

CUMIS® Stationery Online Ordering Site - Training Manual

Site Address: www.cumis.cgconverge.com

REGISTER: If this is your first time visiting the site, you will need to register by clicking on: "Click Here to register."

New User to this site? [Click Here to register](#)

Account Access:

Welcome to the online ordering system developed exclusively for you. Registered users, please enter your Email Address and Password to begin ordering:

Email: Email is a required field.

Password:

Remember Me ?

Enhanced features you'll find in Converge!

- Reduced clicks for faster ordering
- Compact navigation to quickly locate your products
- Link to recent orders on your home page
- Improved order history view with search tools
- Streamlined checkout
- Print friendly views of your entire order
- Ease of transition from existing ordering site
- Enhanced administration tools

converge™
Where fast and easy ordering meet.

If you have already registered, you will be able to enter your username and password and proceed with ordering your stationery.

Creating a new user:

To start your self registration, please complete the fields in the form below.

[Click Here for Registration Instructions](#)

User Prompts:

Username:

Email:

Once submitted your user name and password will be emailed to you

Registration Tips:

- Please complete all required fields.
- Once submitted an email will be sent to the address provided.
- Our Customer Service department is here to assist you, the Toll Free number will be displayed at the top of each page.

For more help with the Registration process, click on this link or contact our Customer Service.

Creating a new user is easy. Enter a username and your email address. Then select the Continue with Registration button. An email will be sent to the address you entered with a temporary password to use the first time you login. You will be prompted to change your password at this time.

Once you've entered your email address you will get confirmation that your user registration has been submitted.

New User Setup

Thank You!

- Your new user registration has been submitted for processing.
- Once complete, you will receive an email with a link containing your login information.
- First time login will require that you create a password.

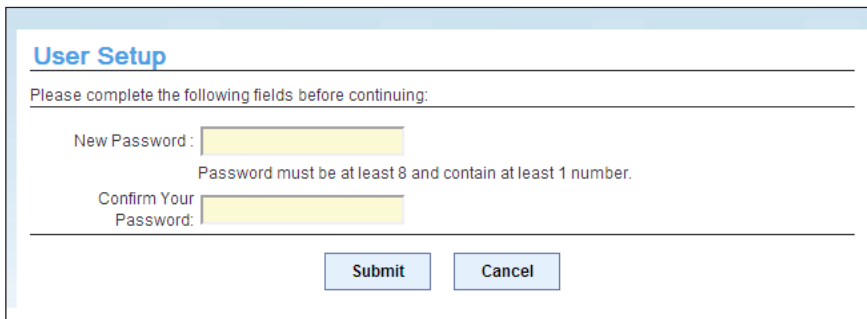
Site Address: www.cumis.cgconverge.com

You will receive an email in your inbox once you have submitted your registration request. If you do not receive it shortly after submission, check your junk folder.



The image shows a registration confirmation email. At the top, there is a blue header with a circular arrow icon and the text "Thanks for registering!". Below this is a section titled "Registration Details". The email body starts with "Dear dsburnett@taylorcorp.com:" followed by "Thank you for registering . Your account has been set up and activated using the following credentials:". A bold instruction says "Click on the link below to get started!" and a note states "Please Note: For security reasons, your password must be changed after first login." A red box highlights a long URL: "Take me to the ordering site <http://cumis.cgconverge.com/Login.aspx?HashedPassword=true&username=dsburnett&password=KY%2bUZ6x%2fvN9wh455%2bVt03i6BYnPAsY7M8mod%2fwkw%2bVzJqrm03v0bjaoDEdVTUFgis%2fz9uEH4rhvxYq8GDeiJQ%3d%3d>". A red arrow points from the text "Click on the link in the email to go back to the site." to this URL. Below the URL, it says "Online instructions are available" and provides a link to a PDF file: "Converge Ordering Overview". A red arrow points from the text "A PDF file for ordering instructions is available in the email body." to this link. Further down, it provides a URL and login credentials: "URL: <http://cumis.cgconverge.com/> Username: dsburnett Password: w3CSy4a2FK". At the bottom, it offers customer service contact information: "Contact Customer Service Toll Free: 800-565-5345" and "Email us at customerservice@valuegraphics.com". A red arrow points from the text "A link to our customer service email address is available if you have any questions about the site or the registration process." to this email address.

