

Welcome to Color Inc Pro Lab ROES and Events tutorial.

Today we will be looking at how to build Favorites and Packages in ROES for easy ordering in ROES and ROES Events. This tutorial will show you how to create favorites and packages so you can order your commonly used products quickly

You must build your favorites and packages out of a single catalog. Roes will give you an error message when ordering if your Favorites are out of multiple catalogs.

To begin click on the Start Ordering tab and select the catalog you want to make your favorites or packages from. We will be using The School and Sports catalog to create our Favorites and Packages. Since we will be ordering through Events we also know we will be exceeding 20 prints.

Since I want my packages to use subject names I am building my items for use in ROES events. You can use this same process in standard ROES as well.

Let's start by clicking on the favorites button to view your favorites. Here you can see any favorites you have saved. All of your favorites will be saved here to use when ordering. I am going to create a new group called Color Inc School Favorites that contain only favorites from the School & Sports catalog. Click on the Plus tab to create a new group and type in the name of the group then hit enter. Click on the Favorites button again to go back to the main catalog.

Now we are going to save some commonly ordered products so we can find them more easily when placing orders. This is a great time saver when you are placing orders and prevents you from searching throughout the entire catalog for your commonly ordered products. Find the product you want to add and select it. Click on the Save this as a new favorite button which is the heart and plus sign. This will take you to the Favorites section and a text box will appear. Select the tab for the group you want to save this favorite in then Type in the name of the favorite and hit enter. It is important to select the appropriate group tab as your favorite will be added to the group that is selected. Your favorites will be saved continuously as you add them to the list. Repeat this step for all of the products you want in your favorites.

**DELETING/RENAMING FAVORITES**

If you need to delete or rename a favorite just click on the favorite you want to edit then click on the sprocket icon in the bottom left corner of the screen then select delete or rename favorite. You can also delete or rename your groups in this panel as well.

## BUILDING PACKAGES

Now we will look at building packages. Packages are a great time saver because you can group multiple products into a single favorite for easy ordering instead of ordering each item individually.

Make sure you are in favorites by clicking on the favorites button. Create a new group by clicking on the plus tab. Don't forget to name the new group. I am going to call this one Color Inc Sports packages to remind myself which catalog this comes from and that they are for sports orders. You can name your group however is best for you. Click on the show packages and cluster control button. This must be selected to build packages. Click on the favorites button to go back to the School & Sports catalog to find your products. Click on a product to select it. To add an item to the package click and hold on the item then drag it into the center window with the other item then let go. If you simply click on the other item it will select it instead of letting you drag and drop in the other package. You can move your products around until you are satisfied with their location. If you need to remove an item click on the red minus sign in the upper left hand corner to remove it. You can also change the quantity of an individual item within a package. Click on the new package drop down, select the product you want to change and type in the new quantity then hit enter. Click on the "Save this as a new favorite" button and a text box will appear. Select the tab for the group your product should be added to and then click in the textbox and type in the name of your new package. Since you will be using Events for this item you will want to name this package something simple so lets name this package "A". Hit enter to save the favorite. Continue to create your package list in the same manner.

If you like you can also use saved favorites from other groups to create packages. Please remember the products must be from the same catalog to prevent getting an error when ordering.

When you are creating single item packages, a pop up window will appear. Select "Save as packages" to save this as a package to be used in Events. You can even save templates such as memory mates this way and associate fields to data when placing orders through Events. See the video How to assign fields to packages in ROES events.

Once all of your packages are complete you are ready to start ordering.

Check out the video for placing an order for the next step. If you are using ROES events then you are ready to assign fields to your packages.