

# Apogee StoreFront Asanti StoreFront

The Cloud-Based Web-to-Print Solution  
for Creating Online Storefronts

## **StoreCenter – User's Guide**

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# About This User's Guide

This User's Guide explains how you can create online stores with the STOREFRONT application. It contains all the procedures for working with the StoreCenter web-browser interface and information to set up auxiliary services.

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## Intended Audience

This document is designed for two audiences:

- Administrators and Operators of print service providers who set up stores for their customers (Companies). These roles are referred to as Printer Administrator and Printer Operator.
- Administrators and Operators of Companies for which one or more stores have been created. These roles are referred to as the Company Administrator and Company Operator.

Administrators and operators use STOREFRONT to create stores, manage generated orders, and monitor the interfacing with the Apogee Prepress and Asanti systems. The features you can use depend on your role. See “Roles” on page 30.

No prior knowledge of online stores is required but some basic understanding of how websites are created is recommended in order to set up storefronts.

The STOREFRONT software is a hosted service and you do not need to install any software on your local computer.

Sections with information mainly for Printer Administrators are indicated with a note at the beginning of the section.

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**NOTE:** This documentation does not provide information on how to use the website storefronts created with STOREFRONT.

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## Getting Started with STOREFRONT

The sections in this User’s Guide are arranged in the sequence required to get you started with the application, from logging on to creating and managing stores.

- ◆ Click the steps below to go immediately to the relevant sections and set up your first store:

### Step 1: Log on to StoreCenter

To set up and manage stores in STOREFRONT, you need to log on to the StoreCenter.

---

## Step 2: Set up a Company

Companies are the customers or business relations of a printer or print service provider. These need to be defined by the Printer Administrator before a store can be set up. A Company is assigned one or more stores and optionally a Company Administrator who in turn can create Users who are authorized to use the storefront.

## Step 3: Define Your Resources

The Advanced menu provides access to general settings and preferences that need to be defined before you can create templates and set up a store. These resources are available for all Companies and Stores.

## Step 4: Create Product Templates

Product Templates allow you to optimize the overall efficiency of your stores by defining standard types for all your printed and non-printed products.

## Step 5: Create Products

Products are the publications and non-printed items that you want to sell or distribute via stores. They are created for a specific Company and can be used in all the stores of the Company.

## Step 6: Design the Storefront Pages

The Printer Administrator sets up one or more stores in the StoreCenter for specific Companies. Every store has a corresponding storefront with a unique internet address (URL) and a customized look and feel.

## Step 7: Give Access to Users

The visitors of your storefront are referred to as Users.

## Related Documentation

You can also refer to the following documentation:

- Apogee Prepress and Asanti Online Help
- Apogee Prepress and Asanti Tutorials
- *PrintSphere Help*: instructions on setting up the PrintSphere file-sharing application
- *SphereCenter Help*: instructions on buying PrintSphere licenses and creating PrintSphere users

## Release Notes and Support

For the latest information, known issues and updates for this documentation, please visit the *Support* pages. You can also visit *Apogee Network* to participate in the user forums (requires registration).

Read the release notes in the Product History section of the Support landing page.

## Videos

This documentation includes a selection of videos to complement the instructions:

- Access Labels
- Edit the Order Reference dialog (Reference tab)

All available training videos are listed on the *Support* pages.

## Update Checklist

It is recommended that you perform the following actions for the new release:

- Update the STOREFRONT Converter plug-in on all systems running Adobe InDesign.
- Check that product kits are properly processed by all systems connected to STOREFRONT, such as MIS, billing, or shipping solutions.
- It is recommended to remove any stores that are no longer in use or were created for training or testing purposes.



## Navigating the Online Help

- ◆ You access the Online Help by clicking the Help link on the StoreCenter navigation bar. The Online Help opens in a new browser window.

The Online Help version of this documentation uses a responsive design to accommodate a wide range of screen sizes. This means that some navigation features are displayed or hidden, depending on the size of the screen you are viewing this documentation on. For example, the table of contents may be hidden if you are viewing the documentation on a small screen. Use the buttons in the top navigation bar to browse through the documentation.

You can view topics in the Online Help by expanding the sections in the **Contents** panel and clicking a heading. You can continue to read in sequence by pressing the **Next** button in the navigation toolbar.

As you progress, the hierarchy of each specific topic is indicated at the top of the topic pane in the breadcrumb trail. You can click any one of these levels to go back to a higher level in the hierarchy.

You can also jump to **Related Topics**, to additional information within the documentation set and to internet sites. All these links are highlighted in red. In these cases you navigate back and forward by clicking the **Back** and **Forward** buttons on the browser tool bar.



Show/hide the table of contents



Show/hide the list of index terms



Show/hide the search panel



Previous topic



Next topic



Print a PDF of the whole document



Print current topic



Displays a section



Displays collapsible (expandable) text or images

## ▷ Searching

The Online Help has a search feature for finding information. The following queries can be made:

- Simple search with a single word: Enter a single word for a list of all topics that contain that word.
  - Advanced search for all words: For example, enter *disk space* for a list of all topics that contain *disk* AND *space* in the same topic. Try to avoid using common words such as "a", "the", etc. in your search query.
  - Advanced search for an exact phrase: For example, enter “*disk space*” in quotes for a list of topics that only contain this exact phrase.
- 1 If the search box is not visible, for example if you are working on a small screen, click the **Search** button.



- 2 Type a word or phrase in the Search box.
- 3 Click the **Go** button or press Enter.

The search results are listed.

- 4 Click a search result to jump to the topic.

You may need to expand sections of the topic to see the word or phrase you queried.

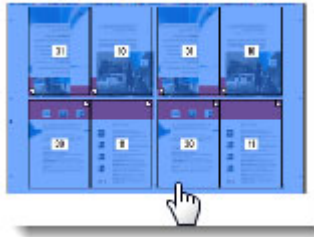
### Search limitations

- It is not possible to use wild cards in your search query.
- Search is case-insensitive.
- Search queries must be at least 3 characters. For example, searching for "QR" will not produce any results; you should search for "QR codes".

## ▷ Illustrations and Animations

Large images have been reduced in size to display properly in the Help topics.

- ◆ Hover over an image and if the cursor changes to a *hand* you can click the image to view it full size in an overlay panel. Click the **X** or click outside the image to close the overlay panel and return to the Help topic.



### ▷ Expanding topics

Headings with a triangle are collapsed to provide a better overview of the information.

- ◆ Click the heading or the colored triangle to expand the topic.



# Printing Help Information

If you want to print information from the Online Help, two options are available:

## ▷ Print individual topics

- ◆ Click the **Print** button in the navigation bar or choose **File > Print** from the browser menu bar.



## ▷ Print the whole document

All the information in the Online Help is also provided in a printer-friendly PDF document.

- 1 Click the **PDF** button in the navigation bar to open a PDF document.



- 2 Print the whole document or specific sections as required.

This feature is only available if your browser has the Adobe Acrobat plug-in.

---

**NOTE:** You may need to set up browser functionality in Adobe Acrobat.

---

# Introduction to STOREFRONT

STOREFRONT is a web-to-print solution that enables printers and print service providers to create online storefronts for themselves or other organizations.

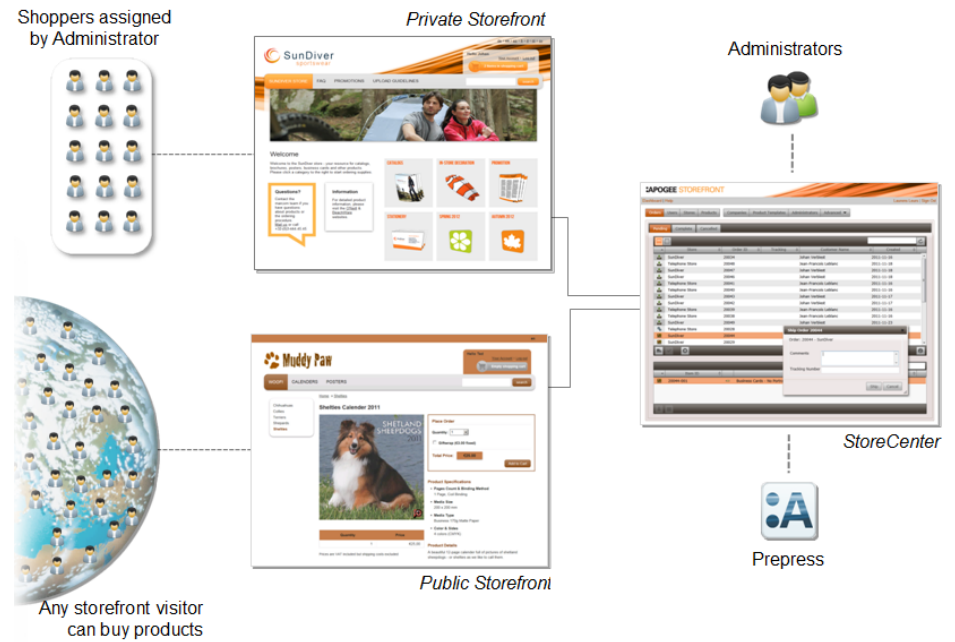
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# Overview

When visiting storefronts created with STOREFRONT, shoppers can browse through a catalog of print and non-print products, order products, and track the status of their orders. Secure online payment of orders is also integrated in STOREFRONT.

Orders generated through private and/or public storefronts are monitored and processed in the back-end application called StoreCenter.

Figure 1.1: Overview of STOREFRONT



# StoreCenter

StoreCenter is the back-end web application of STOREFRONT where administrators and operators work with stores.

A store in STOREFRONT consists of the web-to-print website which has a unique URL, referred to as a storefront in this documentation, and the back-end functionality set up in the StoreCenter.

Figure 1.2: StoreCenter



- 1 Navigation bar with links to the Dashboard, Download Plug-in, License Agreement, Help, user account, Switch to SphereCenter and Sign In/Out button
- 2 Menu bar with menus for all Administrators and Operators
- 3 Menu bar with menus for Printer Administrators and Operators
- 4 Menu dialogs subdivided in tabs
- 5 Main toolbar to add, delete, edit and enable/disable a list item
- 6 Lists (Stores, Products, Users)

**NOTE:** The available menus and toolbars that you see in the StoreCenter depend on your role. See “Roles” on page 30 for more information.

## Toolbars, Filters, Sorting

As you navigate the various menus in StoreCenter you see additional toolbars to add and edit resources, lists that can be sorted alphabetically and search boxes for filtering lists.

Figure 1.3: Toolbars and filtering in StoreCenter



- 1 Search boxes for filtering lists
- 2 Column headers can be clicked to sort the lists
- 3 Toolbars with tools for adding, editing, deleting and sorting resources
- 4 Global filter

**NOTE:** Clicking the Go Back button of your browser always takes you back to the logon window. You must use the menus and navigation bar links to navigate in StoreCenter

### Global Filter

You can apply the Global Filter on certain pages to filter large amounts of data.

#### ▶ Apply the Global Filter

- 1 Click the Global Filter icon in the top right corner.





A filter bar appears where you can select a Company and/or a Store to filter on.

- 2 Click **Company** or **Store** to reveal a drop-down list and select the company and/or store that you want to filter on.

If you now go to a page, e.g. product templates, orders, products, the data you see is filtered according to the criteria you selected.

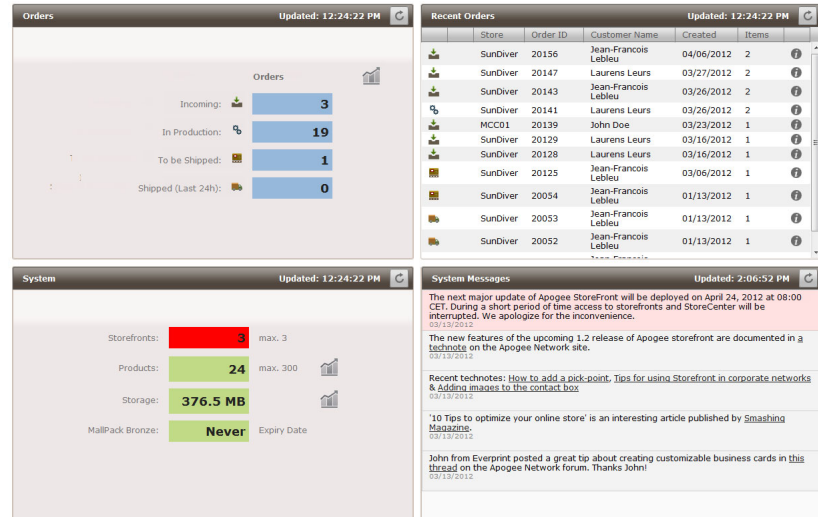
- 3 To remove the filter, click the gray cross (X) in the filter bar.

Now you will see all the data for all companies and stores.

## Dashboard

The Dashboard is the landing page when you log on to StoreCenter.

Figure 1.4: The StoreCenter dashboard (Printer Administrator view)



It displays the following information:

- **Orders overview:** Shows the totals for all the stores managed by a Company Administrator or Printer Administrator.
- **License statistics (only displayed for Printer Administrators):** Shows the maximum capacity (disk space, number of products, etc.) allowed for the Printer Administrator's type of license and the capacity in use.
- **Recent orders:** Shows the most recent 12 orders for the stores managed by a Company Administrator or Printer Administrator, sorted by creation date.

- **System messages:** Shows messages sent by the System Administrator. Important messages, e.g. products with low or out-of-stock levels, software update notifications, are displayed in red or with special icons.

Various links are provided to navigate further in StoreCenter or view additional statistics. You can return to the Dashboard at any time by clicking the link in the navigation bar.

## Common Resources

STOREFRONT is designed to maximize the use of resources across the different stores and companies that print service providers serve. These common resources include:

- Product templates
- Products (only for stores of the same company)
- Price lists
- Media type and sizes
- Shipping, payment gateway and tax
- Translations of common components
- Production Center, Production Settings, Licenses

## E-mail Notifications

STOREFRONT includes an e-mail service that sends the necessary e-mails to notify users and administrators. The Printer or Company Administrator enters the e-mail address for a user when the user profile is created. E-mails are sent in HTML and plain text.

E-mails are sent for the following actions:

- to administrators:
  - A user is created with access as administrator to STOREFRONT; e-mail with hyperlink to STOREFRONT and an initial password
  - New order notifications (if the option selected in Account Profile)
  - Order approval request
  - One or more of the licensing parameters are exceeded
- to shoppers:

- 
- ❑ A user is created with access as shopper to a private storefront; e-mail with hyperlink to the storefront and an initial password
  - ❑ A user has requested a new password
  - ❑ To confirm an order has been received/rejected by the Administrator
  - ❑ To confirm an order has been shipped

---

**NOTE:** The signature STOREFRONT Team is no longer used at the end of the e-mails to shoppers.

---

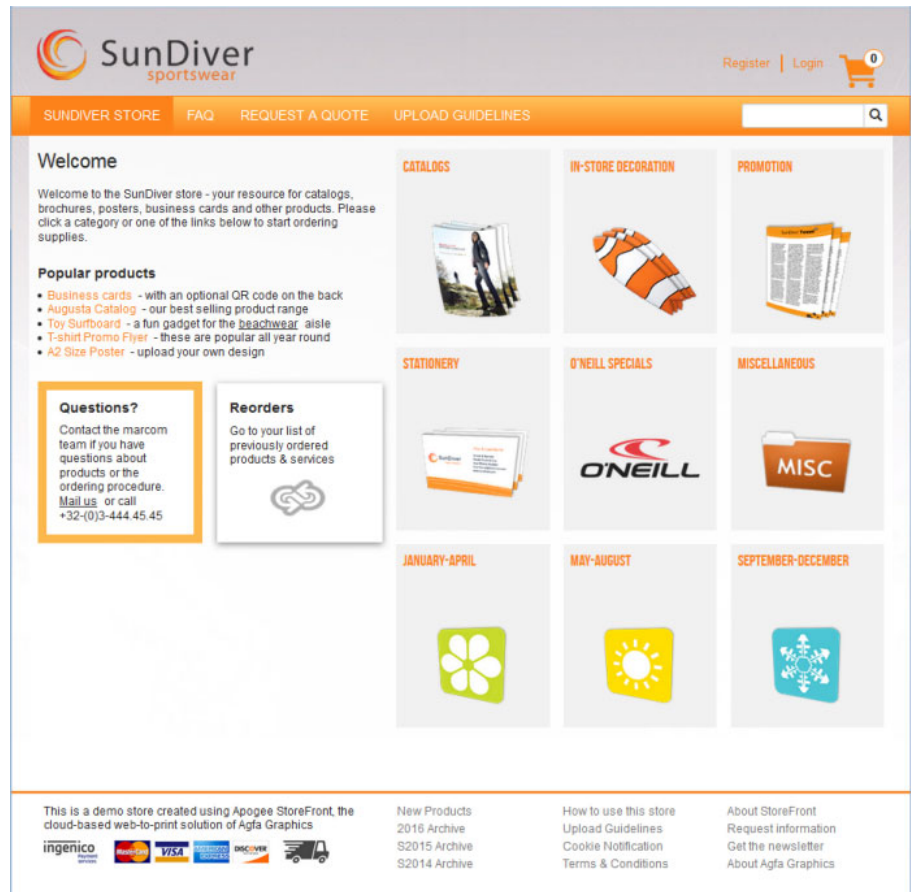
Related topics:

- [Avoid spam issues with Sender Policy Framework on page 560](#)

## Storefronts

Every store created in STOREFRONT has a corresponding storefront with a unique internet address (URL) and a customized look and feel.

Figure 1.5: A storefront home page



This is the actual website where products can be purchased by shoppers. Products are displayed with or without prices. The range of products offered on the storefront is referred to as the Product Catalog and similar products are organized in Categories.

Shoppers can order products and specify quantities, and these are added to their shopping cart as order items. If prices apply for these items, they immediately see the total price per ordered item and the sub-total for the order.

A storefront is private if it can only be accessed by users who have been assigned a login and password by an administrator. The storefront is public if it can be accessed by all visitors.

Figure 1.6: Order items in the shopping cart

The screenshot shows the SunDiver sportswear storefront's shopping cart page. The page features a navigation bar with links for 'SUNDIVER STORE', 'FAQ', 'PROMOTIONS', and 'UPLOAD GUIDELINES'. A search bar is located on the right side of the navigation bar. The main content area is titled 'Your shopping cart' and contains a table of items. The table has columns for 'Quantity' and 'Price Taxes Excluded'. Below the table, there is a summary section with 'Item Sub-Total: €136.00' and a 'Checkout' button. A note at the bottom left states 'Base prices are taxes and shipping costs excluded'.

	Quantity	Price Taxes Excluded	
<p>Quarterly Newsletter</p> <p>Edit... PDF preview</p>	250	€100.00	<ul style="list-style-type: none"> <li>Remove</li> <li>Save for later</li> <li>Edit Item...</li> <li>Comments...</li> </ul>
<p>'Tweets' newsletter</p> <p>Edit... PDF preview</p>	100	€12.00	<ul style="list-style-type: none"> <li>Remove</li> <li>Save for later</li> <li>Edit Item...</li> <li>Comments...</li> </ul>
<p>Kite GK69581248</p> <p>Color : Blue</p>	2	€24.00	<ul style="list-style-type: none"> <li>Remove</li> <li>Save for later</li> <li>Edit Item...</li> <li>Comments...</li> </ul>
		Item Sub-Total:	€136.00

Base prices are taxes and shipping costs excluded

Checkout

# Roles

As a StoreCenter user you will have one of the following roles:

- **Printer Administrator:** You create the Companies for which stores are set up. You have full access to the StoreCenter features and manage the Users, Companies and Products for all the stores.

---

**NOTE:** This role is not unique. The first printer administrator to access StoreCenter must accept the terms and conditions for using STOREFRONT.

---

- **Company Administrator:** You have access to the StoreCenter features required to manage the Users and Products for the stores of your Company. A Company Administrator may also be granted permission to manage orders and manage stocks.
- **Printer Operator:** You can manage all Users and you follow up orders generated by the stores.
- **Approvers:** An approval workflow can be set up using approval groups. See “Approval Groups” on page 54 for more information.
- **Company Operator:** You can manage the Users of your Company and follow up the stocks for your Company.

Table 1.1 Access to StoreCenter menus by role

	Orders	Users	Stores	Products	Companies	Product Templates	Administrators	Advanced
Printer Administrator	full access							
Printer Operator	lim.	full	read only				limited	
Company Administrator	only access to their own data				menu not visible	limited		
Company Approver	own data	menus not visible						
Company Administrator/ Approver	only access to their own data				menu not visible	limited		
Company Operator	only access to their own data				menu not visible	limited		

## Integration with Apogee Prepress and Asanti

STOREFRONT interacts with Apogee Prepress 11.0 or higher and Asanti Production 4.0 or higher, via a dedicated service that ensures that print products ordered on the storefront are automatically downloaded for processing in these prepress workflows. Refer to the Apogee Prepress and Asanti documentation for more information on this integration.

Apogee Prepress and Asanti also have an optional task processor that exports STOREFRONT orders in a variety of data file formats. The data file can be used in Management Information Systems (MIS). Contact your ECO3 representative for more information about this feature or read the *article* on ApogeeNetwork.

- Related topics:
- [Integrating STOREFRONT with Apogee Prepress/Asanti on page 326](#)
  - [How to export an order summary from Apogee Prepress \(YouTube\)](#)
  - [Export Module for MIS Systems \(ApogeeNetwork\)](#)

## Online Editor for Customizable Products

A Customizable Product is a publication that a shopper can edit to personalize the content before ordering. Typical examples are business cards, letterheads, newsletters, posters, etc. A Variable Data Product (VDP) is a special kind of customizable product that allows a shopper to upload variable data such as names, addresses, images, etc. and merge these data with a product to create multiple publications.

The print service provider's designer creates the base layout in Adobe InDesign and converts them into a StoreFront Package using the StoreFront Converter plug-in. The StoreFront Package is uploaded and administrators can use the Online Editor integrated in STOREFRONT to fine-tune the base layouts and set restrictions on the extent to which the shopper can modify the documents. A similar version of the Online Editor is available on the storefront so shoppers can add or edit their personal content.

### Converter Plug-in

A plug-in is available for Adobe InDesign to convert documents prepared in Adobe InDesign to a package that can be used in the STOREFRONT Online Editor. This package has a .zxp extension.

## Multilingual Support

The following table gives an overview of the languages supported in the different components of STOREFRONT.

Language	Storefronts	StoreCenter	Online Editor
Chinese - Simplified	✓	✓	✓
Chinese - Traditional	✓	✓	✓
Czech	✓	✓	✗
Danish	✓	✗	✓
Dutch	✓	✓	✓
English (UK)	✓	✓	✓ (US)
English (US)	✓	✓	✓
Faroese	✓	✗	✗
Finnish	✓	✓	✗
French	✓	✓	✓
German	✓	✓	✓
Italian	✓	✓	✗
Japanese	✓	✓	✗
Korean	✓	✓	✓
Norwegian	✓	✓	✗
Polish	✓	✓	✓
Portuguese (Brazil)	✓	✓	✗
Portuguese (Europe)	✓	✓	✗
Russian	✓	✓	✗

See “Multilingual Storefronts” on page 511 for the procedures for creating a multilingual storefront.

See “Create a Company” on page 46 to set the language of the Graphic User Interface for working in StoreCenter.



# Search Engine Optimization (SEO)

Search Engine Optimization (SEO) can help you attract visitors to a public store. SEO depends in the first place on the actual content that you publish on the storefront. In addition, STOREFRONT adds information in the `head` element of the HTML code and fills the `title` and `meta description` elements when generating your storefront pages.

## Title and Meta Description Elements

By default, STOREFRONT uses the store name, category name and product name to fill the `title` element. The first 160 characters of the body text are copied into the `meta description` element. However, you have ample opportunity to fine-tune this information when creating your store.

### ■ Home page example:

```
<title>My Store Name</title>

<meta name="description" content="My Webshop for posters and signs" />
```

### ■ Optional page example:

```
<title>FAQ</title>

<meta name="description" content="Questions about my webshop" />
```

### ■ Product category example:

```
<title>Brochures | My Store Name</title>

<meta name="description" content="full color brochures" />
```

To make the most of SEO, make sure you complete the relevant fields when performing the following tasks:

- when creating a store (see “Meta Tags Tab” on page 254)
- when creating the storefront pages (SEO title and description: see “Pages Tab” on page 222)
- when creating products (product name and description: see “Creating Products” on page 157)
- when creating product categories (category name and description: see “Add a Category and Products” on page 208)

## Sitemaps

STOREFRONT also creates a sitemap file, called `sitemap.xml`, for each of your public stores, so it's easier for search engines to crawl your storefront website. You can see the sitemap file by navigating to your storefront and adding `a/sitemap.xml` to the URL as follows:

```
https://myonlinestore.apogeestorefront.com/a/sitemap.xml
```

Sitemaps can also be submitted to search engines to improve indexing. If you want to do this, you can use *Google Webmaster Tools*. You'll need to create a special `meta name` tag that includes the code that verifies you are the owner of the storefront. Read how to create the `google-site-verification` meta tag in "Meta Tags Tab" on page 254.

On the other hand, if you do not want your storefront to appear in search results, read how you can prevent search engines crawling your storefront with the `robots` meta tag – also in the section "Meta Tags Tab" on page 254.

For more information about SEO in general, read the article *Making Public Stores Customer and Search-Friendly* on ApogeeNetwork.

# System Requirements

STOREFRONT is made available as software-as-a-service (SaaS) and hosted by ECO3. This means no extra hardware is required and no software has to be installed. All users of STOREFRONT, including administrators, and visitors of the private storefront websites log on to ECO3' central hosting servers. Public storefronts are also hosted on the central servers.

The following system requirements apply for storefront shoppers:

- Internet connection
- Any recent browser:
  - Edge 14 or higher
  - Mozilla FireFox 50 or higher
  - Google Chrome 54 or higher
  - Apple Safari 9 or higher
  - other browsers will work but have not been tested

The following system requirements apply for using the StoreCenter of STOREFRONT:

- Internet connection
- Recommended browser: Mozilla Firefox 50 or higher; most other browsers can also be used.
- Minimum monitor resolution of 1024 x 768 pixels; recommended resolution: at least 1680 x 1050 pixels.

The following system requirements apply for integrating STOREFRONT with Apogee Prepress or Asanti:

- Apogee Prepress 11.0 or higher (only Manage and Integrate versions) is required for automatic downloading and processing of ordered print products.
- Other versions of Apogee Prepress or third-party systems can use manually downloaded PDF/JDF files.
- Asanti Production 4.0 or higher

To use the STOREFRONT Converter, you need the following version of Adobe InDesign:

- Adobe InDesign 6.0, CC, CC 2014/2015 on Windows or Macintosh

## Online Security

Internet security is an essential element for all e-commerce systems and may be subject to legal requirements in your country.

### Full HTTPS support

STOREFRONT supports Hypertext Transfer Protocol Secure (HTTPS) for all data communication. When accessing any page in a store, the browser will show the 'secure' green lock icon in the address bar. For stores that use a custom domain name, there is no need to purchase a separate SSL-certificate as STOREFRONT automatically takes care of this using Let's Encrypt certificates.

### Payment Gateways

The security of online payments is ensured by payment gateway services integrated in STOREFRONT. The supported gateway services depend on your location and include Ingenico (Worldline brand), PayPal, Mercado Pago, Stripe, Bambora and Inicis. These systems handle all payment aspects and do not require that credit card data is stored on the STOREFRONT web servers.

You can download the document *Configuring Payment Gateways* which has the latest information on setting up these services. Always check that you have the latest version of this document.

Read the article *Infrastructure, Security, Privacy and Confidentiality* on the ApogeeNetwork for more information.

Related topics: 

- [Configuring Payment Gateways on page 563](#)

## Legal Considerations

Most countries have specific legislation that governs e-commerce practices or websites in general. This section provides some general guidelines, however, you are responsible and must ensure that the storefronts you set up meet the legal requirements of the country or regions it operates in.

### Terms & Conditions

Depending on local legislation, the following information may need to be provided on the Terms & Conditions page. For private stores the requirements may be less stringent than for public business-to-consumer stores. See “Add/edit legal information (Legal tab)” on page 228 for details on how to create this content.

### Company specific information

- The name of the service provider: When the trading name is not the same as the real name of the company, this should be explained.
- Physical address
- E-mail address
- Registration number: In some countries the place of registration should also be stated.
- VAT number or sales tax information

### Privacy policy

STOREFRONT uses a number of features that may concern the privacy of storefront visitors. Disclaimers should be included on the storefronts to notify visitors about these features.

The Users tab in StoreCenter has an option to export a list of users to an Excel file. This feature was added to allow companies to use the data in other applications, such as for instance an e-mail marketing program. Even though you may consider sending all customers an e-mail to be a service, legally this can be seen as spam. Most countries have very strict legislation regarding the use of such e-mails. Make sure you are working within the legal framework of your country.

## Complaints procedure

You may need to explain how buyers can report an issue with their purchase and indicate the time frame for receiving a response.

## Right of withdrawal/Return policy

Consumers in many countries, and particularly in EU member states, have the right to withdraw from certain online purchases and return goods within a certain period. Traders may need to provide shoppers with a model withdrawal form. Certain products are excluded from this rule (e.g. personalized goods) so it may only apply to stock products and not to customized products such as business cards.

See also the *EU Consumer Rights Directive* on distance selling (e.g. internet).

## Trade and Professional Associations

If the print service provider is a member of a trade or professional association, membership details should be provided on the Terms & Conditions page. It may be a good idea to become a member of a local e-commerce trade association or at least check the recommendations on their web site. For countries in the European Union, a list of such organizations and quality labels can be found on the *EMOTA* website.

## Cookies

Cookies are text files that are saved on a user's computer each time the user visits your website. The websites you create with STOREFRONT use *persistent cookies* to collect information which is essential to the correct functioning of the website. For example, a cookie is used to collect data about the products a shopper adds to the shopping cart. If such a cookie could not be used, the shopper would have to remember all the products he put in his cart. You do not have to inform shoppers that these essential cookies are being used.

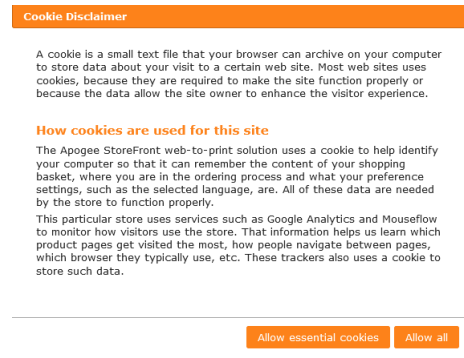
However, in some countries, e.g. the countries of the European Union, you are required to inform visitors of your website about *non-essential cookies*, such as the Google Analytics cookies, which STOREFRONT allows you to add to your website.

To comply with the General Data Protection Regulation (GDPR) cookie regulations, a blocking pop-up window appears (when the cookie check is enabled), allowing the user to accept all cookies or only essential cookies. The user must select one of the following options to continue using the STOREFRONT website:

- **Allow essential cookies:** accept only essential cookies.

- **Allow all:** accept all cookies.

Figure 1.7: An Example of Cookie Consent Pop-up Window



If it is legally required and you are using cookies for non-essential services, you can add a link in the footer of your storefront pages to your cookies acceptance page, or a banner that appears at the bottom of each storefront page. See “Add/edit legal information (Legal tab)” on page 228 for more information on creating a cookies acceptance page or banner.

Related topics:

- [General Tab on page 196 to add Google Analytics to your storefront.](#)

## Shopper Notifications

Legislation may require that a shopper is informed automatically about a purchase by e-mail or post. STOREFRONT sends an e-mail automatically for each order.

## Product Information

Some countries require that products on sale are clearly described to the shopper. STOREFRONT has a description field that can be used for this.

## GDPR

For information on STOREFRONT compliance with the EU’s General Data Protection Regulation, see the *ECO3 website*.





# Logging on and Editing Your Account

To set up and manage stores in STOREFRONT, you need to log on to the StoreCenter.

## Logging On

Your account is set up by an ECO3 Administrator and logon details are sent to you by e-mail.

### ▷ Log on to StoreCenter the first time

---

**NOTE:** Administrators must confirm that they accept the License Agreement the first time they log in and each time the agreement is modified. You can consult the License Agreement at any time by clicking the link in the navigation bar.

---

- 1 Click the link in the e-mail you received from your Administrator or copy and paste the URL in the address bar of your browser.

This unique link remains valid for 7 days.

- 2 Enter your e-mail address.
- 3 Enter a password of your choice in the **Password** field and enter it a second time in the **Password Confirmation** field.

---

**NOTE:** You can change your password later if you want.

---

- 4 Click **Initialize Password**.

The StoreCenter dashboard is displayed.

**TIP:** You can bookmark the StoreCenter URL as a favorite, just like any other website.

### ▷ Log on to StoreCenter

- 1 Click the link in the e-mail you received from your Administrator

OR

Copy and paste the URL `https://www.apogeestorefront.com/sfadmin` in the address bar of your browser. You should use the recommended browser.

---

**NOTE:** The URL for the Asanti Production StoreCenter is:

`https://www.asanti-storefront.com/sfadmin`

---

- 2 Enter your e-mail address and your password.
- 3 Click **Sign in**.

The StoreCenter dashboard is displayed.

Related topics: 

- [Impersonate a user on page 282](#)

## Editing Your Account

You can manage your account once you are logged in.

### ▷ Change your password

- 1 Click your name on the navigation bar to open your Account.
- 2 Enter a password of your choice in the New Password and Repeat New Password fields.
- 3 Click **Save**.

 Save

### ▷ Edit your Account Profile

You can change some of the profile settings which are set initially by the Administrator.

- 1 Click your name on the navigation bar to open your Account.
- 2 Enter your details in the **Profile** tab.
- 3 Choose your preferred language in the **Language** drop-down list.

This is the language used for the StoreCenter.

- 4 Select the **Notifications** check box if you want to receive an e-mail for each new order.

---

**NOTE:** If the store requires approval of orders before processing, Company Administrators should select this option to receive e-mails as the orders are placed.

---

- 5 Click **Save**.

A rectangular button with a light red background and a thin border, containing the word "Save" in a dark red font.

### ▷ **Reset a forgotten password**

- 1 In the StoreCenter logon window, click **Forgot Your Password**.

- 2 Enter your e-mail address and click **Submit**.

You will receive an e-mail inviting you go to the StoreCenter where you can set a new password of your choice.

- 3 Enter a new password of your choice in the Password field and the Password Confirmation field, and click **Reset Password**.

You are now signed in.

Related topics:

- [Impersonate a user on page 282](#)



# Companies and Administrators

---

**Printer Administrator only**

---

Companies are the customers or business relations of a printer or print service provider. These need to be defined by the Printer Administrator before a store can be set up. A Company is assigned one or more stores and optionally a Company Administrator who in turn can create users and products, and manage orders and stocks for his company.

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▶ Administrators .....	49
▶ Approval Groups .....	54

# Companies

Companies are the highest level in the StoreCenter hierarchy and need to be defined before company administrators can be assigned.

---

**NOTE:** A print service provider who wants to create his own store must create a Company for himself.

---

## ▷ Create a Company

A Company is your customer or business relation for whom you want to create a store.

A store in STOREFRONT consists of the web-to-print website which has a unique URL, referred to as a storefront in this documentation, and the back-end functionality set up in the StoreCenter.

- 1 On the menu bar, choose **Companies** and then click the **Add** button.



- 2 In the **General** tab, enter a Company Name and Source Language.

The Source Language is the default language for new Administrators, Stores and Products.

---

**NOTE:** The source language cannot be changed once you click Save.

---

- 3 Optionally enter a location for the **Export Folder**. This is where orders are exported via the PrintSphere service.

- 4 Choose a **Salutation**:

- Informal (first name only)
- Informal No Title (first name only)
- Formal (title and last name)

This is the salutation format which is used for e-mails sent for all the stores of the company.

- 5 Enter your **Billing Address** details (name, etc.) and your MIS ID if applicable. If the company will only be used for billing purposes, select the **Use**

**this company only for billing** check box. This means the company will only show up in lists related to billing.

- 6 Click **Save** to confirm your changes.



The Company is displayed in the list.

- 7 In the **Languages** tab, add additional supported languages which are relevant for this particular Company.

For example: you may need a second language to set up a bilingual storefront.

- 8 In the **Access Labels** tab, add access labels as required to control which products a user can see on the storefront. The maximum number of labels is 516. See “Access Labels” on page 262 for more information on setting this up.
- 9 In the **Approval Groups** tab, add group labels as required to control who can approve. See “Approval Groups” on page 54 for more information on setting this up.
- 10 Click **Save** to confirm your changes.



### ▷ Edit a Company

- 1 On the menu bar, choose **Companies** and select the company you want to edit in the list.
- 2 Make the changes in the relevant tabs.

---

**NOTE:** You cannot change the source language you chose when creating the Company.

---

- 3 Click **Save** to confirm your changes.



### ▷ Delete a Company

---

**NOTE:** You need to delete the products that have been created for the company first.

---

- 1 On the menu bar, choose **Companies** and select the company you want to delete.

2 Click the **Delete** button.



3 Click **OK** to confirm that you want to delete the selected company.



# Administrators

You can create the following types of administrators:

- **Printer Administrator:** has full access to all of the functions of StoreCenter. It is recommended that a Printer Administrator sets up an additional administrator as back-up for when the first Printer Administrator is absent or cannot access the system for other reasons.
- **Printer Operator:** has limited rights to perform tasks in StoreCenter, e.g. monitoring and processing orders. This step is optional and only required if you want to delegate these tasks to a Printer Operator.
- **Company Administrator:** a role with the rights to perform certain tasks in StoreCenter with regard to the specified company and its stores: create Users, manage orders and stocks. This step is optional and only required if you want to delegate certain tasks to a Company Administrator.
- **Company Approver:** can approve orders placed by users of a specified approval group or groups.
- **Company Operator:** can manage the stock of his company.
- **Company Administrator/Approver:** in addition to the company administrator role, this administrator may also be a dedicated approver for a specified approval group or groups.

---

**NOTE:** An administrator who wants to view a storefront he created must create a User account for himself (see “Create a new user” on page 276) or impersonate another User (see “Impersonate a user” on page 282).

---

## ▷ Create Administrators

- 1 On the menu bar, choose **Administrators** and then click the **Add** button.



- 2 In the **Profile** tab, enter the person’s name and other personal details:
  - **E-mail:** Enter a valid e-mail address for sending notifications; if you want to use a fake or dummy e-mail address for testing purposes, use the example.com domain (e.g. fakeuser@example.com) to avoid e-mail bouncing and error logs on the StoreCenter server.

- Language: Choose a language in the drop-down list, preferably a language that is supported by the stores.

**3** In the **Title** drop-down list, choose a title for the formal salutation. The options depend on the language you just selected for this user.

For example, if you chose English as language, the following title options are displayed:

- Mr.
- Ms.
- Ms./Mr.: if you do not know the gender of the person

For example, if you chose German as language, the following title options are displayed:

- Frau Dr.
- Herr Dr.
- Frau/Herr: if you do not know the gender of the person
- Frau
- Herr

---

**NOTE:** The title is only displayed in e-mails if you selected the *formal* salutation style for the Company.

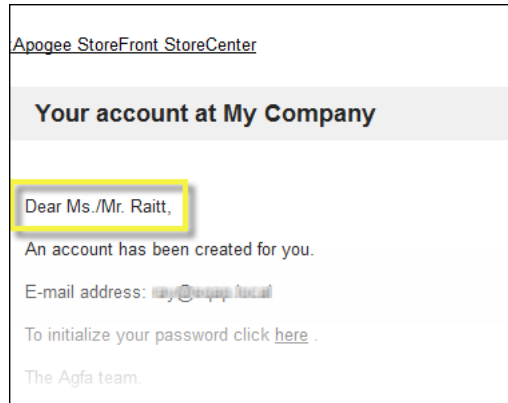
---

---

**NOTE:** For German, the title is also shown on the storefront when *formal* is enabled.

---

Figure 3.8: Example of a formal salutation for a user whose gender is unknown.



4 Choose one of the following **Roles**:

- Company Administrator
- Company Administrator/Approver
- Company Approver
- Company Operator
- Printer Administrator
- Printer Operator

---

**NOTE:** See “Approval Groups” on page 54 for more information on the Company Approver and Company Administrator/Approver roles.

---

5 For *Company Administrator*, *Company Administrator/Approver* and *Company Operator*:

You can allow these two roles to manage orders and stocks. This can be useful for stores where a third party manages part of the order fulfillment (e.g. non-print products such as gifts and gadgets).

- Manage Orders:** download orders, apply corrections, carry out shipments, subscribe to e-mail notifications for new incoming orders
- Manage Stock:** change the stock counters in the Product tab, receive stock related e-mail notifications when a product is nearly and really out-of-stock.

- 6 For the Company roles, choose a **Company** from the drop-down list. The Printer roles are assigned for all companies.
- 7 Select the **Notifications** check boxes so this user receives notification e-mails:
  - Send an e-mail for each new order to approve: can be selected only for Approvers

---

**NOTE:** If the store requires approval of orders before processing, Company Administrators/Approvers should have this option selected to receive e-mails as the orders are placed.

---

- Send an e-mail for each new order: can be selected only if **Manage Orders** is selected
  - Send an e-mail for each new quote: The shopper receives an e-mail with a link to a requested quote.
- 8 Click **Save** to confirm your changes.



The new administrator is displayed in the list with the role and company.


A welcome e-mail is sent to the e-mail address entered in the Profile tab. The log-on procedure is explained in “Logging on and Editing Your Account” on page 41.

### ▷ Deleting Administrators

---

**NOTE:** You cannot delete yourself as administrator.

---

- 1 On the menu bar, choose **Administrators** and select the person you want to delete.
- 2 Click the **Delete** button.  

- 3 Click **OK** to confirm that you want to delete the selected administrator.


### ▷ Disable Administrators

An administrator account can be disabled temporarily.

---

**NOTE:** You cannot disable your own account.

---

- 1 On the menu bar, choose **Administrators** and select the person whose administrator account you want to disable.
- 2 Click the **Disable** button.  
A small square button with a power symbol (a circle with a vertical line through it) inside.
- 3 Click **OK** to confirm that you want to disable the selected administrator.

# Approval Groups

---

**NOTE:** This feature may not be included in your license pack.

---


A workflow can be set up for the approval/rejection of orders placed by shoppers. In its simplest form, approval is performed by the Company Administrator who can approve/reject orders for all the stores assigned to his company.

However, in certain scenarios, a dedicated person in a company (e.g. a department manager) may need to be designated to approve the orders of a subset of users (e.g. a department). In other words, the approver depends on the user who places the order.

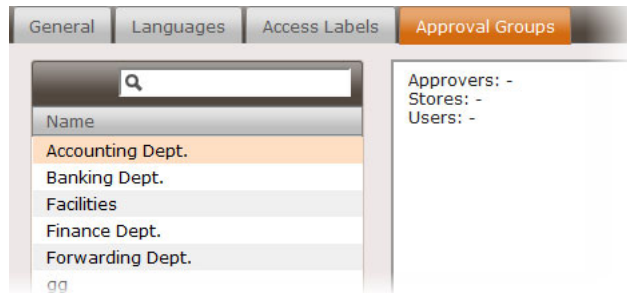
This approval scenario is covered by the *approval group* concept whereby users are assigned to groups within the company. One or more dedicated approvers can then be specified for each approval group.

Setting up an approval group consists of the following steps:

▷ **Step 1: Specify approval groups for a company**

- 1 On the menu bar, choose **Companies** and select the company you want to add/edit approval groups.
- 2 Go to the **Approval Groups** tab and click the **Add** button to add your first approval group.  

- 3 Enter a name for the approval group in the Add Group Label dialog and click Save
- 4 The approval group name is added in the left column.
- 5 Add as many groups as you need; select the **Keep dialog open** check box to work faster.

You now have a selection of approval groups which are currently empty: no approvers and no users.

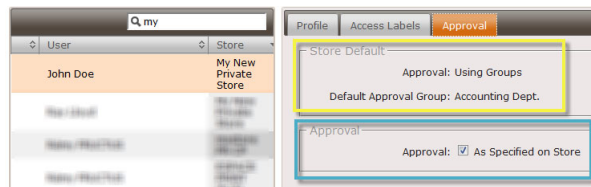


- 6 Click **Save** to confirm your changes.



### ▷ Step 2: Assign your users to approval groups

- 1 On the menu bar, choose **Users** and sort the list by store so you can see the users of the store for which you want to use group approval.
- 2 Select one of the users and go to the **Approval** tab.



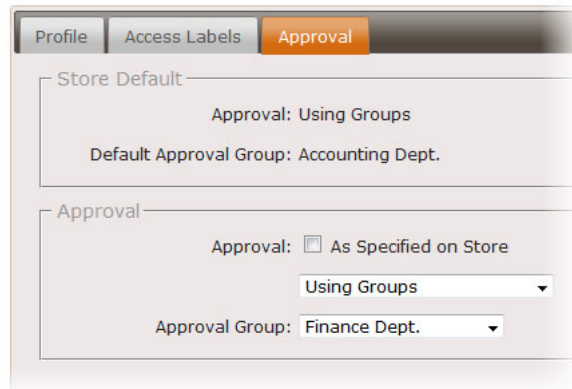
The approval mode (Using Groups) and default approval group are indicated in the Store Default panel.

- 3 In the Approval panel, you can override the store defaults by clearing the **Approval: As Specified on Store** check box.

You have three options:

- None: orders placed by this user do not require approval
- All approvers can approve: every user with an approval role can approve the orders placed by this user
- Using Groups: orders can only be approved by Approvers of the respective Approval Group

By choosing the latter option, you can assign the user to a different approval group than the default approval group.



- 4 Click **Save** to confirm your changes.



- 5 Repeat the procedure to populate the different approval groups.

### ▷ Step 3: Specify group approvers

One or more administrators or approvers can be assigned to an approval group.

- 1 On the menu bar, choose **Administrators** and select the administrator to whom you want to assign group approval, or create a new administrator.

---

**NOTE:** This must be an administrator of the company for which you created the approval groups.

---

- 2 In the **Profile** tab, you can choose from the following roles:

- Company Administrator:** This administrator can only approve the orders placed by all the users of all the company's stores. All other operations are disabled in the Orders panel.

---

**NOTE:** The Company Administrator does not receive e-mail notifications for new orders. You can promote him to Company Administrator/ Approver and then indicate whether he must receive e-mail notifications for the selected approval groups.

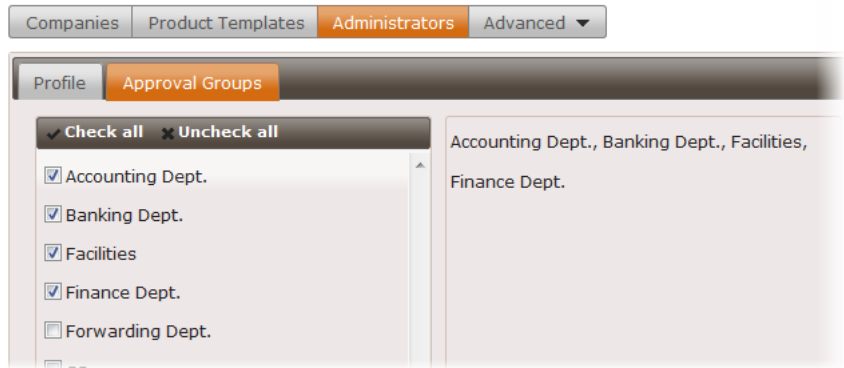
---

- Company Approver:** This administrator can only approve orders placed by users who belong to the approval group or groups as specified in the Approval Groups tab for this administrator; applies for all stores of the company. In the Orders panel, this administrator only sees the Approval tab which lists the orders that he is allowed to approve/reject.



- **Company Administrator/Approver:** This administrator has two Approval tabs in the Orders panel: the My Approval tab lists orders from groups assigned to him; the Approval (All) tab lists all the orders of the company that need to be approved.

- 3 In the **Approval Groups** tab, select the group labels for the groups that this administrator is allowed to approve.