The link in your email will take you to the user setup on the site. You will need to create & confirm your new password.



The image shows a "User Setup" form. It begins with the heading "User Setup" and the instruction "Please complete the following fields before continuing:". There are two input fields for passwords. The first is labeled "New Password:" and the second is labeled "Confirm Your Password:". Below the first field, a note states "Password must be at least 8 and contain at least 1 number." At the bottom of the form, there are two buttons: "Submit" and "Cancel".

Site Address: www.cumis.cgconverge.com

HOME PAGE This is your home page where you have access to all the tools within Converge, your online ordering site.

Contact us: 800-565-5345 or customerservice@valuegraphics.com Logout

cumis Online Stationery Store

Basket Total : \$0.00 (0) Items View Basket

Home | Browse Products | Order History/Check Status | **Manage My Account**

Stored text Profile for dsburnett@taylorcorp.com | [Switch User](#) | [Manage](#) | ?

Personalized Items

- Business Cards
- Envelopes
- Letterhead
- Notepads
- View All

Fulfillment Items

- Envelopes
- Folders
- Thank You Cards
- View All
- Quick Order

Welcome!

A drop down list of products is available on the left side of your screen, or simply [Click Here](#) to view the product catalog. If you need assistance we are here to help! Contact and help information is located at the top of your screen.

Ordering Instructions:

If you are new to this site or would just like to refresh your memory, an online user guide is available in PDF format.

[Click Here to open](#)

Managing Your Account:

[Manage Your Account](#)

Usernames and Passwords **Manage Stored Text**

Need to change your password? User and password settings can be found in the My Account section.

Converge can save text to prefill your personalization prompts, shipping locations, or requester information.

[Click Here to Manage](#) [Click Here to Manage](#)

When you login for the first time, go to the **Manage My Account** link to edit your profile, billing address & shipping information. Once saved, you won't have to enter these details again, unless you need to make edits.

Manage My Account

My Account Shortcuts

- [Stored Text](#)
- [Requester Information](#)
- [Shipping Locations](#)
- [Change Password](#)

Stored Text Profile(s)

[+ Add New](#)

Display Name	Profile Options	Copy / Remove
dsburnett@taylorcorp.com	Stored Text Prompts	

In Manager My Account, you can edit your profile, update your requester information or shipping locations (you can add more than one if you need to). Click on the links to go to each section.

If you will be ordering for more than one person, select **Add New** to create additional profiles. You will be given the option to select from the various users when you personalize the item you select.

If you have another profile to create and the details are very similar, you can select the Copy/Remove icon and it will create a copy of the profile for you to edit.

User Prompts

Display Name:

Username:

Email:

Imprint Prompts

Prefill Address:

English

Name:

Designations:

Title:

User & Imprint Details When you select the Edit Profile link, a window will pop up listing all the user and imprint prompts. You can edit your username and email address.

You can also fill in the Imprint Prompt. There will be a Prefill Address selection for the envelope items, English and French fields. This information will flow in the appropriate location on any item you select. This reduces the amount of information you have to type in when you place future orders.

All the text is editable and can be changed at any point and easily saved back to your profile.

Once you have entered all the details in the prompts, select **Save Changes** at the bottom of the window.

You will receive verification that your user has been saved.

My Account Shortcuts

- [Stored Text](#)
- [Requester Information](#)
- [Shipping Locations](#)
- [Change Password](#)

Requester Details

[+ Add New](#)

Edit	Display Name	Requester Details	Copy / Remove
+ Add New			

When you go to the Requestor Information link, you can select Add/New or Edit an existing one.

Requester Details

This is my primary requester.

Display Name:

Submitter Name:

Submitter Phone:

Department:

The details you fill out in this window will flow into the Billing section at checkout. Please make sure all the information is accurate.

