



# Managing Manual Zinfonia Connect Orders

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## Overview

This document outlines strategies to help manage your Zinfonia orders using the Zinfonia Publisher tools, especially when managing orders within a team. In this document the Zinfonia Manger refers to the user that is responsible for the primary Zinfonia account and Publisher Access code. If you have not yet logged in as the Zinfonia Manager, you should do this now.

## Setting up multi-user Access

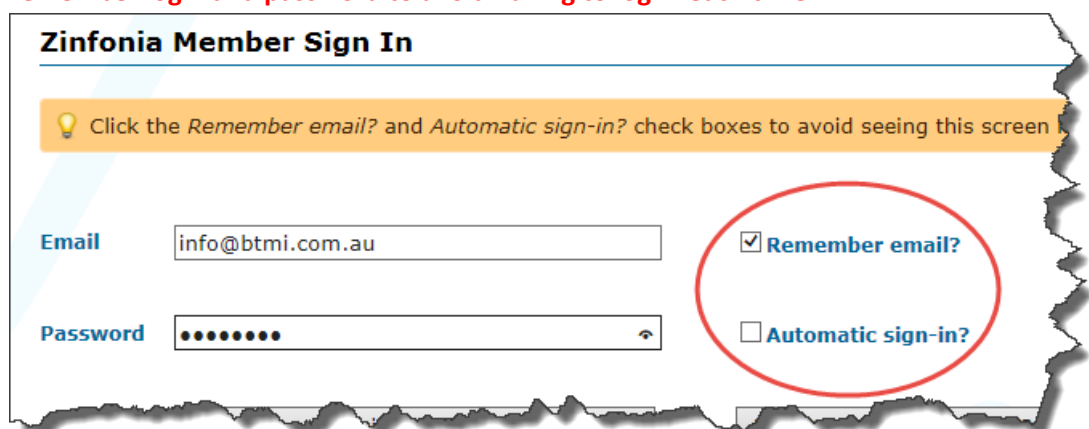
It is possible to provide multiple users access to the Publisher section with or without the Publisher Access Code. It is recommended that all Zinfonia administrators log in and use Zinfonia using their own login details rather than sharing the master login.

The steps to accomplish this are as follows:

1. All users should create their own Zinfonia account, being careful to complete all of the name and address details correctly in the process. The Zinfonia Manger can start this process by using the Publisher Referral page:

<https://www.zinfonia.com/zPubRefer.aspx>

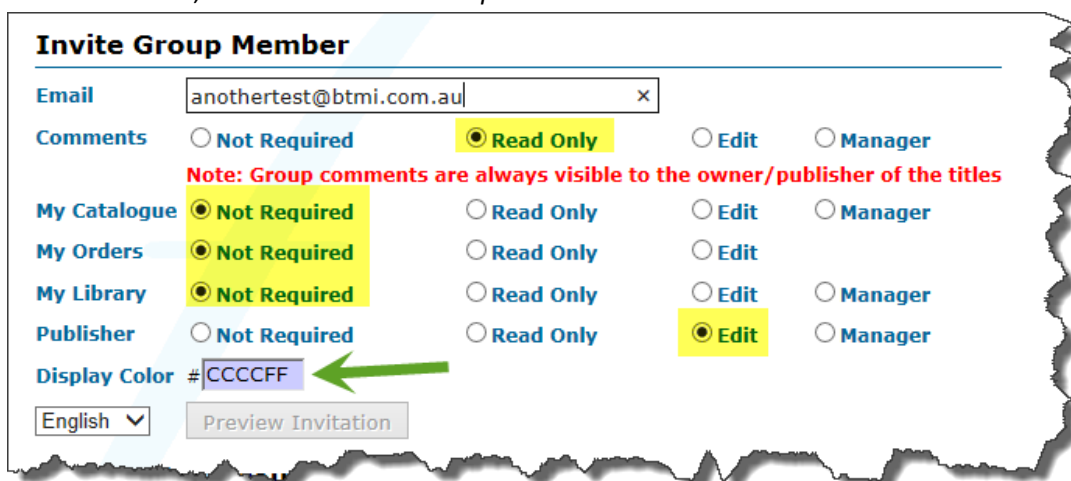
**Note: it is recommended that all users on a secure network use the checkboxes to remember login and password to avoid having to log in each time.**

