

Forms Library On-Line User Manual

Control-o-fax is pleased to present Forms Library On-Line (FLO). Designed with YOU the customer in mind, FLO helps keep track of all your forms and filing needs. Track your inventory levels and re-order points. Receive e-mail when inventory levels drop below a level that YOU specify. Work smarter, not harder. Let FLO simplify your office needs!

Login

Use your Internet browser to access FLO. Click on the Forms Library Online link at <http://www.controlofax.com>.

You've Used FLO before? You will be asked to enter your User ID and Password. You should then click on the "Login" button that will take you into FLO.

Forgot your Password? We'll ask you to fill in some of the information you gave us on your original New User Registration form. Control-o-fax will then email you a new password. If you have questions, please contact us at 1-800-344-7777.

New User? You should click on the "New User" button then proceed to fill out the New User Registration form which includes:

User Name:	Enter a name you will easily remember since you will need to enter it each time you access FLO.
First Name:	Enter your first name.
Last Name:	Enter your last name.
Office Name:	Enter your Office's name or your own name. The name you enter in this field will appear on Purchase Orders.
Address:	Enter your street address and/or post office box. We have provided a second line if you need the space.
City:	Enter your city.
State:	Enter your state.
Zip:	Enter your zip code.
Phone (optional):	Enter your phone number
Email:	Enter your email address.
Password:	Enter a password you will easily remember since you will need to enter it each time you access FLO. (Your password must be at least 5 characters.)
Verify Password:	Please enter the same password you entered above for verification.
Email Alerts:	Receive an email if your projected quantity for an item falls below your minimum quantity. You set the projected usage and minimum quantities when you add an item.

After you have registered, you will be returned to the login screen. You will be asked to enter your User ID and Password. You should then click on the "Login" button that will take you into FLO.

In order for you to track your inventory levels, you will want to start building your own library of inventory items. Click on the [Add Item](#) option at the top of the screen.

Add Item

You may add forms or other inventory items that you would like to track. Enter the following information then click on the "Add Product" button.

Form Type:	Choose a form type from the list provided. Examples: Insurance Claim Forms, Patient Statements, Ledgers, Day Sheets, Notepads, Misc
Description:	How do you identify this form? Fill in your description.
Minimum Quantity:	Enter the quantity that you do not want to fall below.
Quantity on hand:	Enter the quantity you have on hand right now.
Estimated Usage:	Enter your projected usage amount in daily, weekly or monthly quantities.
Control-o-fax Ref # (if known)	If you ordered your product from Control-o-fax, enter the reference number here. (For Example, ENV70070000)
Vendor	Control-o-fax is the default vendor. If you have added other vendor's, you may choose them from this list. For more information on adding vendors please refer to the vendor section at the end of this document.

Click on the "Add Product" button to be returned to the **My Inventory** screen. To add more products to your Inventory listing, click on the [Add Item](#) option at the top of the screen.

My Inventory

This screen shows you a detailed listing of all inventory items that you have added.

Want to make a change? Click on the item's underlined Form Type to open a **Modify Product** screen where you may edit any of the item's details. After editing, click on the "Update" button. If you no longer want to track this item, click on the "Delete" button.

Want to create a Purchase Order? Click the **Buy** checkbox next to one or more of your items then click on the "Create PO" button to open a Purchase Order window that you can edit then print or email.

Want a list of Products that have fallen below your specified minimum quantity? Click on the [Suggested Purchases](#) option at the top of the screen. If you want to create a purchase order at this point, click the **Buy** checkbox next to one or more of your items then click on the "Create PO" button. You can edit then print or email your purchase order.

My Profile

This screen allows you to review and change the login information that was initially entered.

Want to change your password? Locate the Change Password box at the bottom of your screen and type in your old password, your new password, and verify your new password by typing it a second time. Click on the "Change" button.

Want to update your login information? Locate the My Profile box and click in the field that you want to update. Enter the new information and click on the "Update" button.

Want to change your user name? Once the user name is entered and accepted on your original New User Registration form, you are not allowed to change it. However, you can change the password as often as you like. For further assistance with your user name please feel free to contact us via email at info@controlofax.com or by telephone at 1-800-344-7777.

Vendors

From this screen you can view, add, or change your vendor information.

Want to add a new vendor to your list? Click on the [Add Vendor](#) option at the top of the screen. Enter the following information then click on the "Add Vendor" button.

Vendor Code:	How do you want to identify this vendor? Fill in a code that you will recognize.
Vendor Name:	Enter the vendor's name. The name you enter in this field will appear on Purchase Orders.
Address (optional):	Enter the vendor's street address. We have provided a second line if you need the space.
City (optional):	Enter the vendor's city.
State (optional):	Enter the vendor's state.
Zip (optional):	Enter the vendor's zip code.
Contact Name (optional):	Enter the name of your contact from the vendor's office.
Phone (optional):	Enter the vendor's phone number.
Fax (optional):	Enter the vendor's fax number.
Email Address (optional):	Enter the vendor's email address.

Click on the "Add Vendor" button to be returned to the [My Vendors](#) screen. To add more vendors to your Vendor listing, click on the [Add Vendor](#) option at the top of the screen.

Want to make a change? Click on the underlined Vendor to open a [Modify Vendor](#) screen where you may edit any of the vendor's information. After editing, click on the "Update" button. If you no longer use this vendor, click on the "Delete" button.

Reports

The following reports are currently available:

- Complete Inventory List (very helpful for doing your in-house inventory review)
- Suggested Purchases List (see which items need to be purchased)
- Vendor List (keep track of your vendors)

All reports can be printed using your print option on your browser (Microsoft IE or Netscape)

Sign Off

When you are ready to exit FLO click on the [Sign Off](#) option at the top of the screen. You will be returned to the **Login** screen.