



**Candid
Color
Systems®**

C•ORE

OVERVIEW

This document outlines all the main and sub navigation in CORE

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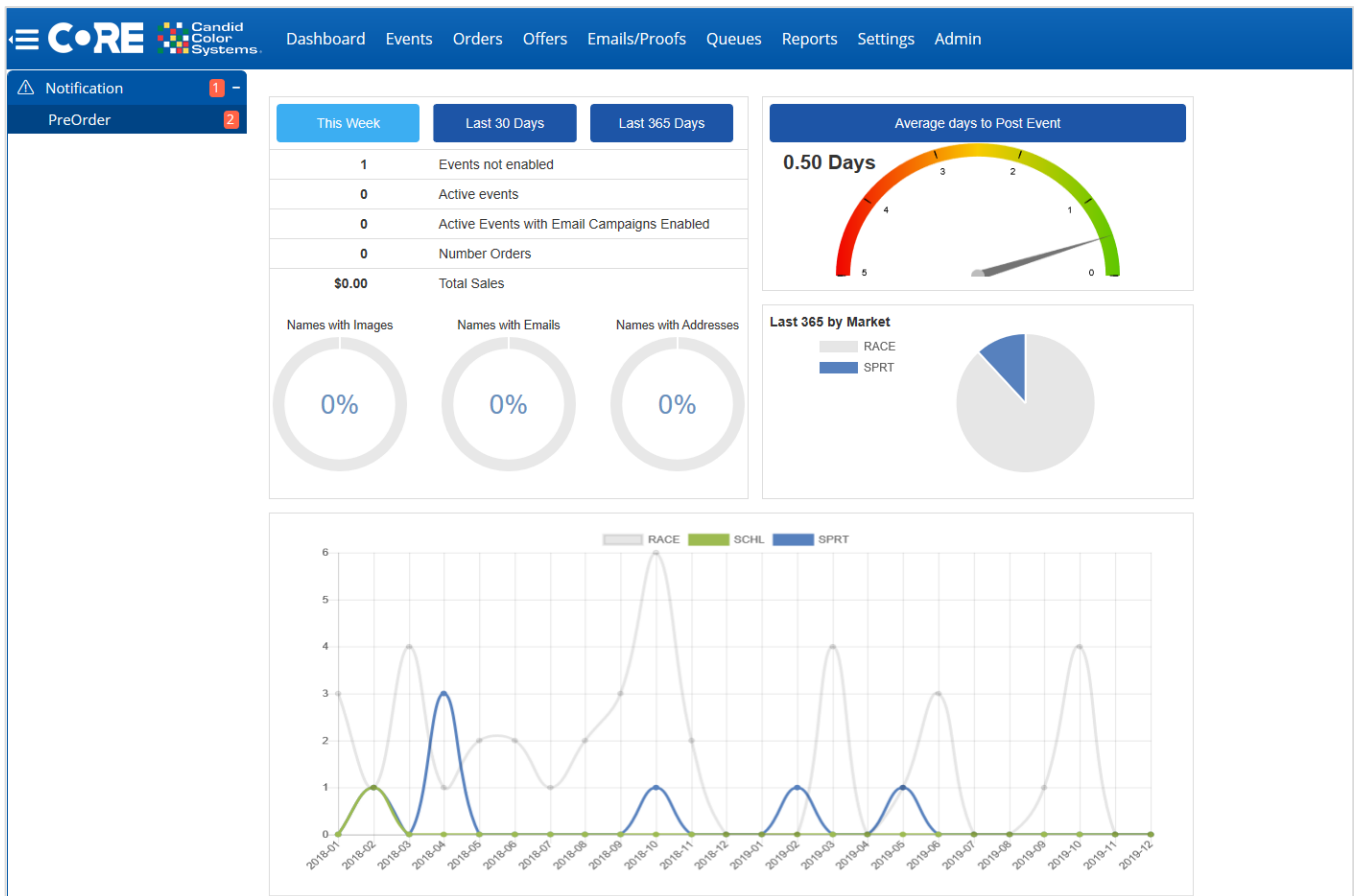
CORE is Candid Color Systems most extensive and powerful software tool to manage and market event images. CORE allows you to identify images to individual names and/or groups and market to your customer using personalized emails and/or sms text messages.

DASHBOARD

The purpose of the DASHBOARD is so at a glance you can see important stats about your business.