Manage My Account

- [User Profile\(s\)](#)
- [Billing Information](#)
- [Shipping Locations](#)
- [Change Password](#)


Shipping Locations

[+ Add New](#)


Edit	Display Name	Billing Details	Copy / Remove
Edit	DSB Site	Denise Burnett 123 John Street Johnsonville, ON	
Edit	My Shipping Location	Denise Burnett 123 John Street Johnsonville, ON	

When you go to the Shipping Locations link, you can select Add/New or Edit an existing location. If there is more than one shipping location you will have the choice in check-out to select which location you want the order to be shipped to.

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Online Stationery StoreBasket Total : \$0.00 (0) ItemsView Basket

[Home](#) [Browse Products](#) [Order History](#)

Stored text Profile for  dsburnett@taylorcorp.com | [Switch User](#) | [Manage](#) | [?](#)

Personalized Items

- Business Cards
- Envelopes
- Letterhead
- Notepads
- [View All](#)

Fulfillment Items

- Envelopes
- Folders
- Thank You Cards
- [View All](#)
- Quick Order

Browse Products

Personalized Items

Business Cards	Letterhead
Envelopes	Notepads

Fulfillment Items

Envelopes	Folders
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Personalized Items include the items that need to be customized & require additional information to be entered like business cards, letterhead, notepads and envelopes.

Click on the category you want to find the items available for ordering (see pg. 6 for details)

When you are done editing your profile, you can select **Browse Products** at the top of the screen.

Personalized Items

- Business Cards
- Envelopes
- Letterhead
- Notepads
- [View All](#)



Fulfillment Items

- Envelopes
- Folders
- Thank You Cards
- [View All](#)
- Quick Order

Thumbnail View | List View | 25 Items Per Page

[Add Selected Items to Basket](#) [Clear/Reset Selected](#)

Fulfillment Items > Envelopes

	CL011 CUMIS Retirement Services No 9 Return Env. Regular English Burlington	<input type="checkbox"/> Item Selected Quantity: 0 Price:
	CY035S CUMIS Ives Insurance No. 9 Return Env Regular English	<input type="checkbox"/> Item Selected Quantity: 0 Price:
	EP007 CUMIS Claims Centre Prepaid No. 9 Env, English, Burlington	<input type="checkbox"/> Item Selected Quantity: 0 Price:

To see a larger image of the item, click on the thumbnail picture.

Fulfillment Items include the items that are prepackaged or inventoried items that have no variable information.

Site Address: www.cumis.cgconverge.com

Personalized Items - When you select a personalized item, a window will pop up asking for you to select your quantity

The CUMIS Group Limited
Firstname Lastname, Degree
Title Line One
Title Line Two
123.456.7890 ext. 134
1.800.123.4567
fax: 456.789.0123 call: 987.654.3210
firstname.lastname@cumis.com
P.O. Box 5065, 151 North Service Road
Burlington, ON L7R 4C2

Item Details
Item Number: CUMISBC2E
Description: CUMIS Business Card - English, 2 sided
Select Quantity: 250
Price: \$40.53
Turnaround Time
Standard in-house production time is 3 days.

[View Full Size Image](#)

[Continue / Personalize This Item](#)

Click to view a full size image of the item you have selected.

The cost is updated based on the quantity you have selected.

Select **Continue** once you've selected your quantity.

Item: CUMISBC2E [Item Details and Quantity](#)

Prefill prompts with stored text for: [What's This?](#)
dsburnett@taylorcorp.com
 Update the above stored text profile with what I type below

Designations
BA
Title
Project Manager
Phone
519 123 4567 , ext. 123
Toll Free
800 456 7890 , ext.
Fax
519 456 7890 , ext.
Cell

Email
dsb@cumis.com
Address

Product Preview: Zoom Level: 150% [View Full Size Image](#)

The CUMIS Group Limited
Denise Burnett, BA
Project Manager
519.123.4567 , ext. 123
1.800.456.7890
fax: 519.456.7890
dsb@cumis.com
123 John Street, Suite 234
Stratford, ON N5A 7S8

cumis

[- Shrink / + Expand](#)

If you have edited the details below, you can save the changes directly back to your profile by ticking this box.

