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## Customer Portal Checklist

### Portal Qualifiers (Check all that apply)

- Customer has static documents that are printed regularly
- Must have an account or credit card billing set up with Copy It!
- Has to be in good standing, i.e. no late payments, etc.
- Needs to be able to access the internet

### Portal Setup Checklist (Check all that apply)

- Meet with a Copy It! The Copy Store representative to determine if a custom portal meets your needs
- Provide or setup account with Copy It! The Copy Store
- Choose from the checklist below which services you would like to incorporate into your custom portal (Check all that apply)
  - Thumbnail and document preview – Allows you to preview the entire content of your documents before selecting for print. Peace of mind that you are selecting exactly what you need!
  - Inventory management tool – See and manage any preprinted inventory, set minimum inventories and reorder points to ensure that you will always have documents on hand when you need them.
  - Document search – Find your documents fast by using a search engine or by specific document number.
  - Order tracking numbers – Unique, auto-generated tracking numbers provided for easy tracking.
  - Document descriptions – Customized descriptions of your documents to aid in the printing process and to describe to your end users what the printing will look like (color or black & white, single sided, drilling, etc.)
  - Price calculations for document budgeting – Pricing per unit and calculation of each job. Never receive a “surprise” bill.
  - Document categories and sections to delineate between departments or locations – Great for multiple applications so you can organize your documents by location, department, or person! Set up a separate section for your HR department and another for your Marketing department so that you will have all your company documents located in one custom portal, but listed by specific groups.
  - SSL document encryption – Safe, secure, and password protected!
- Provide Copy It! The Copy Store with all your documents and descriptions you would like to have incorporated into your portal.

- Provide your customer portal username and passwords. You can provide individual names and passwords for each user if you would like.

That's it! You should have your custom portal up and running in typically 2-3 business days pending the size and scope of your portal. Once the portal is running, enjoy the simplicity of ordering and managing your documents from anywhere the internet is available! Gain the peace of mind that you are ordering the exact documents you need, securely. No more calling back and forth to manage inventory levels or trying to picture what the printer is trying to describe... it is all on line for you to view! Best of all, the service is **absolutely FREE!**

Thank you for considering a custom portal from Copy It! The Copy Store. We are sure that we can make your life easier, your printing experience better, and your time stretch further. Please contact us with any questions or unsolved printing solutions.

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