Consumables Eco Tool Dealer Management Instructions





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7.17.18

# **Overview- For Dealers Use**



Welcome to the Instruction Section of the Consumables Eco Reporting (CER) tool.

This database is designed to be managed by an individual designated by a business entity. That person will be recognized in the CER system as the CER System Administrator (CSA). The CSA will complete the Organization Access Form to gain access to the CER. Once access is granted, the CER will generate a unique account code for the organization's main location.

From that point on, the DEALER CSA, when using the CER tool to manage Customer information, will either create a whole company structure for a Customer or will create Branch(s) or Company(ies), and Company(ies) or Company Location(s) depending on the option picked. For each of these that the CSA sets up, one of the fields will be incremented that is associated with the main account number to individualize them for reporting purposes. It is the responsibility of the organization and it's employees to enter those account codes (in the proper format) on the prepaid return label. The company account code MUST be the first entry in the name field of the RS return Label, that the customer must then print out off our webspace to return Ricoh family consumables. Any consumables returned without the account number properly included upon the return label, WILL NOT be included in the CER data base for reporting purposes. The account code consists of 3 segments- XXXXX-X-X (Company code - Location code - Sub Location code) (i.e. 62406-0-0). Please note: the system can accept an unlimited number of Locations and Sub Locations. Therefore, the hyphens and segments are critical when addressing the UPS RS return label and the Account code must be entered first in the Company/ Customer Name line, prior to any alphabetic characters describing the location.

The CSA will be responsible for training your organization(s) on the various facets of the CER, for administrating the access rights of your business representatives, and establishing Region(s), Location(s), Sub Location(s) for your organization.

Once created, an organization has the ability to report on the number of shipments and the weight of those shipments at the macro, Region, Location and Sub Location level, on a customizable reporting basis, or by calendar year, month, day.



1<sup>st</sup> Segment- Randomly selected 5 digit Company code *i.e.- Global Master Print*  **3<sup>rd</sup> Segment-** Sequential number for each "Sub Location", of a "Location", as entered into tool (unlimited) *i.e.-Mail Room* 

**2<sup>nd</sup> Segment-** Sequential number for each "Location" as entered into tool (unlimited) *i.e.- Headquarters* 



- 1. The Eco Tool can be used for the tracking of the recycling of consumables of your Dealer organization, just as any other company. If options 2 or 3 are utilized, it must be decided at the time of account setup and those option choices applies to all entries going forward.
- 2. Alternately, the Consumable Eco Reporting tool can be used to track consumables returns made by your linked customers or on behalf of customers depending on the arrangements and management programs you have with them. It will just limit the depth of the reporting capability of the tool depending upon the approach.

NOTE: IN ANY OF THESE SCENARIOS THE DEALER PERSONNEL MUST BE THE CSA(S) OR CUSTOMERS WILL BE ABLE TO CHANGE AND SEE OTHERS CUSTOMERS INFORMATION! (except when separate account codes are used).

#### DEALER/ CUSTOMER OPTIONS RICOH imagine, change.

### **Option 1:** DEALER acts as CSA

**Customer/ Customer Locations/ Customer Sub Locations** 



# PROs & CONs Option 1

### PROs

- In this method you can have reporting on a single Customer, to the deepest levels
- You will be able to give the Customer reporting at the Region, Location and Sub Location levels
- Information cannot be mixed by accident, as only one Customer is assigned the main account number.

### <u>CONs</u>

- In this method the Dealer CSA will have to setup a different Account for each Customer in the CER and manage and set up Region(s), Location(s), Sub Location(s), Profile(s) respectively.
- Dealer CSA will have to use/create separate email addresses for each account. Email addresses are unique and can only be associated with one company. Each Email account will be reported upon separately.
- Greater time involvement for the Dealer CSA

## DEALER/ CUSTOMER OPTIONS

### **Option 2:** DEALER/Customers/ Customer Locations

RICOH

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XXXXX	-X	-X	Numbering example
DEALER	Customer A	Customer A Location 1	11111-1-1
		Customer A Location 2	11111-1-2
		Customer A Location 3	11111-1-3
	Customer B	Customer B Location 1	11111-2-1
		Customer B Location 2	11111-2-2
		Etc OF RICOH	7

## PROs & CONs Option 2

### PROs

- In this method you can have reporting on multiple customers under one main company code.
- Customers will be able to report each location (each location has it's own unique ID).
- You will be able to give the customer reporting at the summary and location level.