The checked labels move to the right-hand panel.

This administrator now belongs to the selected approval groups and is allowed to approve/reject orders placed by users in these groups.

- 4 Click **Save** to confirm your changes.



#### ▷ **Step 4: Define the approval mode for a store**

- 1 On the menu bar, choose **Stores** and select a store that is assigned to the company you have created group labels for.
- 2 In the Set Up panel in the **General** tab, scroll down to the Approval drop-down list.



You have three options:

- ❑ None: orders do not require approval
- ❑ All approvers can approve: every user with an approval role can approve all orders
- ❑ Using Groups: orders can only be approved by Approvers of the respective Approval Group

Choosing the latter option, Using Groups, displays the **Default Approval Group** drop-down list where you see the approval groups you created.

Choose one of the groups for the Default Approval Group.

Access:  Private (password protected)  
 Public

Approval: Using Groups

Default Approval Group: Accounting Dept. (selected)

Reference: Banking Dept. (partially visible)

Stock: Facilities

Payment Method: gg (partially visible)

Pricing: Manufacturing Dept. (partially visible)

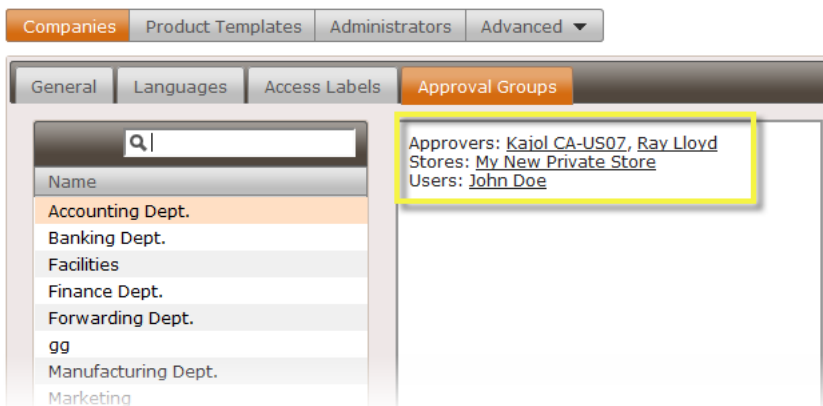
- 3 Click **Save** to confirm your changes.



### ▶ Step 5: Check your Approval Groups

- 1 Now go back to the company profile in the **Companies** tab.
- 2 Go to the **Approval Groups** tab.

For each approval group you created earlier, you now see the approvers and users in the right column.



- Related topics:
- [Users on page 275](#)
  - [Approving/Rejecting Orders on page 295](#)



# Setting up Resources (Advanced Menu)

---

## Printer Administrator only

---

The Advanced menu provides access to general settings and preferences that need to be defined before you can create templates and set up a store. These resources are available for all Companies and Stores.

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▷ Media Types .....	62
▷ Media Sizes .....	64
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▷ Shipping Services .....	65
▷ Shipping Regions .....	76
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---

**NOTE:** The Advanced menu also provides access to the Translations feature. This is explained in a separate section: “Multilingual Storefronts” on page 511.

---

# Media

Media refers to the substrate on which the Product will be printed.

---

**NOTE:** This resource is set for all Product Templates.

---

The following options are available:

- Media Types
- Media Sizes

## Media Types

In the Media Types dialog box you will define the different media types you want to make available and you can organize substrates in media type categories, e.g. offset paper, inkjet paper, PVC, etc.

### Details Tab - Paper

Choose this category for paper media that you want to designate with a Grade.

- Stock Brand** Enter the brand of the substrate.
- Weight** Enter the range of paper weights, separated by a comma and without a space, for the paper brand you entered in Stock Brand. These weights will appear in the Weight drop-down list when you create your product templates.
- AND/OR
- Thickness** Enter the range of thickness values, separated by a comma and without a space, for the paper brand you entered in Stock Brand. These values will appear in the Thickness drop-down list when you create your product templates.

For example:

- Weight values: 100, 120, 150 g
- Thickness values: 200  $\mu$ m; 8 mil (Imperial and US Customary)

---

**NOTE:** You must specify all available weights and thicknesses if you are using weight and packaging based shipping. Both values are required for the correct calculation of the shipping costs. See “Calculation Method” on page 68 for more information on shipping costs. If you enter both the weights and the thicknesses, STOREFRONT assumes that the respective weights match the respective thicknesses.

---

**MIS ID** This code is included in the JDF order data and can be used to inform an MIS or ERP system on the media type. It is also displayed on the order item details page.

**Grade** Choose one of the generic grades to describe paper.

### Details Tab - New Category

Choose this category for all other media that you do not want to designate with a Grade, including certain paper types (e.g. inkjet papers). New categories are added to the drop-down list after saving your changes and you can select this new category when creating subsequent media.

**Category Name** Only active if you choose New Category; enter a category name and this name appears in the drop-down list once you save this new medium.

**Coating Front/Back** Only active if you choose New Category; select one of the generic coatings to describe the substrate; the front and back coatings can be different.

### ▷ Create Media Types

1 On the menu bar, choose **Advanced > Media**.

A list of media is displayed in the Media Type dialog box.

2 Click the **Add** button to add a new substrate to the list.



3 In the **Details** tab, choose a category from the drop-down list. Initially you have one category, **Paper**, but you can add types by choosing **New Category** in the drop-down list. See “Details Tab - Paper” on page 62 and “Details Tab - New Category” on page 63 for more information.

4 Click **Save** to confirm your changes.



The new substrate is added to the list, designated with the stock brand and grade or coating. The category is displayed in the Cat. column which can be used to sort the media by category.

### ▷ Export Media Types

1 On the menu bar, choose **Advanced > Media**.

2 Click the **Export** button to export all the media types in the list.



You can choose to view or download an Excel file which displays all the media types with their details in a single worksheet.

## Media Sizes

The Media Sizes dialog shows all the standard media sizes which are defined by default in the STOREFRONT system in the left panel. You can move standard sizes to the supported sizes to make them available for all media types. You can also create your own media sizes.

### ▷ Assign Media Sizes

- 1 On the menu bar, choose **Advanced > Media** and then choose **Media Sizes**.
- 2 Move the sizes that you want to make available from the Standard Media Sizes panel on the left to the Supported Media Sizes panel on the right by clicking the arrow in the middle.

The size is added automatically to the correct category. The category is created in the Supported Media Sizes column if it's new.

- 3 Repeat to create a list of frequently used sizes

---

**NOTE:** Product templates can be created with custom sizes not mentioned in this list.

---

### ▷ Add Custom Media Sizes

You cannot add custom media sizes to the system categories so you may need to create a custom category first.

- 1 On the menu bar, choose **Advanced > Media** and then choose **Media Sizes**.
- 2 In the Standard media Sizes column, click the **Add New Category** button and enter a new Media Category Name.



- 3 Click Save to add the category to the list.
- 4 Click in the new category and then click the **Add New Size** button and enter a new size.



- 5 Click Save to add the custom media size to the list.

Related topics: 

- [Product Templates on page 115](#)



# Shipping

Storefront orders are shipped using a shipping service and every store must have at least one shipping service assigned to it. In the Shipping resource you can set the shipping region (a town, region, or even several countries) or a fixed address, order tracking, the estimated shipping date, and how the shipping price is to be calculated for each service.

The following options are available:

- Shipping Services
- Shipping Regions
- Packaging Units

## Shipping Services

Three types of shipping services exist:

- **Ship to User Address:** The shopper provides the delivery address in the shipping region you define.
- **Ship to Fixed Address:** You provide one or more pick-up points that the shopper can choose from.
- **Ship to Address Specified in Separate File:** The shopper provides a file containing shipping instructions for the order: multiple addresses, different packaging, grouping of items, delivery times, etc.

---

**NOTE:** A shipping service is only available for stores whose price list currency is the same as the currency of the shipping service.

---

Related topics: 

- [About Shipping Costs Based on Packaging on page 70](#)

### ▷ Add a 'Ship to User Address' shipping service

You can allow a shopper to provide a delivery address which must be located in the selected shipping region.

- 1 On the menu bar, choose **Advanced > Shipping > Shipping Services** tab.
- 2 In the Shipping Service pane, click the **Add** button and choose **Ship to User Address** to add a new service to the list.



- 3 In the General tab, complete the Name field.
- 4 In the Shipping Region list, select a region from the drop-down list.

The **Shipping Region** list contains one region, Worldwide, by default. You can add your own regions in the Shipping Regions dialog box: See “Create Shipping Regions” on page 76.

- 5 (US print service providers only) Select the **Delivered by Printer** check box if you are going to deliver orders yourself. This option affects the calculation of sales tax by the TaxCloud service.
- 6 Complete the following fields:

**Tax Codes** Select one of the tax rates from the drop-down list.

---

**NOTE:** The tax code option is not available for print service providers in the US. When creating your stores you can choose to use the TaxCloud service to calculate US sales and shipping tax. See “TaxCloud Integration” on page 566 for more information.

---

**Tracking** Choose a standard service to be used for the actual shipping; this service will be used to track orders once they are shipped.

The following services are currently supported:

- Tracking Not Available
- Canada Post
- Chronopost (France)
- Custom
- DHL, DHL Germany
- DPD
- Federal Express
- Swiss Post
- UPS
- USPS

Choose ‘Custom’ if you are not sure who will provide this service or if the shipping service supports shipment tracking using a personalized URL. When

an order is shipped, a pop-up window allows you to insert the tracking URL which will then be included in the shipment confirmation e-mail to the shopper.

### Specify Tracking URL Template

In the Tracking drop-down, choose 'Specify Tracking URL Template' if you want to specify the syntax of the tracking URL template – for example, if the courier service does not use a predictable URL syntax.

The following is an example with AfterShip, a shipping aggregator, where a custom URL is entered with {0} acting as a placeholder for the delivery ID:

In this example, if a new order with delivery ID code 695478 is shipped, this means the tracking URL will be <https://fancyprints.athership.com/695478>. Other aggregation services may also support the use of a tracking URL template.

### Time to ship

To indicate the estimated shipping date, select the check box and enter the Number of days that it takes to prepare an order for shipment. The shopper sees the estimated date during checkout by adding a message in the Shipping Info Tab. For example, set the Number of days to 2 days so a shopper who orders on Monday sees that his order ships on Wednesday. If the Order is placed BEFORE the Order Deadline (set in the Production Calendar), the current day is also taken into account: 2 days will then be "Tuesday" instead of "Wednesday".

**NOTE:** For this to work, you must define your production schedule. See Production Calendar. Keep in mind that the estimated shipping date does not take all production aspects into account (complex finishing, high quantities, workload, etc.) so you may want to include a disclaimer in the shipping info text.

Estimated shipping dates are shown in the Pending Orders tab: grayed out and in italics in the Shipped column. You can sort on this column to see which orders require priority. Once an order is shipped, the actual shipping date is shown in the regular font. For shipments that are overdue the estimated date is marked in red.

Shoppers see the estimated shipping date:

- in the first checkout step, Shipping, if Shipping Info is configured for the Shipping Service
- in the second checkout step, Review, and in the order confirmation e-mail
- on the order details page

7 In the Pricing pane, complete the following fields:

**Calculation Method** This specifies how the shipping price is calculated:

- Fixed Fee per Shopping Cart Item:** Enter a fixed amount to be charged for each item the shopper adds to the cart.
- Single Fixed Fee:** A fixed amount will be charged for shipping the order.
- Percentage on Order Total:** A percentage of the total order amount is added for shipping.
- Fixed Fee plus Percentage on Order Total:** A fixed amount and a percentage will be added per order.
- Free Shipping:** Nothing is added to the total amount of the order for shipping.
- Shipping costs will be added:** At checkout, the shopper is notified that shipping costs will be added to the price of the order but an amount is not specified. The shipping cost is billed separately, outside the STOREFRONT system.
- Fixed Fee per Package:** Enter a base price for the first package and a price for each additional package. STOREFRONT calculates the total number of packages based on the thickness and weight of the media. All the necessary packaging parameters must be defined for this calculation method to work.
- Fee per Weight Unit:** Enter a fixed fee and a price per weight unit. STOREFRONT calculates the total weight based on the media weight and the weight of the required packaging units. All the necessary packaging parameters must be defined for this calculation method to work.
- Fee per Packaging Unit:** Enter the Fixed Fee you want to charge or leave this field blank, save the Shipping Service and then, in the table, set the price that you want to charge per packaging unit. See “Set packaging unit prices” on page 79 to do this. All the necessary packaging parameters must be defined for this calculation method to work. See “About Shipping Costs Based on Packaging” on page 70 for more information.

If an order requires different packaging units, select the **Use the highest price of first unit once for orders with different units** check box if you only want to apply the higher Price of first Packaging Unit once (the highest of all first units will be applied). Otherwise the higher price for each first unit will be applied.

---

**NOTE:** The packaging unit table is empty if no units have been defined or if you have not yet saved the shipping service you are creating. See “Create packaging units” on page 77 to specify these units.

---

- UPS Quote:** This method requires an account with UPS which may not be available in all countries. At checkout, STOREFRONT submits the address and order data to a UPS service that immediately quotes the shipping cost based on the weight and number of packages. See “Set up a real-time UPS Quote shipping service” on page 71 for more information.
- Weight based fee:** Here you can specify a fixed cost and a price per kilo or pound for multiple weight categories. The weight is the combined weight of all of the items in the order. All the necessary packaging units must be defined for this calculation method to work.

**Packing Optimization** Controls how order items are packed together when *Fee per Packaging Units* is selected:

- By Number of Packaging Units:** the system uses as few boxes or rolls as possible, even if this leads to higher shipping costs;
- By Shipping Costs:** the system picks the combination of boxes or rolls with the lowest shipping cost, based on the shipping cost for first units, even if this leads to the use of additional packaging units.

**Currency** Select the appropriate currency for the calculation method.

---

**NOTE:** Once the shipping service has been selected for a store, you cannot edit the currency.

---

**Free for orders above** Enter an amount to offer free shipping for orders above this amount. Shipping is never free if you leave this field empty; if you enter 0, shipping is always free (the same as Free Shipping calculation method).

- 8 Click **Save** to confirm your changes.



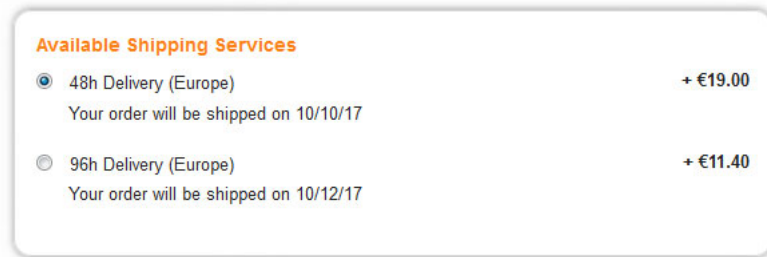
The new Shipping Service is displayed in the list.

**Max. Shipping Cost** Specify a value that cannot be exceeded when the shipping cost is calculated.

## Shipping Info Tab

In this tab you can create a text blurb that appears under the shipping service during checkout.

Figure 4.9: Shipping Info (here with `estimatedshippingdate` variable) appears under the name of the Shipping Service at checkout



If you enabled the **Time to ship** option, you can insert the following three variables in your text:

- `{estimatedshippingdate}` inserts the date when the order is expected to be shipped, e.g. '10/10/2017'. The date formatting depends on the regional settings of the store.
- `{orderdeadline}` inserts the cut-off time, e.g. '11:30 AM'; if you order before this time, the day counts as a production day.
- `{shippingdays}` inserts the number of days before orders will be shipped, e.g. 4

## About Shipping Costs Based on Packaging

You can choose from several methods for calculating the shipping fee of an order. If you choose a shipping service whose cost is based on the packaging (*Fixed Fee per Package, Fee per Weight Unit, Fee per Packaging Unit, UPS Quote* calculation methods) when setting up a store, the shipping fee depends on the number and type of packaging units required to ship an order. **STOREFRONT** chooses the most appropriate packaging units and calculates the number of units by comparing the product specifications with the available packaging units. The number of packaging units is subsequently multiplied by the specified price of the unit.

The following steps are required to set up a store with a shipping service whose cost is based on the packaging.

- 1 Go to **Advanced > Shipping > Packaging Units** tab, and create packaging units for the packaging types that you want to make available: different boxes, tubes, wrapping, etc. See “Create packaging units” on page 77 for more information. You must set the weight, thickness and measurements for the media used for these packaging units in **Advanced > Media**. See “Media” on page 62 for more information.
- 2 Go to **Advanced > Shipping > Shipping Services** tab and create a service with a fee based on packaging (*Fixed Fee per Package*, *Fee per Weight Unit*, *Fee per Packaging Unit* as calculation method). This is where you set the shipping fee for the different units. See “Shipping” on page 65 for more information.
- 3 Go to **Stores > Shipping** tab and select a shipping service based on packaging. See “Shipping Tab” on page 215 for more information.

---

**CAUTION:** You must assign packaging units to a product template if your store uses a shipping service based on packaging as calculation method. If you do not do this, the shopper will not be able to complete the order process.

---

- 4 Go to **Product Templates > Packaging Units** tab and add packaging units (either boxes or rolls, not both) to the product templates that will be used to create products for the store. See “Packaging Units Tab” on page 147 for more information.
- 5 Go to **Product Templates > Product Template** tab to set packing measurements for the product templates. See “Packing Measurements button” on page 126 for more information.
- 6 Go to **Product > Pricing and Scheduling** tab in the Shipping section and specify Combined Packaging options. See “Shipping” on page 168.

Related topics:

- [Taxes Tab on page 253](#)

### ▷ **Set up a real-time UPS Quote shipping service**

This is a packaging-based, Ship to User Address services so read the information “About Shipping Costs Based on Packaging” on page 70. This method requires that you, as printer administrator, have an account with UPS which may not be available in all countries. When a shopper checks out, STOREFRONT submits the address and order data to UPS that immediately quotes the shipping cost based on the weight and number of packages.

## Prerequisites

You need to create an account with UPS before performing this procedure.

- 1 On the menu bar, choose **Advanced > Shipping > Shipping Services** tab.
- 2 In the Shipping Service pane, click the **Add** button and choose **Ship to User Address** to add a new service to the list.



- 3 Complete the fields as explained in “Add a ‘Ship to User Address’ shipping service” on page 65 and choose **UPS Quote** as the **Calculation Method**.

A dedicated dialog is displayed for the UPS Quote method.

The screenshot shows a 'General' dialog box for configuring a shipping service. The 'Type' is 'User supplied delivery address'. The 'Name' is 'My USP Service'. The 'Shipping Region' is 'All'. There is a checkbox for 'Delivered by Printer'. The 'Tracking' is set to 'UPS'. The 'Calculation Method' is set to 'UPS Quote'. The 'Currency' is 'EUR'. The 'Username' is 'johndoe', 'Password' is masked with dots, 'Access Key' is masked with asterisks, and 'UPS Account Number' is masked with asterisks. The 'Delivery Method' is '[07] UPS Worldwide ExpressSM'. The 'Markup' is '10.00 %', 'Fixed Fee' is '0.00', and 'Free for orders above' is '5,000.00| EUR'. The UPS logo is in the bottom right.

- 4 Enter the following UPS information:

- User name/Password
- Access Key
- UPS Account Number
- Delivery Method: Select one or more Delivery Methods that UPS supports when shipping from the address in your Production Center to the region that you selected in your shipping service.

---

**NOTE:** You may want to create several shipping services – each with a dedicated UPS delivery method.

---

- Mark-up: You can enter a mark-up to be added on top of the UPS quote.



- ❑ **Fixed Fee:** You can enter a fixed fee to be added on top of the UPS quote.
- ❑ **Free for orders above:** Enter an order amount that entitles the shopper to free shipping.
- ❑ **Account Type:** Make sure you select Production once you've finished testing the account; Production guarantees best performance.

5 Click **Save** to confirm your changes.



The new UPS Quote Shipping Service is displayed in the list.

### ▷ **Add a 'Ship to Fixed Addresses' shipping service**

You can specify shipping services with one or more fixed pick-up points. Shoppers can only have their orders delivered to the specified address or addresses.

- 1 On the menu bar, choose **Advanced > Shipping > Shipping Services** tab.
- 2 In the Shipping Service pane, click the **Add** button and choose **Ship to Fixed Addresses** to add a new fixed delivery addresses service to the list.



- 3 Complete the general and pricing sections as explained in "Add a 'Ship to User Address' shipping service" on page 65.
- 4 Enter the Delivery Address details and complete all the required fields.
- 5 In the Info pane you can use the HTML Editor to enter additional information to help a shopper.

Delivery Address

Name:

Address Line 1:

Address Line 2:

ZIP/Postal Code:

City:

Country:

To add another Delivery Address to a Shipping Service, select the Shipping Service, click the + button and select "Additional Delivery Address"

Info

Content:

File Edit Insert View Format Table Tools

Opening Hours:

<input type="checkbox"/>	Monday - Thursday	08:00-17:00	<input type="checkbox"/>
<input type="checkbox"/>	Friday	09:00-15:00	<input type="checkbox"/>
<input type="checkbox"/>	Saturday	09:00-12:00	<input type="checkbox"/>

table » tbody » tr » td

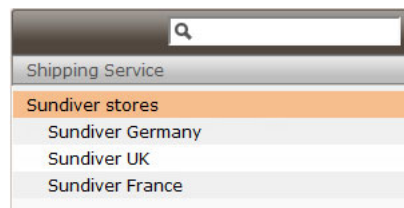
Primary & secondary colors might change depending on the store.

**NOTE:** The Delivery Address and Info panes may appear at the bottom of the window and you may need to scroll down.

- Click **Save** to confirm your changes.



The new Shipping Service is displayed in the list with the delivery addresses indented.



You can add multiple delivery addresses to the same shipping service by selecting a Fixed Delivery Addresses service in the list and choosing **Add New Delivery Address** in the Add button context menu. You can enter the additional delivery address details; all the other settings are inherited from the service.

**TIP:** You can customize the Fixed Delivery Address label when setting up the store: see “Shipping Tab” on page 215.

Figure 4.10: Fixed delivery address with opening hours added in the HTML editor – storefront view

**Fixed Delivery Address**

**Germany - Düsseldorf**

Paul-Thomas-Strasse 59  
D-40599 Düsseldorf  
Germany

**Opening Hours**

Monday - Thursday	08:30-18:00
Friday	08:30-20:00
Saturday	08:30-17:00

### ▷ Add a ‘Ship to Addresses Specified in Separate File’ shipping service

The shopper is requested to attach a file containing shipping instructions for his order. The document can be a TXT, Word, Excel, PDF or any other file and it is expected to specify how the order should be shipped. However, this is an off-line method for providing shipping instructions so none of the automation features (calculation of shipping cost based on destination, order data in Excel summary, communication with an MIS system, etc.) apply.

- 1 On the menu bar, choose **Advanced > Shipping > Shipping Services** tab.
- 2 In the Shipping Service pane, click the **Add** button and choose **Ship to Addresses Specified in Separate File**.



- 3 Complete the general and pricing sections as explained in “Add a ‘Ship to User Address’ shipping service” on page 65.

Figure 4.11: A storefront checkout page where the shopper can upload a file with shipping instructions

**Checkout**

**1 Shipping**  
Select your Shipping Service

**2 Review**  
Review your order

**Where is this order being shipped to?**

A shipping address specified by myself

Upload a file specifying the shipping instructions

**Delivery Addresses**

No file selected.

**Available Shipping Services**

Ship to multiple addresses (Worldwide) **Free Shipping**

Orders that come in with this shipping service are indicated in the Pending tab of the Orders page with a diskette icon. You can download this file and read the instructions.

## Shipping Regions

You can specify two types of shipping regions for the 'Ship to User Address' shipping services:

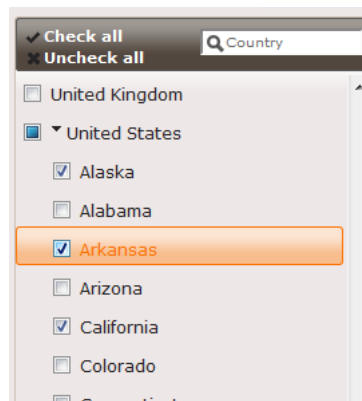
- Country-based region:** The 'Ship to User Address' can be anywhere in the specified country/countries or states.
- Zip code-based region:** The zip/postal code of the 'Ship to User Address' must be included in the list of codes specified for this region.

A message informs shoppers to use a different shipping service if they enter an address which is located outside the region.

### ▶ Create Shipping Regions

- 1 On the menu bar, choose **Advanced > Shipping**.
- 2 In the **Shipping Regions** tab, click the **Add** button and choose a region type.
- 3 Complete the Name field (e.g. Europe, Benelux, Asia).
- 4 For a **Country-Based Region**, select the check boxes or double-click the countries you want to group in a region to add them to the list on the right.

For some countries you can select states or provinces. These countries can be expanded by clicking the black arrow.



OR

- 5 For a **Zip Code-Based Region**, select a country from the drop-down list and then enter the zip (postal) codes that you want to assign to this region. You can define ranges and multiple values or both.

Name:

Country:

ZIP/Postal Codes:

Comma separated list of ZIP or postal codes and/or code ranges using a hyphen.  
Examples:


- 80000-810000,70000,2500-5000
- 200,300,400,500,700-1000
- 1-9,15,19,500,7521-5987

Follow the displayed instructions for designating the codes for the country in question.

- 6 Click **Save** to confirm your changes and validate the codes you entered.

Check the codes and syntax if the codes do not validate correctly.

The new Shipping Region is displayed in the list and will also be displayed in the Shipping Region drop-down list when creating a Ship to User Address shipping service.

Name
Australia
Belgique
Benelux
 Brussels
Worldwide

Zip-code based regions are indicated with a special icon in the list of shipping regions.

## Packaging Units

If you choose **Fee per Packaging Unit** as calculation method for a shipping service, you need to define the packaging units you plan to use for shipping. These can be Boxes for brochures, etc. or Rolls for posters, etc.

### ▷ Create packaging units

- 1 On the menu bar, choose **Advanced > Shipping**.
- 2 In the **Packaging Units** tab, click the **Add** button.

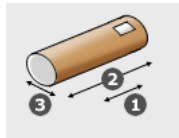


- 3 Complete the Name and Description fields so you know which unit to select when creating a product template.
- 4 Choose the **Packaging Unit Type**:

Box:



Roll:



- 5 Complete the following fields:

<b>Box Dimensions</b>	The Length (1), Width (2) and Height (3) of the packaging unit as indicated in the diagram.
<b>Roll Dimensions</b>	The minimum Width (1), maximum Width (2) and Diameter (3) of the packaging unit as indicated in the diagram. The Diameter value is only used for the UPS Quote shipping service calculation.
<b>Tare Weight</b>	The weight of the packaging unit without its contents (optional).
<b>Max. Gross Weight</b>	The maximum allowed weight of the contents including the packing unit (optional).

- 6 Click **Save** to confirm your changes.

The new packaging unit is displayed in the list and will now also appear in the Pricing table for your shipping service.

Related topics: 

- [About Shipping Costs Based on Packaging on page 70](#)

## ▷ Set packaging unit prices

If you choose **Fee per Packaging Unit** as calculation method for a shipping service, a table is displayed with all the available units and their prices. The prices need to be set for all packaging units.

- 1 On the menu bar, choose **Advanced > Shipping**.
- 2 In the **Shipping Services** tab, select the service whose prices you want to specify and in the Pricing pane, click the **Edit** button.



**NOTE:** The **Edit** button is at the bottom of the screen so you may need to scroll down.

The Edit Pricing dialog box is displayed.

Pricing

Calculation Method: **Fee per Packaging Unit**

Use the highest price of first unit once for orders with different units

Packing Optimization: **By Number Of Packaging Units**

Currency: **EUR**

Fixed Fee:  EUR

Free for orders above:  EUR

Packaging Unit	Dimension (Length x Width x Height) in mm	Price of First Packaging Unit	Price of Additional Packaging Units
Box A3 105x200	430 x 310 x 105		
Box A3 180x220	320 x 440 x 200		
Box A4 105x240	305 x 215 x 240		
Box A4 50 x 90	305 x 215 x 50		
Roll 100x300 30kg	1,000/3,000 x 300		
Roll 300 50kg	2,500/3,000 x 200		
Roll 50x100 6kg	500/1,000 x 200		

- 3 Enter the price for each unit.

You can set different prices for the first packaging unit and the second and following units, for example if you want to give a discount if several identical units are ordered. If you do not want to distinguish between the first and additional units, only fill in the “Price of First Packaging Unit” column and leave the “Price of Additional Packaging Units” column empty.

- 4 Click **Save** to confirm your changes.



The prices are added in the respective column in the pricing table.

Related topics: • [Create a store on page 206](#)

- Shipping Tab on page 215



## Payment Methods and Tax

The following options are available:

- Payment Methods
- Tax Config
- TaxCloud Integration (US only)

### Payment Methods

A store can be set up to accept one or more online payment methods from which shoppers can choose when placing orders. Online payment is optional in the case of private stores, which are often used in a B2B environment, for example to allow franchisees, branches or subsidiaries to order products. However, online payment is a requirement for public stores which are visited by unknown shoppers.

STOREFRONT provides two main methods for handling online payments: by bank transfer (also referred to as wire transfer) or via secure payment gateways such as Ingenico and PayPal.

---

**NOTE:** This resource only needs to be set if one of the stores requires online payment of items.

---

#### ▷ Set up payments by bank transfer

The Bank Transfer payment method allows shoppers to pay for their orders by transferring the order amount directly into a specified bank account. They receive instructions about how to make the payment during check-out. The same procedure can be used for payments with cheques.

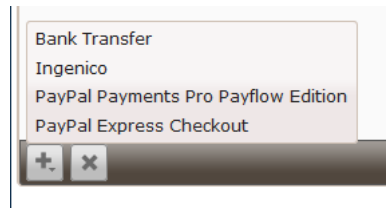
Orders which are paid by bank transfer require manual intervention to update the payment status in the orders Pending tab. See “Pending Orders” on page 299.

---

**NOTE:** Bank transfers through external payment service providers are not supported in STOREFRONT.

---

- 1 On the menu bar, choose **Advanced > Payment Methods and Tax**.
- 2 Click the **Add** button and choose a **Bank Transfer** in the list.



- 3 Enter a name for the bank transfer payment method. This is the name that appears in the General tab of the store set-up.
- 4 Leave the **Order processing only upon payment** check box selected if you want orders to be put on hold until payment is received. If you are certain the shopper will pay, clear this check box and the orders will be processed while waiting for the payment.

---

**NOTE:** Selecting or clearing this option affects all orders that use this payment method, including orders which are already in the pending order list.

---

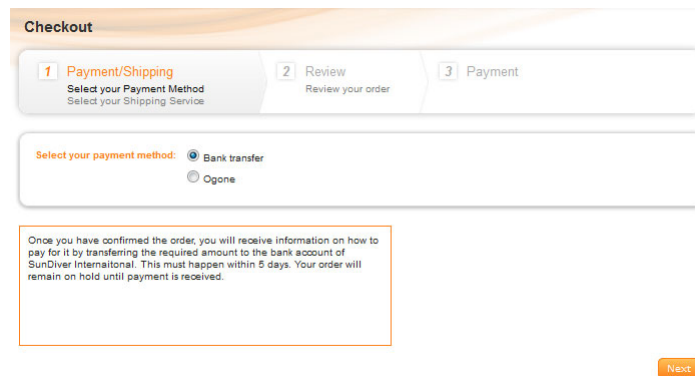
- 5 Click **Save**.

The **Customization** and **Surcharge** tabs are active.

- 6 In the Customization tab, enter a Description, Checkout Text and Payment Instructions.

The **Description** (optional) is displayed on the 1st page of the checkout wizard, when the shopper has to select the payment method. So here you can provide text that explains that the shopper is expected to pay for the order by bank transfer.

Figure 4.12: Description on the 1st page of the checkout wizard



The **Checkout Text** (mandatory) is displayed on the 3rd page of the checkout wizard. You can modify the sample text if you want. The `{ordertotal}` code generates the total sum to be paid for the order.

Figure 4.13: Checkout Text on the 3rd page of the checkout wizard

**Checkout**

1 Payment/Shipping  
Select your Payment Method  
Select your Shipping Service

2 Review  
Review your order

3 **Payment**

Your order will be processed as soon as your payment (€464.75) is received.  
Payment instructions will be shown once the order is placed.  
They will also be included in your order confirmation e-mail.

Order Total: €464.75

Place Order

The **Payment Instructions** (mandatory) are displayed on the order details page when the shopper has completed the checkout wizard, and in the order confirmation e-mail. Edit the introductory text as required and enter the name of your Bank, your Account Number, and the name of the Company. The {ordertotal} and {ordernumber} codes generate the total sum and the order number.

Figure 4.14: Payment Instructions on the order details page

**Order Details 00003** [Print a copy of this receipt](#)

**Delivery Address**  
John Smith  
Septestraat 27  
B-2640 Mortsel  
Belgium  
Via DHL

**Billing Address**  
John Smith  
Buyers Drive  
1000 Mortsel  
Belgium  
Via Bank transfer

Order Status: In production  
Order Number: 00003  
SAP Order Code: AWP-15232  
Order Date: 12/9/14 10:30:04 AM CET  
Ordered by: John Smith

Please transfer the required amount within 3 days. Your order will be processed as soon as payment is received.

Amount: €464.75  
Bank: KBC Switzerland  
Account Number: CH93 0076 2011 6238 5295 7  
Company: SunDiver International  
Reference: 00003

	Quantity	Price VAT Excluded	Price VAT Included	VAT
<b>Augusta Baseball</b> Body Media Type : Standard - Matte coated paper - 80g	50	€380.00	€459.80	21%

Items Sub-Total: €380.00  
VAT: €79.80  
Shipping Sub-Total: €4.95  
Order Total: €464.75

7 Click Save.

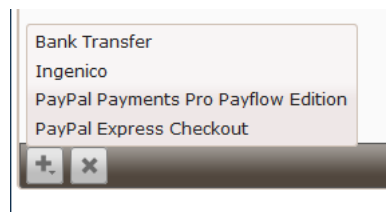
- 8 Go to the **Surcharge** tab if you want to charge extra for using a payment method: for example, an extra charge for paying with a credit card. Enter a fixed cost and/or percentage.
- 9 Click **Save**.

Related topics:

- [General Tab on page 196](#)
- [HTML WYSIWYG Editor on page 265](#)

### ▷ Set up Payment Gateways

- 1 On the menu bar, choose **Advanced > Payment Methods and Tax**.
- 2 Click the **Add** button and choose a payment method in the list.



The following Payment Methods are currently available:

- Ingenico
  - PayPal Payments Pro PayFlow Edition(UK and US only)
  - PayPal Express Checkout
  - Stripe
  - Mercado Pago
  - Inicis
  - Bambora
- 3 Choose the Payment Method you want to use and enter the configuration details.

The configuration details are provided by the payment method service provider.

---

**NOTE:** Read how to apply for a payment gateway account and integrate this with STOREFRONT in “Configuring Payment Gateways” on page 563.

---

#### 4 Choose the Time of Payment from the drop-down list.

- Deferred:** The customer’s card is authenticated when the purchase is made. This is a check that the card is valid and payment is feasible. Store-Center will indicate for the order that online payment is required. The card is charged when the order status is changed to ‘Shipped’. Store-Center will then briefly indicate that the payment is being captured. Once payment is processed, its status is updated. See “Payment Status and History” on page 320 for information on how the payment status is indicated with icons in the Pending Orders list.
- Direct:** The customer’s card is charged when the purchase is made. Store-Center will indicate in the Pending Orders list if the order is paid or if the payment failed.

#### 5 Click **Save** to confirm your changes.



The Payment Method is now configured.

## Tax Config

In this tab you can configure how sales tax or VAT is applied when shoppers from abroad purchase items in your store. For each country, you can choose from one of the following options:

- No tax:** Nothing is added to the product price when a foreign shopper purchases something.
- Foreign tax:** The tax of the foreign shopper’s country is applied.
- Domestic tax:** Your tax rate is applied to purchases made by foreign shoppers.

---

**NOTE:** Tax Config cannot be combined with TaxCloud for a US account.

---

## TaxCloud Integration (US only)

Print service providers based in the US can enter their details for TaxCloud integration in the TaxCloud Integration dialog box.

### *Prerequisites*

You must first visit the TaxCloud website, register for this service and obtain your TaxCloud codes before performing this procedure. See “TaxCloud Integration” on page 566 for more information on.

## ▷ TaxCloud Integration

In this tab you can enter the TaxCloud details that you received when you registered with the TaxCloud service.

- 1 On the menu bar, choose **Advanced > Payment Methods and Tax > TaxCloud Integration** tab.

---

**NOTE:** The TaxCloud Integration button is only visible if your location is set to **United States**. Choose **Advanced > Production Center** to check your location. You need to sign out and sign back in for this change to take effect.

---

- 2 Enter or copy/paste the API ID and an API Key which were generated on the TaxCloud website.
- 3 Click **Save** to confirm your changes.

 Save

Now you can enter the default TIC code.

- 4 Choose **General Goods and Services** as the default TIC and click **Save** to confirm your changes.

 Save

The TIC code is now displayed next to the TIC category.

The default TIC is used for all products on the storefront. You can specify a different code if required at the product level.

Related topics:

- [Create a store on page 206](#)
- [Configuring Payment Gateways on page 563](#)
- [TaxCloud Integration on page 566](#)

## Production Settings

Here you can set the preflight defaults for Uploadable Products, PDF Preview details for Printed Stock, On Demand and Customizable Products, and the settings that control how orders to be printed are processed further by Apogee Prepress or Asanti.

The following options are available:

- Preflight Defaults
- Production Center
- Production Calendar
- Order Item Flags
- PDF Preview
- Prepress Settings

## Preflight Defaults

Shoppers upload their own PDFs or image files when ordering an Uploadable Product and STOREFRONT performs a number of preflight checks to validate the incoming files. In this tab you can decide which issues are fixed automatically and to which extent the shopper is warned about potential issues.

Figure 4.15: A shopper is notified about errors and fixes when uploading a file.

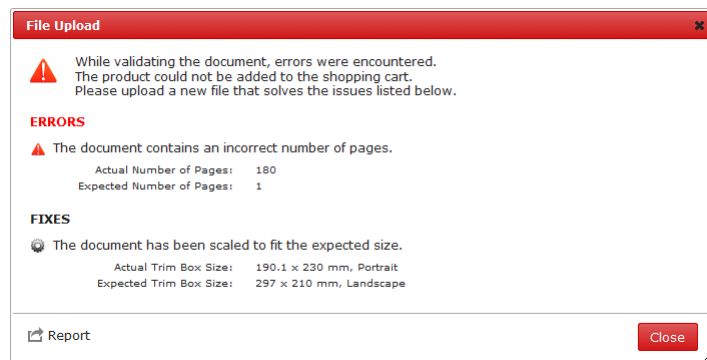
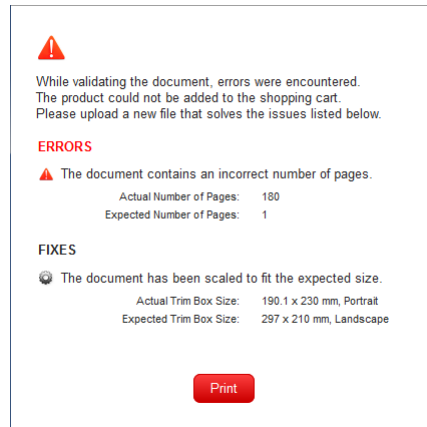


Figure 4.16: A shopper can print the preflight report if necessary.



**NOTE:** Remember that preflight warnings interrupt the ordering process and may have an adverse effect on the number of orders you receive.

The preflight defaults set here can be overridden by the preflight settings of a product template. Go to [Product Templates > Preflight Tab](#).

### ▷ Set Preflight Defaults

- ◆ On the menu bar, choose **Advanced > Production Settings > Preflight Defaults** tab.

## Options for Uploadable Products

### File Support

Preflight will be performed on the following file types:

- Unbound** Set the allowed file types for unbound products: PDF for documents and/or TIFF, TIF, JPEG, JPG, GIF and BMP for images.

Select the **Allow multiple documents combined in one PDF** check box if you want to let shoppers upload a single PDF that contains more than one document (multi-document feature). For example, 50 posters with different information can be uploaded in the same PDF for a single-sided poster product. Each page of the PDF generates a job in the workflow system: in this case 50 jobs. If the



product is for a double-sided poster product, 25 jobs will be created in the workflow system.

Clear the **Allow automatic Trim Box rescaling** check box if you do not want uploaded PDFs to be scaled automatically, for example if your shoppers upload PDFs that are not prepared with professional layout applications (these PDFs may be scaled incorrectly if they do not include a trim box).

**Bound** A shopper can only upload PDFs for bound products.

### Editor Settings

This setting allows you to create stores with a mix of uploadable products with and without tools in the upload wizard.

**Hide Tools** Select this check-box to hide the tools so that shoppers cannot use tools to modify uploaded files for all products except those that do not follow the defaults: clear **As Specified in the Preflight Defaults** check-box in the Preflight tab of the template in question. See “Preflight Tab” on page 149.

### Fixes

The following preflight issues are remedied automatically:

**Allow Trim Box rescaling of uploaded PDFs** When selected, the document will be scaled proportionally and you can choose from 2 modes for scaling which are important if the aspect ratio of the document is not the same as that of the product:

- Underfill: the document fills the width or height of the product and all the content remains visible; you may have white space at the top and bottom, or to the left and right.
- Overfill: the entire product is filled but some of the content may be cropped.

If you clear this option, the validation settings for Incorrect Trim Box apply: see “Validation (after fixes)” on page 90.

**Allow addition of blank pages to the uploaded PDF** When selected, blank pages will be added to ensure the document matches the number of pages in the product definition. For products with a self-cover, the blank pages will be added at the end of the file. For products with a separate cover, the blank pages will be added in front of the last two pages.

You can also choose to notify the shopper about these fixes and generate a warning that the shopper must confirm to continue. If you clear this option, the fixes are applied without notifying the shopper.

---

**NOTE:** Fixed files can be downloaded by the shopper from the product page when the uploading process has finished.

---

### Validation (after fixes)

The following parameters of the uploaded PDF or images are validated against the product definition:

<b>Trim Box Tolerance</b>	The uploaded PDF is rescaled if the entered tolerance is exceeded.
<b>Incorrect Trim Box</b>	Does the trim size match the product page size after taking into account the Trim Box Reference?
<b>Missing Fonts</b>	Are the necessary fonts embedded?
<b>Incorrect Number of Spot Colors</b>	The system only checks the number of spot colors when the color setup of your product contains 1, 2, 3 or 4 spot colors. Color is set up in the product template: see “Color” on page 128. If the color setup is specified as Full Color or Gray, no warnings or errors are displayed when the shopper uploads a file that does contain spot colors. Full Color indicates that the printed result will be CMYK (or whatever ink set is used in the flow) and that all spot colors in the uploaded file will be converted to that color space.
<b>RGB, Lab or ICC Based Content</b>	Is the color space RGB or Lab? Are ICC profiles embedded?
<b>Objects without ICC Profile</b>	Is line art tagged with an ICC profile?
<b>Images without ICC Profile</b>	Are images tagged with an ICC profile?
<b>Unexpected number of pages (only for bound products)</b>	<p>Checks whether the uploaded file contains the same number of pages as indicated in the product specifications on the storefront.</p> <p>You can select how the issues will be handled by selecting one of the following options:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Ignore: Do not check the uploaded file for the parameter in question.</li> <li><input type="checkbox"/> Warn: A warning is displayed and the shopper must choose to cancel the uploading process or continue and add the product to the cart.</li> <li><input type="checkbox"/> Reject: An error is displayed and the uploaded file cannot be added to the cart.</li> </ul>

**Check Image Resolution** This check verifies that the resolution of the uploaded files is sufficient to guarantee satisfactory print quality. Set the minimum values to generate warnings (Warn below) and errors (Reject below). Errors will stop the upload process. Different values can be specified for grayscale/color images and binary (line art) images.

## Options for Customizable Products

For Customizable Products you can specify the severity when preflighting the shopper's customized document: preflighting can generate a warning or error, or just be ignored. Here you set the defaults which you can still change when creating the product in the Online Editor: see "Warnings Tab" on page 450.

---

**CAUTION:** A shopper may be prevented from ordering a product.

---

◆ Select the preflight severity – Ignore, Warning, Error – in the drop-down list for the following parameters, and then select or clear the check boxes to control the behavior depending on the severity:

- Frame outside page
- Text overflow
- Missing Characters
- Image output resolution
- Image resize
- Empty variable
- Minimum Output Resolution
- Check resolution on: Any, Bitmap, Vector
- Minimum/Maximum Resize %
- Check resize on: Any, Bitmap, Vector

**Prevent save on errors** Selecting this check box prevents the shopper from saving the customized document if it contains errors.

**Prevent PDF generation on errors** Selecting this check box prevents the shopper from generating a PDF of the customized document if it contains errors.

**Show warnings on save** Select this check box if you want the shopper to see the preflight warnings when saving the document. Otherwise the document is saved without notifying the shopper of potential issues.

---

**NOTE:** New settings only apply to newly created products, not to existing products.

---

- Related topics:
- Preflight Settings on page 450
  - Preflight Results on page 451

## Production Center

- ◆ On the menu bar, choose **Advanced > Production Settings > Production Center**.

**Company Details** Here you can enter the address details of a production center from where orders are shipped. This section needs to be completed in full by US-based print service providers. The location entered here is used by the online TaxCloud service as the *nexus* to calculate the sales tax. See “TaxCloud Integration” on page 566 for more information. The address you enter is also validated on the fly by the TaxCloud service.

**Time Zone** Choose your time zone from the drop-down list. For example:

(UTC+02:00) Central European Summer Time (Europe/Brussels).

**BCC Address** Use this field to enter an e-mail address for sending a copy of out-going e-mails. A copy of all out-going e-mails is sent to this e-mail address by STOREFRONT for the following actions:

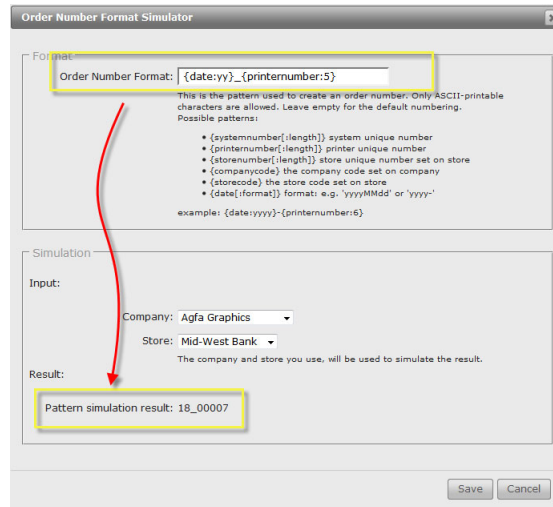
- account activation
- order confirmation
- StoreCenter notifications
- etc.

If these e-mails are sent to a mail client that supports rule sets, it is also a powerful way of automating certain tasks. You could, for example, set up a rule that notifies a customer service representative each time an order confirmation mail is sent for purchases in a specific store.

**Order/Invoice/Quote Number Format** When an order is placed, unique numbers (IDs) are generated by the system for the order number, the invoice number, and the quote number. You can customize and differentiate each of these numbers using different patterns and variables based, for example, on the date, the store or the company code. So

while your order numbering may be consecutive across all stores and companies for all orders (with the `printernumber` variable), you can number invoices consecutively by store if you have multiple stores (with the `storenumber` variable). Consecutive invoice numbering is a legal requirement in some countries so you need to set up the numbering so canceled orders do not affect your invoice numbering.

Click the Edit button to open the Order/Invoice/Quote Number Format simulators where you can experiment with the patterns and variables.



In the Order/Invoice/Quote Number Format field, enter a combination of hard-coded text and variables to create your numbering pattern. You can see the result in the Simulation panel.