You can control who sees what widget on the dashboard by user access permissions. Only Admins and those with sales access will see widgets with sales data.

In addition to the dashboard widgets, you'll see your notifications on the left side of the screen. Notifications alert you to items that need attention.



EVENTS

The EVENTS page is where you setup new events and will find all your past events listed. You will be able to filter your list using the filters at the top of the page. You may also sort the list by clicking on any of the column headers to sort by that column of data.

Event Setup

- Click the menu on the left menu that you wish to setup the event in.
- Click the Create New Event button to setup a new event.

Existing Events

- The left menu allows you to quickly jump into a specific market or set of events. Example: By clicking Graduation on the left menu it will narrow your event list to events you setup in the Graduation market.
- The filter menu above the event list allows you to narrow your list by status, event name, event number, account or market.
- To manage a specific event you'll click on the event name.

The screenshot displays the CORE Events management interface. At the top, there is a navigation bar with tabs for Dashboard, Events, Orders, Offers, Emails/Proofs, Queues, Reports, Settings, and Admin. Below this is a left-hand menu with categories like Notifications, Create New Event, Jump to Market, Graduation, Group, Race, School, Sport, and YM. The main area shows a filter menu with options for Workflows, Organization, Markets, EventID, Account, Season, and To-Do List. Below the filters is a table of events with columns for Name, Date, Event #, EventID, Online Retail, Email Camp, Account #, Mkt, Name Count, Names w/Images, Names w/Emails, ID Count, Image Count, Event Deadline, Late Fee Date, Expiration Date, Visitors, Orders, and Sales. The table lists various events such as 'Quail Athletic Center - Football', 'Texas Tech vs OU Football', and 'SOUTHEAST HIGH SCHOOL FOOTBALL 2019'. At the bottom, there are buttons for 'Mark Inactive', 'QPPlus: Disable', 'Enable', 'Refresh', and 'Refresh Offer & Captions on Retail'.

ORDERS

The ORDERS page is where you can pull up your customer's images to place an order (typically used to place a single order) or to pull up past orders. You can pull up customers by PIN, Name, Order ID, Image, Email or Phone.

Orders Menu (Left side of Screen)

- On the left menu you can select to view
 - Orders ready to transmit
 - Orders
 - Current, Complete, Incomplete, Cancelled or Batched orders
 - Quick Order Entry *(if you utilize organizations)*
 - Bulk Order Entry
 - Bulk Payments *(if you utilize organizations)*

The screenshot displays the CORE software interface. At the top, there is a navigation bar with the CORE logo and the Candid Color Systems logo. The main navigation menu includes Dashboard, Events, Orders (highlighted), Offers, Emails/Proofs, Queues, Reports, Settings, and Admin. On the left side, there is a vertical menu with options: Notifications (7), Customer Search, Transmit Orders, Orders (+), Quick Order Entry, Bulk Order Entry, Bulk Payments, and Notes (+). The main content area is titled "Customer Search" and contains the following search options:

Search for:
Order Number:
Module: All
Event: All Events

Limit searching to a specific event.
 Only show spotted customers.
 Add to order in progress.

Search

Search by: Auto
 PIN or CustomerID ("1234")
 Customer Name ("smith, j")
 Ordered Name
 Order ID - Online Retail Order ("smith, j ", "VG1234")
 External PIN ("1234")
 Bib Number or Code ("1000" or "**")
 Order ID - Manual Order ("5678")
 External OrderID ("5678")
 Order-Roll-Frame ("21001234-00001-0024")
 Division/Category
 Email
 Phone

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 /CORE/Customers/Default.aspx

OFFERS

The OFFERS page is where all your different product offerings reside. An “offer” is your collection of packages and products that you offer your customer. Some refer to these as online order forms or pricelist.

Offers & Packages

- You can import Candid Color Systems official offers here
- You can add/create your own offers here
- To manage/edit an offer, click on the offer name
- You can use the filter at the top of the page to narrow your list by name, status, market or season (if you utilize seasons)

Offers Menu (Left side of Screen)

- On the left menu you can view
 - Product Browser which is a way to view what products are available in specific markets
 - Group Pose codes (*only used for the group market*)
 - Custom Products (*used to sell products not produced by CCS*)
 - Custom Backgrounds (*Your chroma-key background library*)

Offer and Package Builder
Manage your offers, packages and products

An offer is a set of packages that may be offered on an event. Create an offer below, and then click the offer name to build packages.