### CONs

- In this method it is cumulative reporting only, no reporting at Dealer Branch level
- No information available below Location Level
- Customer Regional information is not tracked.
- If Customers do not use suffixes properly, information will be conglomerated

#### DEALER/ CUSTOMER OPTIONS RICOH imagine, change.

### **Option 3:** DEALER/ Dealer Branch/ Customers



## PROs & CONs Option 3

### PROs

- In this method you can have reporting on multiple Dealer Branches within one company code.
- Each Branch will be able to report each of their Customers (each Customer has it's own unique ID) under the one company code.
- You will be able to give the customer reporting at the summary level

### <u>CONs</u>

- No information available below Company Level. In this method it is cumulative reporting only, no reporting at Customer Region, Location level, or below
- If Customers do not use suffixes properly, information will be conglomerated

# How to use the CER Program-



In order for the CER program to provide your company and locations the detailed and complete information you are looking for, it is imperative, that all shipments returned for recycling utilize the proper account code for that User in the "Customer /Company Name" field of the "Take back program" in the format provided in the User profile.

IMPORTANT: Only returned items that begin with the complete and proper Account code in the "Company/Customer Name" Field will be included in the data provided in the reporting tool information. It MUST INCLUDE and have all three segments- XXXXX-X-X and the hyphens are required.

,	Take-Back Prog	Iram	Maintenance Kit
	Shipping Information.		
Example	Company/Customer Name *		Shipment
	44965-0-2 Global Master Printers Address		Package 1 Estimated weight in whole LBS
	City +		EDP code # *
	Alabama		Add Package I V
	Postal Code +		
	Phone Number		
	E-Mail Address		
	Email delivery notification desired?		

**Process Shipment** 

Clear

# Registering for Access to Tool RICOH imagine. change.

This is the entry page to the CER tool-

New users start with the "Register Today" link

	COH e. change	ē.				What is an EDP code?
Home	Sign In	Change Password	Registration	Print Prepaid Return Label	User Guidelines	About Consumables Eco Reporting
Home / C	Consumable	es Eco Reporting				
Weld	come	to Consur	nables l	Eco Reporting		
		F	Pre- Recycl	Paid Label ing Prograi	m	
	S	ign In		Register Today	-	Print Prepaid Return Label





To register enter your "company code" and then press "next"

Note: If you do not know your "Company code", then you must contact your CSA to obtain it.

	COH e. change.						What is an EDP code?	
Home	Sign In	Change Password	Registration	Print Prepaid Return	n Label	User Guidelines	About Consumables Eco Reporting	
Home / F	Registration	Form						
Usei	r Regi	stration F	orm					
Enter Co	mpany Coo	le: *		Next >>				
		[Type your company c please refer to your lo	ode. If you don't have cal admin or rep.]	one,				

#### **Organization Registration Request Form**

If you'd like your organization to utilize and have access to the Eco Reporting Web Portal, please visit Org. Registration Request Form

# **Registering (continued)**



A potential user will need to fill out this form in it's entirety

The User will need to request a selection from one of the 4 Titles-

Executive Regional Manager Local Manager Local Rep

The Title determines the access and visibility to select data reporting availability.

**NOTE:** The Company's CSA is responsible for confirmation of User level and Report access

Home / Registration Form

#### User Registration Form Global Master Print : 58165-0-0 **Company Information** \* = required Company Location: \* Global Master Print HQ.HQ [chosen location] Personal Information \* = required Title: \* Executive V Last Name: \* First Name: \* Phone No: 000-000-0000 Comments:

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Login

### Hierarchy of reporting capability-



**Executive-** Has access, visibility, and reporting capability to all data for the entire company

**Regional Manager-** Has access to see all "Locations" and "Sub Locations" for the "Region" or "Regions" assigned to him/her

**Local Manager-** Has access to specific "Location(s)" and "Sub Location(s)" assigned to him/her. Locations can cross "Regions" if desired.

**Local Rep-** Has access to specific "Sub Location(s)", but no access to information at "Location" or higher levels.

**CER System Administrator-** are the only members of an organization that have the ability to create, change, or remove profile rights, "Regions", "Locations" and "Sub Locations" in the system. Ricoh takes no responsibility for the setting up of additional CSA's in the system after the initial one has been set.

IMPORTANT: ALL passwords must be updated every 3 months or the user will be locked out of the system and the CSA will have to manually reauthorize each profile.

# **Registering (continued)**



Once completed, you must agree to the user license agreement, click that "I agree" and "Submit" the form. From there your submission will go to your CSA for review and profile creation, if granted by the CSA.

Website:		
Address: *		
City: *		
State: *	Alabama	$\checkmark$
Zip code: *		

#### Eco Tool Administrator Information:

* = required	
Last Name: *	
First Name: *	
Phone No: *	
Email Addresss: *	
	(Email address must have an organization relationship, must match company domain- third party addresses are not acceptable)
License Agreement: *	Please read terms of use before proceeding by clicking link. Once completed, check the box below to electronically sign and agree to ULA.
	□ I agree
	[check to electronically sign ULA]





After your CSA approves your request, you will receive an email similar to the one below, which will include your user information and password.