For example, the following format as Invoice Number Format:

```
{date:yy}-{storenumber:5}
```

where: `storenumber` = counter at Store level set to start at 10

generates:

```
18-00010
```

The following variables can be used:

- `systemnumber`: A counter that increments across all companies and stores in the STOREFRONT system and which cannot be reset; this is the default number if you leave the Order/Invoice/Quote Number Format

blank. The counter is always identical for a related order, invoice and quote; it also increments each time an order, invoice or quote is created.

- `printernumber`: A counter that increments across the companies and stores of your printer business and independently for orders, invoices and quotes. In other words, these counters are not necessarily in sync. You can reset the counter in the Printer Order/Invoice/Quote Number boxes below, at the end of this tab. For example, use this counter for your order numbers and quote numbers.
- `storenumber`: A counter that increments at the store level and which you can reset in the General tab of the store (see “Defining Numbers” on page 198). For example, use this counter for a continuous numbering of invoices per store irrespective of the numbering used for ordering or quotes.
- `companycode`: A static code (maximum 5 characters with letters and/or digits) that you can specify in the General tab of the company to identify the company (see “Companies” on page 46).
- `storecode`: A static code (maximum 5 characters with letters and/or digits) that you can specify in the General tab of the store to identify the store (see “Defining Numbers” on page 198).
- `date`: Sets the date; must be followed by `format`; format can be any combination of d, M, y (e.g. ddMMyy, ddMMyyyy, yyMMdd, etc.)
- `length` parameter: Sets the length of numbers; for example, `storenumber:4` expresses the storenumber with 4 digits: 0003

#### Printer Order/Invoice/ Quote Number

Enter a number to reset the counter for the `{printernumber}` variable which can increment independently for orders, invoices and quotes across all of your companies and stores.

Related topics:

- General Tab on page 196

## Production Calendar

Use this tab to specify the days of the week when no production occurs and to add holidays. This information is required for the **Time to ship** feature (estimated shipping date) to work: see Shipping Services.

#### Order Deadline

The cut-off time for a day to count as a production day. If the shopper orders before this time, the day counts as a day to calculate the estimated shipping time.

**NOTE:** The cut-off time is in your time zone as set in the Production Center tab and not the time zone in the country where the shopper is located.

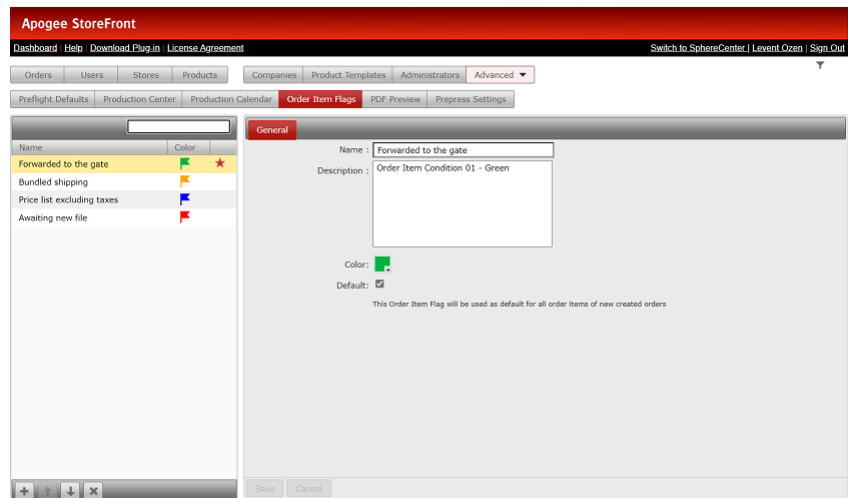
**Weekly Holidays** Select the days of the week which are not regular production days.

**Yearly Holidays** Click the **Add** button to add exceptions to the regular production days. Click in the Date field to display a monthly calendar and specify a day. Optionally enter a Name and a Description.

## Order Item Flags

You can customize the order items which require an intervention to facilitate production and/or indicate their production status by creating different order item flags.

Figure 4.17: Order Item Flags View



### ▷ Create an Order Item Flag

- 1 On the menu bar, choose **Advanced > Production Settings > Order Item Flags** tab.
- 2 To create a new order item flag, click the **Add** button.



- 3 Complete the following fields in the General tab:

**Name** The text displayed in the Order Items Pane when you hover your mouse over the flag of the selected order item to see its production status.

**Description** Description that summarizes the order item flag and its use.

**Color** Assigns a color to the order item flag.

**Default** Select this check box to automatically assign the order item flag to each new order item created. Only one order item flag can be set to be the default.

4 Click **Save** to confirm your changes.



The order item flag is added to the list.

You can change the display sequence of these flags using the Move Up and Move Down arrow buttons.



Move an order item flag down in the list



Move an order item flag up in the list

### ▷ Edit an Order Item Flag

- 1 On the menu bar, choose **Advanced > Production Settings > Order Item Flags** tab.
- 2 Select the order item flag and make the changes in the General tab.
- 3 Click **Save** to confirm your changes.



### ▷ Delete an Order Item Flag

- 1 On the menu bar, choose **Advanced > Production Settings > Order Item Flags** tab.
- 2 Select the order item flag you want to delete and click the **Delete** button.



- 3 Click **Delete** to confirm in the dialog box.

**Related topics:**

- [Order Item Customization on page 318](#)

## PDF Preview

These settings apply to the PDFs which are generated for preview purposes. A shopper can download a preview PDF before placing the order, and you may want to set restrictions for this PDF.

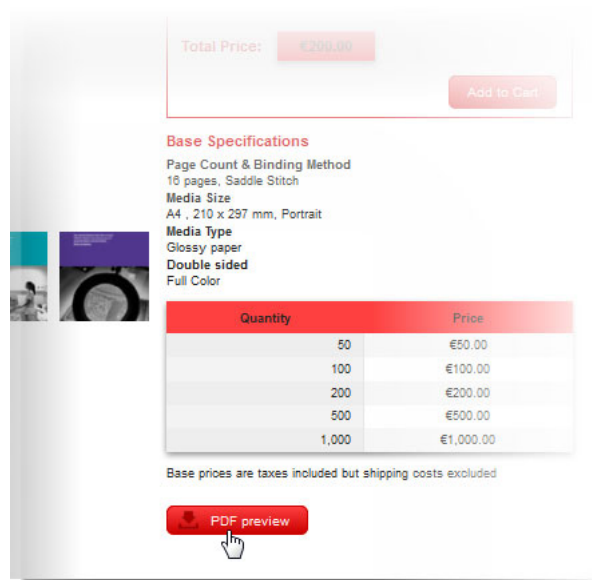
---

**NOTE:** These settings are only applied to newly created Preview PDFs.

---



Figure 4.18: A shopper can download a preview PDF before placing an order.



**NOTE:** For Printed Stock, On-Demand and Customizable Products only.

## Security

Unless you specify otherwise here, the Preview PDFs do not allow content extraction, modification or printing. Choose the content features you want to provide explicitly by selecting the check boxes:

- Allow Content Extraction
- Allow Modification
- Allow Printing

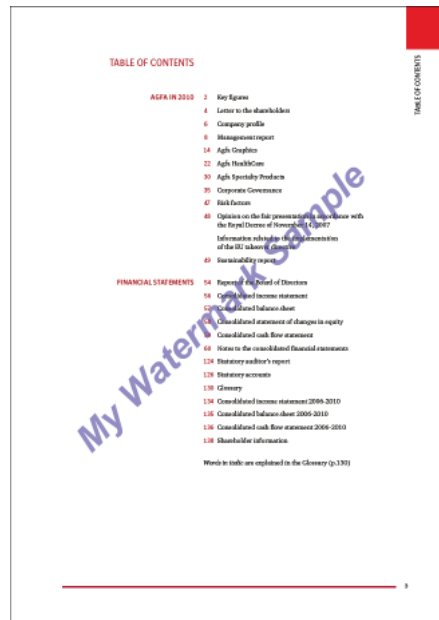
**NOTE:** Preview PDF files are no longer password protected when all three security settings above are enabled and no watermark is defined.

## Watermark

Select the Add Watermark check box to add a watermark to the PDF and then set the options:

- Text** The text to be displayed as a watermark; the text is repeated until the available space is used.
- Color** Click the color patch to open the color picker. See “Style Tab” on page 215 for more information on working with the color picker.
- Font Size** The font size for the watermark text.
- Opacity** Enter a low percentage if you want the watermark text to be transparent and show the content under the mark.
- Angle** The angle of the watermark on the pages.

Figure 4.19: A watermark in a preview PDF.



- Related topics:
- PDF Preview Settings on page 205

## Prepress Settings

These settings control how the files of incoming orders are processed in your production workflow. Files can be sent automatically to your workflow system, downloaded manually, or exported to an FTP site or your PrintSphere space.

**NOTE:** These are the default settings for products in all stores. You can change the file type settings when creating your product templates: see “Production Tab” on page 150.

## ▷ Configure Prepress Settings

- ◆ On the menu bar, choose **Advanced > Production Settings > Prepress Settings** tab.

**Apogee Prepress/Asanti Version** Choose your version from the drop-down list. This affects the JDF file generated by STOREFRONT for further processing.

**Order Handling** This option lets you choose how incoming orders are downloaded and processed.

**Manually download order items for production:** Select this option if you don't have automatic integration with Apogee Prepress 8.0 or higher/Asanti or if you do not want to use automatic processing.

**Automatically download all order items to Apogee Prepress/Asanti:** Select this option to automatically send all order items to Apogee Prepress/Asanti. The following options appear:

- Hot Ticket:** You must enter the name of a Hot Ticket which has a JDF import task processor and which you created in Apogee Prepress/Asanti for importing STOREFRONT jobs.
- Track Apogee Prepress/Asanti Feedback:** Enables an extra button in the Orders tab that can be clicked to see feedback from the workflow system.

**Automatically send order items to FTP server:** Select this option if you want to export a ZIP file for each order item to an FTP server. Enter your FTP details:

- FTP Server:** ftp.mycompany.com
- Default port is 21 (do not change)**
- User name:** myname
- Password:** mypassword
- Active mode:** select the check box to use FTP active mode as opposed to the default FTP passive mode

**Automatically send order items to your PrintSphere:** Sends a ZIP file to your PrintSphere space which can be set up to sync automatically to your local network. You can specify the Export Directory in your PrintSphere space, for example: /StoreFront/ExportOrders. Click the Folder button to navigate directly to this folder without logging on to PrintSphere.

**Default Ticket Template** Enter the name of a ticket template that you created in Apogee Prepress/Asanti for processing orders downloaded automatically or choose a template in the drop-down list. Job ticket templates created in Apogee Prepress 8.0 and higher/Asanti with the option 'Mark available for STOREFRONT' appear automatically in this drop-down list. This default ticket template can be overridden by specifying a ticket template in the Product Template. Refer to "Production Tab" on page 150.

**Default File Type** If you choose to download files manually (also applies when overriding your automatic flow), you can select which type of file is created for download:

- MJD (mime-packaged JDF) zip file: An MJD (mime-packaged job description) file is a single file which contains both the administrative order data as well as any available content (the PDF file the shopper uploaded or the PDF of the document the shopper customized or ordered).
- PDF/JDF zip file: the PDF with the page content and the JDF are two separate files. If you have a prepress workflow that is capable of processing MJD files, it is recommended to use that option. For all other systems choosing PDF/JDF is recommended. If you choose automatic downloading of files, Apogee Prepress/Asanti always downloads an MJD to create the jobs.

The files are contained in a zip package in both cases.

- Related topics:**
- [Integrating STOREFRONT with Apogee Prepress/Asanti on page 326](#)
  - [Downloading and Processing Files on page 322](#)
  - [Production Tab on page 150](#)
  - [System Requirements on page 35](#)

## External Accounts

On this page you can link STOREFRONT to your PrintSphere account, the file-sharing service hosted by ECO3. You can use PrintSphere to create folders and sub-folders for your image libraries and then upload images to these folders in bulk. These images can then be referenced in customizable documents that you create with the Online Editor.

### ▷ Open External Accounts

- ◆ On the menu bar, choose **Advanced > External Accounts**.

The panel on the left lists the external accounts which have already been set up. The General tab on the right displays the details of the selected account:

- Account** The URL of the PrintSphere account (printsphere.com) and your user name for this account. You will need the matching password to create the locations.
- Locations** These are the paths to specific folders in your PrintSphere space. A single space can have several locations specified and you can choose the companies and stores that can link to these locations. You can see which customizable products and stores are linked to each location.

### ▷ Add an external account and location

Here we explain how you can link to folders in your PrintSphere space.

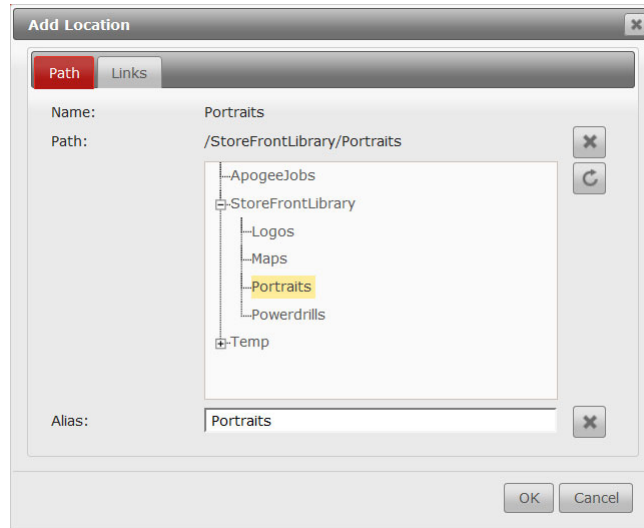
#### *Prerequisites*

You must have a PrintSphere account and you will need the credentials of this account to perform this procedure. Create a dedicated folder that you will use for STOREFRONT images and name this folder `StoreFrontLibrary`, for example. Create sub-folders as required and add image files that you want to reference in your customizable documents.

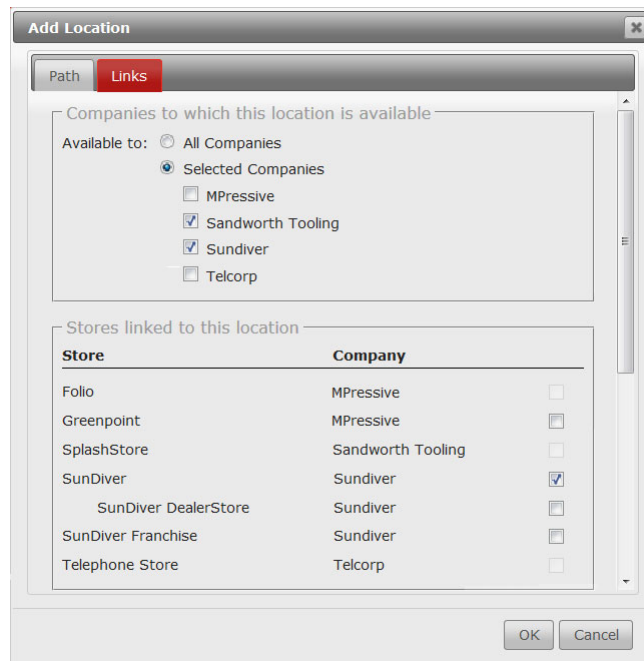
- 1 On the menu bar, choose **Advanced > External Accounts**.
- 2 Click the **Add** button to add a new account to the list.



- 3 In the **Account** panel, enter the URL of your PrintSphere account (printsphere.com) and your user name.
- 4 In the **Locations** panel, click the **Add** button to open the Add Location dialog.



- 5 In the **Path** tab, choose a folder or a sub-folder and give this path an alias. The alias is the name you will see for this path in the Online Editor.
- 6 In the **Links** tab, choose the companies and then the stores that you want to give access to this folder.



---

**NOTE:** Locations (but not accounts) can also be edited and added in the Upload Files dialog of the product wizard for customizable products. See “Creating Products” on page 157.

---

**7** Click **OK**.

The account is added to the list and in the Locations panel you can see how many stores have access to the location.

**8** To add additional locations to the same account, select the account in the list on the left and click the **Add** button again.

**9** To edit an existing location, click the **Edit** button and make your changes in the Add Location dialog.

Related topics:

- Online Editor on page 335
- Images Tab on page 435
- Use PrintSphere to upload images in bulk on page 443
- Creating Products on page 157
- Related Documentation on page 16 for info about PrintSphere

# Automated Product Creation

Use this feature if you have similar On-Demand Products that need to be created on a regular basis. The following single-version product types, i.e. 1 PDF per product, are supported:

- Unbound-Flat
- Unbound-Folded
- BoundSelfCover
- Bound-SeperateCover
- Unbound-Flat-VariableSize

PDF files can be dropped in input hot folders which are associated with a channel that creates the product and adds it to the specified store and category automatically.

## Channel Name

The name of the channel as displayed in the Channel list. This requires that an External Account is configured. See “External Accounts” on page 101.

## External Location

Click the Edit button to open the Select Location editor where you can specify the following:

- |                         |   |
|-------------------------|---|
| <b>External Account</b> | The PrintSphere account where the input folders are located and where PDFs can be dropped.  |
| <b>Location Folder</b>  | Choose or create a subfolder in the external account location. The folder you select as "Location folder" will be the root for the channel. The name of the subfolder within the Location folder will be used as Category Name on the Store and the PrintSphere user must drop the PDF files in the subfolder in his PrintSphere Account. PDF files can never be dropped directly in the Location folder. |
| <b>Store</b>            | Click the Edit button to select a store from the list.  |
| <b>Product Template</b> | Click the Edit button to select a template that will be used to create the product using the input file   |



- Update on Upload** This means that when a new PDF file is dropped in PrintSphere with a filename that is the same as an On-Demand product that is already available, the existing product will be updated to include the new PDF file.
- Notifications tab** Lists the products created from the input PDF files with Status, Processing Time, Error, etc. The processed files can be filtered by Error Only, Channel and Date Range.

## Custom Attributes

Use custom user attributes to add additional fields to the user profile which is visible on the profile page and on the self-registration page. For example, you can add fields for a mobile phone number, personal billing code, department ID code, etc. The information entered in these custom fields can subsequently be retrieved with the Autofill feature in the Online Editor.

### ▷ Add a custom user attribute

- 1 On the menu bar, choose **Advanced > Custom Attributes**.
- 2 In the **Custom User Attributes** tab, click the **Add** button to add a new custom user attribute to the list.



- 3 Specify as follows:

<b>Display Name</b>	The name of the field as it is displayed in the user profile.
<b>Unique Code</b>	Enter a unique code (or name) which will be used by the Autofill feature in the Online Editor to add the attribute to a customizable document. For example, use this feature to add a user's social media information to a business card.
<b>Default Value</b>	This value fills the box of the custom field.
<b>Enabled</b>	Select the checkbox to activate the field on the user profile page.
<b>Accessibility StoreCenter</b>	You can choose to make the field editable (Editable) or editable and mandatory (Mandatory) on the user profile page.
<b>Accessibility STOREFRONT</b>	This option applies in the self-registration window and profile page where the shopper has the following options: <ul style="list-style-type: none"> <li><input type="checkbox"/> Not Visible: the field is not displayed for the user to fill in</li> <li><input type="checkbox"/> Visible: the field is displayed but cannot be edited</li> <li><input type="checkbox"/> Editable: the field is displayed and can be edited</li> <li><input type="checkbox"/> Mandatory: the field is displayed and must be filled in</li> </ul>
<b>Max Size</b>	The maximum number of character that the user is allowed to enter in the field is 255.

---

Save your changes to add the custom attribute to the list. The new attributes now appear on the profile page of the users of your stores.

- Related topics:
- [Create Users on page 276](#)
  - [Autofill Forms on page 380](#)

## Predefined Values

Predefined values can be codes or other content that you want shoppers to choose from during checkout, for example order reference codes, purchase order numbers or product options.

### ▷ Add/edit a list of predefined values

- 1 On the menu bar, choose **Advanced > Predefined Values**.
- 2 Click the **Add** button to add a new list of values.



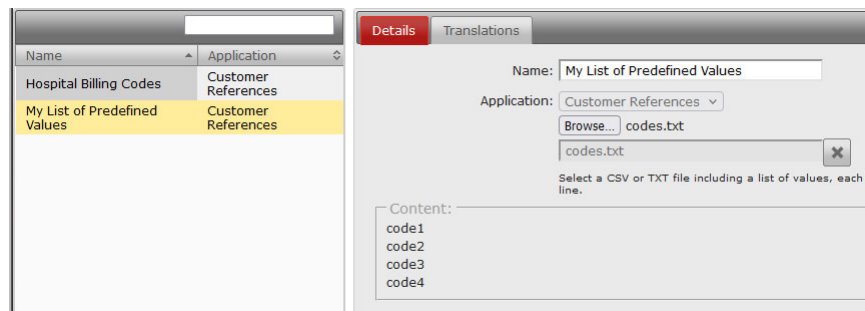
- 3 Enter a Name for the new list of values and choose **Customer Reference** from the Application drop-down list.

Now you can upload a TXT or CSV file which contains the values – one code per line in the file you upload.

Alternatively, choose **Free Text Option** from the Application drop-down list to create predefined values for Product Options.

- 4 Browse to the file with values and upload it.

The values you have in the file now appear in the Content panel.



- 5 Save your changes.

Now this list can be enabled when setting up your Store in the General Tab.

# Licenses

Each license entitles you to an amount of disk space, a number of stores, products and visitor sessions. Additional capacity can be obtained by upgrading to another license.

Clean-up starts automatically when the disk space quota is exceeded for 3 consecutive months. The system continues to delete old order content data until the storage usage drops to 80% of the storage quota. However, the system never deletes data for orders that have not yet reached the 'Shipped' status and data that is not older than 3 months.

---

**NOTE:** The STOREFRONT License and Service Agreement contains more information about these licensing parameters and describes what happens if one or more parameters reach their limit.

---

You can view detailed license information in the Licenses tab and summary statistics on the Dashboard.

## ▷ License information via the Advanced menu

◆ On the menu bar, choose **Advanced > Licenses**.

An overview of your licenses with the maximum allowed resources and current usage is displayed.

**Licenses** The name of your STOREFRONT license (different license packs are available) and licenses for other products with their start and end date. For example:

- Multistep Approval
- Automated Product Creation via PrintSphere

**Quota** The maximum allowed disk space average and login sessions. This disk space includes the configuration data of all the stores, the product data and the incoming orders data. The maximum number of visitor sessions is reset every month. The number of sessions increments each time a visitor accesses one or more of the public or private storefront pages. So a visitor who views several storefront pages and makes several orders only counts as one session.

**PrintSphere Quota** The maximum allowed disk space and usage of your PrintSphere file-sharing license. You can manage the license by clicking the **View your PrintSphere licenses** link which opens the SphereCenter application.

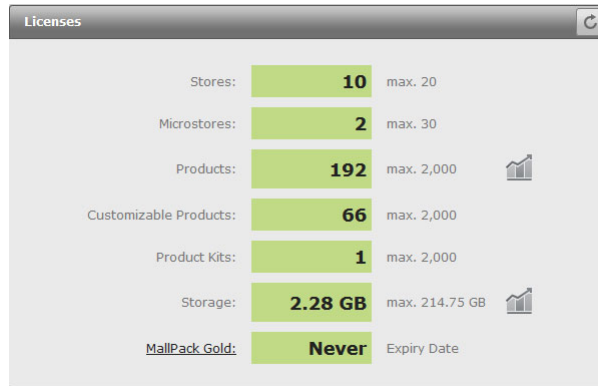
<b>PrintSphere AutoPilot Quota</b>	The disk space assigned to you and the quota for Active Scripts and CPU time per month if you have the PrintSphere AutoPilot license. See the <i>SphereCenter Help</i> and the <i>PrintSphere Help</i> for more information about PrintSphere AutoPilot.
<b>Products</b>	The maximum number of products that can be created in StoreCenter with the current license. This number includes products which are not used in a store or microstore, or are off-line. A product used in several stores only counts for one. There is no limitation on product templates.
<b>Stores</b>	The number of stores and microstores that can be created in StoreCenter with the current license. This number includes stores and microstores which are not online.
<b>Payment Methods</b>	Indicates that you have the option to set up payment gateways and bank transfers. (See “Payment Methods” on page 81.)
<b>Online Editor Actions</b>	Indicates that you have the option to create variable actions in the Online Editor. (See “Variable Actions” on page 458.)
<b>Access Labels</b>	Indicates that you have the option to create access labels. (See “Access Labels” on page 262.)
<b>Approval Groups</b>	Indicates that you have the option to create approval groups. (See “Approval Groups” on page 54.)
<b>VDP Option</b>	Indicates that you have the option to create Variable Data Products. (See “Variable Data Processing (VDP)” on page 382.)
<b>Digital Products</b>	Indicates that you have the option to create digital products. (See “Create a Digital Product” on page 169.)
<b>Global Filter</b>	Indicates that you can use the Global Filter feature. (See “Global Filter” on page 24.)
<b>Multi-version Products</b>	Indicates that you have the feature to create multi-version products. (See “Create multi-version or multi-SKU documents” on page 176.)
<b>Product Discounts</b>	Indicates that you have the option to apply a discount to products. (See “Discount/Markup” on page 167.)
<b>Promotions</b>	Indicates that you have the option to create promo codes. (See “Promotions Tab” on page 250.)
<b>Quoting</b>	Indicates that you have the option to generate quotes. (See “Quoting” on page 205.)

**VDP Option** Indicates that you have the Variable Data Processing option. (See “Variable Data Processing (VDP)” on page 382.)

### ▷ Licenses statistics on the Dashboard

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.

As Printer Administrator, you are able to view various statistics relating to your licenses.



The System panel displays the following statistics:

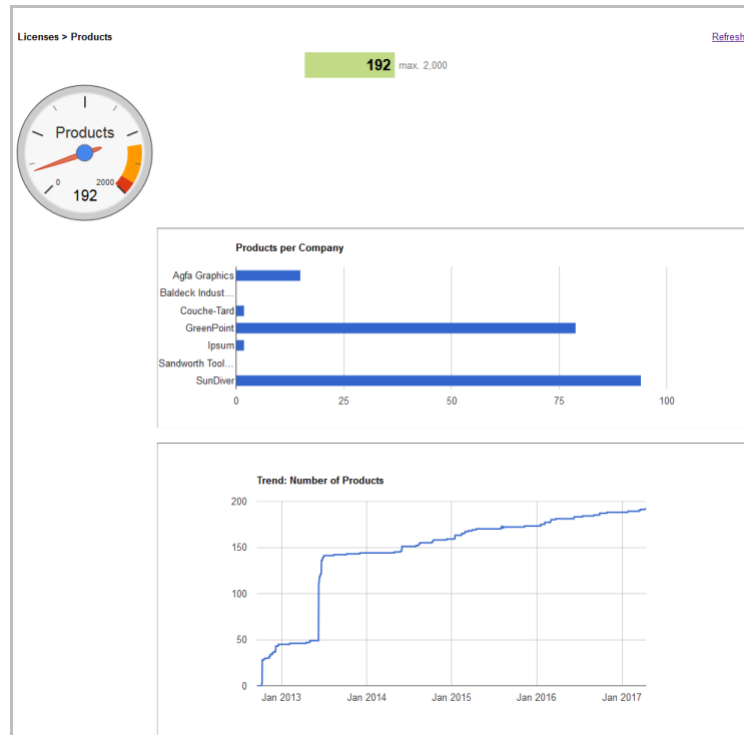
- Stores: the number of stores you have set up
- Microstores: the number of microstores you have set up
- Products: the total number of products created but not necessarily added to a store
- Customizable Products: the total number of customizable products created but not necessarily added to a store
- Product Kits: the total number of product kits created but not necessarily added to a store
- Storage: disk space used by your stores, including the data linked to placed orders, data uploaded to the server by the shopper for use in customizable products with the Online Editor; extra storage space per blocks of 400 GB can be ordered
- License type and expiry date of the license

The maximum values in the right-hand column depend on your license type.

- 2 Click the **Products** link.



The statistics are displayed for your products, broken down by company.



3 Click **Dashboard** to return to the Dashboard.

4 Click the **Storage** link.

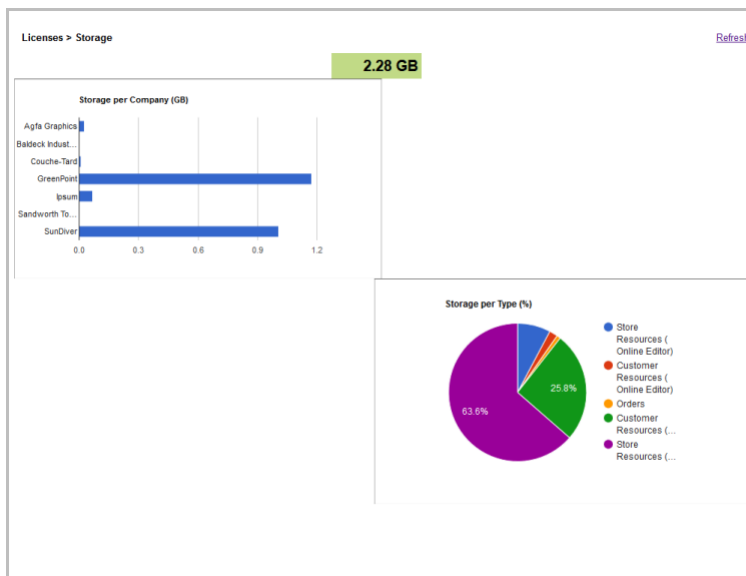


The storage statistics are displayed, broken down by company and by type of data:

- Store Resources (Online Editor): space used by documents and assets for customizable products
- Store Resources (PDF, images, etc.): space used by other assets you have uploaded



- ❑ Customer Resources (Online Editor): space used for assets uploaded to the Online Editor by shoppers
- ❑ Store Resources (PDF, images, etc.): space used for other assets uploaded by shoppers



- 5 Click **Dashboard** to return to the Dashboard.

Related topics: • “Order Monitoring on the Dashboard” on page 286



# Product Templates

---

**Printer Administrator only**

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Product Templates allow you to optimize the overall efficiency of your stores by defining standard types for all your printed, non-printed, and digital products.

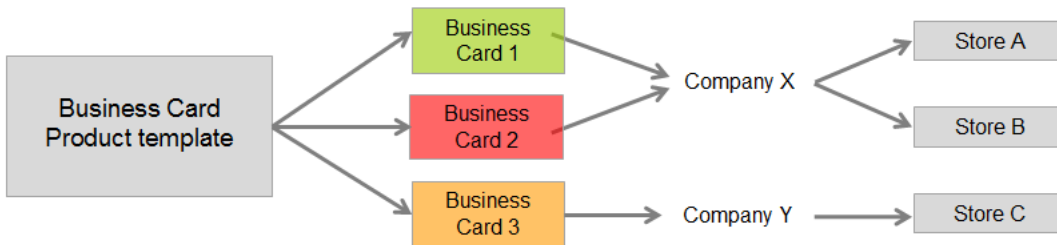
▶ Product Templates Overview .....	116
▶ General Tab .....	122
▶ Preferred Sizes Tab .....	130
▶ Product Options Tab .....	132
▶ Pricing Tab .....	138
▶ Packaging Units Tab .....	147
▶ Preflight Tab .....	149
▶ Production Tab .....	150

# Product Templates Overview

Stores can only be filled with products based on Product Templates. Templates can be used for all Companies and their stores or for a specific Company and its stores.

Product templates are also associated with price lists for the actual product and prices for options sold together with the product.

Figure 5.20: A business card template used for several companies and stores



The Product Templates dialog consists of the Product Template list and four tabs:

- “General Tab” on page 122
- “Product Options Tab” on page 132
- “Pricing Tab” on page 138
- “Packaging Units Tab” on page 147
- “Preflight Tab” on page 149
- “Production Tab” on page 150

## *Prerequisites*

Product Templates use common resources which need to be set up before you can create templates. These resources are available on the Advanced menu. See [Setting up Resources \(Advanced Menu\)](#) on page 61.

### ▷ Create a Product Template

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Add** button to add a new template to the list.



- 3 Complete the fields in the **General** tab and choose the **Base Type** to reveal the fields that are relevant for the chosen base type.
- 4 If you want to add or edit your resources, click the **Edit** button next to the field in question.



For example, you can edit Media Sizes and add Standard Media Sizes to the Supported Media Sizes list.

- 5 Click **Create** to create the template.



The new Product Template is displayed in the list.

You can now proceed with the settings in the Product Options Tab, Pricing Tab, Packaging Units Tab, Preflight Tab, and Production Tab. Not all of these tabs are visible for some of the base types.

### ▷ Duplicate a Product Template

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Duplicate** button in the toolbar and then the Duplicate button to confirm that you want to duplicate an existing template.



A copy of the Product Template is displayed in the list with the *Copy* suffix in the name.

- 3 Complete the fields in the **General** tab. You will probably want to change the name in the Template Name field.
- 4 If you want to add or edit your resources, click the **Edit** button next to the field in question.



- 5 Click **Save** to save your changes to the modified template.



The new Product Template is displayed in the list.

You can now proceed with Product Options, Pricing, Packaging Units, Preflight, and Production settings.

### ▷ Delete a Product Template

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Delete** button to delete a template from the list.



The template is removed from the list.

---

**NOTE:** If the template has already been used to create a product, a warning is displayed indicating that you cannot delete the template. This is because the template links the product to its pricing list.

---

### ▷ Export Product Templates

You may want to export a list of all your product templates to have an overview for reference purposes.

---

**NOTE:** It is not possible to round-trip (export/import) a file with product templates.

---

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Export** button and choose **Export Product Templates** to export all the templates in the list.



You can choose to view or download an Excel file which contains a list of all the templates and their properties.

### ▷ Export Price Lists

You may want to export an overview of all your price lists for reference purposes.

---

**NOTE:** It is not possible to round-trip (export/import) a file with price lists.

---

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Export** button and choose **Export Price Lists** to export all the price lists.



You can choose to view or download an Excel file which displays the different prices lists in separate worksheets.

## ▷ Create a template for a Digital product

A digital product doesn't require you to specify any physical settings such as dimensions, media, etc. because the product will consist of one or more files that the shopper can download.

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Add** button to add a new template to the list.



- 3 Complete the fields in the **General** tab and choose **Digital** in the Base Type drop-down list. This base type has no further general settings to be specified.
- 4 Click **Create** to create the template.



The new Product Template is displayed in the list. Only three tabs are displayed for a digital product template.

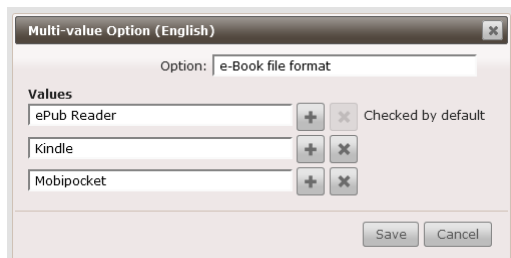
- 5 Open the Product Options tab and click the **Add** button.



Only one option type is available for digital product templates:

- Multi-value option

- 6 In the Multi-value Option dialog, enter the Option name. This is the text for the option heading in the Place Order panel on the storefront.
- 7 Enter one or more Values for the options. For example, if the template is for e-books, you could enter ePub Reader, Kindle, Mobipocket as options. Click the **Add** button to add as many options as you need.



The first in the list is selected by default on the storefront. You can rearrange the list.

- 8 Click **Save** to save your changes.



- 9 Open the Pricing tab and set the pricing for each option.
- 10 Click **Save** to save your changes to the modified template.



You can now create a product based on this template.

### ▷ Create a template for a Product Kit

A Product Kit inherits many settings from its kit items and their respective templates, but these may be overruled by the kit settings.

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Add** button to add a new template to the list.



- 3 Complete the fields in the **General** tab and choose **Kit** in the Base Type dropdown list. This base type only requires you to enter the **Supported Quantities**.
- 4 Click **Create** to create the template.



The new Product Template is displayed in the list. Only four tabs are displayed for a kit template: General, Product Options, Pricing and Packaging Units.

- 5 Add your Product Options:
  - Single Value option
  - Multi-Value option
- 6 You can only choose from three Pricing Formulas:
  - Fixed Price
  - Price/Copy
  - Setup Cost + Price/Copy

The chosen price formula is applied on top of the sum of the prices of the kit items. You may want to set the kit price to zero or charge for an additional kit packaging.



- 7 Packaging Units can be specified for the kit and overrules those of the kit items. If no packaging units are specified for the kit, those specified for the kit items will be used.

# General Tab

In this tab you will define the main settings for the product template.

## General

- Template Name** Enter a name to identify the template in the Product Template list.
- MIS ID** (Visible after saving a new template, except for Non-Printed Product.) Enter a unique ID generated by the Management Information System (MIS) to ensure the MIS system correctly associates the product reported by STOREFRONT with the matching user account in its own database. Otherwise, leave this field empty.
- MIS Template** Enter the name of the Management Information System (MIS) template if applicable.
- Description** Enter a description that summarizes the template and its use.
- Category** Choose a category from the drop-down list or create a new one. You can enter the categories in the search filter at the top of the template list.
- Available to** You can create the template for all or one specific Company by making a selection in this drop-down list. Selecting **All Companies** ensures that the template can also be used for Companies that you will create in the future.
- Base Type** Choose a base type from the drop-down list.
- A list of parameters is displayed depending on the base type you choose. Specify the parameters as required.
- Bound - Self Cover: a product consisting of stacked or nested parts which are bound but without a separate part for the cover, such as brochures, books, magazines, notebooks, textbooks
  - Bound - Separate Cover: a bound product consisting of stacked or nested parts and a separate cover part, such as brochures, books, magazines, notebooks, textbooks
  - Unbound - Flat: work which is not folded such as business cards, flyers, posters, tickets, banners; fixed size
  - Unbound - Flat - Variable Size: the shopper can choose from a list of predefined sizes or set a custom size for flat work which is not folded such as posters, etc.; pricing may be based on the size (width height, surface). Choosing this type displays the Preferred Sizes Tab. See “Preferred Sizes

Tab” on page 130 for information on which product types can use this base type.

- Unbound - Folded: unbound flat work which is folded such as invitations, leaflets, folders
- Digital: This base type can only be used to create a Digital Product, i.e. files that you want to sell via your storefront, for example, e-books, audio files, images, video, etc. You only need to specify a few general settings for this base type.
- Kit: This base type can only be used to create a Product Kit, i.e. a bundle of products that are sold together.
- Non-printed Product: This base type can only be used to create Non-printed Products such as gadgets, giveaways, accessories, etc.

**Binding Side** This option allows you to set the binding side for special *bound* products such as calendars and notepads.

- Left, Right, Top or Bottom

**Binding Order** This option specifies how the parts of a *bound* product will be assembled.

- Nesting: parts are assembled within each other
- Stacking: parts are assembled on top of each other

**Binding Method** Choose a binding for *bound* products.



Channel Binding: A U-shaped clamp is used to bind the sheets and cover.



Coil Binding: A metal or plastic coil is used to bind the sheets and cover.



Corner Stitch: A staple in one corner binds the sheets.



Edge Gluing: The sheets are glued along the edge.



**Hard Cover:** The publication has a separate hard cover.



**Loose Binding:** A method that allows individual sheets to be inserted or removed. Loose binding can also be used for a 4-page leaflet which is defined as a 'Bound - Self Cover' product. In this case, the shopper must provide a file with 4 pages as opposed to uploading a spread for an 'Unbound - Folded' product.



**Plastic Comb:** A plastic comb is used to bind the sheets and cover.



**Ring:** Sheets are punched with holes for insertion in a ring binder.



**Saddle Stitched:** The sheets and cover are secured by wire staples through the center fold.



**Soft Cover:** The publication has a separate flexible cover.



**Strip Band:** Sheets and cover are bound using a strip band.



**Tape:** Sheets and cover are bound using a tape.



**Wire Comb:** A wire comb is used to bind the sheets and cover.

---

**NOTE:** Choose a binding method that is compatible with the binding order.

---

## Measurements

**Size** The finished, trimmed size of a product. For *folded* products you specify a closed size and an open size (e.g. closed size is 210 mm x 297 mm; open size is 420 mm x 297 mm); *bound* and *flat* products only have a closed size. Enter a custom size or choose a standard media size from the drop-down list. For *Unbound - Flat - Variable Size*, you can set a minimum and maximum size and the shopper can choose a size between these values when uploading a file; you can also allow the product to be rotated to fit the entered size.

**Orientation** You can specify the required orientation or make this dependent on the uploaded file:

- Portrait
- Landscape
- Landscape & Portrait: The orientation depends on the uploaded file.

**Bleed** Specify a bleed area for images and documents of Uploadable Products. Entering a value scales TIFF and JPEG files to the size + bleed. This bleed is only applied to PDFs if the PDF needs to be scaled, otherwise the bleed specified in the document is respected.

**Folding Scheme** For a *folded* (unbound) product you can specify how the sheet is to be folded:



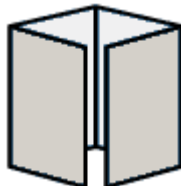
Single Fold: The sheet is folded in the middle to create 2 panels.



2-Fold Letter Fold: The sheet is folded inwards twice to create 3 panels.



2-Fold Accordion (Zigzag) Fold: The sheet is folded twice to create 3 zigzagging panels.



3-Fold Letter Fold: The sheet is folded inwards three times to create 4 panels; also referred to as a gate-fold.



3-Fold Accordion (Zigzag) Fold: The sheet is folded three times to create 4 zigzagging panels.



3-Fold Parallel Fold: The sheet is folded three times to create 4 panels which are nested inside each other.

---

**NOTE:** Folding a sheet usually requires short panels to keep the finished product flat.

---

- Media Type** Specify the paper stock for printing the order on; for the body part and the cover part separately in the case of Bound - Separate Cover. You can make additional media type options available (with or without a surcharge) in the Product Options tab; see “Product Options Tab” on page 132.
- Display Name** The name of the Media Type as you want to display it in the storefront; for example, you may want to display a less technical name for the paper stock.

---

**NOTE:** Media Type Display Name is one of the translatable product options.

---

### Packing Measurements button

Packing measurements are used to calculate how many packaging units are required for an order.

---

**NOTE:** Only relevant if your store uses a shipping service that needs to calculate the shipping cost based on these measurements. For example, this is not relevant for free shipping.

---

- ◆ Click the **Packing Measurements** button to open a dialog box where you can fine-tune the packing information.



For a *Bound-Separate Cover* template type you can specify the measurements by selecting one of the following three options from the drop-down list:

- Copy-based:** Enter the total thickness and weight for one copy of the finished product.
- Page-based (fixed thickness):** Enter the total thickness for one copy if this is known, e.g. a filled binder. The weight is calculated based on the weight of each page. In **Extra** you can enter the weight of the binder.
- Page-based (calculated thickness):** This option accepts the calculated thickness and weight for each page but you can specify extra thickness and weight per copy, e.g. for the binding.

Figure 5.21: You can override the calculated packing measurements and add extra specifications. These are used to calculate the number of packaging units required for an order.

**Packing Measurements: My Brochure**

Size: 210.0 x 297.0 mm  Custom

Bound - Separate Cover

Page-based (fixed thickness)

Thickness: 50.0 mm

This value represents the total thickness of 1 copy.  
Use fixed thickness e.g. when the product is grouped in a binder or box.

Cover

Weight: 7.173 g  Custom

All values are page-based.

Body

Weight: 10.000 g  Custom

All values are page-based.

Extra

Weight: 25 g

Extra values are copy-based.  
Use these settings e.g. to take care of extra binding measurements.

Save Cancel

Select the **Custom** check box if you want to override the calculated thickness or weight values:

- Thickness:** This is the thickness that corresponds with the paper weight (grammage) specified for the selected media; these thicknesses are defined in Advanced >Media for all your media. If the thickness is not specified in the media type, you must enter it here.

- Weight:** This is the weight of a sheet calculated for the given size and selected paper weight (grammage).

For the *Unbound-Folded* and *Unbound-Flat* templates you can override the calculated values for thickness and weight of a folded copy or sheet respectively.

## Color

Specify the colors for the front and back of the product. If applicable, select the **Back follows front** option to use the same colors for both sides of the product. The following color options are possible:

- Black & White
- Full Color (i.e. CMYK)
- Black & White + 1 to 4 Spot Colors
- Full Color + 1 to 4 Spot Colors
- 1 to 4 Spot Colors

For *flat* and *folded* products you can specify combinations and also leave the back blank (single-sided vs. double-sided). For *bound-separate cover* products, you specify the colors for the body and cover parts separately. You can make additional color options available (with or without a surcharge) in the Product Options tab; see “Product Options Tab” on page 132.

## Pages

### Supported Page Counts

Enter page count values separated by a comma and without a space, and choose one of the options. These page counts include the cover.

- Users can only order the specified number(s) of pages: Only page counts as indicated in this field are selectable from the menu in the storefront.
- Users can order an intermediate page count: Select this option for a more flexible range of page counts for when you don't know the exact page count of a product. In the **Use multiples** drop-down list, choose a multiple of 1, 2, 4 or 8 to be added to the supported number of pages. For example, if you have 8, 16, 24, 32, 48 as supported page counts and a multiple of 4 is selected, a shopper can order a product with a 12 pages. The first and last values in this field are the minimum and maximum page counts.



## Quantities

- Supported Quantities** Enter order quantities separated by a comma and without a space, and choose one of the options:
- Users can only order the specified quantities: Only the quantities as entered in this field are selectable from a menu in the storefront. Other quantities cannot be ordered.
  - Users can order intermediate quantities: Any quantity between the minimum (first) quantity and the maximum (last) quantity can be entered for ordering on the storefront.
- Default Quantity** Enter a quantity if you want the default quantity to be higher than the lowest supported quantity of the template. Can also be set in the product wizard (see “Create a product” on page 157.)

## Preferred Sizes Tab

This tab is displayed for the *Unbound flat - Variable Size* template base type. The products using this template have a minimum and maximum size. In this tab, you create a list of predefined sizes that the shopper can choose from, within the range of the minimum and maximum sizes.

The *Unbound flat - Variable Size* template base type can be used for the following product types:



Customizable product (HTML5-based): see “Customizable Product with User-Definable Size” on page 508



Uploadable product: the uploaded file is scaled to the requested size

When the *Unbound flat - Variable Size* template base type is used for an uploadable product, the uploaded file is scaled to the requested size.

### ▶ Add/Edit Preferred Sizes for Variable Size template

1 On the menu bar, choose **Product Templates** and select the template you want to edit.

2 Click the **Preferred Sizes** tab and then the **Add** button.



The minimum and maximum sizes are displayed in the dialog.

3 Choose one or more predefined sizes from the **Size** drop-down list which do not exceed the minimum and maximum sizes.

4 Choose the Orientation

- Portrait: 1 size is added to the list with the highest value set for the height (H)
- Landscape: 1 size is added to the lists with the highest value set for the width (W)
- Portrait/Landscape: 2 sizes are added to the list

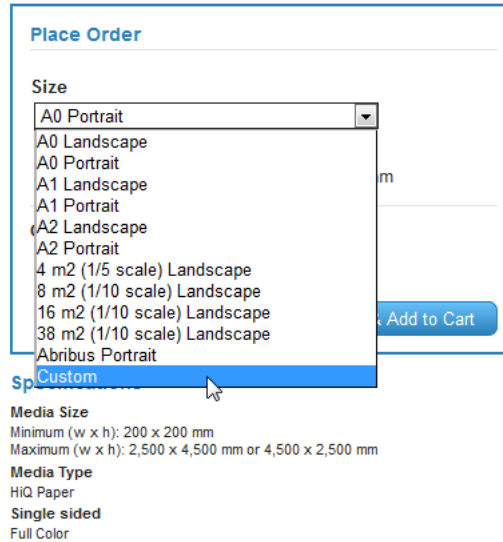
5 Click **Save**.

The size or sizes are added to the list.

6 Repeat to add additional preferred sizes.

- 7 Select the **Use only listed sizes** check box if you do not want to allow the shopper to use a custom size. If you do not select this check box, the Custom option is available for the shopper and a random size that does not exceed the minimum and maximum sizes can be entered.