Offer Name Status Market Season
 Search for... Active SCHL Any Update

[Click here to add a new offer.](#)
[Click here to import an official CCS offer.](#)

		Name	Market	Version	Season	Packages	Events	Active	Read-Only
DELETE	COPY	2018 SCHOOL - Elementary Spring Portraits	SCHL	2.00	Default Season	230	209	Yes	No
DELETE	COPY	2018 SCHOOL - Elementary Spring Portraits with Virtual Groups	SCHL	2.00	Default Season	250	11	Yes	No
DELETE	COPY	2018 SCHOOL - Elementary Fall School Portraits	SCHL	2.00	Default Season	173	39	Yes	No
DELETE	COPY	2018 SCHOOL - Elementary Fall School Portraits (Mustang)	SCHL	2.00	Default Season	172	1	Yes	No
DELETE	COPY	2018 SCHOOL - Elementary Outdoor Portraits	SCHL	2.00	Default Season	238	3	Yes	No
DELETE	COPY	2018 SCHOOL - HS Senior	SCHL	2.00	Default Season	90	4	Yes	No
DELETE	COPY	2018 SCHOOL - HS Senior (Mustang)	SCHL	2.00	Default Season	117	1	Yes	No
DELETE	COPY	2018 SCHOOL - Middle School Fall School Portraits	SCHL	2.00	Default Season	144	2	Yes	No
DELETE	COPY	2018 SCHOOL - Middle School Fall School Portraits (Copy)	SCHL	2.00	Default Season	73	0	Yes	No
DELETE	COPY	2019 SCHOOL - Elementary Fall School Portraits (Mustang)	SCHL	2.00	Default Season	136	3	Yes	No

[Setup your default offer tabs.](#)

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 /CORE/Setup/PackageBuilder/Default.aspx?EventID=08.NotifyMenuChange=1

EMAILS/PROOFS

The EMAILS/PROOFS page is where all your different email templates, SMS templates and campaigns (collection of templates) reside.

Emails/Proofs Menu (Left side of Screen)

- Templates
 - This is where you will view and manage, printed, email and SMS templates
- Campaigns
 - This is where you will view and manage Email Campaigns and Consolidated Campaigns
- Template Settings
 - This is where you will view and manage Queue Profiles which are used when queueing single email templates or printed forms.
 - You will also view and manage Paper Types used for printed templates
 - File Manager is where you can store documents that may be used to link to in emails
 - Email Images is where you can store images/graphics used in email campaigns

The screenshot shows the CORE system interface. The top navigation bar includes: Dashboard, Events, Orders, Offers, **Emails/Proofs**, Queues, Reports, Settings, Admin. The left sidebar menu includes: Notifications (6), Templates, Campaigns, Template Settings, Printer Settings, Email Addresses, and Returned Mail.

The main content area is titled "Email Templates" and includes a checkbox for "Show inactive templates" and a link to "Add a new: Email template". Below this is a table of email templates:

					Name	Subject	Campaigns	Email Jobs	Active
					Template.Grad.Sport.School	Your \$EventName\$ photos are available	1	24	✓
					A BLANK Template.Grad.Sport.School (Use to update deadline)	Order Your \$EventName\$ photos before it's too late	10	80	✓
					Bid Day_2019_Time is running out	Time is running out on discounted pricing!	1	12	✓
					_GRAD.19.EMAIL.ShippingFree	FREE shipping on your \$EventName\$ images	1	2	✓
					_GRAD.19.EMAIL.ShippingFreeLastChance	Last chance for FREE shipping on your \$EventName\$ images	1	3	✓
					AOP-Composites-Last Chance	Last chance for best pricing!	1	1	✓
					AOP-Composites-Online Now	Your composite portraits are ready to view!	2	9	✓
					AOP-Composites-Online Now2	Your composite portraits are ready to view!	1	1	✓
					AOP-Composites-Time Running Out	Time is running out-order your composite portraits today!	1	1	✓
					BAND.19.EMAIL.01.Online Now Band	\$EventName\$ portraits are ready!	1	12	✓
					BAND.19.EMAIL.03.OnlineNow(Text Version)	Your \$EventName\$ Photos are still available	1	86	✓
					BAND.19.EMAIL.04.Products	New products using your \$EventName\$ images	1	1	✓
					BAND.19.EMAIL.05a.DeadlineApproaching	Deadline to order \$FirstName\$'s portraits approaching	1	1	✓
					BAND.19.EMAIL.05b.Reorder	Need more portraits of \$FirstName\$	1	1	✓
					BAND.19.EMAIL.06.DeadlineExtended	Deadline to order \$EventName\$ images has been extended	1	1	✓
					BAND.19.EMAIL.07.Packages	\$FirstName\$, Create your custom package	1	1	✓
					BAND.19.EMAIL.08.ImageDownloads	Digital Downloads from your \$EventName\$ images	1	2	✓
					BAND.19.EMAIL.09.Frames	Frames for your \$EventName\$ images	1	1	✓
					BAND.19.EMAIL.10.1yearAnniversary	Can you believe it's been 1 year, \$FirstName\$	1	1	✓
					BAND.19.EMAIL.11.1 1/2yearAnniversary	You can still order \$FirstName\$'s images	1	0	✓
					BAND.19.EMAIL.12.2 1/2yearAnniversary	\$FirstName\$, You can still order your \$EventName\$ Photos	1	0	✓
					BAND.19.EMAIL.13.3yearAnniversary	It's almost been 3 years since your \$EventName\$ image were taken	1	0	✓