A screenshot of the "Zinfonia Member Sign In" form. The form has a title "Zinfonia Member Sign In" and a yellow banner with a lightbulb icon and the text "Click the Remember email? and Automatic sign-in? check boxes to avoid seeing this screen". Below the banner are two input fields: "Email" with the value "info@btmi.com.au" and "Password" with masked characters. To the right of the password field are two checkboxes: "Remember email?" which is checked, and "Automatic sign-in?" which is unchecked. A red circle highlights these two checkboxes.

2. Once the accounts have been created, the Zinfonia Manager should invite their colleagues to join their publisher group via the Share page accessible here:

<https://www.zinfonia.com/zShare.aspx>

To share access, click on the *Invite Group Member* button



**Invite Group Member**

Email

Comments  Not Required  Read Only  Edit  Manager

**Note: Group comments are always visible to the owner/publisher of the titles**

My Catalogue  Not Required  Read Only  Edit  Manager

My Orders  Not Required  Read Only  Edit

My Library  Not Required  Read Only  Edit  Manager

Publisher  Not Required  Read Only  Edit  Manager

Display Color  ←

English

and enter the email along with the options highlighted above. Select a unique Display Colour to help identify the user (lighter colors work best) and then click on the *Preview Invitation* button. Send the email message and request that your colleagues click on the link in the text to log into the Group.

3. Now all users can access the Publisher section by entering the Publisher Access Code at the Publisher Admin Sign in Screen <https://www.zinfonia.com/zPubSignIn.aspx>  
**Note: It is also possible to access the Publisher section using a special URL that overcomes the need to enter the Publisher Access Code. Please contact BTMI for details**

## Processing Incoming Zinfonia Orders

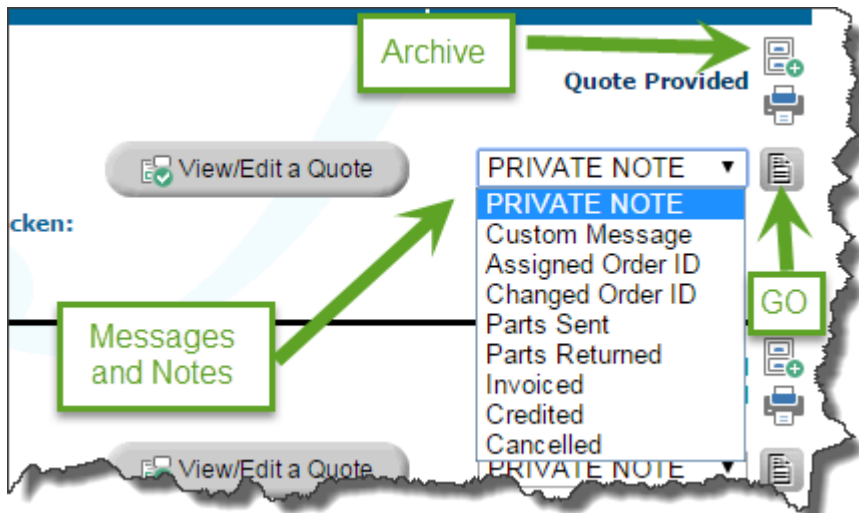
The **Orders In** section of Zinfonia <https://www.zinfonia.com/zPubOrders.aspx> is the place you can manage all aspects of incoming orders, including the ability to:

- Send messages to your customers
- Add private notes about orders
- Issue Quotes
- Archive orders

Some of these operations are outlined below

## Sending Customer Messages and Private Notes

Use the messages and notes dropdown along with the GO button to send messages to customers or to create private notes that are only visible in the publisher section.



The options available here include:

**PRIVATE NOTE**

Private Notes are only visible in this section (and so are not viewable by your customers).

When selected you are prompted to enter a note and click the Send Message button.