From: donotreply@ricoh-usa.com <donotreply@ricoh-usa.com> Sent: Tuesday, June 26, 2018 4:15 PM To: Ramon Romero <ramon.romero@ricoh-usa.com> Subject: Consumables Eco Reporting Profile Change Notification Email

#### **Consumables Eco Reporting**

New Profile Entry Notification Email

General Information				
A new account profile has been created for you as part of Consumables Eco Reporting. We recommend you change your password at your earliest by clicking on <u>Change Password</u> . Please make sure you have your location code available.				
Profile Full Name:	Ray Ramos			
User Name/Email:	ramon.romero@ricoh-usa.com			
Password:	1234567			
Note: A determination for access to the Eco Reporting web portal is subject to your company administrator availability and corporate constraints.				
Sent on Tuesday, June 26, 2018 @ 4:15:15 PM				





After receiving your "Sign in" credentials, you return to this pagehttp://ecoreporting.ricoh-usa.com/ and "Sign in"-

RICOH imagine. change.							
Home Sign In Change Password Regi	stration Print Prepaid Return Label	User Guidelines About Consumables Eco Reporting					
Home / Consumables Eco Reporting	Home / Consumables Eco Reporting						
Welcome to Consumab	Welcome to Consumables Eco Reporting						
Print.Ship.Recycle							
Sign In	Register Today	Print Prepaid Return Label					





Signing in-To sign in, you enter your email and password.

Note: If you do not have a password, then you must contact your CSA to obtain your "Company code" and register in the system

RICOH imagine. change.	Sign in to your profile	
	Email Address: [* required]	
	Password: (* required-7 chars min]	
	Keep me signed in Or uncheck if using public system? Forgot password?	
	Sign In	
	Not Registered	
	Create a new profile	





Once you are logged in the screen will look something like this-

To see your assigned locations click on the "Assigned Locations" link

RIC	COH e. change.		What is an EDP of	code?   Reports   As:	signed Locations   We	elcome, Daffy Duck (Mgr.) Log out	
Home	Change Password	Reports	Print Prepaid Return Label	User Guidelines	About Consumable	s Eco Reporting	
Home / C	Consumables Eco Re	porting					
Welcome to Consumables Eco Reporting							
Pre-Paid Label Recycling Program							
	Welcome, Daffy Duck	Mgr.)	Re	eports	Print	Prepaid Return Labe	

Since registration to this program your assigned location(s),have recycled 2,158.00 lbs. and processed 18.00 shipment(s). Cartridges recycled YTD: 1,980.00 lbs. and processed 14.00 shipment(s).

## Assigned Location(s)



#### Your assigned locations will populate accordingly

	COH e. change.		What is an EDP code?   Reports   Assigned Locations   Welcome, Daffy Duck (Mgr.)				
Home	Change Password	Reports	Print Prepaid Return Label	User Guidelines	About Consumables Eco Reporting		
Home / A	Assigned Locations						

#### **Assigned Locations**

#### **Global Master Printers**

Shipping Codes	Location	Sublocation	Region	Full Address
44965-0	Global Master Printers		East	5 Dedrick Plc 1 West Caldwell, New Jersey 07006
44965-0-1	Global Master Printers	Printing Kiosk	East	5 Dedrick Plc 1 West Caldwell, New Jersey 07006
44965-0-2	Global Master Printers	Marketing Communications	East	5 Dedrick Plc 1 West Caldwell, New Jersey 07006

Since registration to this program your assigned location(s),have recycled 2,158.00 lbs. and processed 18.00 shipment(s). Cartridges recycled YTD: 1,980.00 lbs. and processed 14.00 shipment(s).







The reporting categories are-

Shipping date(s)- by year, month, day or a custom Period

Shipments by- region, location, sub location

Tracking- report based upon individual tracking number

Weight- report on all packages equal to or above a specific weight Home / Shipment Reports

### Shipment Reports

Find By:

Shipping Date(s): Dellok arrow

[criteria returns records containing related selection Information]

Shipments by: Dollok arrow

[returns records containing related sublocation information]

Tracking: Dellok arrow

[criteria returns record containing related tracking # information]

Weight: 🔊 oliok arrow

[criteria returns record containing related weight..]