- Printer Settings
 - This is where you will activate and/or deactivate printers used when queuing printed from via CORE Print
- Email Address
 - This is where you can opt out/in email addressed
- Return Mail

CORE Candid Color Systems

Dashboard Events Orders Offers **Emails/Proofs** Queues Reports Settings Admin

Notifications **6** + **Email Templates**

Templates + Show inactive templates

Campaigns + Add a new: [Email template](#)

Template Settings +

Printer Settings

Email Addresses

Returned Mail

	Name	Subject	Campaigns	Email Jobs	Active
DELETE COPY EDIT	Template.Grad.Sport.School	Your \$EventName\$ photos are available	1	24	✓
DELETE COPY EDIT	A BLANK Template.Grad.Sport.School (Use to update deadline)	Order Your \$EventName\$ photos before it's too late	10	80	✓
DELETE COPY EDIT	Bid Day_2019_Time is running out	Time is running out on discounted pricing!	1	12	✓
DELETE COPY EDIT	_GRAD.19.EMAIL.ShippingFree	FREE shipping on your \$EventName\$ images	1	2	✓
DELETE COPY EDIT	_GRAD.19.EMAIL.ShippingFreeLastChance	Last chance for FREE shipping on your \$EventName\$ images	1	3	✓
DELETE COPY EDIT	AOP-Composites-Last Chance	Last chance for best pricing!	1	1	✓
DELETE COPY EDIT	AOP-Composites-Online Now	Your composite portraits are ready to view!	2	9	✓
DELETE COPY EDIT	AOP-Composites-Online Now2	Your composite portraits are ready to view!	1	1	✓
DELETE COPY EDIT	AOP-Composites-Time Running Out	Time is running out-order your composite portraits today!	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.01.Online Now Band	\$EventName\$ portraits are ready!	1	12	✓
DELETE COPY EDIT	BAND.19.EMAIL.03.OnlineNow(Text Version)	Your \$EventName\$ Photos are still available	1	86	✓
DELETE COPY EDIT	BAND.19.EMAIL.04.Products	New products using your \$EventName\$ images	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.05a.DeadlineApproaching	Deadline to order \$FirstName\$'s portraits approaching	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.05b.Reorder	Need more portraits of \$FirstName\$	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.06.DeadlineExtended	Deadline to order \$EventName\$ images has been extended	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.07.Packages	\$FirstName\$, Create your custom package	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.08.ImageDownloads	Digital Downloads from your \$EventName\$ images	1	2	✓
DELETE COPY EDIT	BAND.19.EMAIL.09.Frames	Frames for your \$EventName\$ images	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.10.1yearAnniversary	Can you believe it's been 1 year, \$FirstName\$	1	1	✓
DELETE COPY EDIT	BAND.19.EMAIL.11.1 1/2yearAnniversary	You can still order \$FirstName\$'s images	1	0	✓
DELETE COPY EDIT	BAND.19.EMAIL.12.2 1/2yearAnniversary	\$FirstName\$, You can still order your \$EventName\$ Photos	1	0	✓
DELETE COPY EDIT	BAND.19.EMAIL.13.3yearAnniversary	It's almost been 3 years since your \$EventName\$ image were taken	1	0	✓

QUEUES

This where you will find emails and print jobs that are in line to be sent or printed. You will also find other process queues that are a background function of CORE.