 A screenshot of a form titled 'PRIVATE NOTE'. At the top, it says 'PRIVATE NOTE' in bold. Below that is a 'From:' label followed by a dropdown menu showing 'Ulrich Steffen Eck'. In the center, there is a text area with the heading 'Enter Note and Press Send Message' and the text 'Hello' inside. At the bottom, there are two buttons: 'Send Message' and 'Cancel'. The entire form has a light orange background.

Orders with Private notes are displayed with a coloured background (which is set via the Share option described above) to indicate the LAST user to add a private message. To edit a private note, simply click on the note, edit the text and click the Send Message button. To delete a note, click on the note, remove all text and click the Send Message button.

126305 **Various** Just Testing in B k Quote accepted and ordered

15/10/2014 **BTM Innovation Pty Ltd** (Peter Grimshaw) PRIVATE NOTE

5:20 PM Quote agreed and paid by Peter Grimshaw on Saturday, 28 February 2015 2:19 PM... [click for more](#)

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134059 **Anonymous** No Title Quote accepted and ordered

19/02/2015 **Test Account** (Peter Grimshaw (Test)) PRIVATE NOTE

5:02 AM

**Saturday, 28 February 2015 1:41 PM** • Peter Grimshaw (Test)  
This is a test

**Thursday, 18 September 2014 11:01 AM** • Ulrich Steffen Eck  
Another Test

**Saturday, 21 February 2015 6:12 AM** • Quote accepted and ordered  
*Peter Grimshaw (Test) (Test Account) -> Zinfonia*

With the Private Notes filter, you can locate orders with messages by author. To only see notes by a particular author, make sure that the *Always show Messages with NO Private Notes* checkbox is NOT Checked.

Order #  \* Submitted  select month... ▼

Composer  Order Type  select type... ▼

Title  Status  select status... ▼

Company  Performance/s  select month... ▼

Your   Attachment/s  Show Archive

Private Notes  Peter (Test) Grimshaw  **Always show Messages with NO Private Notes**

Results per Page  50 ▼

Note: Only orders sent to **Zinfonia** will be

Order # ▼	Work
Created	Company
135478	<b>Anonymous</b> No Title II/A song without words and music

## CUSTOM MESSAGE

Custom messages are free text notes (with optional attachments) with a fixed title (that will be translated in the user's language) and

**Custom Message**

Request Received ▼

Request Received

More Information Required

Quote Provided

Order Cancelled by Distributor

More Performance Details Required

More Delivery Details Required

More Contact Details Required

Return of Parts Overdue

Status Changed

B2B Response

Attachment Sent

message

**Enter File Attachment link or select from list**

select link...

Send Message Cancel

**ASSIGNED ORDER ID**

**CHANGED ORDER ID**

**PARTS SENT**

**PARTS RETURNED**

**INVOICED**

**CREDITED**

**CANCELLED**

These are special messages that will be sent to the customer in their own language. Some options will require additional input (like the consignment number for a delivery).

## Issue Quotes

You can use the quote buttons to view, edit and issue Zinfonia quotes (the same functionality is available here: <https://www.zinfonia.com/zPubQuote.aspx> . More information about Zinfonia quotes is available here: <http://hlmsw.com/?p=670>

## Archive Items

Publishers can **Archive** orders that are no longer required to be displayed in the *Orders In* section of the Publisher Toolbox.

To archive an order, select the filing cabinet icon alongside each order (the alternate icon can also be used to remove an item from the Archive)



When the order is marked as Archived then it will not normally be displayed in the list of orders unless a new message or status is posted against the order.

You can display and search archived orders by checking the Show Archive checkbox.

**Publisher Orders**

admin sign out  
status  
publishers  
distribution  
reports  
accounts  
settings  
orders in  
quote  
attachments  
terms and conditions

Order #  \*

Composer

Title

Company

Your ID

Private Notes  Peter (Test) Grimshaw

Submitted  select month...

Order Type  select type...

Status  select status...

Performance/s  select month...

Attachment/s  **Show Archive**

Always show Messages with NO Private

Display Results Clear

Results per Page  50

Note: Only orders sent to

Order # Work

11 March 2015  
Peter Grimshaw