This is your proof and your product will be printed exactly as is displayed. Review the proof to ensure everything is correct and then tick the box below for online proof approval.

Approving Your Proof:

I've changed my mind!
[Cancel](#) Do not add this to my cart

Once approved, select Continue at the bottom of the page.





Online Proof Approval: By checking this box I agree that layout, content, and spelling are correct. I understand that my order will be printed exactly as shown and I will not be allowed to make changes once checkout is complete.

I have read the information stated above and approve this proof.

Site Address: www.cumis.cgconverge.com

Fulfillment Items - When you select the fulfillment items section, you will see a full list of all the available products and you can select quantities for however many forms you need.

Fulfillment Items > Envelopes

	CL011 CUMIS Retirement Services No 9 Return Env. Regular English Burlington	<input type="checkbox"/> Item Selected Quantity: 0 Price:
	CL163 CUMIS 9 x 12 Window Envelope, English	<input type="checkbox"/> Item Selected Quantity: 0 Price:

Add Selected Items to Basket **Clear/Reset Selected Items**

Once you are done selecting your items, hit **Add Selected Items to Basket** to continue

Select your quantity and the price will update accordingly

Once you've added items to the Basket, a screen will pop up giving you the option to Continue Shopping or Proceed to Checkout.

Catalog Notice

Your item(s) have been added to the basket.

Continue Shopping **Proceed to Checkout**

Site Address: www.cumis.cgconverge.com

BILLING: Review the Requester details and confirm the information is accurate. For payment, you will have to indicate a valid department code from the drop down list.



Will I receive a copy of my receipt?

Once your order has been placed you will receive an email order confirmation. You will also receive a notification email once your order has shipped.

Requester:

[Add New Requester](#)

Prefill prompts with:

Submitter Name:

Submitter Phone:

Department:

Save

Selecting "Save" is required for checkout.



Additional Details:

Please share any additional details that may be needed to process your order.

Additional Email:

If you would like to designate another person or group to receive a copy of this order email confirmation, please enter the address in the space provided.

Email Address:

Multiple addresses entered separated by semi-colon (Example for: test1@mail.com;test2@mail.com)

This is required.

Enter your email address or another email for the confirmation to go to an additional person.

Basket Total: \$252.09

Estimated Order Total: \$284.86

Completing your Order:


Final Approval: I agree that all information is correct and proofs are approved and ready to be processed. I understand that due to the speed of electronic processing changes or cancellations are not allowed once this order is placed in production.

I have read the information stated above and approve this order.

Place Order

Before you can submit your order, you will have to check the above box indicating your approval to proceed with the order. Once you submit your order, you will receive a confirmation email listing all the details of your order.

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Order History & Check Status

On the Home Page, you can select **Order History** at the top of the page and search any orders you've placed.

Order Search


Search in this field:

ConfirmationNumber ▾

For this value:

Search
Reset

Order Summary -- Test

 [Printer Friendly View](#)

Order Number: 5243246 *created on 10/25/2012 9:12:55 AM*
Ordered by : dsburnett@taylorcorp.com

Requester Details:

Submitter Name: Denise Smith
 Submitter Phone: 123-456-7890
 Department: 5001AB005

Shipping Details:

Attention1: Denise Smith
 Address1: 123 John Street
 Address2:
 City: Stratford
 State: ON
 Zip: N5A 7S8

Order Numbers

[5243246](#)
 10/25/2012 9:12:55 AM
 dsburnett@taylorcorp.com

01

Basket Summary

Quantity	View Sample	Item Detail	Price
250	View	CUMISBC2E - CUMIS Business Card - English, 2 sided - (Denise Burnett) Ship Method: Purolator Production Time: 3 Days	\$40.53
Basket Total :			\$ 40.53
Estimated Order Total :			\$ 45.80

If you have any questions about the system or the orders you have placed, please contact our Customer Service Department and they would be happy to assist you.

1-800-565-5345

or

customerservice@valuegraphics.com