Queues

- Summary
 - This is a list of all the queues and background jobs
- Email Jobs
 - This is where emails that have been queued will sit until the time they are schedule to send or until you select and send them
 - Manually queued emails or emails you have flagged to require approval will remain in the queue until you select and send them
- Print Jobs
 - This is a list of print jobs you've queued up via CORE print. These will typically be camera/scan/sequence cards and/or proof order forms or postcards
- CORE Agent Jobs
 - These are background processes that automatically occur. It is not likely you will ever need to visit this page
- Job History
 - This is a history of functions that have taken place by user

The screenshot shows the CORE software interface. The top navigation bar includes: Dashboard, Events, Orders, Offers, Emails/Proofs, Queues (highlighted), Reports, Settings, and Admin. The left sidebar contains: Notifications (4), Summary, Email Jobs, Print Jobs, COREAgent Jobs (+), and COREAgent Transmit (+). The main content area is titled "Queues" and contains a list of links with descriptions:

- [Summary](#): Summary of various inprogress and scheduled jobs.
- [Print Jobs](#): Queued print job statuses.
- [Email Jobs](#): Queued email job statuses.
- [COREAgent Jobs](#): List of tasks being handled by the background service.
- [COREAgent History](#): List of tasks previously handled by COREAgent.
- [COREAgent Transmit](#): Queued and stalled orders.
- [Manage Retouching](#): Images needing to be sent to CCS and waiting for your approval.
- [Pending Artwork](#): View Orders that have artwork scheduled to be returned from CCS.

At the bottom of the page, there is a copyright notice: Copyright © 2002-2019 Candid Color Systems Inc. | Account Terms | v5.0.4-vm01 /CORE/Setup/Queues/Default.aspx

REPORTS

This where you will find a link to the reporting site and email reporting, as well as other reports to help your run your business.

Reports

- Reporting.partytics.com is where you will find all your sales reports. Link to sales reports are only available to users with sales access.
- Email Campaign & Template Reporting is where you can run reports on email templates and campaign to see your open rates and sales from emails.
- Basic, Spotting & Sales reports are obsolete reports. Information from these reports can be gather from reporting.partytics.com
- Retail Reports
 - Session Tracking - allows you to view number of visits to the retail website by date
 - Greenscreen Background Images Ordered – allows you to view what backgrounds are being ordered online by event
 - Discount Sales Reporting – view what discount codes have been used
- Custom Reports
 - View sales on Auto Zcropped images vs non-cropped images

The screenshot shows the CORE Reporting Dashboard. The top navigation bar includes links for Dashboard, Events, Orders, Offers, Emails/Proofs, Queues, Reports (highlighted), Settings, and Admin. The left sidebar contains a menu with Notifications (4), CCS Hosted Reports, Email Reporting, CORE Reports, Retail Reports, and Custom Reports. The main content area is titled 'Reports' and is organized into several sections:

- CORE Retail CCS Hosted Reports (Internet Connection Required)**: Includes a link to reporting.partytics.com with a note: "You will need to sign in with your CCS AccountNumber and Password."
- CORE QPPlus Email Reports**: Includes a link to [Email Campaign & Template Reporting](#).
- CORE QPPlus Basic Reports**: Includes links to [Export Custom Products](#) (Shows custom product orders, including captions), [Batch Reports](#) (Batch reports for GRAD Batching), [Export Name Data](#) (Export names, addresses, spotting, o/r/f by Event(s)), [Order List](#) (Detailed list of orders placed), [Order List with Shipping Address](#) (Detailed list of orders placed including the address the order was shipped to), and [Notes](#) (Notes that have been created for events).
- CORE QPPlus Spotting Reports**: Includes links to [Spotting Exception Report](#) (Shows events, names, spotted names, unspotted names), [Spotting Set Totals](#) (Shows set totals spotted broken down by event), and [Spotting Order Percentage](#) (Counts of individuals who were spotted vs who ordered broken down by event).
- CORE QPPlus Sales Reports**: Includes a link to [Default vs Non-Default Image Sales](#) (Sport market sales comparison by event between default and non-default individual images).