Reporting







#### There are a number of methods to view/chart your data-Bar/ Column/ Data/ Cylinder/ Pie/ Pyramid



### **Report Chart Types**



Consumables Eco Reporting

2018 Year-To-Date Shipment(s)

<u>Bar</u>



#### **Pyramid**



#### RICOH imagine. change.

Generated on								
Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date	
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018	
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018	
	58165-2-0	General Support	Not Specified	OIRUTKSJHF	1.00	WEST	7/7/2018	
	58165-2-1		DEMAN	9280457IUWS	2.00	WEST	6/7/2018	
	58165-3-0	Shipping	Not Specified	394875AIUDFH	1.00	SOUTH	5/7/2018	
	58165-3-1		Delivery Station	09423785AIUFH	2.00	SOUTH	5/7/2018	

Data

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Total lbs recycled: 9.00

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#### <u>Column</u>



#### **Cylinder**





Pie





Reporting utilizing the "Shipping Dates" provides a great deal of flexibility- from a macro level to a day level.

The "Date Range" feature gives you ultimate control of your data.



# Reporting- Date Range Year to date example



#### RICOH imagine. change.

#### Consumables Eco Reporting

#### 2018 Year-To-Date Shipment(s)

Generated on Wednesday, July 25, 2018

Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018
	58165-2-0	General Support	Not Specified	OIRUTKSJHF	1.00	WEST	7/7/2018
	58165-2-1		DEMAN	9280457IUWS	2.00	WEST	6/7/2018
	58165-3-0	Shipping	Not Specified	394875AIUDFH	1.00	SOUTH	5/7/2018
	58165-3-1		Delivery Station	09423785AIUFH	2.00	SOUTH	5/7/2018

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Total lbs recycled: 9.00





#### RICOH imagine. change.

#### Consumables Eco Reporting

#### June 2018, Monthly Shipment(s)

Generated on Wednesday, July 25, 2018

Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018
	58165-2-1	General Support	DEMAN	9280457IUWS	2.00	WEST	6/7/2018

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#### Total lbs recycled: 5.00





#### Consumables Eco Reporting

#### Shipment(s) on June 7, 2018

Generated on Wednesday, July 25, 2018

Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018
	58165-2-1	General Support	DEMAN	9280457IUWS	2.00	WEST	6/7/2018

**Reporting- Date Range- Day example** 

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Total lbs recycled: 5.00

# Reporting- Date Range Custom range example



#### Consumables Eco Reporting

#### Shipment(s) from 5/7/2018 to 6/7/2018

Generated on Wednesday, July 25, 2018

**RICOH** imagine, change.

Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018
	58165-2-1	General Support	DEMAN	9280457IUWS	2.00	WEST	6/7/2018
	58165-3-0	Shipping	Not Specified	394875AIUDFH	1.00	SOUTH	5/7/2018
	58165-3-1		Delivery Station	09423785AIUFH	2.00	SOUTH	5/7/2018

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Total lbs recycled: 8.00







Consumables Eco Reporting

#### Shipment(s) for Region

Generated on Wednesday, July 25, 2018

Region	Company	Code	Location(s)	Sublocation(s)	Tracking No	Weight	Ship Date
NORTH Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	6/7/2018	
		58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	6/7/2018

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Total lbs recycled: 3.00

Reporting- Location/ Sub Location Example RICOH



Consumables Eco Reporting

#### Shipment(s) for Location

Generated on Wednesday, July 25, 2018

Region	Company	Code	Location(s)	Sublocation(s)	Tracking No	Weight	Ship Date
NORTH	Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	6/7/2018

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Total lbs recycled: 1.00

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Consumables Eco Reporting

#### Shipment(s) for Location

Generated on Wednesday, July 25, 2018

Region	Company	Code	Location(s)	Sublocation(s)	Tracking No	Weight	Ship Date
NORTH	Global Master Print	58165-1-1	Sales Marketing	Communications Team	ADKFJIURHRIHEWT	2.00	6/7/2018

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#### RICOH imagine. change.

#### Consumables Eco Reporting

#### Shipment(s) by Weight

Generated on Wednesday, July 25, 2018

Company	Code	Location(s)	Sublocation(s)	Tracking No.	Weight	Region	Shipping Date
Global Master Print	58165-1-0	Sales Marketing	Not Specified	3498075AJKFHD434	1.00	NORTH	6/7/2018
	58165-1-1		Communications Team	ADKFJIURHRIHEWT	2.00	NORTH	6/7/2018
	58165-2-0	General Support	Not Specified	OIRUTKSJHF	1.00	WEST	7/7/2018
	58165-2-1		DEMAN	9280457IUWS	2.00	WEST	6/7/2018
	58165-3-0	Shipping	Not Specified	394875AIUDFH	1.00	SOUTH	5/7/2018
	58165-3-1		Delivery Station	09423785AIUFH	2.00	SOUTH	5/7/2018

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Total lbs recycled: 9.00

# **RICOH** imagine. change.