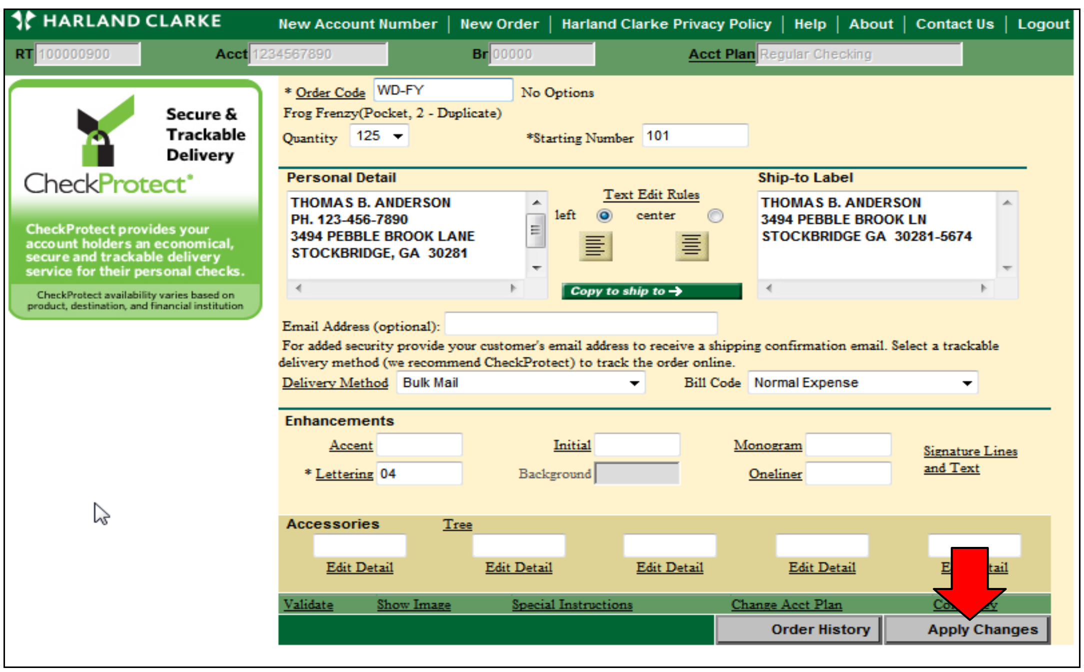
# UPDATE INFO –

1. Enter your customer's account number and branch number, and click the **Next** button. Select the account plan information, and click the **Next** button. The **Order History** page loads.

2. Locate the appropriate order on the Order History screen. If the Order Status is **Billed**, click the **Update Info** button to change the order information for future reorders.



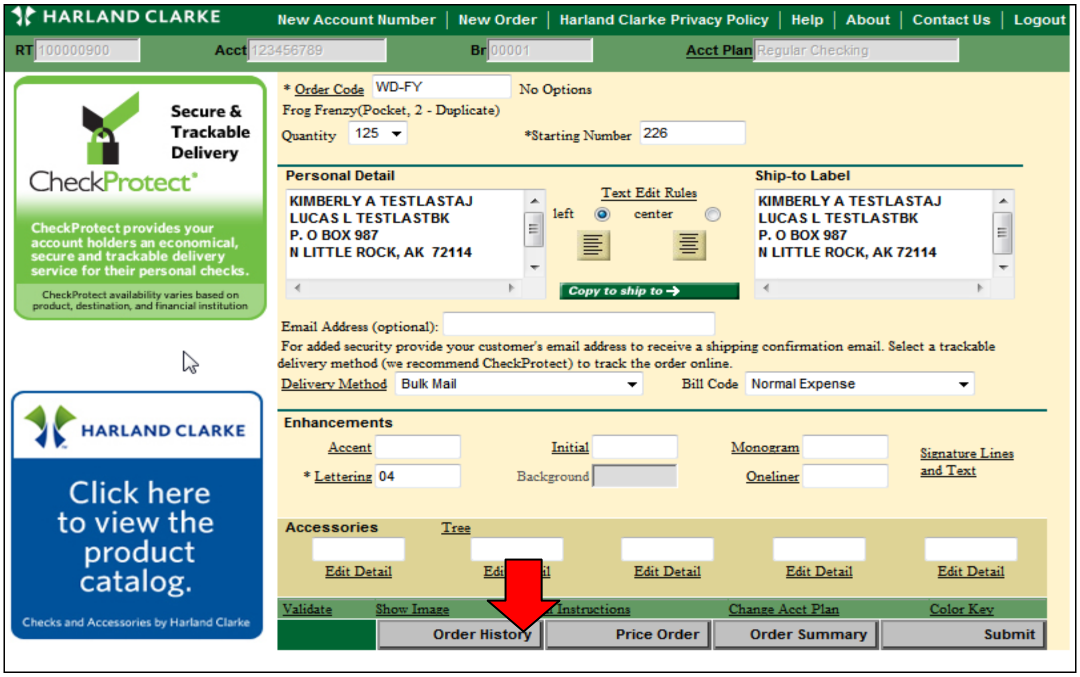

3. Make the needed changes to the order and click the **Apply Changes** Button. Changes will be applied to all future reorders, even if the customer orders through OrderMyChecks.com.




# Return to Order History

The new Return to Order History feature allows users to return to the Order History screen at any time during the ordering process or upon submission of an order.

The **Order History** button will appear, at the bottom of the Primary page, throughout the ordering process for all account numbers that have order history.




**Note:** If the "Order History" button is selected during the order process and before the order is submitted, the Order History screen will be displayed and all current information will be lost.

In addition to the button on the Primary page, the "Order History" button will appear on the Order Submission page.