Figure 5.22: The list of sizes with the custom option on a storefront



- 8 You can change the display sequence of these sizes on the storefront using the Move Up and Move Down arrow buttons, and set the default size with the Make Default button.

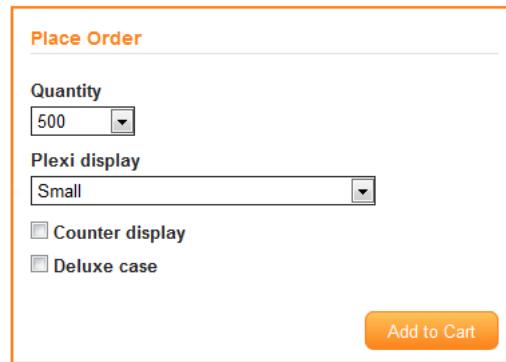


Make a size the default size on the storefront

## Product Options Tab

Product options can be items or services that are sold with a Product, e.g. gift wrapping, displays for flyers, or extra colors or media types which the shopper can choose from. These are defined for each Product Template.

Figure 5.23: Multi-value and single-value options displayed on a storefront



The screenshot shows a 'Place Order' form with the following elements:

- Quantity:** A dropdown menu with '500' selected.
- Plexi display:** A dropdown menu with 'Small' selected.
- Counter display:** An unchecked checkbox.
- Deluxe case:** An unchecked checkbox.
- Add to Cart:** An orange button at the bottom right.

### ▷ Add/Edit Product Options

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Product Options** tab.

A list of options is displayed with option values.

---

**NOTE:** The list is empty if you have not yet defined options for this template.

---

- 3 To create a new option, click the **Add** button.



The following option types are possible:

- ❑ Single-value option: Add an item or service that you want to present with the product.
- ❑ Multi-value option: Add an item or service with sub-options.
- ❑ Color option: Add these options to let the shopper choose from a selection of colors for the front and the back sides – different colors can be specified for the cover and body of a product where applicable.

- ❑ **Downloadable PDF or Image option:** This option displays a list where shoppers can choose between the printed product, a high resolution PDF or image, or both. You can choose the name for the option, the values that appear in the list, and the file format of the product as PDF, PNG, or JPEG.
- ❑ **Media type option:** Add one or more media type options to let the shopper choose from a selection of media for the product – different media types can be specified for the cover and body of a product where applicable.
- ❑ **Free Text Option:** Add one or more free text options for text or predefined values. A free text option can be set to "required" to type a text or to select a value before the product can be added to the shopping cart.

4 If you choose **single-value** option, you will see the following settings:

**Option Name**  
**Checked by default in the Store**

The name of the option as it is displayed on the storefront

If you select this check box, this option will be selected by default on the storefront and added automatically to the total price when an order is placed. The shopper can clear this check box and choose not to buy the option.

---

**NOTE:** All options checked by default are added automatically to the order.

---

5 If you choose **multi-value** option, you can click the **Add** button to add as many sub-options as you need.

The first in the list is selected by default on the storefront and added automatically to the total price when an order is placed. The shopper cannot clear the default sub-option in the drop-down list. For this reason, you may want to create a sub-option with zero charge so the shopper can choose not to buy the option.

6 If you choose **Color** option, you can select alternative colors from the drop-down lists and click the **Add** button to add as many colors as you need. Alternative colors can also be specified for the body and cover parts separately, if applicable for the product type.

The initial color will be checked by default on the storefront.

- 7 If you choose **Downloadable PDF or Image** option, enter the name of the option (mandatory), the values for the options, and one of the downloadable format types.

**Values:**

- Only print
- Print and high resolution PDF or Image
- Only high resolution PDF or Image, no print.

If you do not change the values, the default values in the list are used.

**PDF or Image:**

- PDF
- PNG with Resolution (in ppi)
- JPEG with Resolution (in ppi) and Quality (level from 1 to 100)

Figure 5.24: Downloadable PDF or Image option

Figure 5.25: Print and high resolution PNG offered on a storefront

- 8 If you choose **Media Type** option, you can select a second Media Type and Weight from the drop-down lists, and click the **Add** button to add as many types as you need.

The initial media type will be checked by default on the storefront.

---

**NOTE:** The initial media type option is set in the Product Template tab under Media Type Display Name.

---

- 9 Go to the **Packing Measurements** tab of the Media Type Option Value if you want to set different measurements for the additional media type option.
- 10 Click **Save** to confirm your changes.

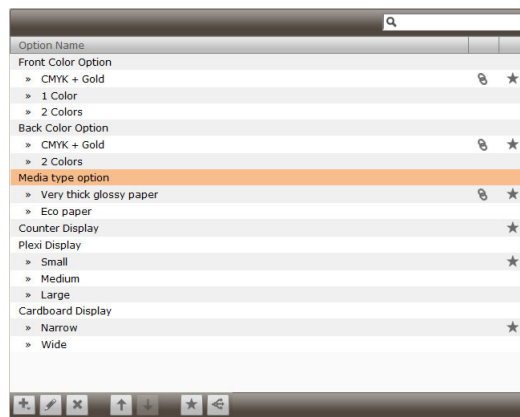


The option and its sub-options are added to the list. The initial media type and colors as set in the Product Template tab are indicated in the list with a link icon.



You can add new sub-options to Multi-Value, Media Type and Color options by clicking the Add button and choosing the **Add option value for selected**.

Figure 5.26: Product options displayed when defining a product template (StoreCenter)



You can change the display sequence of these options and sub-options on the storefront using the Move Up and Move Down arrow buttons, and change the **Checked by default** options using the Make Default button. If you add options to a template which is already being used for products, you can add these options to the existing products with the **Push to Products** button.



Move an option or sub-option down in the list



Move an option or sub-option up in the list



Make a sub-option the default option on the storefront

Push to Products: Makes a new option available to all existing products based on this template

---

**NOTE:** If you added a product option to a template which is already being used for a product, you cannot delete it from the list.

---

For clarity's sake, it is recommended to group all single-value options at the bottom of the product options list on the storefront.

Figure 5.27: Product options when ordering on a storefront

- 1 Multi-value options in a drop-down list
- 2 Single-value options with a check box

You can pick the options that you want to display on the storefront when creating or editing products. See “Creating Products” on page 157.

### ▷ Delete a Product Option from a template

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Product Options** tab.

A list of options is displayed with option values.

---

**NOTE:** The list is empty if you have not yet defined options for this template.

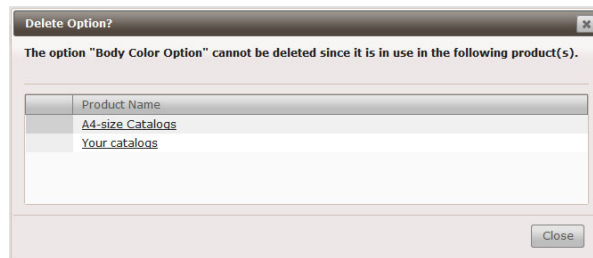
---

- 3 To delete an option, select it in the list and click the **Delete** button.



- 4 The Delete dialog is displayed with a list of products that use this option.





- 5 Go to each product that uses the option and disable the option.

When you have done this for all the products in the list, go back to the Product Options tab and delete the option in the template.

## Pricing Tab


If you choose to apply a payment method when setting up a store, the product template must have a price list that covers the available quantities and options that can be ordered with the product. These price lists are managed in the Pricing tab of the Product Templates dialog and new price lists that you create in the Product Templates dialog are added to the Price List drop-down list. See “Setting up a Store” on page 195.


When you create a Product Template, you need to choose an existing price list to add the prices for the new template, or edit an existing price list. If prices are not set for a product template in the price list selected for the store, any products created from that template may appear on the storefront but they will be unavailable for purchasing.

Two price lists are provided in the Price Lists list by default: including or excluding tax. This enables you to display rounded prices or commercially attractive prices (e.g. 99-prices) with or without the tax included. You can add your own price lists to differentiate between standard and discount prices, prices in other currencies, prices for different Companies, etc.

A price list consists of the following price information:

- ❑ Price Matrix: This is the main table with prices for the different quantities and page counts possible with a product template
- ❑ Color option: Here you specify the costs to be charged for different color options. The initial color is always included in the Price Matrix.
- ❑ Media type option: The initial media type is included in the Price Matrix prices but additional types need to be priced here.
- ❑ Single-value and/or Multi-value options: Here you can set the prices for special finishing, accessories to be delivered with a product, etc.
- ❑ Downloadable PDF option: Here you set the prices for downloading a high resolution PDF instead of a physical product.
- ❑ Free Text option

Each price list may contain *all* the prices for *all* product templates and consequently for all the products (all products are based on product templates). Every time a new product template is created, all the price lists are marked as incomplete with the alert icon  until the Price Matrix and option prices are filled in for the new product template. You only need to update the price list(s) that you will use for a particular template, however, you must ensure that the price list

you select for your store contains the pricing information for the products you add to the product catalog. Products without pricing information are also indicated with the alert icon  in the product catalog.

**NOTE:** If you choose Payment Method None when creating a store, the product template does not require a price list and you can skip this section.

## ▷ Set Pricing

- 1 On the menu bar, choose **Product Templates**.
- 2 Click the **Pricing** tab.

A list of price lists is displayed in the top pane. Two price lists are provided by default: one price list including taxes and one excluding taxes.

- 3 Choose a price list in the Price Lists list and select Price Matrix in the Pricing pane below.

The Price Matrix is displayed in the bottom pane.

If you have just created the Product Template, only the Quantity column is filled in with the supported quantities.

Pages	16	24
Quantity	Total Price	Total Price
50		
100		
200		
500		
1,000		

An alert icon indicates that the prices in the Price Matrix are incomplete.



- 4 Click the **Edit** button to display the Edit Price Matrix dialog.



- 5 In the Pricing Formula drop-down list, choose one of the following formulas for calculating the prices for products based on this template:

- Fixed Price: Specify your prices for each quantity and page count. No other printing cost applies.

**TIP:** When entering values in the Price Matrix, you can use the Tab key to navigate the cells.

**Edit Price Matrix - Default Price List**

Pricing Formula: **Fixed Price**

All prices are in **Price/Copy** of pages  
 Users can only order **Price/Page**  
 Users can only order **Setup Cost + Price/Copy**  
 Users can only order **Setup Cost + Price/Page**

Pages	16	24
Quantity	Fixed Price	Fixed Price
50	50.00	100.00
100	100.00	200.00
200	150.00	300.00
500	200.00	400.00
1,000	300.00	600.00

Price Table

Pages	16	24
Quantity	Total Price	Total Price
50	50.00	100.00
100	100.00	200.00
200	150.00	300.00
500	200.00	400.00
1,000	300.00	600.00

Save Cancel

- Price/Copy: Specify your prices for one copy (unit). This formula is useful if the shopper can order intermediate quantities.
- Price/Page: Specify the price per page. For example, 60 copies of a 16 page brochure at 1 dollar/page will cost 960 dollars.
- Setup Cost + Price/Page: Specify your prices/page and the setup cost for each quantity and page count.

**Edit Price Matrix - Default Price List**

Pricing Formula: Setup Cost + Price/Page ▾

All prices are in **EUR** and **tax excluded**  
 Users can only order the specified number(s) of pages  
 Users can only order the specified quantities

Pages Quantity	16		24	
	Setup Cost	Price/Page	Setup Cost	Price/Page
50	50.00	0.10000000	100.00	0.10000000
100	100.00	0.10000000	200.00	0.10000000
200	150.00	0.10000000	300.00	0.10000000
500	200.00	0.10000000	400.00	0.10000000
1,000	300.00	0.10000000	600.00	0.10000000

Price Table

Pages Quantity	16 Total Price	24 Total Price
50	130.00	220.00
100	260.00	440.00
200	470.00	780.00
500	1,000.00	1,600.00
1,000	1,900.00	3,000.00

Save Cancel

- Setup Cost + Price/Copy: Specify your price per copy (unit) page and the setup cost for each quantity and page count.
- Setup Cost + Price per square metre/foot: (only for products based on an Unbound Flat - Variable Size template) The product unit does not have fixed dimensions, so specify different prices per square metre/foot of media depending on the ordered quantities.
- Setup Cost + Degressive pricing per square metre/foot: (only for products based on an Unbound Flat - Variable Size template and their options) Specify a price depending on the total amount of media used, regardless of the number of copies ordered: e.g. a lower price for higher total sizes. You can also set a minimum price for the product.

**Edit Price Matrix - Default Price List** ✕

Pricing Formula: Setup Cost + Degressive Pricing per square meter ▾

All prices are in EUR and tax included  
Users can order intermediate quantities

Quantity	Setup Cost
1	8.00
50	8.00

You can copy data from a spreadsheet and paste it by clicking [here](#).

	Size in square meter	Price per square meter		
≤10.00	10.00	4.00	+	✕
10.00 - 50.00	50.00	3.80	+	✕
50.00 - 100.00	100.00	3.75	+	✕
>100.00		3.72		

Minimum Price:

**TIP:** Setup costs can be an important cost factor in certain printing environments. Compare the pricing of short runs printed digitally and longer print runs in offset.

For a complex price matrix, you can copy the data from a spreadsheet. See “Using a spreadsheet to prepare and maintain a price matrix” on page 143.

Select the **Cross-Item Pricing** option if you want to apply pricing and discount to several items. For example, you order 8 packs of 250 cards. One pack of 250 cards costs 10 euros but 2000 cards cost 60 euros. On the order summary and all other reporting, each pack of 250 cards will have a price of 7.5 euros. If the pricing involves setup costs you can choose to apply a **Single Setup Cost**.

- 6 Click **Save** to confirm the formula and prices.



The completed Price Matrix is displayed for the selected price list.

If you created Product Options, you need to set the prices for these too.

An alert icon indicates that the price for a Product Option is incomplete.



- 7 Click an Option in the Pricing pane and click the Edit button.
- 8 Choose one of the following pricing methods:
  - Fixed:** The specified price is added once to the total price for the ordered quantity, e.g. a special service.

- ❑ %: A percentage of the price for the ordered quantity is added once to the total price (without other options), e.g. special packaging. The percentage does not apply on top of other options.
- ❑ Unit: The option has its own unit price which is added per the specified quantity, e.g. a special box per 250 business cards, and a one-time Setup Cost (optional).
- ❑ Per Page: The option price is calculated by multiplying the specified price by the page count, plus a Setup Cost (optional).
- ❑ Price Matrix: Choose this option if you want to apply a price formula to control pricing in a non-linear way. You can choose from the same pricing formulas as for the product. This is useful for options such as color, varnish, or binding styles. You can also limit the availability of an option (e.g. varnish that you only want to print if the print run is sufficient) by not specifying prices for lower quantities. Choose a formula in the Pricing Formula drop-down list. The different options are explained above.
- ❑ Size-based: (Unbound products only) The option is calculated depending on the width, height, or surface area of the product, or a combination of these properties; for example: varnish, laminating or adding grommets for Unbound Flat - Variable Size products (signs, posters, etc.)

9 Click **Save** to confirm your changes.



The option price is displayed for the selected Product Option.

The alert icon is no longer displayed when you have completed all the price information.

▷ **Using a spreadsheet to prepare and maintain a price matrix**

- 1 Prepare your raw price data in a spreadsheet, e.g. the setup cost and price/copy for different page counts.
- 2 Copy the cells that you have prepared in the spreadsheet.

---

**NOTE:** Do not include the quantities and total price in your copied data because these are calculated in the price matrix.

---

- 3 In the Edit Price Matrix dialog, click in the top left cell.

You have two options, depending on the browser you are using:

If you are using the Firefox browser, clicking in the cell activates the **here** link which you can click to open a dialog where you can paste the data you copied in your spreadsheet. Click OK.

**Edit Price Matrix - GBP**

Pricing Formula: Setup Cost + Price/Copy

All prices are in **GBP** and **tax excluded**  
 Users can order an intermediate page count (multiples of 4)  
 Users can only order the specified quantities

Pages	8		32	
Quantity	Setup Cost	Price/Copy	Setup Cost	Price/Copy
100				
250				

You can copy data from a spreadsheet and paste it by clicking [here](#).

Price Table

Pages	8	32	64
Quantity	Total Price	Total Price	Total Price
100			
250			

Save Cancel

OR

For all browsers except Firefox, with the cursor in the top left cell, press CTRL+V (paste) to paste the data directly in the price matrix.

The data is pasted into the price matrix and the totals are calculated and displayed in the Price Table.

- 4 Click Save to confirm the pricing matrix.

### ▶ Create a new price list in Product Templates

Price lists can be created in the Product Templates dialog. A newly created price list does not contain any prices.

- 1 On the menu bar, choose **Product Templates** and then the **Pricing** tab.
- 2 Click the **Add** button to add a new Price List to the list.



- 3 Complete the fields in the **Create Price List** dialog.

**Name** This name appears in the Price Lists list and in the Pricing drop-down list when setting up a store.

**Currency** This is the currency used to display the prices; you may want to set up different price lists which are differentiated by currency.

**Exclude taxes** Select or clear this check box to exclude or include tax in the prices you enter in the Price Matrix.



**Description** Additional information

- 4 Click **Save**.



The new price list is displayed in the list with the alert icon. This icon indicates that the price list is incomplete.



- 5 Enter the pricing for all the Product Templates. See “Set Pricing” on page 139.

**▷ Duplicate a price list in Product Templates**

Price lists can be duplicated in the Product Templates dialog. A duplicated price list contains all the prices of the original.

- 1 On the menu bar, choose **Product Templates** and then the **Pricing** tab.
- 2 Click the **Duplicate** button to copy and adapt an existing price list.



- 3 Click **Duplicate**.

The duplicated price list contains all the prices entered for the original price list.

- 4 If necessary, edit the Price Matrix and Option prices in the duplicated list as described in “Set Pricing” on page 139.

**▷ Delete a price list in Product Templates**

Price lists can be deleted in the Product Templates dialog.

- 1 On the menu bar, choose **Product Templates** and then the **Pricing** tab.
- 2 Click the **Delete** button to delete a Price List from the list.



- 3 Click **Delete** to confirm.

The price list no longer appears in the list.

---

**NOTE:** A price list cannot be deleted if it is being used for a store.

---

### ▶ Create a new price list in Stores

- 1 On the menu bar, choose **Stores** and select a store.
- 2 In the Set Up pane, click the Add button next to the Price List drop-down list.
- 3 Complete the fields in the **Create Price List** dialog.

**Name** This name appears in the Pricing drop-down list. It's also added to the Price Lists list in Product Templates > Pricing.

**Currency** This is the currency used to display the prices; you may want to set up different price lists which are differentiated by currency.

**Exclude taxes** Select or clear this check box to exclude or include tax in the prices you enter in the Price Matrix.

**Description** Additional information

- 4 Click **Save**.

 Save

The new price list is displayed in the Pricing drop-down list.

---

**NOTE:** You can only delete a Pricing List in the Product Templates dialog. See “Delete a price list in Product Templates” on page 145.

---

## Packaging Units Tab

In this tab you select the packaging units that can be used to ship the products you create with this template. This tab only needs to be completed if your store uses a shipping service whose cost is based on the packaging (*Fixed Fee per Package, Fee per Weight Unit, Fee per Packaging Unit* calculation method).

---

**CAUTION:** You must assign packaging units to a template if your store uses a shipping service whose cost is based on the packaging. If you do not do this, the shopper will not be able to use the shipping service as it will not be visible on the storefront.

---

### *Prerequisites*

Packaging units must be created in **Advanced > Shipping > Packaging Units** before you can assign them to a template. See “Create packaging units” on page 77 for more information.

The weight and thickness of the media used for the template must be specified in **Advanced > Media**. See “Media” on page 62 for more information.

Packing Measurements must also be set in the General tab of the product template. See “Packing Measurements button” on page 126.

### ▷ **Select Packaging Units**

- 1 On the menu bar, choose **Product Templates** and then the **Packaging Units** tab.
- 2 Click the **Add** button to add a new Packaging Unit to the list.



- 3 Select a packaging unit from the drop-down list and its specifications are displayed. STOREFRONT will calculate the shipping fee based on these specifications and the specifications of the product. Initially, you can choose boxes or rolls if these are available but you cannot have boxes and rolls in the same template.

If you have more than one packaging unit, the most appropriate packaging units will be selected.

Alternatively, you can enter the maximum number of copies per packaging unit in the **Max. Copies** box to overrule this calculation. For example, use this option if you only want to ship maximum 5 posters in a tube.

- 4 In the **Packaging Parameters** pane, specify whether you want the products to be shipped in 2 or more small boxes instead of 1 large box in the **Keep smaller boxes** drop-down list.

### ▷ Packaging Simulator

Once you have selected the packaging units, you can use the Packaging Simulator to simulate possible packaging scenarios for orders containing products based on this template.

- 1 On the menu bar, choose **Product Templates** and then the **Packaging Units** tab.
- 2 In the Packaging Simulator pane, enter a representative page count (bound products only) and order quantity, and click the Calculate button.



- 3 The simulator displays how the order will be packed.

**Packaging Parameters**

Keep Smaller Boxes: 3 ▾

Instead of packing the items in a single larger box, we keep using up to the specified number of smaller boxes as long as the next bigger box is not filled for more than 50%. Default value is 3. This feature only applies to the packaging units of type "Box" and not to "Roll".

**Packaging Simulator**

Use this to do a packaging simulation with the Packaging Units defined for this template.

Pages:

Quantity:

**Elastiekskes Co. - HighGloss - Glossy Plastiexkes - 9mil / Elastiekskes Co. - HighGloss - Glossy Plastiexkes - 4mil**

416 x Box_8.3x11.7x5.5_10oz_5lb	12 items & 4.75 lb (gross) per Packaging Unit
1 x Box_8.3x11.7x5.5_10oz_5lb	8 items & 3.375 lb (gross) per Packaging Unit
	1,979.428 lb in total

Related topics: • [“About Shipping Costs Based on Packaging” on page 70](#)

## Preflight Tab

In this tab you can override the default preflight settings for the products created with this template. The settings are the same as in **Advanced > Production Settings > Preflight Defaults**. See “Preflight Defaults” on page 87.

---

**NOTE:** Only for Uploadable and Customizable products.

---

# Production Tab

In this tab you can override the default prepress settings for all products based on this template. You can also enable the Apogee WebApproval Flow to let shoppers review their ordered content in the WebApproval application (requires setting up the shopper as a guest approver in Apogee Prepress).

## ▷ Override the default prepress settings

- 1 On the menu bar, choose **Product Templates**.
- 2 Click **Production** and clear the **File type** check box.

Now you can specify the file type, MJD Mime or PDF/JDF. See “Prepress Settings” on page 98 for more information about these file types and when they are relevant.

- 3 Enter the **Ticket Template** that you want to use instead of the default ticket template or leave this field empty if you do not want to override the default. See “Prepress Settings” on page 98 for more information on when a ticket template is relevant. Job ticket templates created in Apogee Prepress 11.0 and higher, or Asanti Production 4.0 and higher with the option ‘Mark available for STOREFRONT’ appear automatically in this drop-down list.

## ▷ Enable Apogee WebApproval Flow integration

The use of WebApproval does not affect order statuses. As long as orders are being processed, they have the status ‘In Production’ in StoreCenter. When pages are rejected in WebApproval, this also does not impact the order in StoreCenter. Replacing the rejected pages will have to be handled manually. WebApproval uses its standard messages to invite a shopper to approve pages. This means the shopper will receive an e-mail with a subject line such as “The first pages are available to inspect in job “23599-001 A4 Catalog (23599)””. The e-mail body will state ‘You are invited to approve the pages of your job “23599-001 A4 Catalog (23599)”’. The first pages are available to inspect. You can go to your job by clicking the following link:’. No reference is made to the fact that this is a product previously ordered via a storefront. The only link is the job name which includes the StoreFront order ID and product name. This means that WebApproval should only be used in stores for which users can be made familiar with the approval process and know that it is part of the ordering process. It can be useful to mention the WebApproval step in the product description of all products that require such an approval.

- 1 On the menu bar, choose **Product Templates**.
- 2 Click **Production** and enable the Apogee WebApproval Flow check box.

### ▷ Override the default Print Process with JDF Production Intent

When a print job is described using JDF, a Production Intent tag can indicate if that job is intended to be produced using an offset (lithography), digital (electro-photography) or inkjet press. You can choose this intent in the **Print Process** drop-down list and this overrides the default Prepress Setting.

Related topics:

- [Configure Prepress Settings on page 99](#)
- [Integrating STOREFRONT with Apogee Prepress/Asanti on page 326](#)
- [Downloading and Processing Files on page 322](#)
- [System Requirements on page 35](#)





# Products

Products are the publications and non-printed items that you want to sell or distribute via stores. They are initially created for a specific Company and can be used in all the stores of the Company.

This section explains how to create and edit the different product types. Once a product has been created, you can assign it to an existing or new store.

▶ Products List Overview .....	154
▶ Product Types .....	155
▶ Creating Products .....	157
▶ Editing Products .....	180

# Products List Overview

- ◆ On the menu bar, choose **Products** and select a company to see the list of products which have been created for a company.

Product	Stores	Product Template	Stock	Tax Code
'Shorts' newsletter	SunDiver	Leaflets - A4 double-sided portrait		Standard Rate
'Tweets' newsletter	SunDiver	Leaflet - A4 single-sided		Standard Rate
Augusta Baseball	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Basketball	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Main	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Outerwear	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Soccer	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Spiritwear	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Augusta Track	SunDiver	Catalogs - 209x276 CMYK glossy cover		Standard Rate
Autocreate a batch of business cards	SunDiver	Business Card - 55x85 single-sided		Standard Rate
Bark Samples	SunDiver	Poster - 30x50cm		Standard Rate
Beach Poster L96584125	SunDiver	Poster - A2 single-sided		Standard Rate
Beachball GB69581248b	SunDiver	Goodies - 1 to 50, 0.3 euro, no options	300	Standard Rate
Beachball GB69581248c	SunDiver	Goodies - 1 to 50, 0.3 euro, no options	5400	Standard Rate
Beachball GB69581248r	SunDiver	Goodies - 1 to 50, 0.3 euro, no options	49	Standard Rate
Beachball GB69581248y	SunDiver	Goodies - 1 to 50, 0.3 euro, no options	600	Standard Rate
Beachball GB695812	SunDiver	Goodies - 1 to 50, 0.3 euro, no options	100	Standard Rate
Business Card - Old style	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Business Cards - No Portrait	SunDiver	Business Card - 55x85 single-sided		Standard Rate
Business Cards - No portrait, QR Code on back	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Business Cards - Optional QR code + pic on back - llog	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Business Cards - Optional QR code on back	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Business Cards - Optional QR code on back - Copy	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Business Cards - QR code on back - 2	SunDiver	Business Card - 55x85 double-sided		Standard Rate
Calender April 2013	SunDiver	Leaflet - A4 single-sided		Standard Rate
Calender August 2013	SunDiver	Leaflet - A4 single-sided		Standard Rate
Calender December 2013	SunDiver	Leaflet - A4 single-sided		Standard Rate
Calender February 2013	SunDiver	Leaflet - A4 single-sided		Standard Rate
Calender January 2013	SunDiver	Leaflet - A4 single-sided		Standard Rate

1

2

3

4

5

6

7

8

- 1 Products for the selected company
- 2 Stores where the product is used (empty if not used in a store)
- 3 Product type icons
- 4 The template on which the product is based (click to go to this template)
- 5 Stock level: multiple stock levels are indicated by 'Multiple', otherwise the quantity is displayed
- 6 Tax code
- 7 Product is assigned/unassigned (in use or not in use by a store)
- 8 Free shipping (lorry icon)

## Product Types

The following types of products are available:

- **Customizable Product:** The shopper can edit the publication before buying it (e.g. business cards, data sheets); you need to upload a STOREFRONT Package.
- **Variable Data Product:** The shopper can upload an Excel file (both XLS and XLSX formats are supported) to create multiple versions of a publication with variable data (names, addresses, product names, images, etc.). This is a special type of customizable product.
- **Uploadable Product:** The shopper can upload a PDF or an image file (JPEG, TIFF, PNG, BMP) which is printed according to the product definition. PDF files are preflighted (optional) to check conformity with the product definition. The shopper can control how image files are placed on the available media.

---

**NOTE:** Image files (JPEG, TIFF, PNG, BMP) can only be uploaded for unbound *folded* and *flat* template base types.

---









- **On-Demand Product:** The publication already exists and a quantity is printed on-demand as ordered by the shopper.
- **Printed Stock Product:** The publication is already printed and in stock.
- **Non-Printed Product:** Items in stock which are not printed publications (e.g. giveaways, promotional items, pick and pack products).
- **Digital Product:** This product type can be used if you want to sell digital products such as e-books, images, videos, clip-art, templates. The shopper receives an e-mail with a link to download the files. The e-mail is sent when the order reaches the Prepared order status (5 to 20 minutes after the order is placed). The link will also appear on the order details page: the shopper needs to refresh the page to see it.
- **Product Kit:** A bundle of products, i.e. kit items, that are sold together. Business cards, letterheads and envelopes are a typical example of a product kit.

---









**NOTE:** All the products in a store are based on Product Templates which have a specified base type (bound, unbound, digital, etc.). However, you can create different types of products from a single template.

---

The following icons are used to indicate the different product types in the products list.

-  Customizable product (HTML5-based)
-  Variable data product (HTML5-based)
-  Uploadable product
-  On-Demand product
-  Printed stock product
-  Non-printed product
-  Digital product
-  Product Kit

The following icons are used to indicate the status of a product.

-  Unassigned (not in use by a store)
-  Price list is not complete
-  Stock alarm level is reached
-  Product is out of stock
-  Free shipping: for product with free shipping enabled or for a digital product (shipping does not apply)
-  The product will become available (scheduling is applied)
-  The product will become unavailable (scheduling is applied)
-  Expired: the product is no longer available (scheduling is applied)

## Creating Products

The procedures for creating a product may differ slightly and depends on the type of product you want to create.

### *Prerequisites*

- A product is created for a company so this company must already be created. See “Create a Company” on page 46
- A new product must match the characteristics (media type, page count, allowed order quantities, etc.) of an existing Product Template. These characteristics are inherited from the template. You may need to create a new Product Template. See “Product Templates” on page 115.

### ▷ Create a product

- 1 On the menu bar, choose **Products**.
- 2 Select the company you want to create the product for in the Company drop-down list.
- 3 Click the **Add** button and choose a product type in the list.



- 4 Enter the Product Name.

This is the title of the product as it is displayed on the storefront.

---

**NOTE:** Do not use the following forbidden characters: / \ : \* ? " < > |

---

- 5 For *Printed Stock Products*, enter the number of units you have in stock and set an alarm level. You will be informed by e-mail when the stock reaches the alarm level or is out-of-stock. See also “Replenish low (alarm level reached) and out-of-stock products” on page 184.
- 6 Choose a Product Template from the list.

Some product templates can be used for different product types. Remember that the template must match the requirements for your new product: media type, page count, allowed order quantities, etc. However, templates that are not compatible with the product type are not displayed in the list. For example, Unbound - Flat - Variable - Size templates are only displayed for Uploadable Products.

7 Click **Create** to go to the next step.



The **Describe Your Product** dialog is displayed.

8 Complete the Product Description:

- |                            |  |
|----------------------------|--|
| <b>Summary</b>             | This description is displayed when you hover over the product block on the Category overview page. It's also used for the HTML <code>meta description</code> element on the Product page.  |
| <b>Product Description</b> | Here you can use the HTML WYSIWYG Editor to write a longer description which is displayed under the preview image on the Product page. See “HTML WYSIWYG Editor” on page 265 for more information on formatting the text.  |
| <b>Miscellaneous</b>       | Select the <b>No Approval Required</b> check-box to bypass the order approval process for this product; these orders will go immediately to the Pending tab.   |
| <b>Quantity</b>            | For a <i>Variable Data Product</i> , the quantity of the order depends on the Excel file that a shopper uploads. Here you set how the total number of units will be specified: <ul style="list-style-type: none"><li><input type="checkbox"/> Specified in the product page: The shopper specifies, on the product page, a quantity for each record in the uploaded Excel file. The quantity is the same for all records.</li><li><input type="checkbox"/> Specified in the Excel file: The shopper uploads an Excel file that includes a column for the quantity of each record. The quantity can be different for each record.</li><li><input type="checkbox"/> One copy per record: One unit is produced for each record in the Excel file. This option is typically used for direct mail products.</li></ul> |

Figure 6.28: Variable data upload link (1) and Excel file template (2), on a storefront product page.

**My New Bus Card Var Data**

First Name Last Name

SunDiver sportswear

Address  
Phone  
E-mail@sundiver.com  
www.sundiver.com

**Place Order**

This is a variable data product. You provide the data by uploading an Excel file (see template download links below).

Quantity per Record (25-10000)  
25

**Price per record:** \$70.00

Total Price depends on the number of records in uploaded Excel file.

**Upload Data & Start Editing**

**Templates**

Excel data template [Download](#)

**Specifications**

**Media Size**  
European business card , 85 x 55 mm, Landscape

**Media Type**  
Glossy OnlyW - Gloss coated paper - 100g

**Single sided**  
Full Color

**Supported quantities per record**  
25-10000

Quantity per Record	Price
25	\$70.00
50	\$120.00
100	\$220.00
1,000	\$2,020.00
10,000	\$20,020.00

Prices exclude taxes and shipping costs (if applicable).

**SKU Code** Choose **Single SKU** if you want to use the same code for all versions of a product, or select an option category from the drop-down list and enter an SKU code based on the different product options, i.e. so-called multi-SKU products. For example, specify a code for the different color versions of a non-printed product. Selecting the option category is important when creating a *Digital Product*. See “Create a Digital Product” on page 169.

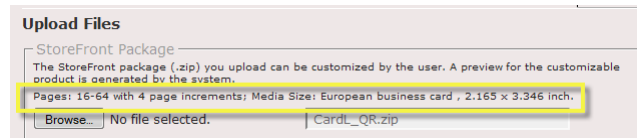
**Backorder Allowed** Non-Printed and Printed Stock products only. Select the check box if you want to allow shoppers to order products even if they are no longer in stock. See “Set backorder quantity” on page 186.

## 9 Click Next.

The **Upload Files** dialog is displayed.

For *Customizable Products* and *Variable Data Products*:

- ◆ Browse to the location of the **StoreFront Package** to upload a customizable document that matches the specifications of the selected product template (size, etc.), as indicated in the STOREFRONT Package panel.



The package is a file with a .zip extension. Uploading a file is a requirement to continue the creation of your product.

---

**NOTE:** The ZIP file must be a STOREFRONT package with a document that matches the specifications of the selected product template, otherwise the product cannot be created. STOREFRONT packages are created in Adobe InDesign using the STOREFRONT Converter plug-in. See “Online Editor” on page 335 for more information.

---

- ◆ Browse to the location of a **Data** Excel file from which shoppers can select records when customizing the document, using the autofill feature: see “Use an Excel file for Autofill” on page 506.
- ◆ Choose the Online Editor that you want to make available for the shopper (see “Online Editor” on page 335 for more information):

Technology:

- HTML:** means that the newer, HTML5-based version of the Online Editor is activated.

Workspace:

- Basic:** the shopper can only edit or add text and images to existing text frames.
- Advanced:** the shopper can add content and also create new frames, link text frames, add lines, etc.
- Forms:** the shopper adds content using form fields and has no direct control over the layout.
- Expert:** combines the Advanced and Forms workspaces.



---

**NOTE:** You can only choose the Forms or Expert workspace for Variable Data Products.

---

For each version of the Online Editor you can also fine-tune the user interface by showing or hiding the following panel items:

Image Panels:

- Show My Images
- Show Product Images: You also have the option to show External Locations which are folders outside the STOREFRONT server. Each location is identified with an alias. Click the Edit button to open the Select Locations dialog where you can select a location or add a new location. See “External Accounts” on page 101.
- Show Store Images
- Show Design Images

For example, you may want to prevent shoppers using their own images in a layout to prevent copyright issues.

Text Panels:

- Show Character/Paragraph Settings
- Show Character Styles
- Show Paragraph Styles

For example, you may want to give shoppers the option to change the font.

See “Images Tab” on page 435 and “Text Tab” on page 431 for more information about these features in the Online Editor.

Extra features:

- 3D visualization

For *On-Demand* and *Printed Stock Products*:

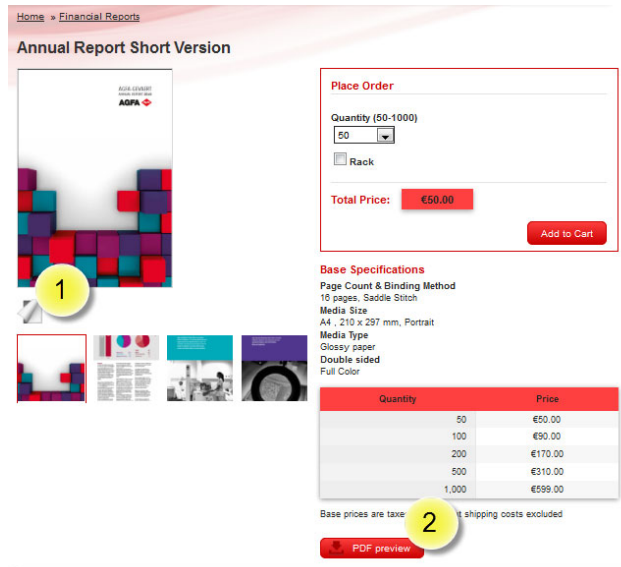
- ◆ Browse to the files you want to upload:
  - Low resolution PDF: This is the PDF preview file that can be downloaded by the shopper. Remember to upload a low resolution file for this purpose to ensure that a shopper cannot use the file for printing elsewhere. It is

recommended to add a watermark. See “PDF Preview” on page 96 for adding a watermark with STOREFRONT.

- High resolution PDF: The PDF file which is used for print production.

**NOTE:** These products can be Multi-Version, in which case you can specify files for each version.

Figure 6.29: The flip book button (1) and PDF preview button (2) on a storefront product page.



Home > Financial Reports

### Annual Report Short Version

ADD TO CART

1

**Place Order**

Quantity (50-1000)

50

Rack

**Total Price:** €50.00

[Add to Cart](#)

**Base Specifications**

Page Count & Binding Method  
16 pages, Saddle Stitch

Media Size  
A4 - 210 x 297 mm, Portrait

Media Type  
Glossy paper

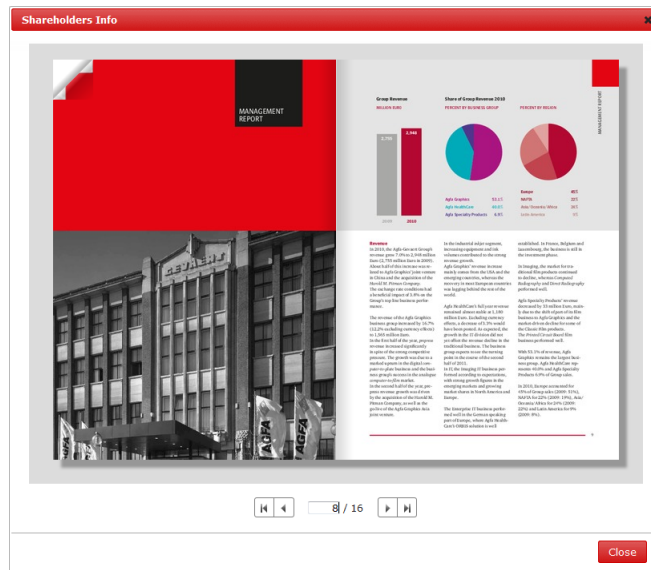
Double sided  
Full Color

Quantity	Price
50	€50.00
100	€90.00
200	€170.00
500	€310.00
1,000	€599.00

Base prices are tax... shipping costs excluded

2 [PDF preview](#)

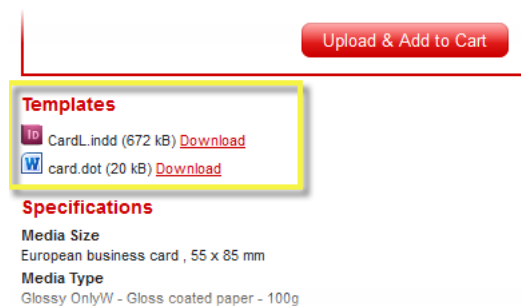
Figure 6.30: A shopper can browse through the document in flip book mode.



For *Uploadable Products*:

- ◆ Browse to template files (maximum 4) that you want make available for downloading on the storefront. The templates can be any type of file (ZIP, PDF, Illustrator, InDesign, Word, etc.) to illustrate or explain the expected requirements of the uploaded product, or to be used by the shopper to create the publication he wants to upload. Providing a template is optional but the file extension must always be included in the file name. Examples of template files are envelopes, newsletters, point-of-sales materials. The maximum file size for uploading is 1 GB.

Figure 6.31: Document templates in 2 different file formats, available for downloading by a shopper



For *Non-Printed Products*:

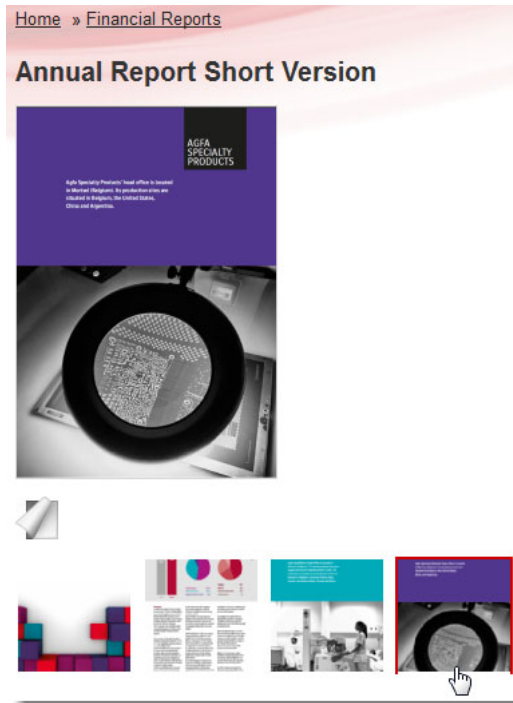
◆ No production files need to be uploaded.

- 10** Upload one or more preview images to illustrate the product on the storefront. If you don't have a dedicated preview image, the first page of your document is displayed as the preview by selecting **Generate from High-resolution PDF**.

A dedicated preview image can be useful if you want to display a preview which is different than the first page of the uploaded document, e.g. a cover with a 'New' or 'Special Offer' banner. If the product is Non-Printed and multi-version, you can upload images per version.

These can be JPEG, GIF or PNG files. STOREFRONT creates a thumbnail of each image which can be clicked to its full size.

Figure 6.32: Preview images illustrate the cover and inside of a publication on a storefront



You can provide several preview images to illustrate the cover and a selection of inside pages for example.

Click the **Add** button and browse to additional images.



---

**NOTE:** For uploadable products, it is recommended to upload an informative preview image that, for example, indicates the expected orientation of the product.

---

For a *Digital Product*:

- ◆ In the Digital Content panel, browse to the file or files you want to upload. A file can be uploaded for each SKU code. These are the files that a shopper can buy and download. See “Create a Digital Product” on page 169.

---

**NOTE:** Digital Products can be Multi-Version, in which case you can specify files for each version.

---

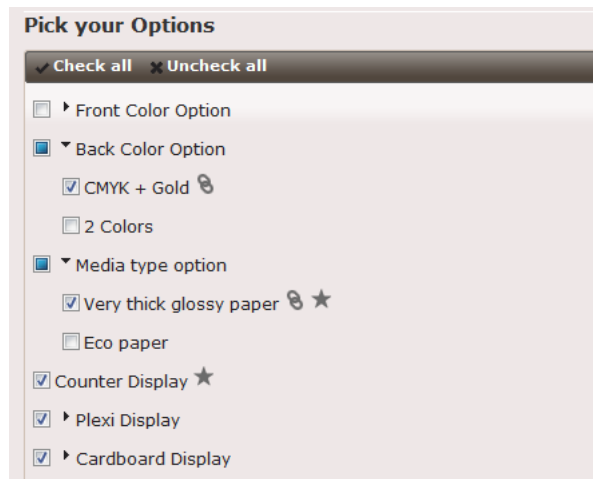
For a *Product Kit*:

- ◆ Upload images that illustrate the Product Kit, not the individual items. For example, upload one or more images of the kit packaging. See “Create a Product Kit” on page 173 to add the individual products to the kit.

## 11 Click Next.



The **Pick Your Options** dialog is displayed where you can select which product options you want to display on the storefront.



Follow the instructions as some product types do not allow multiple options. For example, only one color option and one media type option can be selected for Printed Stock products.

You can change the default options by selecting an option in the list and clicking the **Make Default** button.



**12 Click Next.**



The **Create Product Specifications and Define Tags** dialog is displayed. See “Add Product Tags” on page 178.

**13** In the Product Specifications panel, you can choose from 3 options in the drop-down list for displaying information under the Place Order box on the storefront product page:

- System-generated: Choose this option if you want to show the product specifications as they are generated automatically by the system.
- Hide: Hides the system-generated specifications on the storefront.
- Customize: If you choose this option, the system specifications are displayed in the HTML WYSIWYG editor where you can add information or edit the existing specifications. This information replaces the system-generated specifications under the Place Order box. You can always go back to the system-generated specifications by clicking the Revert button. You may prefer to use customized specifications for more complex products that need further clarification (a point of sales display, large posters with grommets, etc.). You can format the text and even add images using the HTML WYSIWYG editor.

**14** In the Product Tags panel, click an existing tag to add it to the comma-separated list of tags, or enter a new tag. Separate multiple tags with a comma.

See “Add Product Tags” on page 178 for more information.

**15 Click Next.**



The **Set Product Restrictions** dialog is displayed. Depending on the product template used to create the product, you will see one or more panels where you can set restrictions on certain template characteristics. For example, a template may provide quantities between 50 and 5000 copies but you can set a restriction to offer only quantities between 100 and 500. You can also set a **Default Quantity** if you want the lowest supported quantity to be higher than the lowest supported quantity of the template (see “Default Quantity” on page 129). Restrictions do not apply for a digital product.

**16 Click Next.**

The **Select Access Labels** dialog is displayed.

**17** Choose the labels that you want to assign to the product by selecting the check boxes.

The checked labels appear in the panel on the right.

See “Access Labels” on page 262 for more information about using access labels to control who can see which products on the storefront.

---

**NOTE:** Access labels set on a Product Category override access labels set on a Product.

---

**18 Click Next.**

The **Set Price and Schedule** dialog is displayed with the following settings:

**Pricing**

(VDP and multi-documents only) Select the check boxes to apply the set-up cost, quantity pricing and package unit cost for each individual record or document. Clear the check boxes to apply the cost and pricing once to the entire order item. For example, if you have lower prices for higher quantities of an ordered item, the total price will be higher if you select the **Quantity pricing per separate record/document** check box. Selecting this option also affects the calculation method for shipping: when the Fixed Fee per Shopping Cart Item option is enabled, the fixed fee is multiplied for each separate record/document (see “Shipping Services” on page 65).

**Discount/Markup**

Applies a discount/markup (higher price) only to the product you are creating as opposed to an overall discount on the price list. Enter a Fixed or Percentage discount in the box for the selected price lists:

- Fixed: for example, enter 5 to apply a discount/markup of 5 euros (dollars, etc.) per copy or item
- Percentage: for example, enter 10 to apply a 10% discount/markup
- Discount/Markup: Choose whether you want to apply a discount or a markup (higher price)

Select the **Also show the non-discounted price** check box to display the original price on the storefront.

**Place Order**

Size  
A1 Portrait

Width 594.0 x Height 841.0 mm

Quantity (20-500)  
500

**Total Price:** ~~€134.80~~ **€121.40**

Upload & Add to Cart

**NOTE:** If the product is part of a Product Kit, the discount is only applied if the product in question is also available in the same store. Alternatively, use the Cost Weight option as described in “Create a Product Kit” on page 173 to apply a discount for products in a Product Kit. See also “Create a Product Kit with Discounted Kit Items” on page 176.