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SETTINGS

This where you will find settings that control specific functions of your account. Once your initial account settings are entered, you won't likely come to the settings page very often. Note: changing settings will affect how your account functions.

Settings

- General Settings – Do not change anything on this page without consulting CCS Support
- Candid Accounts – Do not change anything on this page without consulting CCS Support
- User Setup – This is where you will manage your users. When you setup a user you control what access they have in CORE. Depending on access they make not see all functions/features in CORE. You can also mark a user inactive or active depending on status
- Custom Fields – These are used to control data that you make need to include in emails or printed forms
- Payments – If you would like to process credit card payments in CORE for orders you receive that are not online, you can setup an account with Authorize.net and enter your account information here. *NOTE: this does not affect online orders place on one of the CCS retail websites. This only affects orders you key directly into CORE. For more info. contact CCS Support.*
- Seasons – Obsolete setting – leave as “Default Season”
- Manage View Names – Obsolete setting –leave as Default View
- QEMS Settings – Do No Edit
- Event Defaults – These defaults control some settings that will automatically be set on your events. You will be able to override these settings on your workflow(s) or your event
- Client Portal – This is where you setup your client/organization to be able to access the pictureadmin.com site. This site is primarily used by schools to approve yearbook images before you provide them with service items
- Workflows – You will need a workflow before you can setup events. Workflows allow you to pre-select specific settings you'd like to use for specific event types. This allows you to automatically setup an event without having to remember multiple settings. You can have as many workflows as you need to accommodate your business processes.
- Organizations – Obsolete setting – leave as Default

- Tax & Shipping
 - Tax Rates
 - You will need to enter all the counties/states that you are required to pay sales tax in. This will then add the appropriate sales tax based on your location(s) and sales tax obligations
 - Shipping/Handling
 - We recommend you use the default shipping scale, but you can edit or add your own shipping scales
- Website
 - General Settings - Once these settings are selected you should not have to edit them. Note: changes will affect how your events function
 - Discounts & Gift Certificates – This is where you create discount codes and gift certificates
 - Product Desc Override – You can give products custom names instead of using the CCS default name
 - PreOrder Poses – this is where you setup poses if you wish to offer specific poses for online preorders
 - SMS Gateway – Obsolete – SMS are now with emails
 - File Manager – This is where you keep files associated with your retail site branding and optionally product sample images
- CORE Print
 - This is the program used to generate printed templates and order forms
 - Here is where you will download the program

The screenshot displays the 'General Settings' page in the CORE system. The interface includes a top navigation bar with 'Settings' selected, and a left sidebar with menu items like 'Notifications', 'Settings', 'Workflows', 'Organizations', 'Tax & Shipping', 'Web Site', and 'CORE Print'. The main content area is titled 'General Settings' and contains several sections of configuration options:

- Miscellaneous Settings:** A list of checkboxes for various system behaviors, such as 'Combine GRAD orders into batches', 'Only admins can issue credits', 'Show all tax rates', 'Enable Divisions/Teams', 'Enable Divisions/Teams Internal DivisionID field', 'Enable Website Ordering', 'Enable enhanced Proof Card detection', 'Enable School market heading-sizing', 'Enable auto sending email receipts', 'Only send email receipt for orders containing digital image downloads', 'Enable align frames multi-view', 'Hide the New Features, Feedback, Webinars, and the Help menu buttons', 'Enable PhotoLyx conversion option', 'Enable Online PreOrders', 'Enable automatic polling for online PreOrders', 'Enable Virtual Group organizer', and 'Enable the Manage Names "Edit Name" to hide custom prompts based on event settings'.
- Event List Settings:** Checkboxes for 'Display seasons filter' and 'Display event id filter'.
- Face Recognition Confidence:** A text input field set to '50'.
- Proofsheet Pricing:** A large empty text area.
- Customize Email Receipt:** A text input field containing 'HTML Email Receipt (Optional)'.

A red warning message is displayed: 'Changing the settings below may cause CORE to operate incorrectly!'. Below this, there are fields for 'CORE Server HostName' (c4008.candid.com), 'QPPlus Base URL' (http://www.gradphotonetwork.com/QP4-GI), and 'Drive Space' (Drive C:\ 33.3 GB free of 99.5 GB). A 'Save' button is at the bottom, with a note: 'Indicates required fields.'