- Tax** For all countries except US. Choose one of the tax code resources in the drop-down list.
- TIC** US only. Taxability Information Code (TIC) for US sales tax calculation by the TaxCloud service. Use this option to set a specific TIC which is different than the code set at the store level. See “TaxCloud Integration” on page 566 for more information.
- Shipping** Select the **Free shipping (always)** check box to always offer free shipping for this product, and choose whether or not the product can be combined with other order items for **Combined Packing**:
- None: do not combine ordered products with each other for shipping
  - Same Template: the ordered product may be grouped with items based on the same product template
  - Same/Compatible Size: group the item with any product that allows grouping, provided that product has the same size, with a tolerance of five percent (for boxes)/provided that the product’s dimensions fall within the minimum and maximum width constraints of the roll packaging unit dimensions (for rolls)

**Scheduling - Limit Product Availability**

Here you can set the product availability. A product which is not available is not displayed on the storefront.



- ❑ From and To are empty: the product is available immediately and no end date applies
- ❑ From: Enter the date from when the product will be available.
- ❑ To: Enter the date when the product will no longer be available.

**19 Click Save and Close.**

Save and Close

The new product is added to the list with its details (grayed out).

At this stage, the product has not yet been assigned to a store and this is indicated with the Unassigned icon:



This icon is no longer displayed once the product is being used in at least one store.

▷ **Create a Variable Data Product**

See “Variable Data Processing (VDP)” on page 382.

▷ **Create a Digital Product**

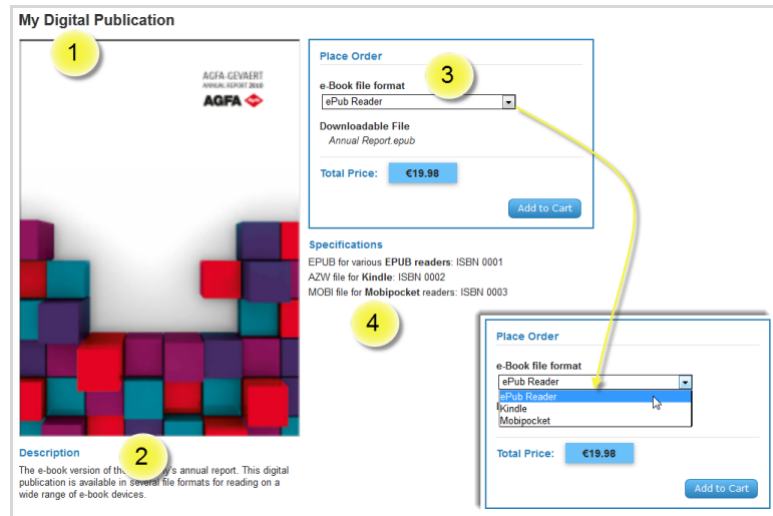
---

**NOTE:** This feature may not be included in your license pack.

---

This is the procedure for creating a digital product once you have created a template for a digital product. See “Creating Products” on page 157.

Figure 6.33: A digital product with multiple values in a drop-down list to download different file formats of the same publication



- 1 Product title
- 2 Description
- 3 Options
- 4 Specifications (customized)

- 1 On the menu bar, choose **Products**.
- 2 Select the company you want to create the product for in the Company drop-down list.
- 3 Click the **Add** button and choose **Digital Product** in the list.



- 4 Enter the Product Name.

This is the title of the product as it is displayed on the storefront.

---

**NOTE:** Do not use the following forbidden characters: / \ : \* ? " < > |

---

- 5 Select the product template in the list. The list is filtered and you only see templates that can be used for digital products.
- 6 Click **Create** to go to the next step.

**Create**

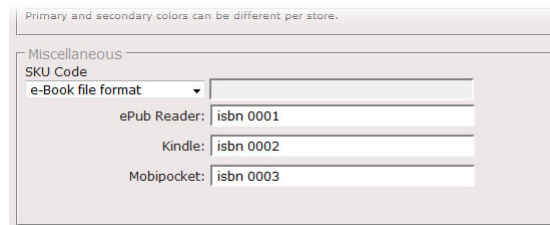
The Describe Your Product dialog is displayed.

- 7 Complete the Product Summary and Description.
- 8 In the Miscellaneous panel, enter the **SKU code**. This is your ID code for the file or files that you are going to upload.

Choose Single SKU if you only want to upload 1 file. In this case, an SKU code is also optional.

OR

Choose your option in the drop-down list if you want to upload more than one file. In this case you must enter a unique SKU code for each file you want to upload.



Primary and secondary colors can be different per store.

Miscellaneous

SKU Code

e-Book file format

ePub Reader: isbn 0001

Kindle: isbn 0002

Mobipocket: isbn 0003

---

**NOTE:** If you do not change the default Single SKU to your option, you will not be able to upload more than one file.

---

- 9 Click Next.
- 10 Upload one or more preview images.
- 11 In the Digital Content panel, upload the files for each option.

The following file types are supported:

- ❑ Audio file types: MP3 (version 2.3.1 and later), WAV
- ❑ Compressed file types: ARJ, GZIP, TAR, TGZ, ZIP
- ❑ E-book file types: AZW, EPUB, MOBI, PRC
- ❑ General file types: HTML, PDF, RTF, TXT, XML
- ❑ Image file types: AI, BMP, DXF, EPS, GIF, ICO, INDD, JPEG, PNG, PSD, SWF, TIFF
- ❑ Office file types: DOC, PPT, XLS
- ❑ Video file types: AVI, FLV, MPEG, MPG, MP4, MOV, SWF, WMV

Other file types are best packaged in a ZIP file

- 12** Click Next. For Digital Products, the Product Specifications are set to **Hide** by default. However, if you want to show specifications such as the ISBN number on the product page, choose **Customize** in the drop-down list and enter the information using the HTML WYSIWYG editor.

**13** Click Next. In the Set Price and Schedule dialog, you only need to select the Tax Code. The Shipping and Scheduling settings are not necessary because the files can be downloaded immediately by the shopper.

**14** Click **Save and Close**.

Save and Close

The new product is added to the list with its details (grayed out).

At this stage, the product has not yet been assigned to a store and this is indicated with the Unassigned icon:



This icon is no longer displayed once the product is being used in at least one store.

## ▷ Create a Product Kit

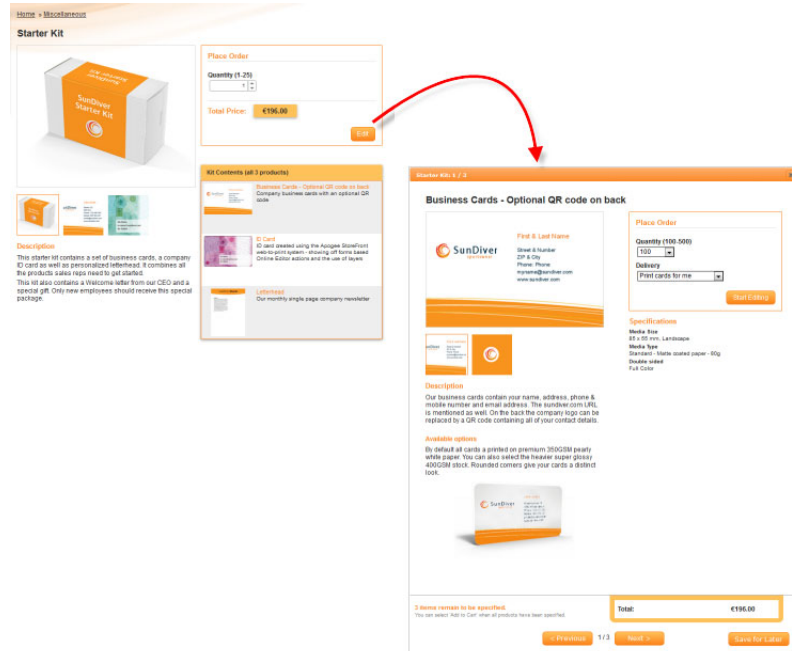
---

**NOTE:** This feature may not be included in your license pack.

---

A product kit is a bundle of products, i.e. kit items, that are sold together. Business cards, letterheads and envelopes are a typical example of a product kit. The kit items behave just like the original products, and the shopper can specify quantities and options for the individual kit items.

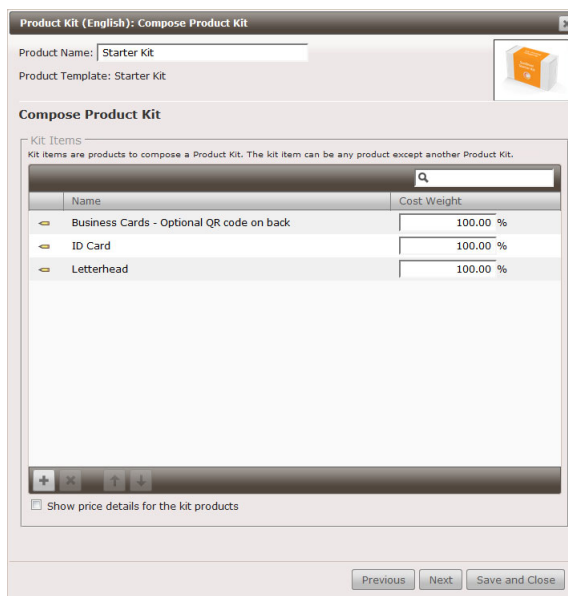
Figure 6.34: A product kit consisting of 3 products. The shopper clicks the Edit button to open the wizard and specify the details for each product.



A kit must contain at least two products and may contain up to sixteen of the same or different product types, including customizable products. The shopper edits the kit items in a step-by-step wizard. A product kit cannot contain another product kit as kit item.

This is the procedure for creating a product kit once you have created a product kit template.

- 1 Start by creating a product as explained in “Creating Products” on page 157.
- 2 In the Upload Files dialog, upload images that illustrate the product kit, not the individual items. For example, upload one or more images of the kit packaging. The individual items in the kit are illustrated with their respective preview images.
- 3 Click **Next** to display the Compose Product Kit dialog.



- 4 In the Kit Items panel, click the Add button and select at least two products for your product kit from the list of products. Press and hold the CTRL key to select multiple products and click Add. You can add different product types to a product kit.

The products are added to the Kit Items list where you can specify a **Cost Weight**. The default cost weight is 100% which means that the full price of the kit item is added to the price of the product kit as specified in the product template. You can specify a lower cost weight (< 100%) if a kit item is less expensive when part of a kit, or increase its price (> 100%). It is not possible to show the original price of the kit item on the storefront if it is affected by the cost weight. See “Create a Product Kit with Discounted Kit Items” on page 176 if you want to do this.

- 5 Select the **Show price details for the kit items** check box if you want to let the shopper see the prices of the different products in the product kit wizard and during the checkout procedure on the storefront.

---

**NOTE:** This kind of information is cached on the STOREFRONT server and is not updated immediately for shoppers to see. See “Caching” on page 196.

---

- 6 Click **Next** to continue with the wizard as explained in “Creating Products” on page 157.

A product kit behaves like a regular product and can have access labels, discount, etc. You may also want to set restrictions, for example on the quantities, when a product is part of a kit.

---

**NOTE:** Don't forget to add the product kit to your store. Orders for product kits are processed together as a whole, like regular products.

---

---

**CAUTION:** Be careful when changing the composition of product kits for kits that are already used in a store. Invalid kits will be removed from the shopping cart.

---

### ▷ Create a Product Kit with Discounted Kit Items

A Product Kit behaves like a regular product and you can apply a price and a discount to the kit in the same way as you would for a product (see “Creating Products” on page 157). The price of the product kit is added to the price of the individual kit items. If the individual kit items have their own discount (percentage or fixed), these discounts are applied on top of the Product Kit discount. However, this is only true if the kit items are also offered as separate products in the same store. If you do not want to include the individual kit items in the same store, you have the following options:

- You can offer kit items at lower (or higher) prices using the Cost Weight option as described in “Create a Product Kit” on page 173, however, this is always a percentage discount and the discount is not displayed as such to the shopper on the storefront.
- To add a discounted product to a kit without making it available in the store, add it to the store but set it up so shoppers can't actually buy it:
  - Set the availability date in the distant future so the product never becomes available.
  - Assign an access label to the product but not to any users (the Access Labels feature requires a MallPack Silver license).
  - Put the product in a disabled product category.

---

**NOTE:** Disabling the product in the product list is not a solution because the product will no longer be available in the Product Kit.

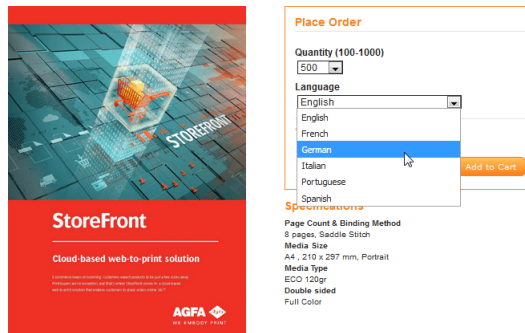
---

### ▷ Create multi-version or multi-SKU documents

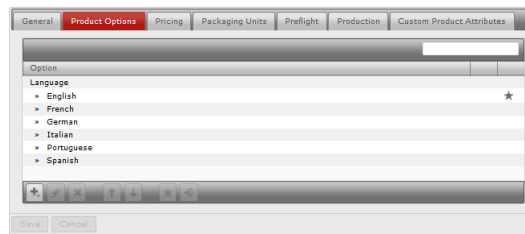
To create multi-SKU versions of non-printed products, for example a USB memory stick that is available in multiple colors, see the procedure for creating a product and select an option category per code (see “SKU Code” on page 159).



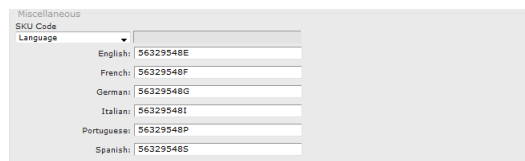
You can also create multi-version products for on-demand products, for example publications in multiple languages or with international variations, and assign an SKU code to each version.



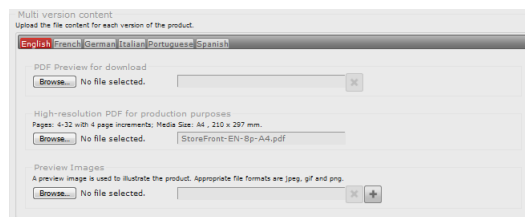
### 1 Define options in the product template:



### 2 In the product settings you can choose to make all options available or you can limit the number of available options. In the Product Description tab, you need to specify which option defines the versions. You can then give each unique version its matching SKU code.



### 3 In the Upload Files tab, you can upload the files associated with each version.



When users select a different version, this means the product image, PDF preview file and flipbook also differ per version. STOREFRONT will also send a different high-res production file to the Apogee Prepress or Asanti workflow, depending on the version ordered.

### ▷ Add Product Tags

When defining a product, you have the opportunity to add invisible tags to the product specification. These can be existing tags which have been used for other products or new tags that you create as needed.

Tags are keywords which are not necessarily included in the title or description of the product but which you may want to include to improve searching effectiveness when shoppers are looking for a particular product on the storefront. These keywords can refer to the subject, language, etc. of your publication or product. It's also good practice to include synonyms.

- ◆ In the Create Product Specifications and Define Tags dialog of the product wizard, you can either:

Click an existing tag to add it to your product.

OR

Enter one or more new tags, each separated with a comma. These new tags will appear the next time you use the wizard.

Digital Product (English): Create Product Specifications and define Tags

Product Name: Space Odyssey Revisited

Product Template: Test digital

**Create Product Specifications and define Tags**

Product Specifications: Hide

Product Tags: digital, e-book, 2013, English, science-fiction,download

Separate each tag with a comma

Tags used in other products: Poster 2013 English 2012 business card digital e-book

Previous Next

▷ **Create a product with user-definable size**

Some products can use a template that allows the shopper to choose the size. See “Preferred Sizes Tab” on page 130 and “Customizable Product with User-Definable Size” on page 508.

# Editing Products

Once a product has been created and appears in the product list overview, you can perform a number of actions on it.

## ▷ Edit a Product

You can edit the product settings by selecting the product in the Product list and clicking the Edit button. Modifications also apply to products which are already assigned to a store.

---

**NOTE:** Changes to the product name, description and preview images are displayed with a slight delay (maximum 10 minutes) on the storefront due to caching.

---

- 1 Highlight the product in the list and click the **Edit** button.



- 2 Choose one of the options in the list and edit as required:
  - Description:** Opens the Description dialog where you can modify the Product Name, Summary, Description and SKU code.
  - Uploaded Files:** Opens the Upload Files dialog where you can change the initially uploaded files.
  - Options:** Opens the Pick Your Options dialog where you can select the product options you want to offer, for example a selection of the media types inherited from the template.
  - Specifications and Tags:** Opens the Product Specifications and Tags dialog where you can set the Product Specifications and add or delete tags.
  - Restrictions:** Opens the Set Product Restrictions dialog where you can edit the quantities.
  - Access Labels:** Opens the Access Labels dialog where you can select or clear labels. See “Access Labels” on page 262 for more information about using access labels to control who can see products on the storefront.
  - Pricing and Scheduling:** Opens the Scheduling dialog where you can change the availability dates.

- ❑ **Items in stock:** Opens a dialog where you can edit the stock for Printed Stock Products and Non-Printed Products.
- ❑ **Online Editor:** Opens the Online Editor for Customizable and Variable Data products. This is where you fine-tune the document and define what can be changed by the shopper. See “Online Editor” on page 335 for more information.

- 3 Click **Save and Close** to confirm your changes or click the **X** button in the top right corner to close the editing dialog without saving.

### ▷ **Show/hide a Product on the storefront**

You can show or hide a product on the storefront. You may want to do this if a publication is no longer up-to-date, if it is unavailable or needs to be taken off-line temporarily.

- 1 On the menu bar, choose **Products**.
- 2 Select a company in the Company drop-down list.
- 3 Highlight an enabled (black) product in the list and click the **Enable/Disable** button to hide the product.



The product is still in the list but it is now grayed out. It's also grayed out in the Product Catalog of the store.

The product is no longer displayed on the storefronts of the stores it was assigned to.

- 4 Click the **Enable/Disable** button again to show the product and display it again in the storefront.

### ▷ **Delete a Product**

- 1 Highlight a product in the list and click the **Delete** button to delete the product from the list.



---

**CAUTION:** Deleting a product in the product list will also delete the product on all the storefronts. No warning is displayed.

---

- 2 Click the **Delete** button to confirm.

### ▷ Duplicate a Product (same or different company)

Products can be copied for use by the stores of the same company or use by the stores of a different company.

- 1 Highlight a product in the list and click the **Duplicate** button.



- 2 In the Duplicate for company drop-down list, choose the company that you want to duplicate the product for.

- 3 Click **Duplicate**.

A duplicate product is added to the list with the same name and the '- Copy' suffix. If you copied the product for a different company, select this company in the Company drop-down list at the top of the panel.

- 4 Highlight the product in the list and click the **Edit** button to modify the name and any other settings you want to change.



At this stage, the product is grayed out in the list because it is not being used in a store.

### ▷ Export a list of all stock products

You can export an Excel file that lists all the printed and non-printed stock products with their current stock levels.

- 1 On the menu bar, choose **Products**.
- 2 Select a company in the Company drop-down list.
- 3 Click the **Export Products with Stock Levels** button to open or save an Excel file with all the stock details.



The following details are provided:

- company id, name and MIS id
- linked stores: stores where the products are made available
- product id, name, SKU
- option id, name, value id, value name, value SKU

- ❑ stock: the quantities still in stock
- ❑ Backorder Limit and Backorder Available

### ▷ Look up where a product is used

Products can be used in multiple product categories and across the stores of the same company. In the Stores column of the Products list, you can see in which stores a product is being used. You can use the look-up feature to navigate quickly to the product categories where a product is being used.

- 1 Select a product in the product list.
- 2 Click the Look-up button.



The stores where the product is used are listed with links to the respective product categories.

- 3 Click a link to go to the store's Product Catalog and the relevant product category.

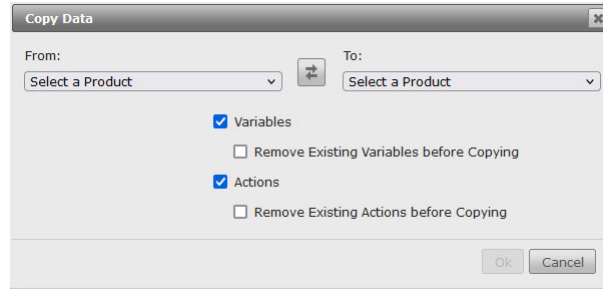
### ▷ Copy Variables and Actions to another product

If you created a product with many variables and sophisticated actions to validate the formatting of e-mail addresses and phone numbers, you can now copy all these settings to another product without redoing all that work.

- 1 First create your new product.
- 2 Select any product in the product list.
- 3 Click the Copy Data button.



- 4 Choose your new product in the To field and the product you want to copy the Variables or Actions from in the From field. Alternatively, select both products in the Products list so they appear in the From and To fields.
- 5 Choose whether you want to remove Variables and/or Actions that already exist in the product.



### ▶ Replenish low (alarm level reached) and out-of-stock products

For *Printed Stock Products* and *Non-Printed Products* you can set an alarm level for when the stock reaches a certain level or is completely out of stock. All printer administrators are informed by e-mail when these levels are reached so you can replenish the stock.

- 1 Click the link in the notification e-mail to go directly to the low-stock product.

OR

On the menu bar, choose **Products** and select the company and highlight the product which needs replenishing in the list of products.

All printer administrators received an e-mail with the name of this product and it is indicated in the list with a special warning icon and the alarm level or out-of-stock level.

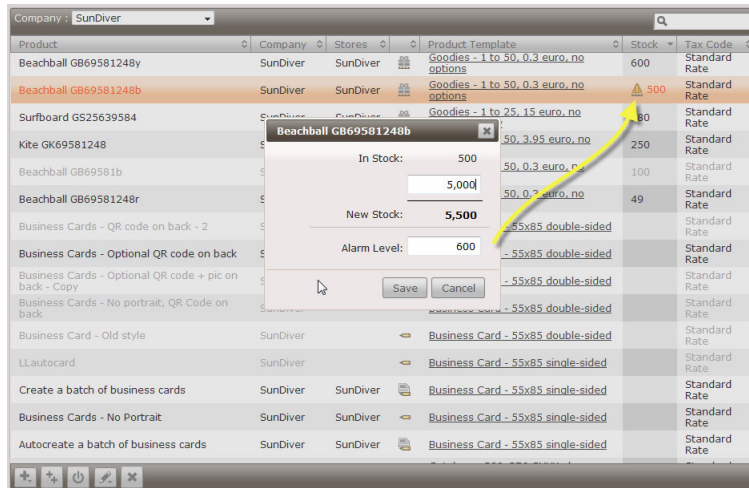
Product	Stores	Product Template	Stock	Tax Code
My Latest Card		My business card		Standard Rate
My New Busines Card One Per Row	My New Private Store	My business card		Standard Rate
My New Printed Stock Product	My New Private Store	6048_BSpC_G120_6323	100	Standard Rate
My printed stock product	My New Private Store	6048_UBFo_F-B_G120_Dupl	0	Standard Rate
My uploadable bus card	My New Private Store	My business card		Standard Rate

- 2 Click the **Edit** button and then **Items in Stock** to add extra stock.



You can now enter extra stock which is added to the remaining stock, and modify the alarm level if you want.





### 3 Click **Save** to confirm your changes.

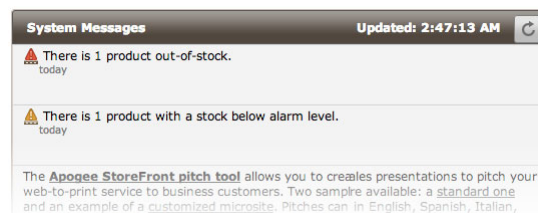


Low stock levels and out-of-stock products are also reported in the System Messages panel on the Dashboard. Stock values can also be negative due to backorders. Replenishing a negative stock must always be done to minimum value 0. For example, if the stock is -500 then the stock must be replenished with minimum 500.

The following notifications are possible:

- Out-of-stock and with backorder limit reached
- Out-of-stock but available for backorder
- Out-of-stock
- Stock below alarm level

Figure 6.35: System messages for out-of-stock and low stock levels



## ▷ Set backorder quantity

If the Backorder Allowed option is enable when creating the product, shoppers can order a quantity of this product even if the quantity exceeds the available stock.

- 1 Select the product in the list of products.
- 2 Click the **Edit** button and then **Items in Stock** to set the backorder quantity.



You can now enter a quantity in the **Backorder Limit** box. This is the maximum quantity that shoppers can order on top of the quantity in stock. This quantity is displayed for shoppers in the Place Order panel.

A screenshot of a 'Place Order' panel. At the top, it says '10 in stock, 500 for backorder' in orange text, which is highlighted with a yellow box. Below this, there is a 'Quantity (1-20)' dropdown menu with '20' selected. Underneath is a 'Color' dropdown menu with 'Orange' selected. At the bottom left, it shows 'Total Price: €80.00' in an orange box. At the bottom right, there is an orange 'Add to Cart' button.

If you leave the Backorder Limit box empty, the backorder quantity is unlimited.

- Related topics:
- [Product Templates on page 115](#)
  - [Product Catalog Tab on page 208](#)
  - [Add Products to an existing Category on page 211](#)
  - [Online Editor on page 335](#)

# Stores, Microstores and Storefronts

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**NOTE:** Some of the procedures in this section are for the Printer Administrator only.

---

The Printer Administrator sets up one or more stores in the StoreCenter for specific Companies. Every store has a corresponding storefront with a unique internet address (URL) and a customized look and feel. Microstores can be derived from main stores.

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## Storefront Website Overview

The storefront is the actual website where the products are displayed — with or without prices. The range of products available on the storefront is referred to as the Product Catalog and similar products are organized in Product Categories.

A storefront is private and secured if it can only be visited by users who have been assigned a login and password. The storefront is public if it can be accessed by anyone with internet access.

## Storefront Grid

The storefront consists of a header area and a footer area which is identical for all pages of the storefront. The navigation bar provides links to the various pages.

Figure 7.36: Storefront grid



- 1 Logo
- 2 Swirl
- 3 Language bar with links to localized storefront pages (optional)
- 4 Shopping cart and account
- 5 Navigation bar with page links and Search
- 6 Page content
- 7 Customizable footer (optional)

## Home Page

The Home page is the landing page of the storefront where the Product Catalog is displayed.

Figure 7.37: Home page layout

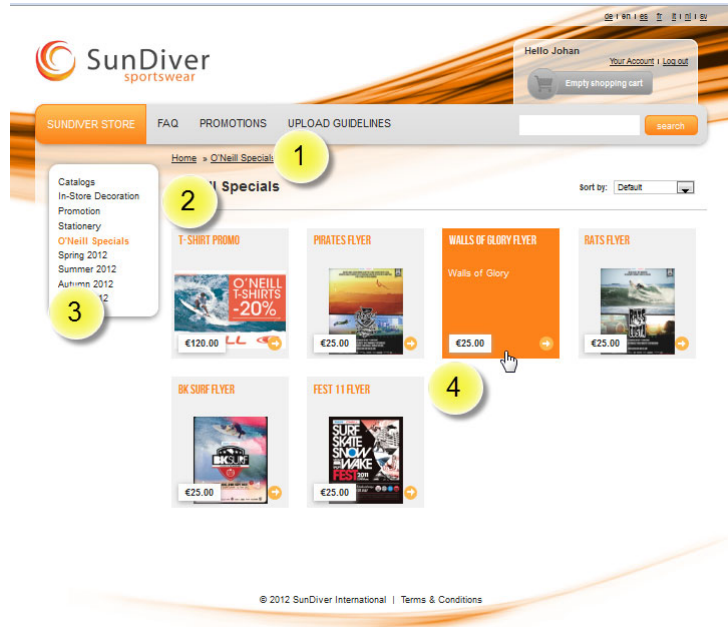


- 1 Link names in the navigation bar
- 2 Banner
- 3 Page title
- 4 Content
- 5 Image inserted in content
- 6 Contact box (optional)
- 7 Link box (optional)
- 8 Product catalog with product categories

## Product Category Page

Clicking a Product Category in the Product Catalog takes you to the second level of the website with pages that display all the products per Category.

Figure 7.38: Product Category page with products



- 1 Breadcrumb navigation trail
- 2 Current product category title
- 3 Navigation to other product categories
- 4 Products

## Product Page

Clicking a product in the Product Catalog takes you to the third level of the website with pages that display the information about the actual product.

Figure 7.39: Product page

The screenshot shows the SunDiver sportswear website's product page for 'Business Cards'. The page layout includes a header with the SunDiver logo and navigation links (SUNDIVER STORE, FAQ, PROMOTIONS), a user account section (Hello Jean-Francois, Your Account, Log out, Empty shopping cart), and a search bar. The main content area is divided into several sections:

- 1 Product name:** 'Business Cards' is displayed prominently at the top of the product section.
- 2 Place Order box:** A form for ordering, including a quantity selector (100, range 100-500), a 'Double sided' checkbox, a 'Full Color' dropdown menu, a 'Media type' dropdown menu (ECO 250), a 'Total Price' of €15.00, and an 'Edit & Add to Cart' button.
- 3 Specifications:** A section listing product details: Media Size (European business card . 55 x 85 mm), Media Type (ECO 250), and Double sided (Full Color).
- 4 Available order quantities and prices with pricing table footer:** A table showing the relationship between quantity and price.
 

Quantity	Price
100	€15.00
250	€20.00
500	€60.00
- 5 Product description:** A text block explaining that users can customize their own corporate cards with their name, function, address, phone, and email address. It also notes that all cards include the SunDiver logo and the URL of the website, and that the expected delivery time is 3 business days.
- 6 Preview images:** A section showing a preview of the business card design, including a SunDiver logo and contact information.

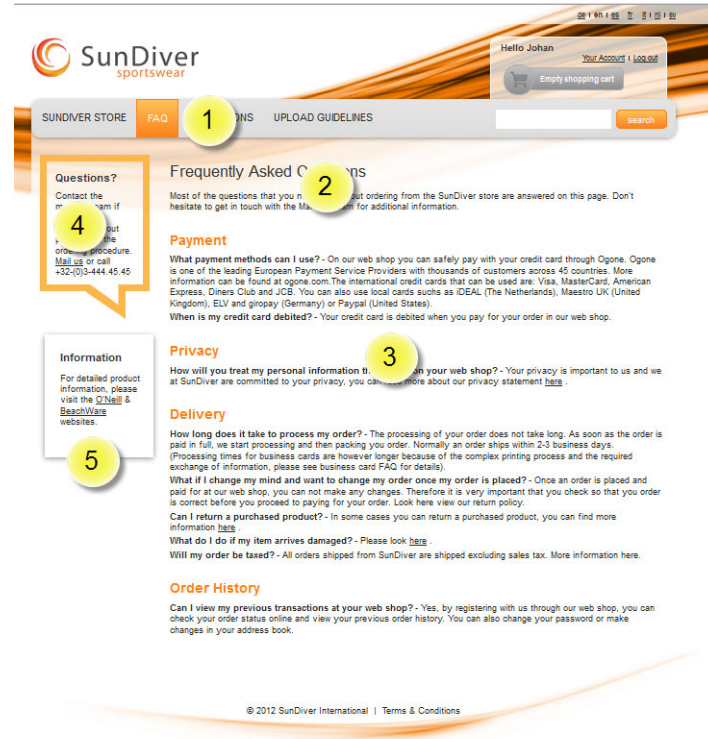
At the bottom of the page, there is a copyright notice: © 2011 SunDiver International | Terms & Conditions.

- 1 Product name
- 2 Place Order box with available quantities, media types and product options
- 3 Specifications of the product (system-generated, hidden or customized)
- 4 Available order quantities and prices with pricing table footer
- 5 Product description
- 6 Preview images

## Optional Pages

Three optional pages with links in the navigation bar contain additional information. The Copyright notice and a link to the Terms & Conditions page can be placed at the bottom of all pages.

Figure 7.40: Layout of the optional pages



- 1 Link names in the navigation bar
- 2 Page title
- 3 Content (can also include images)
- 4 Contact box (optional)
- 5 Link box (optional)

## Search

Every storefront page has a search box in the top right corner which is designed to help shoppers find products. To understand how search works you need to know that it is based on the following principles:

- The search engine is meant to find specific products or product categories. It will not search information pages or external sites.
- Search is not case-sensitive.



- The use of wild cards, such as \* or ?, or logical operators, such as AND or OR, is not supported.
- The following system fields are searched:
  - Category name
  - Product name
  - Product description
  - Product
  - SKU

### Regular and Suggestions Search

A *regular* search is performed when the shopper enters a search term and presses the Enter key or clicks the Search button. When the shopper starts typing, a list of suggestions appears in a separate pop-up window. This is the *suggestions* search. Clicking the View All button triggers the regular search function.

## Responsive Design

If you think shoppers will be viewing your storefront on mobile devices (smartphones, tablets, notebooks, etc.) you can choose to make it responsive. This means the page grid elements will adapt automatically to the size of the screen. For example, on a smartphone, the navigation bar is replaced by the Menu button (the so-called hamburger icon), the banner picture is hidden, the Product Catalogs are displayed in 2 columns instead of 4, and the language bar becomes a menu.

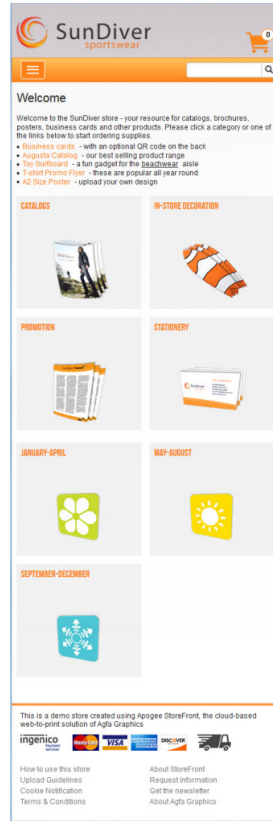
This option is chosen in the Style Tab. If you have a custom footer on your pages, you also need to make some changes in the Custom Footer Tab.

The responsive design grid uses the following screen widths to show/hide certain elements and adapt their arrangement:

- smaller than 768 px
- between 768 px and 992 px
- between 992 px and 1200 px
- larger than 1200 px

You should test what your storefront will look like in responsive mode on the various devices. You can do an initial test on a full-size computer monitor by reducing the size of the browser window to see the effect.

Figure 7.41: A storefront home page on a small screen



# Setting up a Store

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## Printer Administrator only

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A store and the corresponding storefront are managed in the Stores section. This section is divided into several tabs with the settings for the store and options for styling the storefront.

Complete the procedures provided here for each tab:

- General Tab: Set up the store (required)
- Product Catalog Tab: Add Categories and Products to the store (required)
- Languages Tab (optional)
- Shipping Tab: Choose a shipping resource (required)
- Style Tab: Define the look and feel of the storefront (recommended)
- Pages Tab: Add and edit the pages of the storefront (required)
- Invoice Tab: Customize your invoices (optional)
- Custom Footer Tab (optional)
- Promotions Tab
- Taxes Tab
- Meta Tags Tab (optional)
- Banners Tab: Create attractive carousel banners in HTML5 (optional)

### *Prerequisites*

A store can only be created and set up with the products you want to sell or distribute if the following have been created:

- A Company (required): “Companies and Administrators” on page 45.
- A Company Administrator (optional): See “Companies and Administrators” on page 45.

- A shipping service (required): See “Setting up Resources (Advanced Menu)” on page 61.
- The Products you want to sell: See “Products” on page 153.

## Caching

To increase the performance of the storefronts, certain information is cached on the STOREFRONT server which means that some of the changes you make in StoreCenter are not displayed immediately. The maximum delay is 10 minutes but it is usually shorter.

For example, product names, descriptions, product kits, product discounts, and preview images are cached so any modifications are displayed on the storefront with a delay. Prices are not cached so selecting a different price list takes effect immediately, except for the discounts.

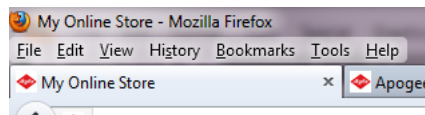
## General Tab

The General tab is where you enter the general information for the store. All of these fields are mandatory. Some fields are only displayed for editing after saving your initial store settings.

### General

- Name** Enter the name of the store, for example *My Online Store*. This name is used for the <title> tag on all the storefront pages. This is also the name of your storefront which appears in the browser title bar and tabs, the logon page and e-mail communications.

Figure 7.42: Store name in browser title bar and tab (with favicon)




---

**NOTE:** This name can be overridden by the SEO title of the individual pages. See “Pages Tab” on page 222.

---

- Site ID** This is a prefix which is added to your storefront URL to create a unique URL for this particular store. If your Site ID is *myonlinestore*, the URL for your storefront is `https://myonlinestore.apogeestorefront.com`. This ID does not necessarily have to be the same as the Name.

---

**NOTE:** The storefront URL for Asanti storefronts is `https://myonlinestore.asanti/storefront/`.

---

Only lower case, numbers and hyphens are allowed. Spaces are not allowed. If the URL already exists, a warning is displayed prompting you to choose a different site ID.

---

**TIP:** Once your storefront is live and advertised, it is not recommended to change the site ID and corresponding website address (URL).

---

**Custom Domain** This field is visible and can be edited after saving your initial store settings. You can use your own, custom URL for the storefront instead of the STOREFRONT URL formed with the Site ID. The custom domain is used for all the pages of the storefront.

The following domain types are supported but should not contain non-Latin characters:

- domain: e.g. `myURL.com`
- sub-domains: e.g. `shop.myURL.com` (but not `myURL.com/shop`)

An example of custom domain redirecting:

- A shopper navigates to `https://myURL.com`. The login window appears and the URL automatically changes to `https://myURL.apogeestorefront.com`. As soon as the user has filled in the name and password, and clicks OK, the main page appears and all URLs are now `https://myURL.com`. On a public storefront, shoppers only have to log in when they want to order products, so most visitors will not see the URL redirect.

---

**NOTE:** Read the important information about setting up your DNS server in the Custom Domain Name dialog.

---

**URL** This is a link to the storefront. If the store is off-line, the link is a preview. See “Previewing an off-line storefront” on page 206.

**Status** The storefront remains **offline** while you set it up; the status changes to **online** when the store is enabled. See “Putting your storefront online/offline” on page 206.

**Store Company** Select the company you want to create the store for in the Company drop-down list.

- Store E-mail** This e-mail address is used for sending notifications when an order is placed, shipped, forgotten password, etc. Specify a company administrator’s e-mail address if this person needs to approve orders.
- Tracking ID** Click the Edit button to open the Google Analytics dialog where you can enter the Google Analytics ID you generated on the Google Analytics website. It is recommended to add the listed domain names to the referral exclusion list in Google Analytics. See “Google Analytics” on page 569 for more information about using Google Analytics to monitor activity on your storefront.
- Maps API Key** This feature allows you to implement autocomplete functionality for shipping and billing addresses.

## Defining Numbers

These numbers can be used in customized numbering patterns to number orders, invoices and quotes by store. Here you can reset them, for example, in the beginning of a new year. See “Order/Invoice/Quote Number Format” on page 92.

- Store Code** Enter a code (maximum 5 characters with letters and/or digits) of your choice to identify this particular store. The code is used by the {storecode} variable.
- Store Order Number** The {storenumber} variable you can set for order numbering per store in the Order Number Format. Enter a number to reset the counter.
- Store Invoice Number** The {storenumber} variable you can set for invoice numbering per store in the Invoice Number Format. Enter a number to reset the counter.
- Store Quote Number** The {storenumber} variable you can set for quote numbering per store in the Quote Number Format. Enter a number to reset the counter.

## Login and Checkout

- Access**
- **Private (password protected):** The storefront can only be used by Users known by the system. You either create these users in StoreCenter or you enable the self-registration feature on the login page. Private is the recommended setting for B2B stores. All payment method options are available.
  - **Public:** The storefront can be viewed and used by anyone on the worldwide web; if you choose this option, the system automatically creates a sitemap for your storefront. See “Search Engine Optimization (SEO)” on page 33 for more information about the sitemap.
- Add -to-cart-flow** Choose what happens when a shopper adds something to the cart:
- Show Cart:** the shopping cart is displayed and the shopper can click *Continue shopping* to navigate back or start the checkout process

- ❑ **Show Homepage:** the homepage is displayed; this can be handy if orders generally consist of a mix of different products; a confirmation window is displayed every time a product is added to the cart
- ❑ **Stay on Product Page:** the product is added to the cart but you do not jump to the cart; a confirmation window is displayed every time a product is added to the cart

## Reference

- ❑ **Optional - Free text**
- ❑ **Required - Free text**
- ❑ **Required - Predefined List:** see “Predefined Values” on page 108

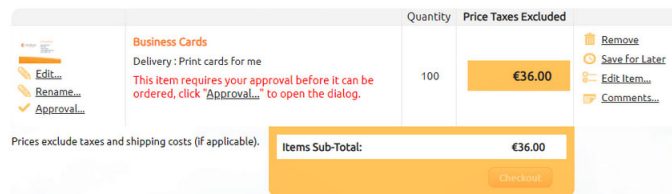
Select this check box if you want to force the shopper to supply an order reference at checkout: for example, an internal purchase order code. A window pops up before the shopper can place the order, and this window must be acknowledged in order to proceed. You can specify the message in this dialog box: see “Edit the Order Reference dialog (Reference tab)” on page 234. If you do not select this check box, the shopper can optionally enter her own reference by clicking a link on the Place Order page.

## Customer Approval

Use this option if you want shoppers to check their product before committing the order – self-approval by the shopper.

- **Not required:** orders do not require approval
- **For Customizable and VDP Products:** the shopper can only proceed from the cart to checkout after reviewing a soft proof and approving the ordered product

Figure 7.43: A shopper must click Approval to open a window with a soft proof that he can download and approve



## Approval

You can choose whether you want orders to be approved by a Company Administrator or Approver before they are processed. All incoming orders then appear first in the Approval tab of Orders (private stores only.). Choose one of the following options in the drop-down list:

- **Multistep Approval:** Selecting this option displays the **Number of Approval Steps** field, where you can select the number of approvers, and the **Assign**

**Approvers** button to specify approvers. The number of steps is displayed in the Steps column of the Orders > Approval tab. Administrators can approve for all steps if required.

- Using Groups: orders can only be approved by Approvers of the respective Approval Group

Choosing the latter option, Using Groups, displays the **Default Approval Group** drop-down list where you see your approval groups. Choose one of the groups as the Default Approval Group. See “Approval Groups” on page 54.

## Payment and Pricing

### Payment Method

- External (use price list): For public stores only. The payment is not through an online payment gateway but via an off-line method as explained in the terms and conditions of the storefront, such as sending an invoice or pay as you collect.
- Ignore price list: For private and public stores. The Printer bills the Company based on information outside the STOREFRONT application.
- Via Contract (use price list): For private stores only. Orders are charged and billed on the basis of a contract between the Company and the Printer. Billing is handled by another system or service, not by STOREFRONT.
- Select one or more payment methods from the list below: Choosing this option lists all your pre-defined payment methods. See “Payment Methods” on page 81. Choose the methods that you want to activate for this store, which may include:
  - One or more bank transfer methods: the shopper pays for his order by paying the order amount into a bank account as instructed during checkout.
  - One or more payment gateways: Orders are charged at the displayed prices and to the billing address via an online payment gateway; see “Configuring Payment Gateways” on page 563 for more information.

### Price List

Choose one price list from the drop-down list; this option is not visible if the Payment Method is set to *Ignore price list*.

A price list can be selected that includes or excludes taxes; these price lists are created in the Pricing tab of the Product Templates (see “Set Pricing” on page 139). Click the Add button if you want to add a price list here.

### Discount

Specify a negative value for a discount on all the prices, or a positive value for a markup to increase all the prices in the price list. Entering a discount or markup



percentage means that the displayed prices will be different than the prices in the price list for all products using the price list, and there is no indication that a discount is applied. This feature can be used to give customers a discount on your standard price list, or to quickly apply an overall price increase. To apply a discount to a specific product, see “Discount/Markup” on page 167 in the product wizard.

**Tax** This section controls how tax (e.g. VAT) is handled in orders, invoices and quotes:

- Show a separate line per tax rate on orders and invoices: Select this option to display the tax percentage; if different tax rates apply to different items, each rate is listed on a separate line.
- Add taxes for cross-border B2B orders: Select this check box to add taxes for cross-border B2B orders.
- Add taxes for cross-border B2C orders: Select this check box to add taxes for cross-border B2C orders.

**Use TaxCloud for US sales tax calculation**

For print service providers in the US: Select this option if you want to display the sales tax which is calculated automatically by the TaxCloud service. If you leave this option unchecked, no sales and shipping tax will be calculated. See “TaxCloud Integration” on page 566 for more information.

---

**NOTE:** Only Price Lists with *Tax Exclusive* are supported with TaxCloud.

---

**Additional Fees**

You can define up to three additional fees that are applied to all orders in a store to compensate for rapidly changing costs. These charges will be displayed in the order summary during checkout, the final order details created, the order confirmation e-mail, as well as on invoices and exported order data. To add additional fees, fill in the following fields:

- Label: Enter a description of the fee you want to include in final order.
- Type: Select the fee type from the drop-down list: Fixed or Percentage on calculated on the items sub-total.
- Value: Enter the price for the defined fee.
- Limit: Set a limit by which the defined fee is not applied if the items sub-total of the order exceeds this amount.

- ❑ **Tax Code:** Choose one of the tax rates from the drop-down list: None, Super Reduced Rate, Reduced Rate (Low), Reduced Rate (High), Standard Rate, or Parking Rate.

Figure 7.44: An example of additional fees

Additional Fees:	Label	Type	Value	Limit	Tax Code
	Temporary Energy Surcharge	Percentage	3.00	1,500.00	Standard Rate
		Fixed			None
		Fixed			None

You can define up to 3 additional fees. All fees are added to the total. Percentage fees are based on order total. A fee is not applied when the order total is above the limit. The fees follow the price list for tax inclusive/exclusive.

**NOTE:** When the Use TaxCloud for US sales tax calculation option is enabled for a US printer account, no additional fees can be applied.

**NOTE:** The label for the additional fees can be translated into any language supported by the store.

**Pricing** Select the **Show Prices in the Store** check box to show prices on the storefront; the option is not visible if the Payment Method ignores the price list; prices are always shown if you choose a payment method (Bank Transfer, Ingenico, PayPal, or Stripe) and this check box cannot be cleared.

Figure 7.45: Prices and specifications on a storefront product page

#### Specifications

##### Page Count & Binding Method

12 pages, Hard Cover

##### Media Size

209 x 276 mm, Portrait

##### Body

Full Color

##### Cover Media Type

ECO 85

##### Cover

Full Color

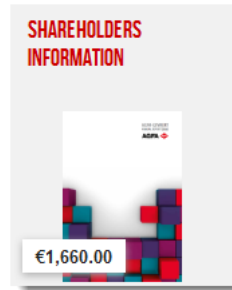
Quantity	Price
50	€60.00
100	€120.00
250	€300.00

If you select this check box you can choose to display prices on the product pages or category pages, or on both, by selecting the following check boxes:

- ❑ **Show Price Table on Product Pages:** A table is displayed with prices and you can set the number of rows you want to display in the Max. Rows drop-down list.

- Show Price Labels on Category Pages:** The base price for the lowest order quantity is displayed. The label is hidden when you hover over the image to see the description.

Figure 7.46: Price label on a category page



**Add taxes for cross-border B2B orders**

Leave this check box unselected if you do not want to apply tax for international business-to-business (B2B) orders. The store must have a tax-exclusive price list. B2B shoppers are identified as such when they provide a tax or VAT number in the Billing Address form.

**Add taxes for cross-border B2C orders**

Leave this check box unselected if you do not want to apply tax for international consumer business (B2C) orders. The store must have a tax-exclusive price list. It is recommended to check whether offering this tax-free option to your international consumer shoppers is legal in your market.

**Price Rounding**

Select the *Use price rounding in store* check box to round the prices of the order to the nearest multiple of the selected rounding unit:

- Rounding Unit: 0.05, 0.10, 0.50, 1.00. In some countries you are required to round to the smallest currency denomination. For example, choose 0.05 to round €14.96 to €14.95;
- Rounding On: Total Only applies rounding to the total sum of the order; Individual Shopping Items applies rounding to each order item.

**Formatting**

**Default Language**

Here you can choose the default language used to display the storefront; in the drop-down list you can choose from the languages you made available for the Company in question.

---

**NOTE:** The default language cannot be changed afterwards.

---

**Regional Formatting**

Select a locale to set the formatting for numbers, money, dates and time.

- Units** Select a units system for measurements and weights:
- Metric: cm, mm, etc.
  - Imperial: inches, pounds, etc.
  - US Customary: inches, pounds, etc.
- Stock** Select the **Show items in stock** check box to display the available stock in the Place Order box on the product page.

Figure 7.47: Available stock on a storefront product page

The screenshot shows a 'Place Order' form with a yellow box highlighting the text '99,800 in stock' in the top right corner. The form includes a 'Quantity (100-10000)' dropdown menu set to '100', three checked checkboxes labeled 'SVO3\_def', 'SVO4\_def', and 'SVO1', and a dropdown menu for 'MVO1' set to 'MVO-option1'. An 'Add to Cart' button is located at the bottom right of the form.

## Advanced

### Online Editor Autofill Forms

This feature controls how fields are filled in documents using variables in the Online Editor:

- Autofill disabled: form fields are empty when a shopper opens a document with variables in the Online Editor;
- Autofill user profile values only: data from the shopper's profile is filled in automatically, e.g. name and address on a business card; the shopper can overtype these values but the edits are not saved in the system;
- Autofill most recently used values: the data used the last time for these variables are filled in automatically the next time a document with the same variables is opened in the Online Editor;
- Autofill user profile values complemented with the most recently used values: combines the two previous options;

See also "Use an Excel file for Autofill" on page 506.

**Quoting** **NOTE:** This feature may not be included in your license pack.

Select the checkbox to enable the generation of quotes in the storefront for all users. This allows shoppers to obtain a document with the details and the total price of an order (products, shipping, packaging, etc.) without uploading dummy files and actually placing the order. An additional button, **Add to Quote**, is displayed in the Place Order panel.

Figure 7.48: Add to Quote button so a shopper can create a quote

The screenshot shows a 'Place Order' form with the following fields:

- Size:** A0 Landscape (dropdown)
- Width:** 1,189.0 mm
- Height:** 841.0 mm
- Quantity (1-25):** 20 (spinner)
- Trimming:** None, add crop marks (dropdown)
- Total Price:** €119.99
- Buttons:** 'Upload & Add to Cart' and 'Add to Quote' (circled in red).

Shoppers can immediately review and print the quote and they also receive an e-mail with a link to each quote they make for future reference.

Figure 7.49: A quote ready for printing

The screenshot shows a 'Quote' summary page with the following sections:

- Shipping/Payment:** Select your Shipping Service, Select your Payment Method
- Review:** Review your order
- Delivery Address:** Laurens Leurs, Septestraat 26, 2000 Middel, Belgium. Via DHL. [Change](#)
- Billing Address:** Same as Delivery Address. [Select From Address Book](#) [New](#)
- Item List:**

	Quantity	Price Taxes Excluded
Your own poster (1 page, 841 x 1,189 mm)	10	€128.99
Augusta Baseball Body Media Type - Standard - Matte coated paper - 80g	50	€390.00
- Summary:**
  - Items Sub-Total: €500.99
  - VAT: €106.89
  - Shipping Sub-Total: €4.95
  - Order Total: €620.83**

## PDF Preview Settings

Clear the check box to specify dedicated settings for this store, other than those specified in the Advanced > Production Settings. See “PDF Preview” on page 96.

**Orders/Products History** Lets you control the extent of the order and products history that shoppers can see:

- Show all
- Show last year
- Show last 2 years

▷ **Create a store**

- 1 On the menu bar, choose **Stores**.
- 2 Click the **Create** button to add a new store to the list.



- 3 Complete the fields in the **General** tab.
- 4 Click **Create** to confirm your changes.



The new store is displayed in the list.

---

**NOTE:** The store is grayed out in the list because the storefront is still off-line.

---

- 5 Complete the information in the others tabs as required.

▷ **Previewing an off-line storefront**

A store remains off-line while you are setting it up but you can preview the content at all times.

- 1 On the menu bar, choose **Stores** and select the store you want to view.
- 2 Click the **URL** link in the General tab.

The storefront is opened in a new tab/window of your browser.

---

**NOTE:** For a private store, you need to create a User and log on with the User credentials. See “Create a new user” on page 276. You cannot log on with your administrator credentials.

---

▷ **Putting your storefront online/offline**

With the initial set-up of your store completed, you can put your storefront online and make it available to shoppers. In addition, you may want to switch the storefront online/off-line for maintenance or other reasons.

---

**NOTE:** A store which is off-line still counts for your license.

---

- 1 On the menu bar, choose **Stores** and select the store you want to go live with.
- 2 At the bottom of the Store list, click the **Enable/Disable** button



The storefront is now online.

---

**NOTE:** You can only go live with your storefront if at least the General and Shipping tabs have been completed.

---

- 3 To take a live storefront off-line, click the **Enable/Disable** button.



The storefront is now off-line but still available in StoreCenter.

### ▷ Viewing an online storefront

You can view a storefront once it has been put online.

- 1 On the menu bar, choose **Stores** and select the store you want to view.
- 2 Click the **URL** link in the General tab.

The storefront is opened in a new tab/window of your browser.

---

**NOTE:** For a private store, you need to create a User and log on with the User credentials. See “Create a new user” on page 276.

---

### ▷ Delete a store

If a storefront is no longer in use, you may want to delete the store to free up disk space and the license allocation.

### *Prerequisites*

- All active orders are complete or canceled
- No microstores depend on the store you want to delete

---

**CAUTION:** All users created for this store will also be deleted.

---

- 1 On the menu bar, choose **Stores** and select the store you want to delete.
- 2 At the bottom of the Store list, click the **Delete** button.



The store and all its users are deleted. The storefront is no longer online. The products used for the storefront are not deleted.

## Product Catalog Tab

Products and categories are set up in the **Product Catalog** tab of the Stores section.

First you create a category and then you can add sub-categories and products to these categories, or add them to an existing category. If a category or sub-category contains a mix of products and sub-categories, the products will be listed first, followed by the sub-categories.

---

**TIP:** Depending on the storefront target group, categories for products can be set up for different types of publications (brochures, catalogs, flyers, posters, etc.), for different types of commercial items (drills, saws, knives, etc.), or for various geographic regions (North Sales Region, South Sales Region, etc.).

---

### ▶ Add a Category and Products

- 1 On the menu bar, choose **Stores**.
- 2 Select the store you want to create the Product Catalog for in the Store list.
- 3 In the **Product Catalog** tab, click the **Add** button in the Categories column:



- 4 Choose one of the following options:
  - On the same level: to create a category at the top level or at the level of the selected category
  - One level deeper: to create a sub-category under the level of the selected category
- 5 Enter the Category Name which is displayed on the pages to identify your product categories. The name must be unique at the given level.
- 6 Enter the Category Description which is used to fill the `description` meta tag in the head of the HTML code on the product category pages of your storefront. The description meta tag is useful for search engine optimization



(SEO) if your store is public. See “Search Engine Optimization (SEO)” on page 33.

For example, entering my catalog description, generates the following HTML code:

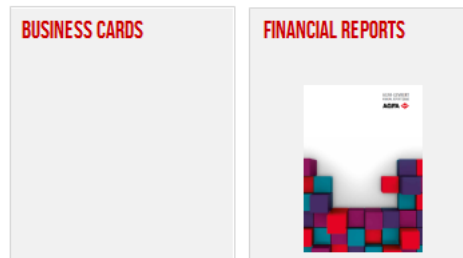
```
<meta name="description" content="my catalog description" />
```

The Category Description is also displayed when you hover over the categories on the home page, and as a tooltip in the navigation list on the left as you drill down into the categories.

## 7 Upload a Category Image by browsing to the image of your choice.

This optional Category Image is used to illustrate a category on the storefront. If no image is uploaded, the category is displayed as a colored box.

Figure 7.50: Category without and with a Category Image displayed on a storefront



The Category Image is used for all language versions of the storefront.

## 8 Choose a Carousel Banner:

- Same as parent category: if you are creating a sub-category, you can choose to display the same banner as the parent category
- None: a banner is not displayed
- Predefined banners: if you have created banners, they are listed here (see “Banners Tab” on page 255)

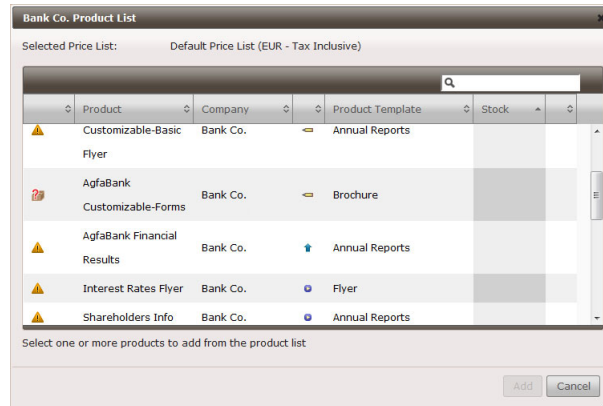
**TIP:** Select the ‘Keep dialog open’ check box if you want to add more new categories.

## 9 Click **Add** to add the category to the list.

## 10 With the category still selected, click the **Add** button in the Product column.



The Product List is displayed.



An alert icon is displayed if the selected Price List for the product is not complete.



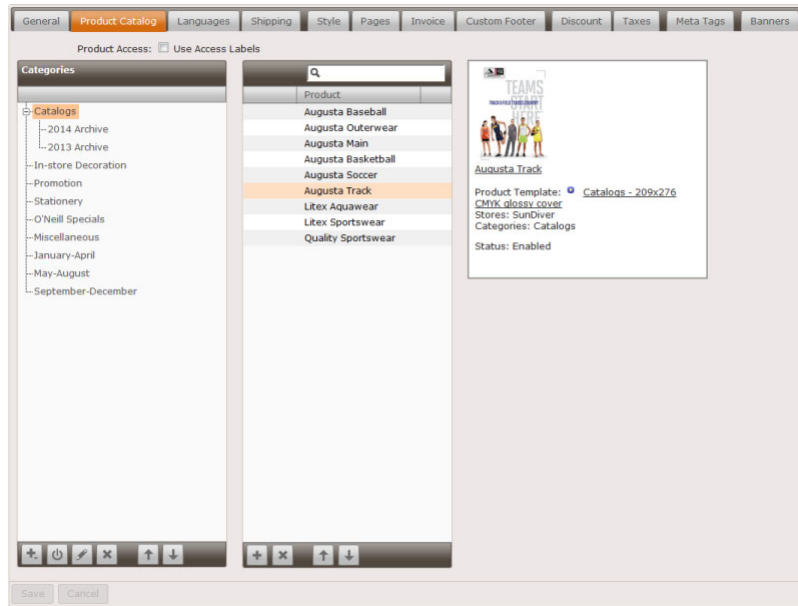
If the store is to include shipping costs based on packaging, you shouldn't select products using product templates which do not have packaging units assigned as indicated with the following icon:



- 11 Select one or more products and click **Add** to add them to the selected product category.

**TIP:** You can populate several categories with the same products.

The products are added to the bottom of the list and you can see a thumbnail and a summary of details for each product by highlighting it in the list. See “Creating Products” on page 157 for more information on products.



The products are displayed in their respective product categories on the storefront Home page, with their description and specifications.

**NOTE:** It can take up to 3 minutes before a product is displayed on the storefront.

- 12 If necessary, use the Up and Down buttons to rearrange the product categories and the products. This reflects the sequence of the categories and the products on the storefront.

### ▷ Add Products to an existing Category

- 1 On the menu bar, choose **Stores**.
- 2 Select the store you want to add products to.
- 3 Select the category you want to add the product to and click the **Add** button in the Product column.



**TIP:** To insert a product at a certain location in the list, select a product in the list and then click Add. The product is added under the selected product in the list.

The master Product List is displayed with all the available products. You can sort the products by clicking the column headers. For example, click the last column header to display the products which have not been assigned to a store at the top of the list.

- 4 Select one or more products and click **Add** to add them to the selected product category.

The products are added to the list and you can see a summary of details for each product by highlighting it in the list. See “Creating Products” on page 157 for more information on products.

---

**NOTE:** You can populate several product categories with the same products.

---

The products are displayed in their respective product categories on the storefront Home page, with their description and specifications.

---

**NOTE:** It can take up to 3 minutes before a product is displayed on the storefront.

---

### ▷ Assign Access Labels to Product Categories

See “Access Labels” on page 262 for more information about using access labels to control who can see products on the storefront.

- 1 Select the **Use Access Labels** check box to activate this feature when editing a category.
- 2 Select a category in the list and click the **Edit** button.
- 3 In the Access Labels tab, you will see the labels that were defined for this company.
- 4 Choose the labels that you want to assign to the category by selecting the check boxes.

The checked labels appear in the panel on the right.

---

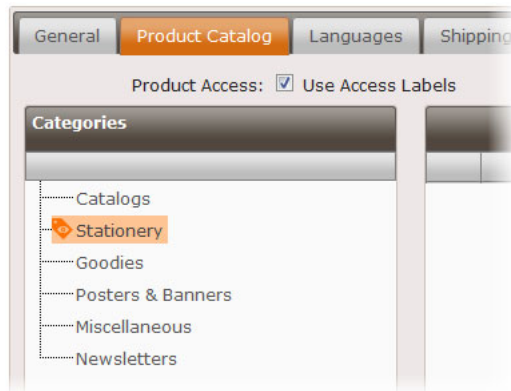
**NOTE:** Product category labels override product labels.

---

- 5 Click **Save** to confirm your changes.

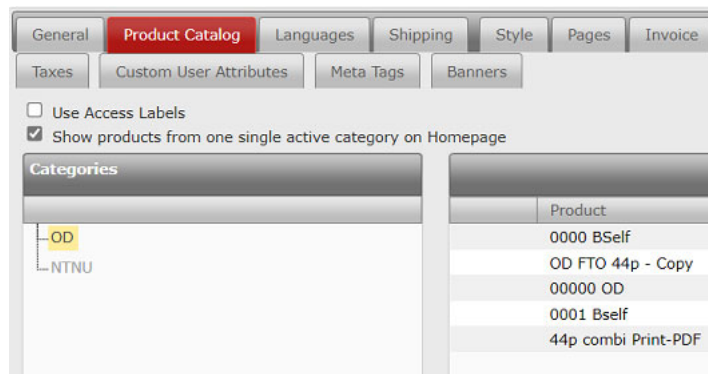


The Access Labels icon indicates that the category has labels applied to it.



### ▷ Show Products of a Single Active Category on the Homepage

- 1 Select the **Show products from one single active category on Homepage** check box to activate this feature.



- 2 Click **Save** to confirm your changes.



The homepage displays products from this single active category.

**NOTE:** The products will only be displayed on the homepage when there is only one active category or when there are multiple active categories in the store and only one category can be accessed by enabling Use Access Labels.

### ▷ Disable or enable a category

- 1 On the menu bar, choose **Stores > Product Catalog**.
- 2 Choose the category you want to disable.

**TIP:** Press the CTRL key to select multiple categories.

- 3 Click the **Disable** button.



The category is no longer displayed in the store.

## Languages Tab

The storefront can be displayed in several languages and a shopper can switch between languages by clicking the links in the language bar in the top right corner of the pages.

- 1 On the menu bar, choose **Stores** and select the store you want to set the Languages for.
- 2 In the Languages tab, select a language in the Available Languages column and click **Add** or double-click the language to add it to the Supported Languages column.

The Available languages are the languages you chose when creating the Company to which this store is assigned.

- 3 Click **Save** to confirm your changes.



The storefront now displays the language links in a drop-down list in the top right corner, and a shopper can switch between languages.



**NOTE:** This setting enables the language versions of the storefront but only provides the translations of the default design components. The actual content has to be translated separately. See “Multilingual Storefronts” on page 511.

## Shipping Tab

You need to specify how orders are shipped before putting the storefront online. A storefront can provide more than one shipping service for a shopper to choose from. These services are set up in the Advanced section. See “Create Shipping Regions” on page 76 for more information.

- 1 On the menu bar, choose **Stores** and select a store in the Store list.
- 2 In the Shipping tab, choose the Shipping Service you require in the top pane and click the **Move Down** button to move it to the Supported Shipping Services pane.



---

**NOTE:** A shipping service which is grayed out is not available because it is in a different currency than the currency of the store.

---

- 3 If you select a Ship to Fixed Addresses service which has multiple delivery addresses that shoppers can choose from, you may want to customize the label that shoppers will see for this service. Enter the label you want to display in the **Fixed Delivery Address Label** box. See “Add a ‘Ship to Fixed Addresses’ shipping service” on page 73.
- 4 When shoppers enter the delivery address for an order, they must include their name, address, postal code, city and country. You can make it mandatory to provide a company name, tax number, e-mail address, or phone number as an option. Shipping services may require this information in the event of a delivery problem:
  - Company Name
  - Tax Number
  - E-mail Address
  - Phone

Related topics: 

- [About Shipping Costs Based on Packaging on page 70](#)

## Style Tab

Once you have added a store to the Store list, you can start designing the storefront. You can change the overall look and feel of a storefront at any time, however, it is recommended to do this while the store is off-line.

## Prerequisites

Products and other resources such as shipping, taxes, languages, etc. must also be set up before you can continue with the following procedures.

## Set-up

**Style** You have four options to set the basic style of the pages.

- Autumna 22:** Provides a modern look to storefronts by using flat tints, rounded corners, bigger buttons with more padding and larger text, minimized shadows, more white space, along with making stores more mobile-friendly.
- Show Colored Bars:** Displays colored bars at the top and bottom of the pages in the primary color.
- Show Custom Background:** Activates the Background panel with options to work creatively with a background image that's displayed on all pages.
- Show Swirl:** Displays a swirl in the color of your choice on all pages.

---

**NOTE:** Some of the parameters listed below may not be available depending on the style chosen.

---

**Primary Color** Used for top level design elements such as main buttons, link text, boxes

**Secondary Color** Used for lower level design elements such as the border of the contact box

**Swirl Color** The color of the swirl image

**Logo** Puts a logo on the left side of the banner on each page.

---

**NOTE:** This logo also appears in e-mails sent to users.

---

**Store FavIcon** A favicon is a small image which appears in the address bar, tabs and favorites bar of the browser. Special tools are available on the internet to create a favicon file (ICO).

**Homepage Options** Defines the place of the content for the homepage:

- Place content at the bottom
- Hide content
- Place content to the left



- Place content on top

---

**NOTE: Homepage Options** will replace **Pages** parameter only when the Style *Autumna 22* is selected.

---

**Pages** Makes your storefront responsive to ensure optimum viewing on a variety of screen sizes. See “Responsive Design” on page 193. If you do not select this option, your storefront website will have a fixed width (960 px) and shoppers will have difficulties reading, navigating and ordering products on small devices.

---

**NOTE:** This parameter is only available for the Style options *Show Colored Bars* and *Show Custom Background*.

---

## Category and Product

**Image Scaling** Select the Automated Scaling check-box to enable the hovering behavior option: Show zoom effect in category and product rollovers.

**Hovering Behavior** This option lets you control what happens when a shopper hovers over Product Categories and Products:

- Show short description in category and product rollovers: hides the image and shows the short description
- Show thumbnails in category and product rollovers: only changes the background color to the primary color
- Show zoom effect in category and product rollovers: the thumbnail images will cover the entire area of the box. Select the Image Scaling - Automated Scaling check-box to enable this option. You need to upload thumbnail images which are large enough: 720 px wide x 430 px high.

**Title Font** You can select a different web font for the categories and products.

**Title Font Size** You can select a different web font size for the categories and products.

## Store

**Main Font** You can select a different web font for the store.

**Button Font** You can select a different web font for the buttons.

**Body Text Size** You can select a different web font size.

## Background

The background of your pages is the bottom most layer where you can use an image or color to fill the entire window. The overlay is the layer above the background that contains the actual content of the pages. If the page is long, the overlay scrolls over the background.

**Text Color** If you choose a dark overlay color you should set a light color for the text to override the default black color for text.

**Color** Sets the background color of the pages.

**Overlay Color** Sets the background color for the content section and cart area of the pages.

**Overlay Opacity** Enter a value lower than 100 to make the overlay area of the page transparent.

**Language Bar Opacity** Sets the opacity of the language bar in the top right corner. You may want to change this if the language bar interferes with your page design. Set to 0% to make the bar invisible. See also “Languages Tab” on page 214. (Does not apply for responsive storefronts.)

**Image** The image used as the background for all the pages.

**Attach to** Lets you control scrolling of the background image on the storefront pages:

- Browser Window:** The background image is fixed to the browser window and will never scroll.
- Web Page:** The background image is fixed to the page content and the image and content scrolls up and down.
- Menu Bar:** The background image starts from the menu bar and is fixed to the page content. The image and content scrolls up and down.

**Position** Anchors the image in the specified Position: Center, Left, Right, Center, Top, Bottom.

**Repeat** Options to repeat the background image vertically and/or horizontally.

Figure 7.51: Autumna 22 style with graphic logo

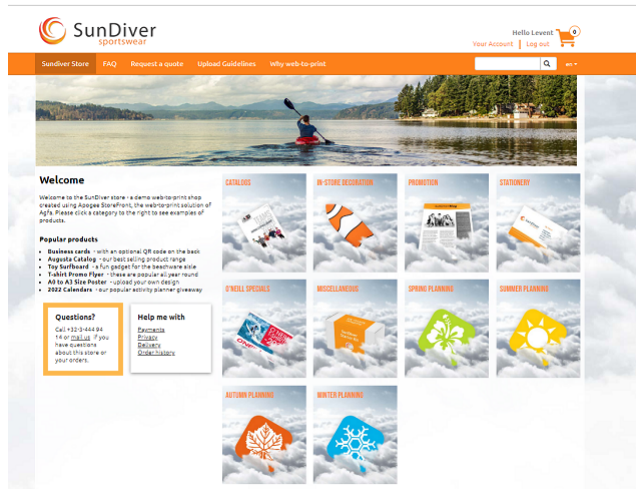
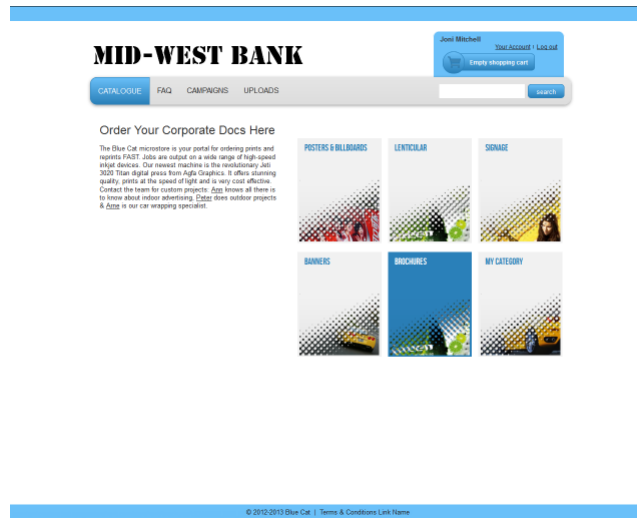


Figure 7.52: Colored Bars style with graphic logo



Figure 7.53: Colored bars style with text logo



**TIP:** When designing your storefront, you can see your changes by logging onto the storefront and refreshing the pages (press F5 or click the Reload button).

Figure 7.54: Background image anchored to top; no repeat; overlay opacity 0; transparent PNG to hide default system logo

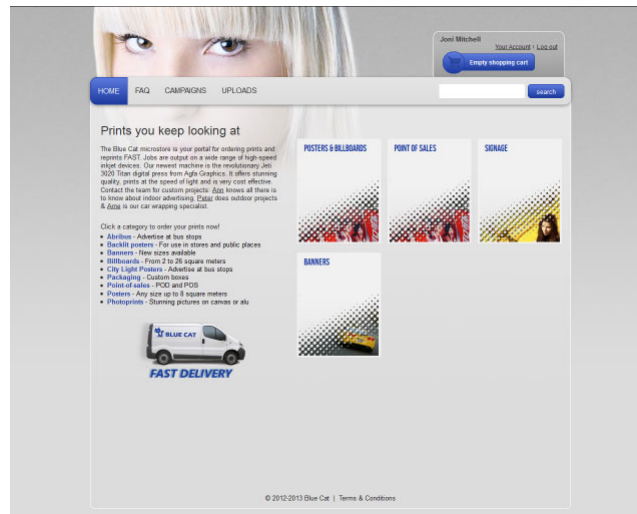


Figure 7.55: Custom Background style; small image repeated horizontally and vertically to create background pattern of lines; overlay opacity 50

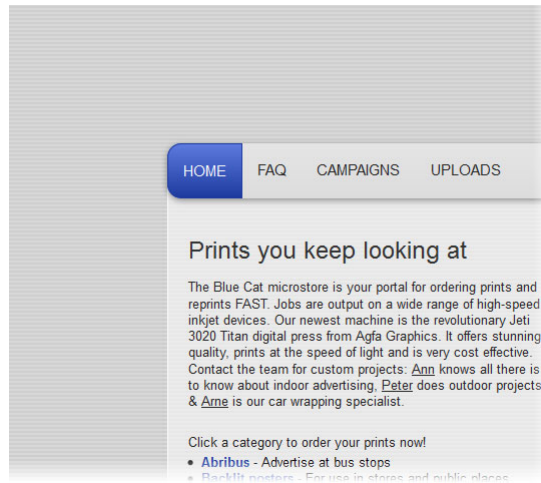
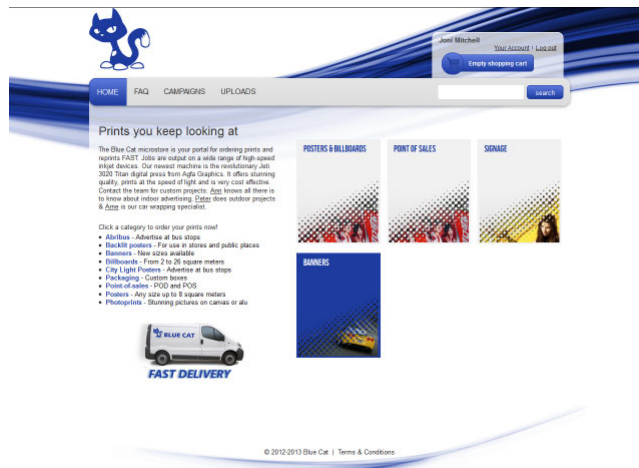


Figure 7.56: Swirl style with logo; swirl color same as primary color

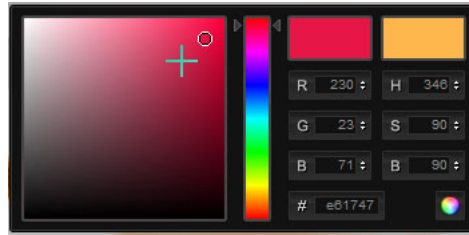


### ▷ Create the look and feel in the Style tab

- 1 On the menu bar, choose **Stores** and select the store you want to style.
- 2 In the Style tab, you start by selecting the basic style from the Style drop-down list.
- 3 Click the color patches to edit the primary and secondary colors.

The color picker is displayed.

**TIP:** Don't choose bright or light colors for text on the storefront because this can be difficult to read.



- 4 Select a color with the hue slider (rainbow colors) and make the hue lighter or darker by moving the cursor in the mixer pane on the left. Alternatively, enter an RGB, HSB or a 6-digit hex value.

The new color is displayed in a patch adjacent to the current color.

- 5 Click outside the color picker to close the picker and confirm your new color.
- 6 If applicable, change the Swirl Color image on the storefront.
- 7 Click **Browse** to select a **logo** for display in the banner of the storefront.

The logo is previewed underneath the Browse box. You can delete the logo by clicking the Delete button or replace it with another.

- 8 Click **Browse** to select a store Favicon.

The favicon image is previewed underneath the Browse box. You can delete the favicon icon by clicking the Delete button or you can replace it with another.

- 9 If you selected the Show Custom Background style option, set the colors and images for the background of the pages.
- 10 Click **Save** to confirm your changes.



- Related topics:
- [Setting up Resources \(Advanced Menu\) on page 61](#)
  - [Multilingual Storefronts on page 511](#)

## Pages Tab

You first create the home page, which is the landing page of the storefront where the Product Catalog is displayed. The home page must be created as every storefront has at least a home page. The six additional pages, legal information and boxes are optional. You can also customize the Login dialog and the Footer of the order details and e-mails in the respective tabs.

---

**TIP:** Including Terms & Conditions and other information on an e-commerce website may be a legal requirement in your country.

---

## ▷ Add/edit pages in the Pages tab

- 1 On the menu bar, choose **Stores** and select the store you want to add/edit Pages for.
- 2 In the Pages tab, click Edit in the **Homepage** tab to create/edit the landing page of the website.



For each page you can edit the following features. Some features are optional.

<b>Link Name</b>	The text displayed as the page link in the storefront menu bar (mandatory)
<b>Title</b>	The title for the page content which appears under the banner image; you can leave this blank if you need the space at the top of the page for other layout elements.
<b>Content</b>	The actual content of the page; you have a blog-style HTML WYSIWYG Editor to write text, insert tables, and place images on the pages; you can also paste text from various sources and switch to HTML mode if you want to use HTML tags. See “HTML WYSIWYG Editor” on page 265 for more information.
<b>Boxes</b>	Select the check boxes to add the Contact box and/or Link box, which you create in the Boxes tab, to the page. See “Create/edit Contact and Link boxes (Boxes tab)” on page 232.
<b>Banner</b>	Browse to add a static banner image (PNG, JPG, GIF) for the page between the navigation bar and the page Link Name. You can use the same banner for all the storefront pages or a different one for each page. This image is also used as an alternative image for browsers and devices that do not support Flash.
<b>Carousel Banner</b>	Browse to add a predefined HTML5 banner as image for the page between the navigation bar and the page Link Name. You create these banners in the Banners Tab.
<b>Page &lt;title&gt;</b>	Enter text to fill the <code>title</code> tag in the head of the HTML code on this page of your storefront. For example, entering <code>My Company's Store</code> , generates the following HTML code: <pre>&lt;title&gt;My Company's Store&lt;/title&gt;</pre>
<b>Page &lt;description&gt;</b>	Enter text to fill the <code>description</code> meta tag in the head of the HTML code on this page of your storefront. For example, entering <code>Webshop for ordering prints</code> , generates the following HTML code: <pre>&lt;meta name="description" content="Webshop for ordering prints" /&gt;</pre>

**NOTE:** Putting information in the head tag of the HTML code is useful for search engine optimization (SEO) if your store is public. See “Search Engine Optimization (SEO)” on page 33 for more information.

---

- 3 Click **Save** to confirm your changes to the Home page.



The home page is automatically enabled and ready for viewing.

Check the result by clicking the **Preview** button. If the store is online and you’re logged on to the storefront, refresh the pages to see your changes or click **View**. If the store is off-line, the link is a preview. See “Previewing an off-line storefront” on page 206.

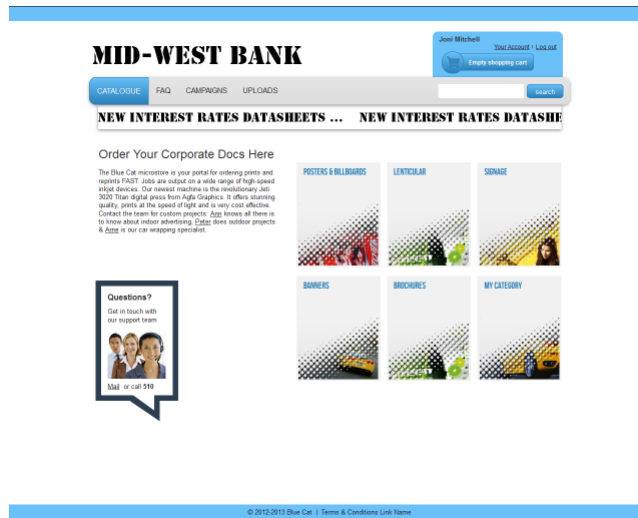
- 4 Click the **Page 1** tab and repeat this procedure to add a second link in the navigation bar.

Remember that these optional pages cannot include the Product Catalog. They are typically used to display additional information about the storefront, for example:

- a FAQ page about the ordering and delivery process
  - guidelines for shoppers who want to submit their own content
  - company news, who to contact, etc.
- 5 Select the **Show page in menu** check box at the top of the Page tab to add it to the storefront.
  - 6 Repeat this procedure for **Page 2** to **Page 6** as required.



Figure 7.57: Colored bars style with animated banner and contact box



## ▷ Customize the storefront login page

In the Login tab, you can customize the login screen that visitors see when they log on to a storefront. For example, you can add contact details (phone number, e-mail link, link to a website, self-registration to help a visitor with the logon process.

**NOTE:** For private stores only.

- 1 On the menu bar, choose **Stores** and select the store you want to enable/edit the login page for.
- 2 In the Pages tab, click Edit in the **Login** tab to enable/edit the Login page of the website.



- 3 Select the **Customization** check box and write your own text for the login screen in the HTML WYSIWYG Editor. You can also add a small image. See “HTML WYSIWYG Editor” on page 265 for more information.

- 4 Click **Save** to confirm your changes.




Your new content will now appear in the panel on the right of the login screen for your storefront.

Welcome to Blue Cat

**I HAVE an account**  
Please enter your e-mail address and password.

[Forgot your password?](#)

**I DO NOT HAVE an account**  
The Bluecat portal is an online tool for ordering prints and campaign reprints.



**No account yet?** Contact Joanne ([j.morgan@bluecat.com](mailto:j.morgan@bluecat.com)) to get access to this ordering portal.

---

**NOTE:** All the other information in this dialog is generated by the system.

---

### ▷ Customize the storefront login page background

In the Login tab, you can customize the background of the login page that visitors see when they log on to a storefront. You can add a background image and a logo.

---

**NOTE:** For private stores only.

---

- 1 On the menu bar, choose **Stores** and select the store you want to enable/edit the login page for.
- 2 In the Pages tab, click Edit in the **Login** tab to enable/edit the Login page of the website.



- 3 Select the **Full screen image background** check box and upload background image and logo using the **Choose File** buttons.
- 4 Click **Save** to confirm your changes.



A full-screen image background and a logo on the login window of the store will now appear.

### ▷ Add a Register button to the storefront login page (self-registration)

You can let new store visitors register themselves when they are on the login page. The self-registration feature adds a Register button to the login screen, and users with an e-mail address of a specified domain are given access without intervention of the administrator.

- 1 On the menu bar, choose **Stores** and select the store for which you want to enable self-registration.
- 2 In the Pages tab, click Edit in the **Login** tab.



- 3 Select the Self-registration check box and enter the relevant domain name, or multiple domain names separated by commas, in the E-mail domains field, for example:

mycompany.com,mycompany.fr,mycompany.de

You can enter up to 1024 characters in the box.

**NOTE:** Do not enter the domains of popular e-mail providers (gmail.com, hotmail.com, etc.) as this would give many users access to your storefront.

- 4 Select the **Billable to company** check box next to the Billing Address option and choose a company for billing the orders from the drop-down list. If you do not select this option, the shopper has to specify the billing address when checking out.
- 5 Click **Save** to confirm your changes.



The login page now displays a Register button so visitors with a valid e-mail address of one of the specified domains can register.

The screenshot shows a registration page titled "Welcome to My New Private Store". It is divided into two sections: "I HAVE an account" and "I DO NOT HAVE an account".

The "I HAVE an account" section includes a text prompt "Please enter your e-mail address and password.", an "E-mail Address" input field, a password input field with a masked password "\*\*\*\*\*", a note "A password is mandatory.", and "Login" and "Forgot your password?" buttons.

The "I DO NOT HAVE an account" section includes a text prompt "If you are an employee of our company, click the Register button to register with your company e-mail address." and a "Register" button. A blue arrow points from this "Register" button to the registration form below.

The registration form contains the following fields:
 

- Title\* (dropdown menu: Select One ...)
- First Name\* (text input)
- Last Name\* (text input)
- E-mail Address\* (text input with a dropdown menu for domain selection: Select One ..., mycompany.com, mycompany.fr, mycompany.de)
- Phone (text input)

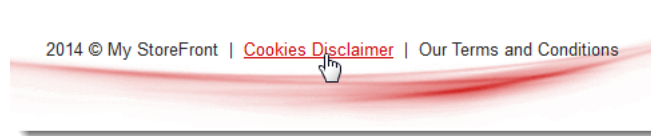
 A red "Register" button is at the bottom of the form. A note at the bottom of the form states "\* Required field".

A password is sent automatically to their e-mail address upon completion of this registration process.

### ▶ Add/edit legal information (Legal tab)

In the Legal tab, you can provide information which may be required from a legal point of view. The content is either displayed in the footer on all the storefront pages, or under the pricing table.

Figure 7.58: A footer on all storefront pages with legal information



- ◆ In the Pages tab, click Edit in the **Legal** tab to create/edit the Copyright Notice, Terms & Conditions, and Cookies page of the website.



The following can be edited:

- Copyright Notice
- Terms & Conditions Page
- Cookie Acceptance Page
- Custom Pricing Information
- Custom Quote Information
- Place Order Button
- Custom Backorder Information
- Custom Tax Exemption Information

### Copyright Notice

**TIP:** Enter ALT+0169 on a Windows computer or Option key + g on a Macintosh computer to type the copyright symbol (©).

Select this check box and enter the copyright notice that you want to display at the bottom of all pages (e.g. 2023 © My Company).

### Terms & Conditions Page

Select this check box and complete the fields to display a Terms & Conditions link on all storefront pages that opens a separate page with your own terms and

conditions. See “Terms & Conditions” on page 37 for more information about what you should mention in your terms and conditions.

**Users must acknowledge the Terms & Conditions at checkout**

Legislation in certain countries may require that a shopper explicitly acknowledges the terms and condition of a storefront when ordering products. Select this check box if this is the case for your country and the following text will be added under the total amount of the order, before the checkout procedure is completed:

- *I agree to the Terms & Conditions* (where Terms & Conditions is a link to the Terms & Conditions page.

**Link Name** The hyperlink text which is displayed on each page.

**Title** The title of the page that opens when you click the hyperlink.

**Content** Use the HTML WYSIWYG Editor to create the content for the Terms & Condition page. See “HTML WYSIWYG Editor” on page 265 for more information.

---

**NOTE:** Terms & Conditions is a hyperlink to a page while the Copyright Notice is simply text.

---

## Cookie Acceptance Page

Select this check box and complete the fields to display a disclaimer about the use of cookies.

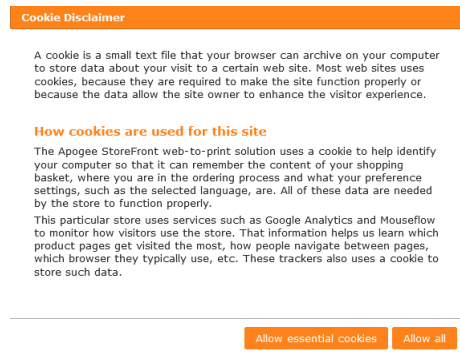
**Users must acknowledge the use of Cookies when visiting the store**

Legislation in certain countries may require that a shopper is explicitly informed about the use of cookies on a website and that they acknowledge acceptance of cookies. Select this check box to display a blocking pop-up window with cookie usage notification including two buttons at the bottom that allow the user to accept all cookies or only the essential ones.

**Link Name** The hyperlink text which is displayed at the bottom of each page.

**Title** The title of the page that opens when you click the hyperlink.

**Content** Use the HTML WYSIWYG Editor to create the content for the use Cookies Acceptance page. See “HTML WYSIWYG Editor” on page 265 for more information.

**Figure 7.59: An Example of Cookie Consent Pop-up Window**

## Custom Pricing Information

Here you can specify text to be added on the storefront product page to explain that prices include or exclude taxes and shipping, or other information. Select the check box and specify:

- **Pricing Table:** Enter custom text that you want to display under the pricing table, for example to inform shoppers that tax is included. Leave empty to display no text under the pricing table. This text is also displayed under the list of items in the shopping cart.
- **Product Price:** Enter custom text that you want to display under the price in the Place Order panel of the product page, and for the Total Price in the Product Kit wizard.

---

**NOTE:** If you do not select the check box, the standard tax and shipping footer, depending on the store configuration, is inserted under each pricing table but no default information is displayed under the product price.

---

Figure 7.60: Custom pricing information displayed under the price and under the pricing table

**Place Order**

---

**Quantity (1-100)**

---

**Total Price:** €445.00

Includes VAT and shipping

Add to Cart

**Specifications**

**Media Size**  
1,500 x 2,000 mm, Portrait

**Media Type**  
Selfadhesive

**Single sided**  
Full Color

Quantity	Price
1	€23.00
10	€445.00
50	€5,750.00
100	€20,000.00

Contact us if want to order more.

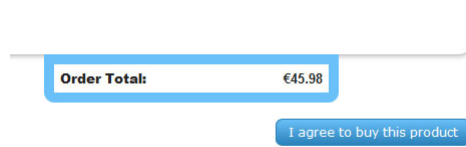
## Custom Quote Information

Select the check box and enter information that you want to include in quotes that a shopper can create on the storefront. See “Quoting” on page 205.

## Place Order Button

Select this check box to enable a customized Place Order button. Otherwise, the system default button is displayed. The Place Order button is the last button in the checkout flow without integrated payment gateway. When a shopper clicks this button, the order is placed and the shopper is bound to pay the amount for the order. In some countries you need to follow guidelines to protect consumer rights and you may need to customize the Place Order button to comply with regulations.

Figure 7.61: A customized Place Order button



## Custom Backorder Information

Enter your text for the backorder information. You can use the variables (macros) mentioned under the box in your text.

## Custom Tax Exemption Information

Enter text that will appear during checkout in the order details and in the order confirmation e-mail.

### ▶ Create/edit Contact and Link boxes (Boxes tab)

The Boxes tab is where you create the Contact and Link boxes which can subsequently be inserted on your pages.

- 1 In the Pages tab, click Edit in the **Boxes** tab to create/edit the Contact Box and Link Box.



You can set up the following two boxes:

**Contact Box** Enter a Title for the box and use the HTML WYSIWYG Editor to create content. You will typically insert a *mailto* link (e.g. <mailto:info@MyCompany.com>).

**Link Box** Enter a Title for the box and use the HTML WYSIWYG Editor to create content. You can insert one or more internal or external hyperlinks to provide additional information, announce special offers, news, etc.

For example, insert the following URL to create a link to a list of previous orders (with `<storename>` being the name of the storefront):

```
https://<storename>.apogee storefront.com/storefront/
accountProductList.ep
```

Or the following code with keywords of your products to link to the search results for those keywords:

```
https://<storename>.apogee storefront.com/storefront/
search.ep?keyWords=calendar
```



See “HTML WYSIWYG Editor” on page 265 for more information.

- 2 Click **Save** to confirm your changes.



The Contact and Link boxes are displayed under the content of the Home page and to the left of the content on the other pages.

---

**NOTE:** The boxes must be enabled for each page by selecting the Boxes check boxes when setting up the page. See “Pages Tab” on page 222.

---

### ▷ Add a footer to order details (Footer tab)

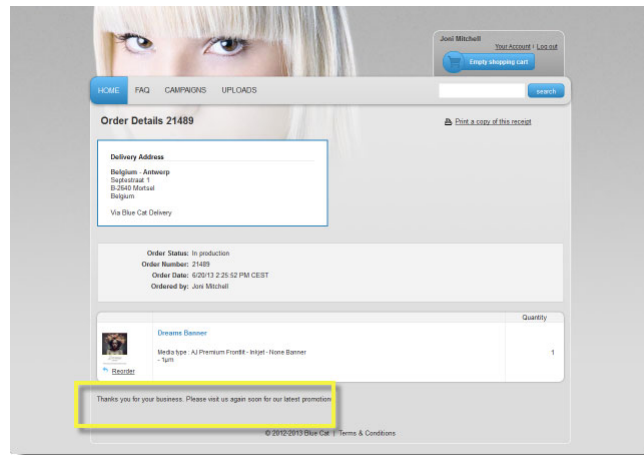
For order-related e-mails and the Order Details page on the storefront, you can add your own content underneath the order details. The footer can be used to inform shoppers about invoicing, inquiries about their order, information about shipping, etc.

- 1 In the Pages tab, click Edit in the **Footer** tab to enable/edit the footer.
- 2 Choose where you want the footer to appear. You can add the footer to either or both of the following locations:
  - Enabled in e-mails: adds the footer to order-related e-mails
  - Enabled in “Order Details”: adds the footer to the Order Details
- 3 Enter the content using the HTML WYSIWYG Editor. See “HTML WYSIWYG Editor” on page 265 for more information.
- 4 Click **Save** to confirm your changes.



Your new content now appears under the order details on the storefront.

Figure 7.62: Footer with your own content under the order details



### ▶ Edit the Order Reference dialog (Reference tab)

The Order Reference dialog is displayed when a shopper proceeds to checkout. You can edit the text of this dialog and the link text that opens the dialog, so it better fits your needs. For example, you can specify the type of purchase code the shopper must enter before checking out.

- 1 In the Pages tab, click Edit in the **Reference** tab to edit the default text of the dialog.
- 2 In the Name field, enter the text for the dialog title.  
This text is also used for the link text on the Checkout page and the column header on the Your Orders page.
- 3 In the Text field, enter the content using the HTML WYSIWYG Editor. See “HTML WYSIWYG Editor” on page 265 for more information.
- 4 Click **Save** to confirm your changes.

**Save**

Your dialog title and text now appear in the order reference dialog on the storefront.

**TIP:** Watch the online training video on this topic (YouTube).

Figure 7.63: Order reference dialog with title (1), text (2) and input field for the reference code to be entered by the shopper(3)

Please provide your purchase code

Enter your purchase order code for this order. This is a **9-digit number** which you can find at the top of your purchase request. Please make sure you enter the correct code.

*Thank you!*

Reference:

Save

The dialog title is also used for the link text on the Checkout page.

**Checkout**

1 Shipping  
Specify your preferred Shipping Service

2 R  
R

**Delivery Address**

Belgium - Antwerp  
Septestraat 1  
B-2640 Mortsel  
Belgium

Via Blue Cat Delivery

Change

Please provide your purchase code: [SAP12345689](#)

Reprint - Runpower

**NOTE:** You only edit the text of the dialog and link text in the Reference tab. See “Reference” on page 199 for information about this option and how you can force the dialog to appear for all orders.

### ▷ Redirect a page to a URL outside STOREFRONT

A page link can also be a link to a URL outside the STOREFRONT system. This is done by inserting a hidden script in the page content.

- 1 Select the page you want to set up with a redirect link.
- 2 Click **Edit** and select the **Show page in menu** check box.
- 3 Enter a **Link Name**, e.g. Blog, and optionally a **Title**.
- 4 In the **Content** panel, choose **Tools > Source code** and paste the following code:

```
<script>// <! [CDATA [  
    window.location.replace("http://destination.com");  
    // ]]></script>
```

## 5 Click **OK** and **Save** your page.

When you click the page link, you briefly see the page with your title before being redirected to your URL outside STOREFRONT.



Figure 7.64: A page link in the menu bar that redirects to a URL

## Invoice Tab

A PDF invoice consisting of one or more pages, which includes the billing address, shipping address, a list of the order items and the total order value, can be generated automatically for all orders. The shopper receives an e-mail notification when the order is shipped, with a link to the order details page where the invoice can be downloaded via a link in the top right corner. The invoice is available when all the order items have been shipped.

Related topics:

- Download all invoices on page 289
- Generate/regenerate an invoice on page 306

Figure 7.65: A default invoice layout (A4)

**SunDiver**  
SPORTSWEAR

**Invoice**  
1-1

Invoice Number 123456789  
Invoice Date August 14, 2015  
SAP Order Code The user customer reference

**Delivery Address**  
StoreCenter  
John Doe  
Wallstreet 99/99  
B-2000 Brussels  
Belgium  
Via DHL, Europe

**Billing Address**  
BillingCompany  
BE 99999999-999  
John Doe  
Wallstreet 11x11  
B-2000 Brussels  
Belgium  
Via PayPal Express

Ordered by John Doe  
Order Date August 14, 2015

Description	Qty	Excl.	Incl.	Tax
Booklet	100	1000 €	1210 €	21 %
Business Card	100	1000 €	1	
Flyer	100	1000 €	1	
Leaflet	100	1000 €	1210 €	21 %
Poster: Full Color	100	1000 €	1210 €	21 %

Items Sub-Total 5000 €  
Tax 1000 €  
Shipping Sub-Total 100 €  
Shipping Tax 71 €  
Order Total 6871 €

- 1 Header (with rounded corners)
- 2 Order items table
- 3 Totals

On the Invoice tab you can specify whether you want invoices to be generated or not, and whether the default invoice format is to be used or a customized format:

#### Generate Invoice

- Never: No invoices are generated.
- When billable to user: An invoice is only generated if the user actually has to pay for the order, not the user's company.
- Always: An invoice is generated for all orders.

**PDF Invoice Layout**

- A4 Size Default Layout:** A4 size invoices are generated based on a default template that uses your logo and the color scheme you specified for your storefront; you can fine-tune some of the default settings .
  - Letter Size Default Layout:** The same as the previous option but with Letter paper size.
  - Custom Layout:** the pages of the invoice are generated based on your PDF Form templates; these PDF Form documents use variables that retrieve the necessary information from the system in order to create the invoice.
- ◆ Select an option to display the layout settings that you can set for the invoice.
- ◆ Click the Invoice Preview button to see a sample invoice.

**Text Form Fields**

Choose a font family for all the text on the invoice. Special fonts are added for the languages Japan, Korean, Chinese-Simplified and Chinese-Traditional:

- Japanese fonts:** HeiseiMin-W3, HeiseiKakuGo-W5 and KozMinPro-Regular
- Korean fonts:** HYGothic-Medium, HYSMyeongJo-Medium and HYSMyeongJoStd-Medium
- Chinese-Simplified fonts:** STSong-Light and STSongStd-Light
- Chinese-Traditional fonts:** MHei-Medium, MSung-Light and MSungStd-Light

**Frame Form Fields**

Switch rounded corners on/off for all table borders; set the border width for the header table and order items table.

**Date**

Choose a Short, Medium or Long date format for the invoice date.

**Table Layout**

Format the header, order items table and totals.

**PDF Form Templates**

(Only for Custom Layout) Select PDF Form documents that you want to use as templates for your invoice:

- First Page:** This template is used for the first page of your invoice. The same template is used for continuing pages (e.g. if the list of order items is long) if no template has been selected for Additional Pages.
- Additional Pages:** This template is used for continuing pages.

- Last Page: Use if your invoice needs to include additional information, e.g. Terms and Conditions

**NOTE:** Each PDF must be maximum 1 page.

### ▷ How to create a Custom PDF Invoice

Custom PDF invoices are based on PDF Forms that you need to create and upload to the system. PDF Forms are interactive PDF documents that include fields that can be filled with variable data. These fields are filled automatically with data which is retrieved from the STOREFRONT system. Sample documents can be found in the STOREFRONT Starter Kit which you can download from *ApogeeNetwork*.

Figure 7.66: PDF Form with STOREFRONT variables

The diagram illustrates a PDF form layout with the following sections and variables:

- Top Header:**
  - Left: `ASF_STORE_LOGO`
  - Right: `ASF_INVOICE_TITLE_BOLD` (with `ASF_PAGENR_NPPAGES` below it)
- Invoice Information:**
  - Left: `ASF_INVOICE_NR_TITLE`
  - Right: `ASF_INVOICE_NR`
  - Left: `ASF_INVOICE_DATE_TITLE`
  - Right: `ASF_INVOICE_DATE`
  - Left: `ASF_CUSTOMER_REFER`
  - Right: `ASF_CUSTOMER_REFERENCE`
- Data Sections:**
  - Left: `ASF_DATA1_TITLE_BOLD` (with `ASF_DATA1_FRAME_COLOR` and `ASF_DATA1_NAMES_ADDRESS_METHOD` below it)
  - Right: `ASF_DATA2_TITLE_BOLD` (with `ASF_DATA2_FRAME_COLOR` and `ASF_DATA2_NAMES_ADDRESS_METHOD` below it)
- Order Items:**
  - Large bottom section: `ASF_ORDER_ITEMS`

### ▷ Step 1: Create the invoice layout

Create the layout of your invoice in your favorite design software, e.g. Adobe InDesign, with all the static elements such as the company logo, colored panels,

etc. The document will typically consist of 3 pages: the first page, the second page for all continuing pages (to accommodate long lists of order items), and the last page for static text such as the Terms & Conditions. You can use the sample documents in the Starter Kit to get started.

### ▷ Step 2: Add text fields

Add form text fields for all the variable content that needs to be retrieved from the system. In InDesign, choose Window > Interactive > Buttons and Forms. Leave the text fields empty but use the `STOREFRONT` variable codes for the text field name. This controls how the content is retrieved: for example, invoice no., invoice date, order items etc. See “STOREFRONT Variables for Custom Invoices” on page 240 for a list of the variables that you can use.

---

**NOTE:** You can also add the form text fields to your layout in Acrobat Pro.

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### ▷ Step 3: Export individual pages

When you are happy with your invoice layout, export each page of the document as individual PDFs. In InDesign, make sure you select Adobe PDF (Interactive) as file type to retain the interactive functionality of a PDF Form.

### ▷ Step 4: Fine-tune the PDF Form

If any of the variables need to be right-aligned, open your PDFs in Acrobat Pro. With the Forms tool open, select the text frame that you want to right-align and set the Alignment option in the Options tab to Right. Save your PDFs.

### ▷ Step 5: Upload the PDF Forms in StoreCenter

In StoreCenter, go to Stores > Invoice and select Custom Layout. In the PDF Form Templates panel, browse to your PDF Form documents to upload them to the system.

## STOREFRONT Variables for Custom Invoices

The following variables can be used for PDF Form fields.

Variable name	Description	example
<b>Variables on Store level</b>		
<code>ASF_STORE_NAME</code>	Store Name	SunDiver
<code>ASF_STORE_LOGO</code>	Store Logo - The logo will be scaled proportionally to fit in the frame. Note: see further down for modifiers	
<b>Page specific variables</b>		



Variable name	Description	example
ASF_PAGENR	Page number of the current page	2
ASF_PAGENR_NRPAGES	Combination of page number and the number of pages in the invoice	2-7
<b>General variables on Invoice level</b>		
ASF_INVOICE_TITLE	Label	Invoice
ASF_INVOICE_NR_TITLE	Title of Order ID	Invoice Number
ASF_INVOICE_NR	Invoice ID	00003
ASF_INVOICE_DATE_TITLE		Invoice Date
ASF_INVOICE_DATE	Date on which the invoice has been made.	
ASF_CUSTOMER_REFERENCE_TITLE	Label	Customer Ref.
ASF_CUSTOMER_REFERENCE	Reference as given by the customer	
<b>Variables on Billing Entity</b>		
ASF_BILLING_TITLE	Label	Billing Address
ASF_BILLING_COMPANY_NAME	Company Name (if applicable)	
ASF_BILLING_ADDRESSLINE1		
ASF_BILLING_ADDRESSLINE2		
ASF_BILLING_ADDRESSES	Combines both address lines in a single variable to avoid empty lines	
ASF_BILLING_COUNTRY		
ASF_BILLING_CITY		
ASF_BILLING_POSTALCODE		
ASF_BILLING_COMPANY_VAT_TITLE	Label	VAT Number
ASF_BILLING_COMPANY_VAT	VAT Number	
ASF_BILING_COMPANY_MIS_ID	MIS Id of Company to be billed	
ASF_COMPANY_MIS_ID	Idem as ASF_BILING_COMPANY_MIS_ID	
ASF_BILLING_NAME	Name of the person to be billed	
ASF_BILLING_NAMES	Company Name, Tax Number and Person Name combined	
ASF_BILLING_ADDRESS	Address of the person to be billed (including address, zip + city, country)	
ASF_BILLING_NAMES_ADDRESS	Names, Tax Number and Address combined	

Variable name	Description	example
ASF_BILLING_NAMES_ADDRESS_METHOD	Names, Tax Number, Address and Payment Method combined	
ASF_BILLING_COORDINATES	Coordinates of the person to be billed (can including phone, e-mail)	
ASF_BILLING_METHOD	Line that describes the billing method	Via PayPal
ASF_BILLING_DATA	All of the above (similar to HTML)	
<b>Variables on Shipment Entity</b>		
ASF_SHIPMENT_TITLE	Label	Shipment Address
ASF_SHIPMENT_COMPANY_NAME	Company Name	
ASF_SHIPMENT_ADDRESSLINE1		
ASF_SHIPMENT_ADDRESSLINE2		
ASF_SHIPMENT_ADDRESSES	Combines both address lines in a single variable to avoid empty lines	
ASF_SHIPMENT_COUNTRY		
ASF_SHIPMENT_CITY		
ASF_SHIPMENT_POSTALCODE		
ASF_SHIPMENT_NAME	Name of the person used for shipment	
ASF_SHIPMENT_NAMES	Company Name and Person Name combined	
ASF_SHIPMENT_ADDRESS	Shipment Address (including address, zip + city, country)	
ASF_SHIPMENT_NAMES_ADDRESS	Names and Address combined	
ASF_SHIPMENT_NAMES_ADDRESS_METHOD	Names, Address and Method	
ASF_SHIPMENT_COORDINATES	Coordinates of the person used for shipment (can including phone, e-mail)	
ASF_SHIPMENT_METHOD	Line that describes the shipment method	
ASF_SHIPMENT_DATA	All of the above (similar to HTML)	
<b>Extra variables on Shipment and Billing level*</b>		
ASF_DATA1_TITLE	Label	
ASF_DATA1	ASF_BILLING_DATA or ASF_SHIPMENT_DATA or empty	
ASF_DATA1_NAMES_ADDRESS	Names and Address	

Variable name	Description	example
ASF_DATA1_NAMES_ADDRESS_METHOD	Names, Address and Method	
ASF_DATA1_METHOD	Method	
ASF_DATA2_TITLE	Label	
ASF_DATA2	ASF_BILLING_DATA or empty	
ASF_DATA2_NAMES_ADDRESS	Names and Address	
ASF_DATA2_NAMES_ADDRESS_METHOD	Names, Address and Method	
ASF_DATA2_METHOD	Method	
ASF_SHIPMENT_COMPANY_VAT_TITLE	Label	
ASF_SHIPMENT_COMPANY_VAT	Tax value Delivery Address	
<b>Variables on Order level</b>		
ASF_ORDER_NR	Order ID	256897
ASF_ORDER_NR_TITLE	Order title ID	256897
ASF_ORDER_STATUS_TITLE	Label	Order Status
ASF_ORDER_STATUS	Status of the order	Shipped
ASF_ORDER_USER_NAME_TITLE	Label	Ordered by
ASF_ORDER_USER_NAME	Name of the person that submitted the order	
ASF_ORDER_USER_EMAIL_TITLE	Label	E-mail Address
ASF_ORDER_USER_EMAIL	E-mail of the person that submitted the order	
ASF_ORDER_USER_PHONE_TITLE	Label	Phone
ASF_ORDER_USER_PHONE	Phone number of the person that submitted the order	
ASF_ORDER_USER_FAX_TITLE	Label	Fax
ASF_ORDER_USER_FAX	Fax number of the person that submitted the order	
ASF_ORDER_USER_MIS_ID	MIS ID of the user	
ASF_USER_MIS_ID	Idem as ASF_ORDER_USER_MIS_ID	
ASF_ORDER_DATE_TITLE	Label	Ordered on

Variable name	Description	example
ASF_ORDER_DATE	Date on which the order has been submitted	
<b>Variable for Invoice Lines**</b>		
ASF_ORDER_ITEMS	Frame that contains the Order Header (if configured in StoreCenter) and the Order Lines. Note: there can only be one such field per page (if there are more, the first container encountered will be used)	

\* If both Shipment and Billing data are available for the invoice, they each can be put in a separate entry (in our standard template, the Shipment Data are typically put on the left side whereas the Billing Data are put on the right side). If, for some reason, the Shipment Data are not available (because no shipment has been specified), one might want to put the BillingData in the box of the Shipment Data and leave the box that was normally used for the Billing Data blank. This functionality can be realized by using the ASF\_DATA1 and ASF\_DATA2 variables. ASF\_DATA1 will refer to the Shipment Data if they are available, otherwise it will refer to the Billing Data. ASF\_DATA2 will refer to the Billing Data (if the Shipment Data are available), otherwise they will be blank.

\*\* The ASF\_ORDER\_ITEMS frames will be used for outputting the invoice lines. How this will be done exactly, can be parameterized by a number of extra formatting parameters (to be completed). These include:

- Setting to generate Order Header: can be switched off. In this case, the invoice template designer can choose to put this information in other frames (see ASF\_ORDER\_... fields)
- Enable/disable columns and indicate spacing (in percentages)
- Use frames (boxes) for Order Items
- Use frames (boxing) for Order Totals
- Font family/point size to be used...

### Text field modifiers that can be used in a custom invoice

All text form fields take over the properties as defined in the PDF forms (such as color, point size, multi-line, alignment etc.). The font selection, however, are overruled by STOREFRONT. In StoreCenter, it is possible to choose a font family. By default, the font to be used is the normal or regular font of the font family. To

use the bold, bold-italic or italic font, you need to apply a modifier to the variable name. Here are a few examples:

- ASF\_SHIPMENT\_METHOD:BOLD
- ASF\_SHIPMENT\_METHOD:ITALIC
- ASF\_SHIPMENT\_METHOD:BOLDITALIC

If you do not want to use the fonts specified by the font family, you can revert to the original font by using the “ORIGINAL” modifier. Example:

ASF\_SHIPMENT\_METHOD:ORIGINAL

### Date field modifiers that can be used in a custom invoice

The variables denoting dates (such as ASF\_ORDER\_DATE and ASF\_INVOICE\_DATE) can have special modifiers:

Modifier	Description	Example
+ <i>[integer]</i>	Indicates an offset in days that will be added to the date. Used to calculate a date on which the invoice must be paid	ASF_INVOICE_DATE:+60
SHORT	Short date formatting	
MEDIUM	Medium date formatting	
LONG	Long date formatting	

### Image field modifiers that can be used in a custom invoice

Currently only applicable for ASF\_STORE\_LOGO

Images are always scaled so that either the width or the height takes the full available space. In addition to this rule, the image will be further aligned according to the following modifiers:

Modifier	Description	Example
TOP	Align image to the top. This is the default setting.	
MIDV	Center the image vertically	
BOTTOM	Align the image to the top	
LEFT	Align the image to the left. This is the default setting.	
MIDH	Center the image horizontally	
RIGHT	Align image to the right	

Use one of TOP/MIDV/BOTTOM only; use one of LEFT/MIDH/RIGHT only. Example: ASF\_STORE\_LOGO:MIDH:MIDV will center the image.

## Frame fields and frame field modifiers that can be used in a custom invoice

It is possible to draw rectangles around frames with the same formatting as specified in StoreCenter.

Variable	Description	Remark
ASF_FRAME		
ASF_BILLING_FRAME	Similar as ASF_-FRAME	Will only be shown if there is billing information
ASF_SHIPMENT_FRAME	Similar as ASF_-FRAME	Will only be shown if there is shipping information
ASF_DATA1_FRAME	Similar as ASF_-FRAME	Will only be shown if there is DATA1 information (see higher for the meaning of DATA1)
ASF_DATA2_FRAME	Similar as ASF_-FRAME	Will only be shown if there is DATA2 information (see higher for the meaning of DATA2)

The following modifiers are available:

Modifier	Description	Example
ROUNDED	Use rounded corners	
RECTANGULAR	Use rectangular corners	
THICK	Use the thick lines (thickness specified in StoreCenter variable)	
THIN	Use thin lines	
COLOR	Use the primary color instead of black	
BLACK	Use black for the frame	

Examples:

ASF\_FRAME:THICK:ROUNDED:COLOR

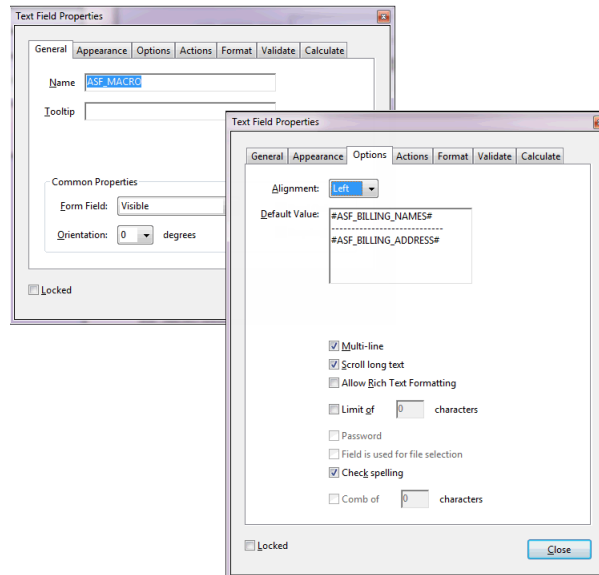
ASF\_FRAME:ROUNDED

## Special fields that can be used in a custom invoice

Field	Description	Remark
ASF_VALUE[a-zA-Z0-9]	Displays the default value in the PDF template (that is: the value is not replaced!)	The font that is used before is determined as with the other form fields (if text modifiers are used, it is possible to change the font).
ASF_CUSTOM[0-9]_TITLE	Custom field title, e.g. ASF_CUSTOM2_TITLE	Not yet supported server-side
ASF_CUSTOM[0-9]	Custom field, e.g. ASF_CUSTOM2	Not yet supported server-side
ASF_MACRO[a-zA-Z0-9]	Similar to ASF_VALUE* above, but the default value can contain variables that will be expanded. The variables must be enclosed by # characters.	Examples: "#ASF_BILLING_NAMES#" or "#ASF_BILLING_ADDRESS#"

**NOTE:** The date and page numbering variables are not supported in the ASF\_MACRO fields.

Table 7.2 Form text field with ASF\_MACRO combining ASF\_BILLING\_NAMES and ASF\_BILLING\_ADDRESS



## Custom Footer Tab

The Custom Footer is inserted at the bottom of every page on the storefront. This is the ideal location to put content such as:

- a list of supported payment options
- information about shipping and shipping costs
- link to a sign-up form for a newsletter
- the company tag line or other commercial messages
- contact information and the company address
- copyright notice and the Terms & Conditions link
- links to other pages of the storefront (e.g. product pages) or external links
- code snippets for various widgets: page tracking and analytics, chat service, etc.

**NOTE:** Enabling the custom footer replaces the Copyright Notice, the link to the Terms & Conditions Page, and the Cookie Acceptance page which are explained in “Add/edit legal information (Legal tab)” on page 228. It is recommended that you provide this information in the custom footer.

Figure 7.67: Custom footer on a storefront page





## ▷ Create/edit the custom footer

The custom footer is a table with one row by default but you can add extra rows if necessary. A table is used to control the layout.

If you choose to make your storefront responsive (see “Responsive Design” on page 193) and you have a lot of content in the custom footer, it is recommended to put the content in table cells so they reflow more gracefully under each other on a small screen.

- 1 On the menu bar, choose **Stores** and select a store, and click the **Custom Footer** tab.
- 2 Select the **Enable Custom Footer** check box.

---

**NOTE:** This check box is not selected by default and the system generates the standard footer with a Copyright Notice, the Terms & Conditions link, and the Cookies Acceptance page if they have been set.

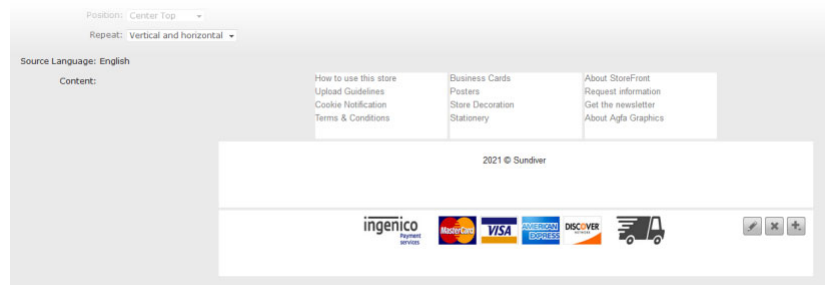
---

You can now enable a background color and/or a background image for the footer area.

- 3 In the content box, click the **Edit** button to enter and format the text you want to display in the footer area using the HTML WYSIWYG Editor. See “HTML WYSIWYG Editor” on page 265 for more information.

This is in the first row of your footer table. If you do not create extra cells in this row, there is no need to set a Minimum Cell Width but the width must be wide enough to accommodate the text or image.

- 4 To create extra cells in the first row, click the **Add** button and choose **To this Row**. Enter your content and set the Minimum Cell Width.



- 5 To create a second row, click the **Add** button and choose **To new Row**.

The text appears on top of the background color or image. The number of lines in a cell determines the height of its row. You can type empty lines to move the text content up or down.

- 6 It is recommended to include a link to your Terms & Conditions and/or cookies disclaimer page: click the Insert Link button in the editor. If you created the Terms & Conditions page in the Pages > Legal tab, click the STOREFRONT Links button to create a link to that page. You can also specify a URL to link to such a page on your website.
- 7 Click **Save** to confirm your changes.



Your new footer is applied at the bottom of all the pages of the storefront.

## Promotions Tab

---

**NOTE:** This feature may not be included in your license pack.

---

A promotion (promo code) entitles a user to a discount on one or more orders. The shopper enters the code at check-out and the discount is applied to the sub-total of the order items. You can create a promotion with a single promo code or with multiple promo codes.

- Single Code: allows several shoppers to use the same code to obtain a discount, e.g. enter 'DEAL2016' at check-out to get 5% off.
- Multiple Codes: a batch of promo codes is generated so shoppers can be given a dedicated discount code, e.g. 900 codes for a personalized e-mail campaign.

### ▶ Set up and export promotion codes

- 1 On the menu bar, choose **Stores** and select a store, and open the **Promotions** tab to see the list of promotions which is initially empty.
- 2 Click the **Add** button to add a new promotion to the list.
- 3 In the Create Promotion dialog, enter the Name and Description of the promotion.
- 4 Choose a promotion type:
  - Promotion on all Products
  - Promotion on single Product: Click the Edit button to choose the product you want to promote.
  - Promotion on all Shipping Services
  - Promotion on single Shipping Service: Select the shipping service you want to promote on the drop-down list.

- 5 Enter a value for a **Fixed** discount or a **Percentage** discount which is the result of the promotion.
- 6 In the **Usage Limit** section, you can specify the maximum number of times and/or a period during which the code can be used:
  - Usage Limit: minimum 1
  - From-To: The default *From* date is the creation date which is set automatically. The *To* date is not mandatory and can be left blank if you do not want to limit the duration of the promotion.
- 7 In the **Promo Code** panel, you have two options:
  - Single Code: select this button and enter the Code that you want to use for this promotion. You may want to set the Usage Limit at least to the number of shoppers expected to use the code.
  - Multiple Codes: select this button and enter an optional Code Prefix (e.g. DEAL-APRIL – max. 32 characters) and the Number of Codes (e.g. 250 – max 999). This example will generate 250 unique codes: DEAL-APRIL02VNpp, DEAL-APRIL0hOBig, DEAL-APRIL0jtjsi, DEAL-APRIL0rd1fP, DEAL-APRIL0YqpSd, etc. You may want to set the Usage Limit to “1”.

The screenshot shows a 'Create Promotion' dialog box with the following fields and options:

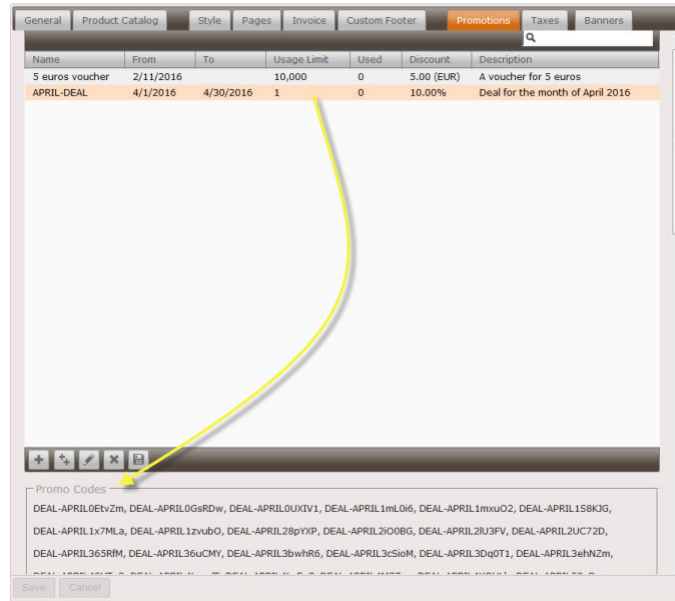
- Name:** April Deal
- Description:** Deal for April 2019
- Type:** Promotion on all Shipping Services
- Promotion:**
  - Fixed: [empty]
  - Percentage: 1.00 %
- Usage:**
  - Usage Limit: 1,000,000
  - From:  04/01/2019
  - To:  04/30/2019
- Promo Code:**
  - Single Code
  - Multiple Codes
  - Code Prefix: April Deal
  - Number of Codes: 250

Buttons: Save, Cancel

- 8 Click Save.

The new promotion is added to the list.

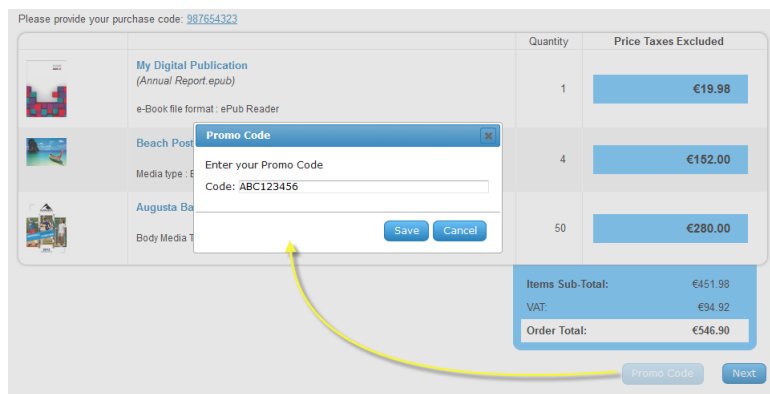
- 9 Select the promotion in the list to display the single code or the multiple codes in the Promo Codes panel.



- 10 Click the Export button to export the codes in an Excel file. This is useful for importing the codes into an another application, e.g. e-mail campaign software.

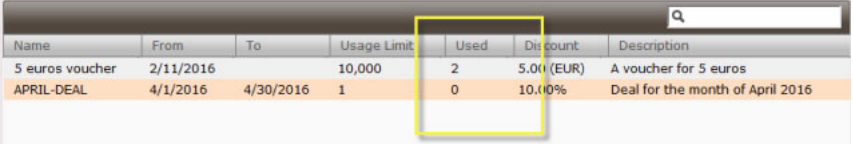
The promo code is now enabled on the storefront and shoppers can provide their promo code in the Review step at checkout.

Figure 7.68: Promo code button enabled on a storefront



The promo code button is displayed on the storefront as long as a store has a valid promotion.

In the promotions list you can see how often a particular code has been used.



Name	From	To	Usage Limit	Used	Discount	Description
5 euros voucher	2/11/2016		10,000	2	5.00 (EUR)	A voucher for 5 euros
APRIL-DEAL	4/1/2016	4/30/2016	1	0	10.00%	Deal for the month of April 2016

Usage of the codes is also reported in the order summary report (see “Order Monitoring on the Dashboard” on page 286).

**NOTE:** This kind of information is cached on the STOREFRONT server and is not updated immediately for shoppers to see. See “Caching” on page 196.

## Taxes Tab

The **Taxes** tab lists the VAT and other types of sales taxes applicable around the world. Different VAT and tax rates may apply, depending on your location.

- ◆ On the menu bar, choose **Stores** and select a store, and click the **Taxes** tab to see the list of taxes per locale.

In the Name column you can see the locales for which tax rates are provided and the different tax rates. For example, for European countries you have the following rates: None, parking rate, reduced rates, standard rates, super reduced rates, etc.

The Percentage column lists the tax rate and whether it is included or not included in the price displayed on the storefront.

The relevant tax and tax rates are applied automatically, depending on the type of product:

- For products that need to be shipped (printed and non-printed products): the tax rate is applied of the country specified in the shipping service selected by the shopper
- For digital products and print products ordered as PDF: the tax rate of the country in the billing address is applied

**CAUTION:** If a tax-exclusive rate applies in a country, the prices will always be displayed without taxes, even if a tax-inclusive price list is selected for the store.

Related topics:

- [Payment Methods and Tax on page 81](#)
- [Creating Products on page 157](#)
- [Use TaxCloud for US sales tax calculation on page 201](#)

## Meta Tags Tab

In this tab you can specify content to be inserted in the `meta name` element. These elements are added to the `head` element on all your storefront pages. The following are a few examples:

- to define you as the author of the site:

```
<meta name="author" content="John Doe" />
```

- to define your company as the copyright holder of the site:

```
<meta name="copyright" content="My Company" />
```

- to claim ownership of a public storefront so that it can be analyzed using Google Webmaster Tools. Similar tags exist for Bing or Yahoo:

```
<meta name="google-site-verification" content="my IDcode" />
```

The ID code is the content code generated by Google Webmaster Tools.

- to prevent the pages of a public storefront being indexed by search engines – by default for private stores:

```
<meta name="robots" content="noindex,nofollow" />
```

---

**CAUTION:** The STOREFRONT system automatically creates a sitemap for public stores. The sitemap allows search engines to *crawl* your public storefronts and index them for searching. If you do not want your storefront to appear in the search results of search engines, don't forget to set up the `robots` meta tag as described here. See “Search Engine Optimization (SEO)” on page 33 for more information on search engines.

---

- to insert one of the geotags that can be used to associate a storefront with a certain location:

```
<meta name="geo.placename" content="my city" />
```

Meta tags are particularly important for public stores. See also “Search Engine Optimization (SEO)” on page 33.

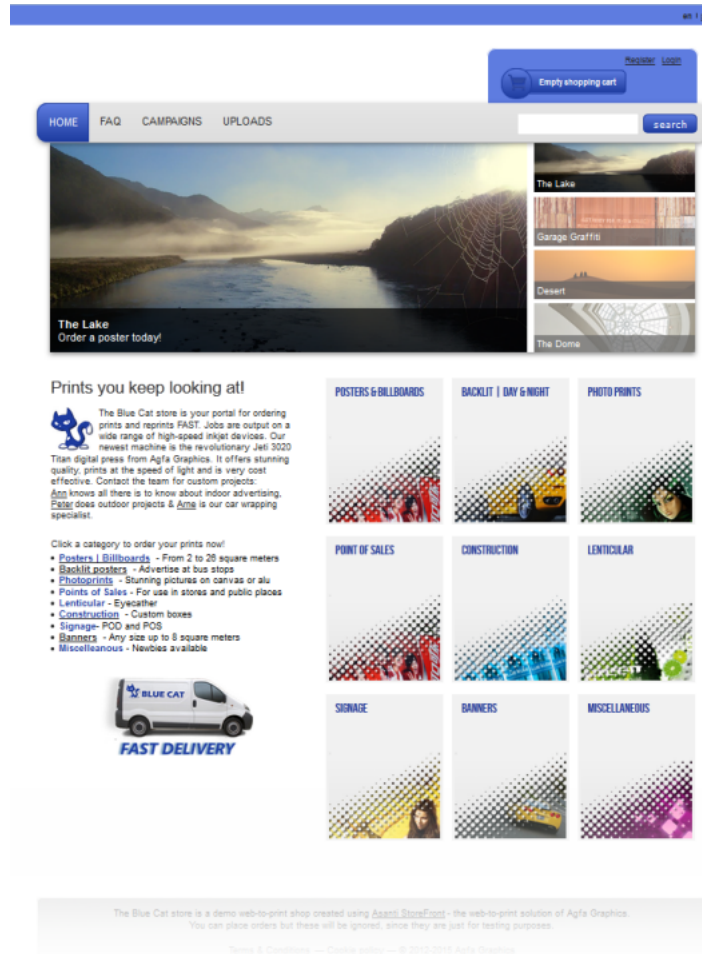
- 1 Enter a string in the Name field to define the meta element type.
- 2 Enter a string in the Content field.
- 3 Click Save.

The element or elements are added to your pages.

## Banners Tab

In this tab you create one or more banners that can subsequently be used on the pages of the storefront. This feature allows you to create attractive carousel banners with images that a shopper can click to go directly to a product page or a category page, or to an external URL.

Figure 7.69: Carousel banner of 4 transitioning images with list on the right



### ▷ Create/edit a banner

- 1 On the menu bar, choose **Stores** and select a store, and click the **Banners** tab.
- 2 Click the **Create** button to open the banner settings.

**Name** This is the name that is displayed in the Carousel Banner drop-down list when editing pages. See “Pages Tab” on page 222.

**Transition Effect** Select a transition effect:

Fading: images fade into each other (combine with longer transition duration)

Sliding: images slide from right to left

<b>Transition and Interval Duration</b>	Enter a duration for the transition effect between multiple images and the time that each image remains visible during the cycle.
<b>List</b>	Select this option to create a list of image thumbnails on the right or left of the main image; the shopper can click the thumbnails to see the image in the carousel.
<b>Images</b>	If the banner images have different widths, the images which are narrower are centered vertically.
<b>Banner Height</b>	The banner is displayed between the navigation bar and the rest of the page content; set the height of the banner here.
<b>Text</b>	Enter text that you want to display under the image carousel.
<b>Banner Images</b>	Click the Add button to open the Banner Images dialog:

---

**NOTE:** You can only add the images after saving the banner.

---

- Text: the text that appears under each image, in the thumbnail list and the carousel
- Image: browse to select an image that you want to include in your banner
- Click-through link: creates a hot spot on the image in the carousel with a link to a STOREFRONT page or an external URL.

Repeat for as many images that you want to insert in your carousel cycle.



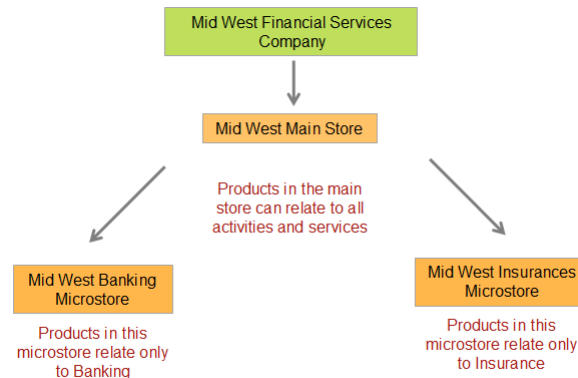
# Microstores

A microstore is derived from an existing store, referred to as the *main store*, and inherits many of the latter's settings. Microstores provide a convenient way to quickly create new stores, for example, to target specific audiences with a combination of shared and dedicated products. Microstores are also a useful mechanism for re-using the products of an existing store for several customers and each with their own branding.

## Example 1: Microstores for the same customer

A major financial services company has a main storefront where head-office staff can order publications related to all the activities and services of the company. The company has a separate division for banking and another for insurances. Microstores can be set up easily with only the publications for the respective divisions. So while these microstores use all the settings and styling of the main store, staff in each division can only purchase specific publications from their microstore.

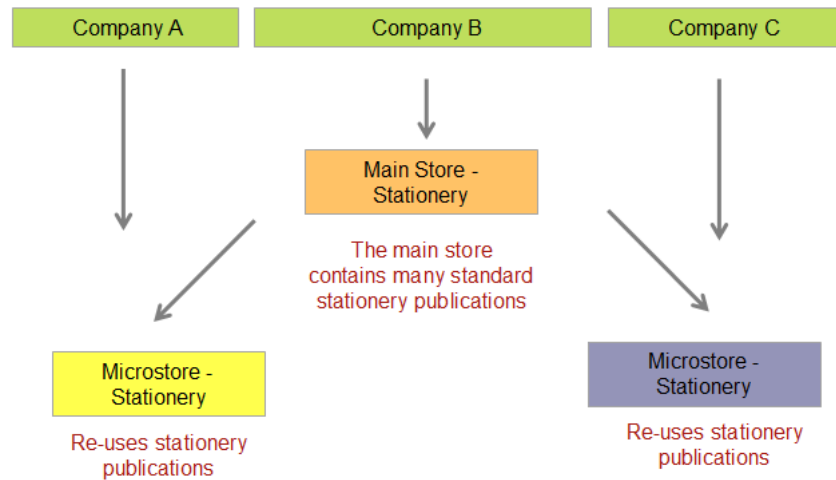
Figure 7.70: Microstores example 1: The storefronts of the main store and microstores have similar styling but offer different sets of publications to order.



## Example 2: Microstores for different customers

A print service provider has created a store with a wide range of stationery products for Company A. Other customers are also interested in a store for distributing stationery to their staff. In this case, the print service provider can easily create microstores for Company B and Company C with each company's branding, and re-use typical stationery products across these microstores.

Figure 7.71: Microstores example 2: The storefronts of the main store and microstores have different styling to reflect the branding of different customers but offer similar publications to order.



The following settings are inherited from the main store and can be fine-tuned for the microstore. The tabs are visible when editing the microstore:

- General Tab: only a few settings can be changed: price list, URL, e-mail, Approval setting; most are disabled: public/private store; payment method, etc.
- Product Catalog Tab
- Style Tab
- Pages Tab
- Invoice Tab
- Custom Footer Tab
- Promotions Tab
- Taxes Tab
- Banners Tab
- Shipping Tab

The following settings are inherited from the main store but cannot be changed for the microstore. The tabs are not visible when editing the microstore:

- Languages tab
- Meta Tags Tab

The following settings are not inherited:

- Users: You must create new users for your microstore from scratch. Users cannot be duplicated across stores.

### ***Prerequisites***

The main store from which you create your microstore and the company for the new microstore must already exist.

#### ▷ **Create a microstore**

- 1 On the menu bar, choose **Stores**.
- 2 In the list, select a store in the list that is to serve as the main store.
- 3 Click the **Create** button and then **Microstore**.



- 4 In the **General** tab, choose the Company for which the microstore will be used. This can be a different Company than the Company set for the main store.

---

**NOTE:** It is recommended that the default language of the parent store company and the microstore company are the same. Otherwise, translation issues may occur.

---

- 5 Complete the other editable fields in the General tab. Some fields are inherited from the main store while others are unique for the microstore.

The microstore has its own Name, Site ID (for a unique URL), e-mail.

---

**NOTE:** You can choose a different Price List as long as it uses the same currency as the main store. This prevents issues when choosing shipping services, which are currency-specific.

---

- 6 Click the **Create** button to add your microstore to the list of stores.

Create

The microstore is indented under the main store in the list.

Store	Company
Blue Cat	GreenPoint
GreenPoint	GreenPoint
My Microstore	SunDiver

Now you can continue to set up the microstore.

- 7 In the **Product Catalog** tab you initially see the categories which have been inherited from the main store. They are indicated with the Share icon.



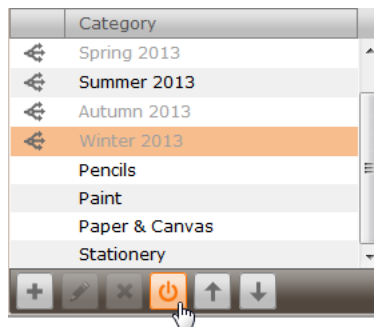
You can disable/enable these categories and rearrange them as desired for the microstore. The shared categories inherit the products as used in the main store.

---

**CAUTION:** Products added or deleted in the main store categories are subsequently also added or deleted in the microstore categories.

---

You can also add new categories. In the example below, you see 4 shared categories of which 1 is enabled, and 4 new categories which have been created and enabled specifically for the microstore.



- 8 In the **Style, Pages, Invoice** or **Custom Footer** tabs, click the **Edit Microstore** button to change the settings for the microstore. The initial settings are inherited from the main store.

You can always revert to the values of the main store by clicking the **Revert to Main Store** button, but this buttons also resets the values in other tabs.

---

**CAUTION: Revert to Main Store** resets the Style, all the Pages tabs, Invoice and Custom Footer tabs to the settings of the main store. Undo is not available.

---

- 9 Click **Save** to confirm your changes.

The microstore is grayed out in the list because its storefront is still off-line. See “Setting up a Store” on page 195 for more information about the settings in general, putting the microstore storefront online, deleting a microstore, etc.

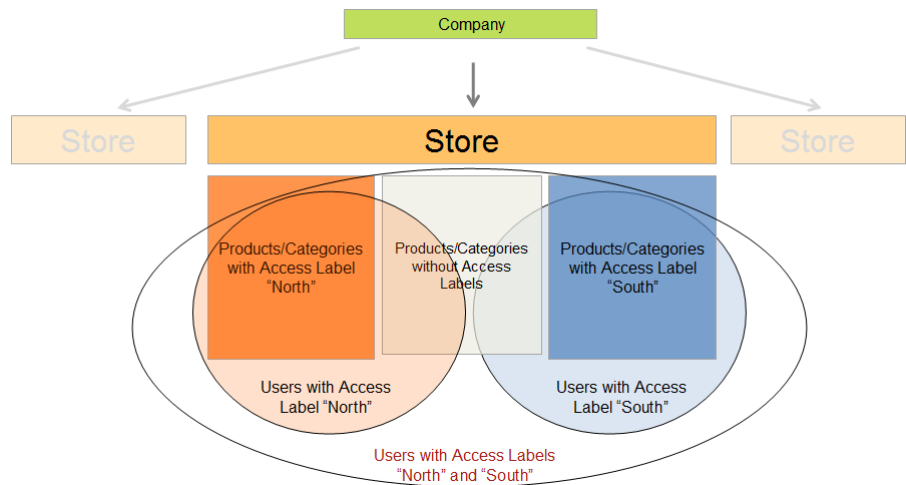
## Access Labels

**NOTE:** This feature may not be included in your license pack.

**TIP:** Watch the online training video on this topic (YouTube).

By default, all the products in your store are available to all its users. You can control access to individual products and/or product categories at the *user's level* by applying access labels.

Figure 7.72: Users can see products/product categories if they have matching access labels.



Only users who have been assigned matching access labels can see these products and/or product categories on the storefront and order them. For example, in a large organization, you may want to filter your products by dealer location (north, south, east, west), by distribution channel (dealer, distributor, chain store), or by language if you have products in different languages.

Figure 7.73: Shoppers can only see a product or product category on the storefront if their user profile has matching access labels. Product category labels override product labels.



You can create up to 512 access labels per company. This means you can create stores in which each individual user sees a different range of products.

Access labels are listed alphabetically when you assign them to products or product categories. To manage a long list of labels, you can use prefixes in the name, e.g. Sales\_User1, Sales\_User2, Marketing\_User3, Marketing\_User4, etc. This makes it easier to quickly find a specific access label.

### ▷ Setting up access labels

Access labels need to be defined and applied at various levels.

- 1 Define a set of access labels for a company: see “Create a Company” on page 46.

You can specify a different set of access labels for each company.

- 2 Apply the access labels you created in step 1 to the Product Categories of the store: see “Assign Access Labels to Product Categories” on page 212.

AND/OR

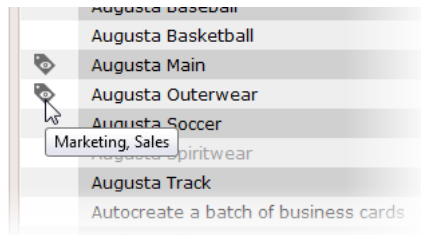
- 3 Apply the access labels you created in step 1 to individual Products: see “Creating Products” on page 157.

- 4 Assign the access labels to the Users to control which products or product categories they can see on the storefront: see “Create a new user” on page 276.

Products and Users with access labels are indicated in their respective lists by the following icon:



Hover over the icon to see which access labels have been assigned to the product or user.



You can check that a user actually has access to the correct products with the Impersonate feature. See “Impersonate a user” on page 282.



## HTML WYSIWYG Editor

The HTML WYSIWYG Editor is used to format the content of your storefront pages, product descriptions and other content.

- ◆ Choose Stores > Pages and click the Edit button at the top of any of the individual Pages tabs to open the Editor.



OR

To edit the description of a product, choose Products > Edit Description.

The HTML WYSIWYG Editor is used at various other locations in StoreCenter to format text.

**TIP:** Consult a HTML reference guide for more information about the general HTML settings.

Many of the commands are similar to those used in popular word processors, but remember that you are creating HTML pages and certain limitations apply. The Editor hides the HTML code in the normal view, however, more advanced users can switch to the HTML mode to edit the code.

Commands are chosen from the menus on the menu bar. Some commands can also be applied by clicking tool icons on the toolbar. An overview of the main commands is given in the next section.

---

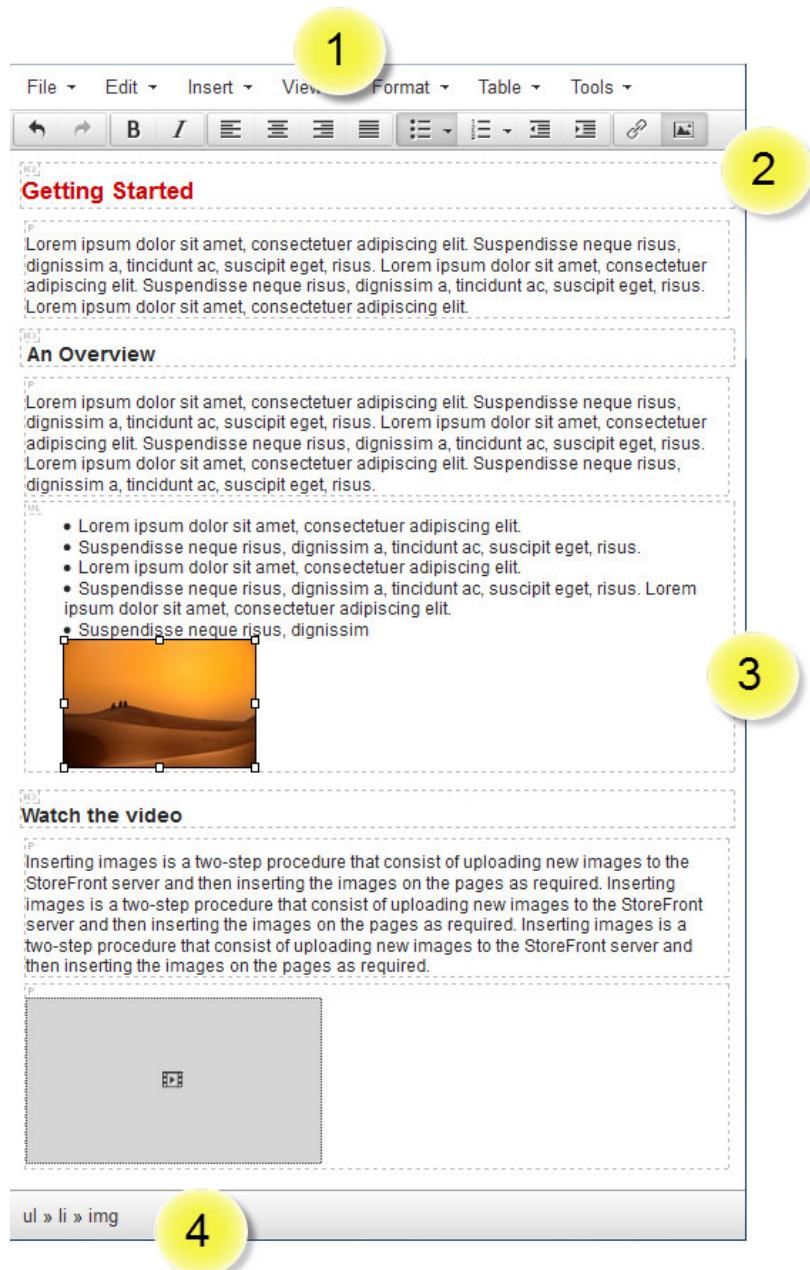
**NOTE:** The formatting you see in the HTML WYSIWYG Editor does not always correspond with the actual formatting of the storefront page. You must preview your pages on the storefront to be sure the expected results are obtained.

---

### View Options

- ◆ With the editor open, choose View to select the optimum editing environment:
  - Show blocks: displays dotted lines around the HTML blocks (p, h1, h2, ol, ul, etc.)
  - Visual aids: displays cues to indicate certain HTML elements (e.g. when you add an anchor)
  - Preview: an impression of what the page will look like on your storefront
  - Full Screen: opens the editor outside the Edit Page dialog; choose this option again to return to the Edit Page dialog and save your page

Figure 7.74: HTML WYSIWYG Editor overview



- 1 Menu bar
- 2 Toolbar
- 3 Page content with Show Blocks selected
- 4 Status bar with tag path

## Styles

It is recommended to use styles to format your pages as they add standard HTML tags to your content for font color, size and other properties.

- ◆ Position the cursor in a paragraph (no need to select text) and choose Format > Formats on the menu bar. The following styles are available:

	Style	HTML tag	Effect
Headers	Heading 1-6	h1 - h6	Creates standard HTML heading styles
Inline			The same in-line styles you see on the Format menu
Blocks	Paragraph	p	Applies/re-applies the <p> tag
	Blockquote	blockquote	Indents and centers the paragraph
	Div	div	Encloses the paragraph between an open and closed <div> tag. You can apply separate styling to this div.
	Pre	pre	Applies Courier font and keeps text on a single line
Alignment	Left, Center, Right, Justify		The same paragraph alignments styles you see in the toolbar
Store	Black Primary Color Secondary Color	span with class for the colors	Applies the pre-defined colors of your store to the selected text (in-line formatting).

- ◆ Choose Tools > Source Code to see the HTML code.

**TIP:** Choose Format > Clear Formatting if you want to reformat selected text from scratch after applying styles or adding your own HTML code. This may be necessary if the formatting on the actual web page is not what you expected.

In Source Code mode you can add your own formatting to the HTML code of the page.

Figure 7.75: The source code of a blockquote with store colors applied in-line

```
<h2>Getting Started</h2>
<p>Many of the tools are similar to those used in popular word processors, but remember that you are creating HTML pages and certain limitations apply.</p>
<div>The Editor hides the HTML code in the normal view, however, more advanced users can switch to the HTML mode to edit the code.<br />An overview of the special tools is given in the next section for each toolbar.</div>
<blockquote>
<p>Many of the <span class="secondaryColor">tools</span> are similar to <span class="primaryColor">those </span>used in popular word processors, but remember that you are creating HTML pages and certain limitations apply.</p>
</blockquote>
<pre>The Editor hides the HTML code in the normal view, however, more advanced users can switch to the HTML mode to edit the code.<br />An overview of the special tools is given in the next section for each toolbar.</pre>
<p>&nbsp;</p>
```

## Paragraph Formatting

- ◆ Position the cursor in a paragraph and click one of the formatting tools to apply the following formatting to the entire paragraph (no need to select text):
  - left, center, right alignment and justified alignment
  - bullet lists and numbered lists

## Inline Formatting

- ◆ Select the text you want to format, and choose Format on the menu bar to apply in-line formatting to the selected text. Bold and italic can also be applied from the toolbar. The following in-line styles are available:
  - bold, italic, underline, strikethrough, superscript, subscript
- ◆ To remove in-line formatting, choose Format > Clear formatting.

## Cut, Copy and Paste

You can use the standard commands and keyboard shortcuts, CTRL+X (cut), CTRL+C (copy) and CTRL+V (paste), to cut, copy and paste text within the HTML WYSIWYG Editor. These commands can also be found on the Edit menu.

Choose Edit > Paste as Text, when pasting from another application and you want to be sure all the formatting is cleared.

---

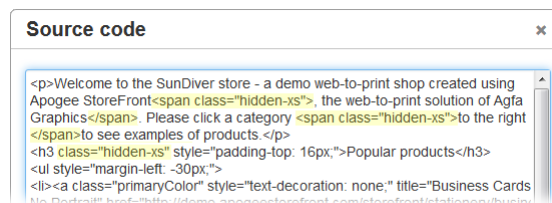
**NOTE:** Selecting Paste as Text turns on this mode until you choose Edit > Paste as Text again.

---

## Hide content on small screens

If you have set up a responsive storefront, you may want to hide certain page content all together on small screens. To do this, switch to Source Code view and apply class="hidden-xs" to the content you want to hide.

Figure 7.76: The hidden-xs class applied to hide content



```

<p>Welcome to the SunDiver store - a demo web-to-print shop created using Apogee StoreFront<span class="hidden-xs">, the web-to-print solution of Agfa Graphics</span>. Please click a category <span class="hidden-xs">to the right</span> to see examples of products.</p>
<h3 class="hidden-xs" style="padding-top: 16px;">Popular products</h3>
<ul style="margin-left: -30px;">
<li><a class="primaryColor" style="text-decoration: none;" title="Business Cards No. Portrait" href="http://demo.apogee storefront.com/storefront/stationery/business_cards_no_portrait">Business Cards No. Portrait</a></li>

```

All content with this class is hidden on small screens.

## Insert/Modify a Table

- 1 Position the cursor where you want to insert a table.
- 2 Choose Table > Insert Table, and select the number of rows and columns by dragging your cursor across the grid.

The table is inserted; you can drag the handles to increase the height and width of the table.

The Insert/Modify Table dialog is displayed where you can define General and Advanced Properties. Many of these are general HTML settings.

**TIP:** Consult a HTML reference guide for more information on HTML tables.

- 3 Choose Table > Table Properties to display the Table properties dialog where you can set overall table properties such as cell spacing, padding, etc.

On the Table menu, you have extensive controls to add/delete rows and columns, merge cells, etc.

- 4 Click in each cell to enter the data.
- 5 Click Save to confirm your changes.

Preview your storefront page and open the HTML WYSIWYG Editor again to modify the table as required.

- 6 To modify the table, position the cursor in the table, choose Table > Table Properties, and fine-tune the table settings.

## Links and Hyperlinks

You can link to products, categories and other storefront pages, or create hyperlinks to external websites.

### ▷ Insert/Edit a link

- 1 Select the text you want to assign a link to and click the Link tool or choose Insert > Insert Link.

The Insert Link dialog is displayed:

**STOREFRONT Links** Choose a product page, a category page or one of your storefront pages that you want to link to. The page URL appears in the Link URL field.

**URL** Enter a website URL with the https:// prefix, e.g. https://www.mywebsite.com.

**Text to display** The highlighted link text.

**Target** Choose whether the target page must open in the same browser window or a new window.

- 2 Click OK.

The link text is displayed in the secondary color and underlined.

- 3 Click Save.

---

**NOTE:** To remove a link, select and delete the link text.

---

## Anchors

If you have long pages, an anchor can be used to insert a link to a specified location on the same page or on a different page.

### ▷ Insert/Edit an anchor

- 1 Select the text that you want to link to.

- 2 Choose Insert > Anchor.

The Anchor dialog is displayed.

- 3 Enter an anchor name, e.g. `my_anchor`.

- 4 Click OK.

An anchor is inserted on the page and you can now create a link to this anchor from another location on the page or from a different page.

- 5 Select the text you want to assign a link to and click the Link tool.

The Insert Link dialog is displayed.

- 6 For links on the same page, enter the anchor name preceded by the hash (#) symbol, for example `#my_anchor`, in the Link URL field.

OR

For links to an anchor on a different page, select the page in the Link List field and append the anchor name preceded by the hash (#) symbol to the end of the URL in the Link URL field.

- 7 Click Save.

## Insert/Upload Images

Inserting images is a two-step procedure that consist of uploading new images to the STOREFRONT server and then inserting the images on the pages as required.

### ▷ Insert an image

- 1 Position the cursor where you want to insert the image and click the Insert/Edit Image tool.

The Insert/Edit Image dialog is displayed.

- 2 Click in the Image List drop-down list and choose the image you want to insert.

---

**NOTE:** The list is empty if no images have been uploaded.

---

OR, if the Image List is empty

Click the browse button next to the Source field and upload an image to the STOREFRONT server. Repeat this step for as many images as you want to add to the list. The uploaded images are now included in the Image List.

- 3 Select the image you want to use from the drop-down list.
- 4 Enter a description of the image; this description is displayed if the image fails to load on the page (`alt` attribute).
- 5 Specify the dimensions for displaying the image in your document, and whether you want to constrain the proportions. The native dimensions of the image are entered by default.
- 6 Click OK.
- 7 Click Save.

## Insert Video

### ▷ Insert/edit a video

- 1 Position the cursor where you want to insert the video and choose Insert > Insert Video.
- 2 Paste the code that points to a video, for example a video hosted on YouTube.
- 3 Click Save and view your page to check that the video plays as expected.
- 4 To edit an existing link to a video, highlight the video in your document and choose Insert > Insert Video.

## Getting Started

Inserting images is a two-step procedure that consist of uploading new images to the StoreFront server images on the pages as required.

Inserting images is a two-step procedure that consist of uploading new images to the StoreFront server images on the pages as required.

### Watch the video

Inserting images is a two-step procedure that consist of uploading new images to the StoreFront server images on the pages as required. Inserting images is a two-step procedure that consist of uploading new images to the StoreFront server and then inserting the images on the pages as required. Inserting images is a two-step procedure that consist of uploading new images to the StoreFront server and then inserting the images on the pages as required.



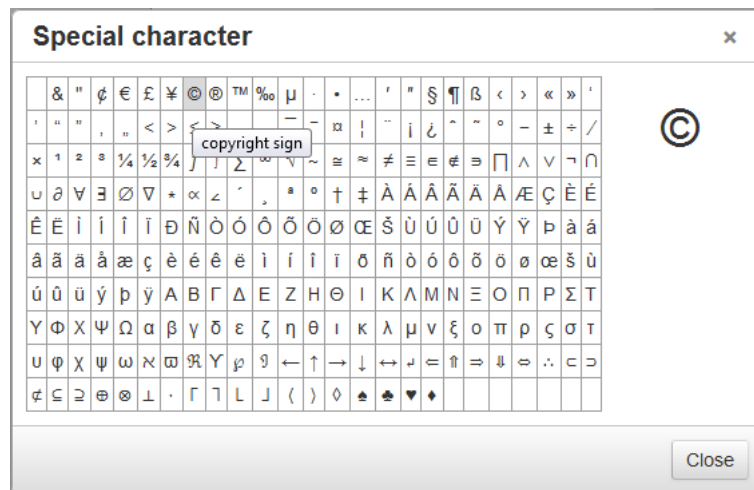
## Special Symbols

The HTML WYSIWYG Editor includes a powerful feature for inserting special characters and symbols.

### ▶ Insert custom characters

- 1 Position the cursor where you want to insert the custom character and choose Insert > Special Character.

The Special Character table is displayed.



- 2 Click the character you require to insert it in your text.







# Users

The visitors of your storefront are referred to as users.

- ▷ Create Users .....276
- ▷ Managing Users .....278

For private stores, you must set up users and provide logon details so they can access the storefront. Alternatively, you can activate self-registration on the login page so new users can initiate their own user account.

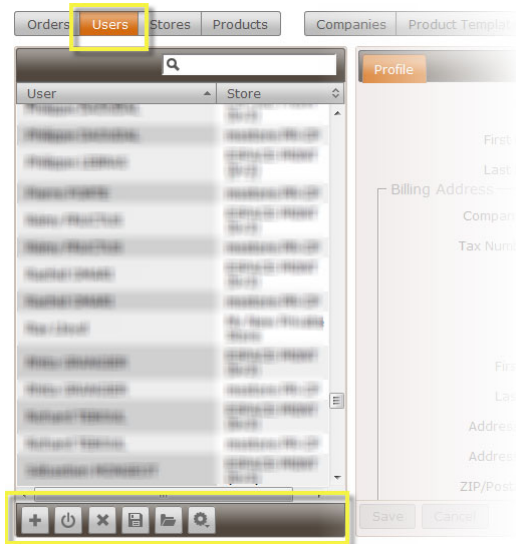
If your store is public, visitors of the storefront will need to create their own account when they proceed to the checkout. They appear automatically in STOREFRONT as users.

---

**NOTE:** Administrators cannot log on to their storefronts with their administrator credentials. They need to create their own user account for each store or impersonate another user (see “Impersonate a user” on page 282).

---

Figure 8.78: Users panel with users per store and toolbar



## Create Users

### *Prerequisites*

Users are assigned to stores so you must have at least one store set up before you can create a user.

#### ▷ Create a new user

1 On the menu bar, choose **Users**.

2 Click the **Add** button.



3 In the top panel of the **Profile** tab, select the Store or Microstore you want to assign a user to.

---

**NOTE:** If you want to give a person access to several stores, you need to create a user instance for each store.

---

4 Choose a Language in the drop-down list, preferably a language that is supported by the store.

5 In the **Title** drop-down list, choose a title for the formal salutation. The options depend on the language you just selected for this user.

For example, if you chose English as language, the following title options are displayed:

- Mr.
- Ms.
- Ms./Mr.: if you do not know the gender of the person

For example, if you chose German as language, the following title options are displayed:

- Frau Dr.
- Herr Dr.
- Frau/Herr: if you do not know the gender of the person
- Frau
- Herr

---

**NOTE:** The title is only displayed in e-mails if you selected the *formal* salutation style for the Company.

---

---

**NOTE:** For German, the title is also shown on the storefront when *formal* is enabled.

---

- 6 Enter the user's name and other personal details:
  - E-mail: Enter a valid e-mail address for sending notifications; if you want to use a fake or dummy e-mail address for testing purposes, use the example.com domain (e.g. fakeuser@example.com) to avoid e-mail bouncing and error logs on the StoreCenter server.
  - MIS ID: If applicable, enter the ID of a Management Information System (MIS) to ensure the MIS system correctly associates the user reported by STOREFRONT with the matching user account in its own database. You can also use this field to enter an employee number or another identification code. Otherwise, leave this field empty.
- 7 Select the **Quoting** check box if you want to allow the user to generate quotes in the store if the Quoting feature is not selected for the store. See "Quoting" on page 205.
- 8 Select the **Tax Exemption** check box if a user is exempt from paying sales tax (e.g. users ordering for charities).
- 9 You can choose one of the following **Billable To** options:
  - User: Orders will be billed to the user and you must complete the user's details in the Billing Address panel.
  - Company: Orders will be billed to the company and the company's details are displayed in the Billing Address panel; the shopper does not have to pay at checkout.
- 10 Click **Save**.

Save

---

**NOTE:** The user profile may also include custom fields. See "Custom Attributes" on page 106.

---

- 11 The new user is added to the list which mentions the e-mail address, the *Creation date* and the *Last login* date. The Last login date is useful for filtering the list of users: see “Filter users” on page 279.

A welcome e-mail with logon information is sent to the user in the preferred language, inviting the user to log on to the storefront where he can set a password of his choice. You can specify the sender e-mail address in the Production Settings (see “Production Center” on page 92).

- 12 You can set access labels for this user in the **Access Labels** tab.

See “Access Labels” on page 262 for more information about using access labels to control who can see which products on the storefront.

- 13 You can set approval rights for this user in the **Approval** tab.

See “Approval Groups” on page 54 for more information about controlling who can approve orders.

- 14 Click **Save**.



## Managing Users

### ▷ Disable a user

You can decline a user’s access to a storefront temporarily by disabling him or her.

- 1 On the menu bar, choose **Users**.
- 2 Select the user you want to disable.
- 3 Click the **Enable/Disable** button.



The user remains in the list but he no longer has access to the storefront. The user can be re-activated using the same button.

### ▷ Delete a user account

You can delete a user permanently.

- 1 On the menu bar, choose **Users**.

**TIP:** You can use CTRL-select and SHIFT-select to select multiple users and disable/enable them.

**TIP:** You can use CTRL-select and SHIFT-select to select multiple users and delete them.

2 Select the user you want to delete.

3 Click the **Delete** button.



The user is removed from the list and no longer has access to the storefront.

### ▷ Filter users

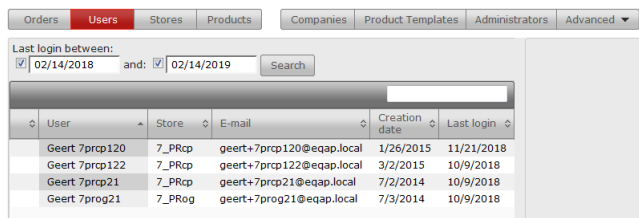
The list of users includes a column specifying the last time a user signed in to the store (Last login). If no date is show, the user never accessed the store. The last login may be in the distant past which means a user is no longer using the store. You can create filtered lists of these users to send reminders to these users, to comply with data privacy regulations, to promote usage, etc.

1 On the menu bar, choose **Users**.

2 Click the **Tools** button (cogwheel) and then choose **Last Login Filter**.



A filter panel is displayed at the top of the list.



3 Select a check box to activate the filter parameters:

- start date only: all users who logged in after the specified date
- end date only: all users who logged in before the specified date
- both dates: all users who logged in between the specified dates

4 Click **Search**.

Users that meet the search criteria are displayed in the list. If you want, you can select these users in the list (press CTRL) and export the filtered list: see “Export a list of users” on page 279.

5 To undo the filter, clear the check boxes and click **Search**.

### ▷ Export a list of users

1 On the menu bar, choose **Users**.

You can export all the users in the list or selected users.

**TIP:** You can use CTRL-select and SHIFT-select to select multiple users and export them.

- 2 Click the **Export** button.



You can choose to view or download an Excel file which contains a list of the selected users with their personal details and billable address details.

### ▷ Import a list of users

Users can be imported into STOREFRONT from an Excel file. You need to contact your ECO3 representative for this import operation, however, the procedure below explains how you can prepare the data in the Excel file.

---

**NOTE:** Your ECO3 representative or dealer can tell you what the maximum number of users is.

---

- 1 On the menu bar, choose **Users**.
- 2 Click the **Export** button to retrieve an example of the Excel file you need.



You can choose to view or download an Excel file which contains a list of all the existing users with their personal details and billable address details.

- 3 Save the Excel file to your hard disk.
- 4 Open the Excel file and clear the data for the existing users.

---

**CAUTION:** Do not modify the content of the first row in the spreadsheet, otherwise the data import will fail.

---

- 5 Enter the details for each user that you want to add, on a separate row.

Leave the first two columns empty.

- 0:User Id
- 1:User GUID

These IDs will be filled in by STOREFRONT upon import.

The following columns are mandatory:

- 2:E-Mail: this is the unique identifier for each user and the same e-mail address cannot be used for more than one user



- ❑ 3:First Name
- ❑ 4:Last Name
- ❑ 11:Store Name
- ❑ 24:Street 1
- ❑ 26:City
- ❑ 28:ZIP
- ❑ 29:Country: two-digit ISO 3166 code; e.g. DE (Germany), US (United States), GB (United Kingdom), FR (France), ES (Spain), NL (The Netherlands), BE (Belgium), PT (Portugal), PL (Poland), etc. The full list can be found on the *ISO website*.
- ❑ 39:ZIP (Extra): only mandatory for Brazil, Poland, Japan, US

The following columns are optional:

- ❑ 6:Phone
- ❑ 7:Fax
- ❑ 8:Locale
- ❑ 16:Store Company Name
- ❑ 20:Address First Name: used for billing
- ❑ 21:Address Last Name: used for billing
- ❑ 25:Street 2
- ❑ 27:State/Province
- ❑ 30:Tax Number
- ❑ 31: Company Name (for billing)
- ❑ 32:Address MIS ID: used for billing
- ❑ 33:MIS ID: can be used to identify a person with a number
- ❑ 34:Address E-Mail: used for billing

- ❑ 38: Invoice Company Name:  
If a user has the setting "Billable To: Company", enter the correct name of a company that exists in StoreCenter; the other billing address fields do not need to be completed in the Excel file.  
If a user has the setting "Billable To: User", leave this field empty and complete the billing address fields.
- ❑ 39: ZIP (Extra): only for US
- ❑ 40: Salutation: Mr., Mrs. or Ms./Mr., or local translations; if you do not provide this column, the default salutation is used in the language of the user as defined in column 8: Locale.
- ❑ 41: Tax Exempt Cert Id
- ❑ 42: Access Labels
- ❑ 43: Bypass Access Labels
- ❑ 44: Approval Type
- ❑ 45: Approval Groups

Delete the other columns in the Excel sheet or leave the cells empty.

## 6 Save the Excel file.

---

**NOTE:** The data must be on the first spreadsheet of the file.

---

The Excel file is now ready for importing into StoreCenter. Please contact your ECO3 representative or dealer for this feature.

## ▷ Impersonate a user

A Printer Administrator can use this feature to log on to a storefront as a user with his own administrator credentials to troubleshoot issues. For example, you may want to fix a customizable product or reproduce a problem that a user has reported or check access labels.

---

**CAUTION:** Any purchases you make are on behalf of the user you are impersonating.

---

- 1 On the menu bar, choose **Users**.
- 2 Select the user you want to impersonate.

- 3 Click the **Tools** button (cogwheel) and then choose **Impersonate**.



The storefront opens in a new browser window and the **Impersonate a user** dialog is displayed with your Printer Administrator e-mail address in the E-mail Address field and the user's e-mail address in the Login as field.

- 4 Enter your password in the Password field and click **Login** to sign in to the storefront as the user you are impersonating.

You can now perform all user actions on the storefront: browse products, check the shopping cart, make purchases, view the user's order history, edit the user's account, etc.

- 5 Log out to end the Impersonate session.

Related topics: 

- [Access Labels on page 262](#)

#### ▷ **Reset a user's password**

The Printer Administrator can use this feature to re-send an e-mail that invites the user to visit the storefront and set a password of his choice.

- 1 On the menu bar, choose **Users**.
- 2 Select the user whose password you want to reset.
- 3 Click the **Tools** button (cogwheel) and then choose **Reset Password**.



- 4 Click the **Reset Password** button to send an e-mail to the user, inviting him to log on to the storefront and set a new password.

Related topics: 

- [Stores, Microstores and Storefronts on page 187](#)
- [Add a Register button to the storefront login page \(self-registration\) on page 226](#)



# Monitoring and Processing Orders

---

**NOTE:** Some of the procedures in this section are for the Printer Administrator only.

---

A Company Administrator can monitor orders placed by shoppers on the storefront and also manage orders and stocks if these options have been selected for him. Only the Printer Administrator and Operator are able to process orders.

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## Order Monitoring on the Dashboard

Once a store has been set up, the monitoring of incoming orders is one of the key activities in the StoreCenter of STOREFRONT. Two areas of StoreCenter focus on these tasks:

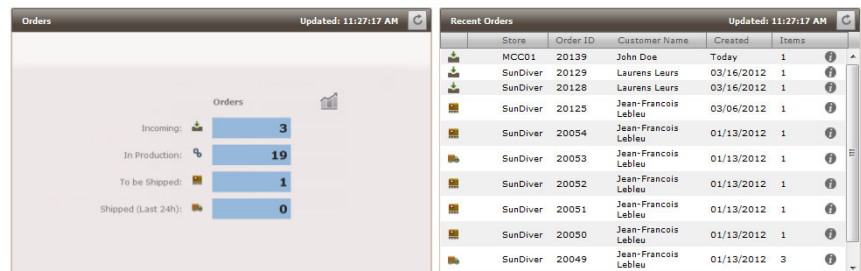
- The Dashboard
- Orders Pane

Related topics: • “Licenses statistics on the Dashboard” on page 111

### The Dashboard

The StoreCenter Dashboard, which is the landing page when you log on to STOREFRONT, provides a summary overview of all orders and a list of the most recent orders. You can navigate from these overviews directly to the relevant tabs of the Orders pane. The Orders overview also has a link to order statistics.

Figure 9.79: Orders overview and recent orders on the Dashboard



#### ▶ Selecting orders via the Dashboard

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.  
The Orders overview table is displayed with the orders broken down by status.
- 2 Click the status links to go to the Orders pane.



The Incoming, In Production, Shipped and Pending Shipments links take you to the Pending tab in the Orders pane. The list of pending order items is filtered accordingly. Company Administrators/Approvers and Company Approvers will see orders waiting for approval if this has been set up for their store.

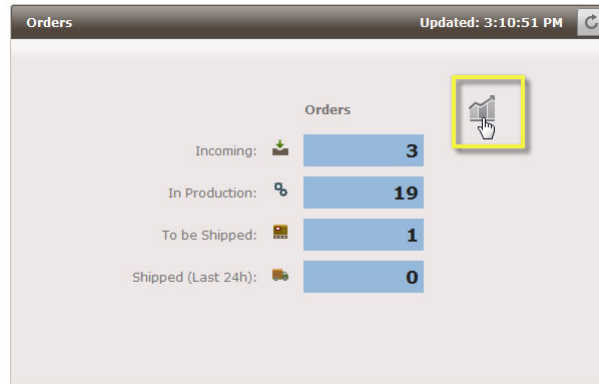
OR

Click an order line in the Recent Orders table to go to the relevant tab in the Orders pane.

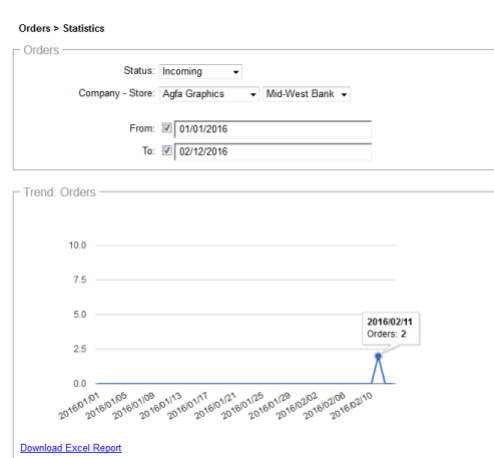
	Store	Order ID	Customer Name	Created	Items	
	MCC01	20139	John Doe	Today	1	
	SunDiver	20127	Laurens Leurs	03/16/2012	1	
	SunDiver	20128	Laurens Leurs	03/16/2012	1	
	SunDiver	20125	Jean-Francois Lebleu	03/06/2012	1	
	SunDiver	20054	Jean-Francois Lebleu	01/13/2012	1	
	SunDiver	20053	Jean-Francois Lebleu	01/13/2012	1	
	SunDiver	20052	Jean-Francois Lebleu	01/13/2012	1	
	SunDiver	20051	Jean-Francois Lebleu	01/13/2012	1	
	SunDiver	20050	Jean-Francois Lebleu	01/13/2012	1	
	SunDiver	20049	Jean-Francois Lebleu	01/13/2012	3	
	SunDiver	20013	Jean-Francois	12/01/2011	1	

## ▶ Order statistics on the Dashboard

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.
- 2 Click the **Statistics** link.



The statistics are displayed.



You can filter the statistics by:

- Order status
  - Company: All Companies or a specific Company
  - Store per Company: All stores of the selected Company or a specific store
  - Date: the maximum period for statistics is 13 months
- 3 Hover your mouse over the graph to see the exact number of orders on a given day.



### ▷ Download an Excel report of orders

Use this procedure to create an Excel file with data relating to orders.

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.
- 2 Click the **Statistics** link.



The statistics are displayed.

- 3 Choose **Excel Report** in the report type drop-down list.
- 4 Filter the statistics as required (by Status, Company-Store, date) and click the **Download Excel Report** link.

You can view or download the Excel file which has one worksheet that lists all the orders, taking into account your filter settings, and a second worksheet with the items for these orders.

In each worksheet, the columns have a title, such as column C which has the title '2:Store Name'. If you use software to automatically parse the order data, that software should not rely on data being present in a specific column, nor should it rely on the full title of the column, which may change over time or be translated to the preferred language of the user who is exporting the data. The software should take the number in the column title as the sole reference. In our example: the '2' will always refer to the column that contains the name of the store in which the order was generated. In future versions of STOREFRONT, the column order may change, the column titles may change but the column ID numbers will remain consistent.

To facilitate automated order processing and save API calls, this report contains the following identifiers: "48:Order UidPK", "58:Order Item UidPK", and "59:Shipment UidPK".

### ▷ Download all invoices

Use this procedure to download copies of all invoices.

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.
- 2 Click the **Statistics** link.



The statistics are displayed.

- 3 Choose **Invoices in ZIP** or **Invoices in Single PDF** in the report type drop-down list.
- 4 Filter the statistics as required (by Status, Company-Store, date) and click the **Download Report** link.

Depending on the report type you chose, all the invoices are created as separate PDF files and collected in a ZIP file, or all the invoices are generated in a single PDF.

### ▷ Order details via the Dashboard

- 1 Click the **Dashboard** link in the navigation bar to go to the Dashboard.
- 2 In the Recent Orders pane, click the information button to view the **Order Details** of a selected order.



The order details for the selected order are displayed in a new browser window.

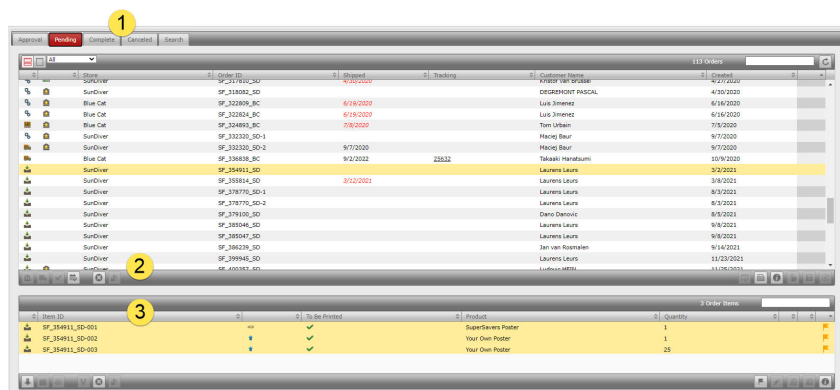
- 3 Close the browser window with the Order Details to return to the Dashboard.

## Orders Pane

On the Dashboard, click the order status links or recent orders to go to the Orders pane where you can see more details about the status of the orders. Alternatively, click Orders on the menu bar.

Orders appear in the top panel while the individual order items (products) are listed in the bottom panel.

Figure 9.80: The Orders pane



- 1 Approval, Pending, Complete, Canceled and Search tabs

- 2 Order panel with a list of orders
- 3 Order item panel with the individual order items for the selected order

If your store has been set up with an approval requirement, all incoming orders appear first in the *Approval* tab and need to be approved before they can be processed. Otherwise, incoming orders appear in the *Pending* tab. Orders move to the *Completed* tab if they have been shipped and marked as completed. Orders canceled by an administrator are moved to the *Canceled* tab.

Printer Administrators, Company Administrators/Approvers, and Company Approvers can approve/reject orders. The Company Administrator may have rights to manage orders of his/her own company in the Pending tab but generally this activity is reserved for the Printer Administrator and Printer Operator who process the orders further. The Company Administrator can always monitor the status of orders in the different tabs. All StoreCenter roles, except the Company Approvers, can also customize (set order item flag) the order items which require an intervention to facilitate production.

The Pending tab toolbar provides buttons to change the status of orders and mark them as Available (To Be Shipped), Shipped, Completed or Canceled.

Each tab and panel has a Search box to search in the displayed lists. You can also search across all orders in the *Search* tab.

## Order Statuses

In the different tabs of the Orders pane, the status of an order is further indicated by the order status icons.



Order or order item to be approved (approval tab)



Order has been approved and continued to production (approval tab)



Order item has been rejected



Order item has been approved



Awaiting inventory for Printed Stock or Non-Printed products ordered in backorder.



Created: incoming but not yet prepared by the system for downloading (Pending tab)



Prepared: incoming and all data has been prepared by the system for downloading



In production: the item has been downloaded and is being processed (prepress, printing, finishing)



To be shipped, i.e. available (stock and non-print products are assigned this status immediately); Product Kit order items with Prepared status



Shipped: the order has been shipped to the shopper



Order or order item returned



Completed: the order has been shipped and requires no further action



Canceled: the order or order item has been canceled by an administrator and requires no further action



The order item has a comment made by the shopper



The order item has workflow feedback information; click the icon to open the workflow feedback




















The order or order item has encountered a problem that prevents the order from being fulfilled. The issue will be fixed by the STOREFRONT team. Contact your ECO3 Service support or dealer if the issue is not resolved automatically.



An order cannot be downloaded to the workflow system or uploaded to the specified FTP server.

## Orders Toolbar Buttons

-  Refresh the list of orders
-  Continue with the selected order to production (send from the Approval tab to the Pending tab)
-  Display the order package slip
-  Display the payment history for the selected order
-  Display details of the selected order or order item
-  Display packing instructions
-  Download the shipping instructions file
-  Generate/Regenerate the invoice (e.g. after modifying the Store invoice presets)
-  Update the payment by bank transfer status
-  Mark the order as completed
-  Mark pending orders as completed (with date range)
-  Mark the order as shipped
-  Cancel the selected order or order items
-  Return the order or order item
-  Approve the selected order item
-  Reject the selected order item
-  Retry order item upload to FTP (upload to FTP failed)



Download the selected order items



Mark the order or order item as to be shipped (available)



Put the order items in a new, separate shipment (splitting an order)



Resubmit: Reverts the order item status to Prepared so it can be submitted again to the workflow. (Apogee Prepress/Asanti)



Order item customization (order item flags)



Edit the order item in the online editor (for customizable or variable data products)



Download a preview PDF



Download the Variable Data Processing file attached to an order item (Excel file)



Display workflow information (Apogee Prepress/Asanti)



View order list with order items in separate panel



View order items list

## Approving/Rejecting Orders

The approval/rejection step is optional but can be set up to allow the Company Administrator/Approver or Company Approver to check whether an order is eligible for further processing in STOREFRONT. The order may contain incorrect information, exceed an agreed budget or need formal approval from a central approving authority.

You can approve/reject an order and all its order items, or you can split the order and approve/reject individual order items.

It is recommended that the Company Administrator chooses to receive an e-mail notification for all orders if the approval requirement is set. See “Edit your Account Profile” on page 42 for more information.

You can fine-tune the approval workflow by creating *approval groups* and administrators with an approval role for these groups. See “Approval Groups” on page 54.

### *Prerequisites*

An order only needs to be approved/rejected if this requirement has been set up for the store by the Printer Administrator. See “Setting up a Store” on page 195 and “Approval Groups” on page 54 for more information.

#### ▷ Approve/reject an order or order items

- 1 On the menu bar, choose **Orders**.
- 2 Click the **Approval** tab and select the order you want to approve/reject.

Incoming orders are indicated with the To be Approved status icon:



---

**NOTE:** Orders awaiting approval do not appear in the Pending tab until they have been approved.

---

- 3 Click the information button to view the **Order Details**.



- 4 Close the Order Details.

You can also review the Order Item details and view a preview PDF for each individual order item (only for printed items).

- 5 Select the order item and then click the **Preview PDF** link to check the content of the supplied data (only for printed items).



AND/OR

- 6 Click the information button to see the **Order Item Details** and check which items were purchased.



- 7 If you want to check or edit the contents of a customizable or variable data product, click the **Edit Customization** button to open the document in the Online Editor.



- 8 With the order selected in the top panel, click the **Continue to Production** button to approve *all* the order items.



OR

Mark the individual order items as Approved/Rejected in the Order Items panel:

Select the individual order items and click the **Mark order item as approved** or **Mark order item as rejected** button.

An approved order item is indicated with the following order status icon:



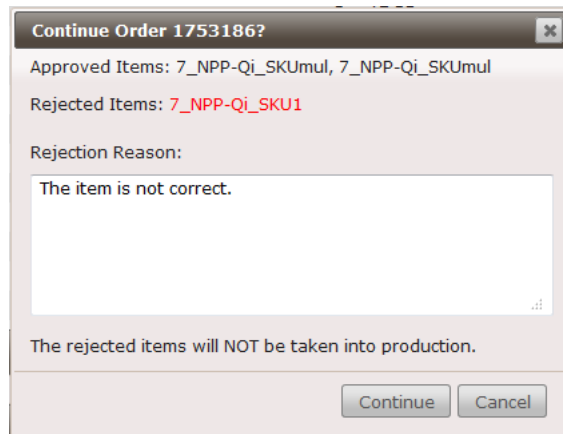
A rejected order item is indicated with the following order status icon:



In the order panel, click the **Continue to Production** button to send *all* the order items to the Pending tab, including those items which have not been approved or rejected.

In the Continue Order dialog, you can enter a reason for rejecting order items.



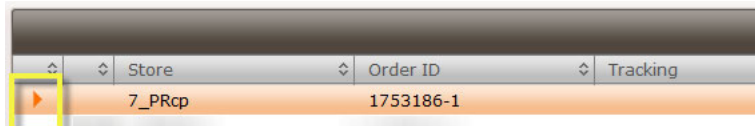


**NOTE:** Order items which are not marked as approved or rejected are passed to production as if they were approved.

## 9 Click **Continue**.

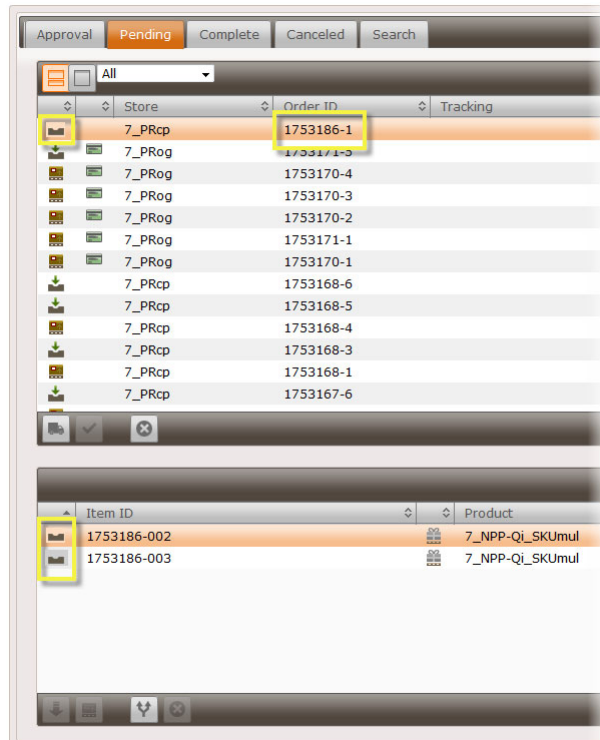
If you rejected the order or certain items, an e-mail is sent to the shopper informing him and stating the reason for the rejection.

The approved order is indicated with following Order Approved and Continued to Production status icon in the order list:



Clicking the Pending tab refreshes the status of the order.

The order now appears in the Pending list with the Created status, and the order items also have the Created status:



An incremental suffix is appended to the order number to indicate it has been *split off* from the original order and does not contain all the original order items.

---

**NOTE:** A rejected order or rejected order item is not displayed in the Pending tab.

---

If you return to the Approval tab, the order is no longer displayed.

---

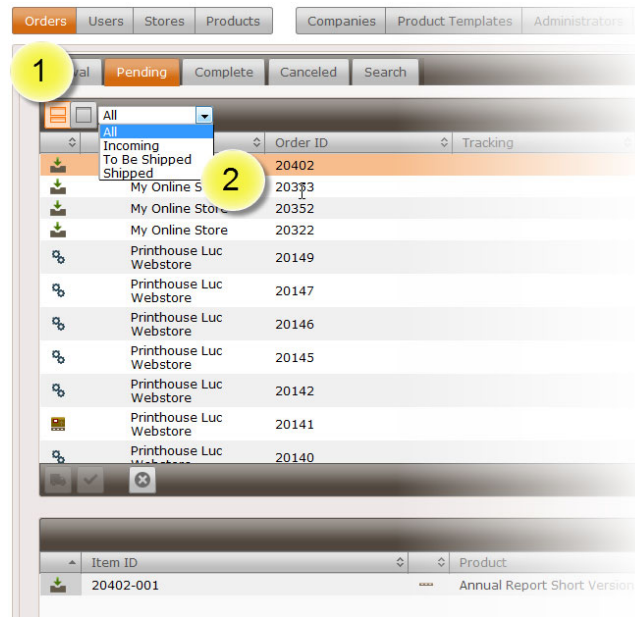
**NOTE:** Rejected orders are removed from the system and are no longer displayed in any of the tabs once you click **Refresh**.

---

## Pending Orders

The Pending tab is the default tab that you see when opening the Orders pane. This is where most of the processing actions are performed. It has two views and you can also filter the orders by status.

Figure 9.81: Views and filtering in the Pending tab



- 1 Buttons to switch between Orders with/without Order Items
  - 2 Drop-down to filter orders by status
- Orders and Order Items view: lists all the pending orders in the top pane and the items per order in the bottom pane. You can filter the orders by *All*, *Incoming*, *To be Shipped* or *Shipped*.
  - Order Items only view: lists the items which are awaiting the To Be Shipped status, across all the orders. In other words, these are orders that need to be printed. You can filter the order items by *All*, *Incoming* and *In Production*.

**NOTE:** If STOREFRONT is integrated with Apogee Prepress 12 and higher, or Asanti Production 4.0 and higher, the *Prepared* status automatically changes to *In Production* once order items are downloaded by Apogee Prepress/Asanti Production.

## ▶ Process a pending order

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



- 2 Select the order you want to process.

---

**NOTE:** Orders awaiting approval appear in the Approval tab until they have been approved.

---

Incoming orders are indicated with the order Created status icon until they have been prepared by STOREFRONT:



Once they are prepared, i.e. the JDF data generated and a print-ready PDF file has been created, the status icon changes to Prepared:




---

**NOTE:** Orders which require payment by bank transfer remain in Awaiting Payment status until you confirm that the payment has been received. See “Update bank transfer payments” on page 304.

---

- 3 Click the information button to view the **Order Details**.



- 4 Close the Order Details.
- 5 Select the order in the top pane to display the items for the order in the bottom pane.

A single order may contain different types of order items (products).



- 6 Select the order item you want to process.

Do one of the following using the toolbar buttons, depending on the product type:


- For Customizable, Variable Data, Uploadable and On Demand, products:

Click the download button  to download an MJD or PDF zip-compressed file; the order status changes to In Production .

**TIP:** Press ALT while clicking the download button to toggle between a PDF/JDF or an MJD zip-compressed file.

- ❑ For Printed Stock and Non-Printed Stock products: The product is in stock or can be ordered in backorder. The status of products in stock changes directly to Available (To Be Shipped) . Products in backorder have the Awaiting Inventory status until the stock is updated and then Available (To Be Shipped) once the stock has been updated.
- ❑ For Digital products and Print products ordered as PDF: The status changes immediately to Shipped .

## 7 Repeat for all the order items.

When all the order items are available, the status of the order changes to Ready to be Shipped .

---

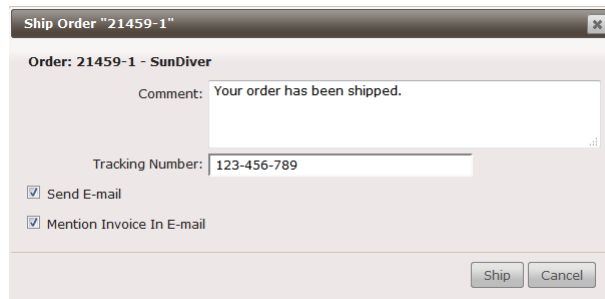
**NOTE:** If you want to ship an order item before all the items are available, you need to split the order into order parts. See “Splitting orders into order parts (New shipment)” on page 302.

---

## 8 Select the order or orders with the In Production status and click the **Ship Order** button.



The Ship Order dialog is displayed where you can enter a comment and the delivery service Tracking Number or URL to monitor the delivery.



Ship Order "21459-1"

Order: 21459-1 - SunDiver

Comment: Your order has been shipped.

Tracking Number: 123-456-789

Send E-mail

Mention Invoice In E-mail

Ship Cancel

The Send Mail check box is selected by default, but you may want to disable this feature, for example if many orders are being shipped on the same day.

If the online payment has not been captured yet, an option is displayed for you to confirm that “I agree to go ahead with the shipment anyway”.

## 9 Click **Ship**.

The order status is updated in the list with the tracking number or URL in the Tracking column. If the shipping service is set to Tracking Not Available, you will see the first 30 characters of the comment in this column.

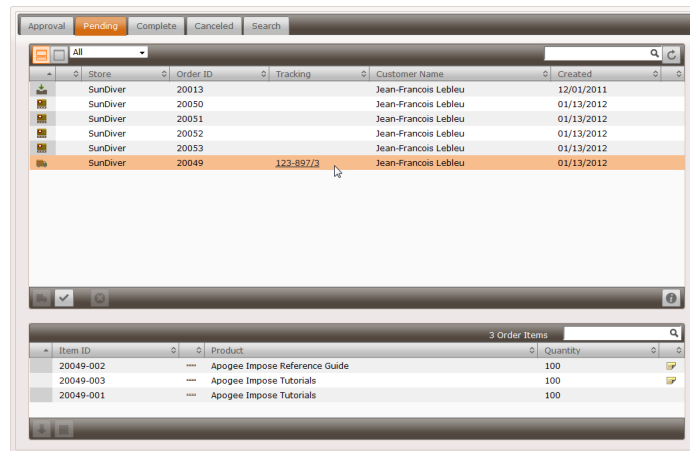
**NOTE:** To edit the tracking URL or add it later, press ALT while clicking the field in the tracking column. (Only Administrators and Operators who are allowed to manage orders can do this.)

The shopper receives a confirmation e-mail with the tracking number and comment. The shopper can click the tracking number to go to the website of the delivery service provider and check the status of the delivery.

The following Shipped order status icon is displayed:



In the Tracking column you can click the number to check the shipment status of the order on the delivery service provider's website.



Shipped orders remain in the Pending list until they are marked Complete.

### ▷ Splitting orders into order parts (New shipment)

You can create sub-orders, or order parts, from the individual items of an order, for example, to ship them without waiting until all the other orders items are ready. This is done in the Pending tab on Prepared orders. It is not possible in the Approval tab.

The packaging is re-calculated for the different order parts because these order parts are shipped separately. The total shipping cost will NEVER be higher than the original shipping cost if the parts were ordered as a single order.

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



- 2 Select the order you want to split in the top pane to display the order items (products) in the bottom pane.
- 3 Select the order item or items you want to split off and click the **New Shipment** button.



- 4 Click **Split Order**.
- 5 The order is now split into two separate orders in the top pane and an incremental suffix is added to the original order number as follows:
  - xxxxx-1: the original order with the remaining order items
  - xxxxx-2: the newly created sub-order with the split-off order item or items
- 6 If necessary, the original order can be split again to create another sub-order:
  - xxxxx-1: the original order with the remaining order items
  - xxxxx-3: the newly created sub-order with the split-off order item

	Store	Order ID	Tracking
	Bonnie's Microstore	21472	
	Bonnie's Microstore	21489	
	Bonnie's Microstore	21499	
	Bonnie's Microstore	21500-2	
	Bonnie's Microstore	21500-3	
	Bonnie's Microstore	21500-1	
	SunDiver	20340	
	SunDiver	20391	

You can now process and ship these orders separately.

### ▷ Monitor/process all pending items across all orders

- ◆ In the Pending tab, click the **View Order Items Only** button (right).



This view shows all the items of orders with the following status:

- Incoming (Created and Prepared)
- In Production

**TIP:** You can use CTRL-select and SHIFT-select to perform actions on several items simultaneously.

In this view, you can perform the following actions on a selected order item:

- download
- mark as available (ready to be shipped)

### ▶ Viewing order comments

A Shopper can create a comment for each item in the storefront shopping cart. These comments are indicated by a yellow icon in the order items pane in the Pending tab.

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



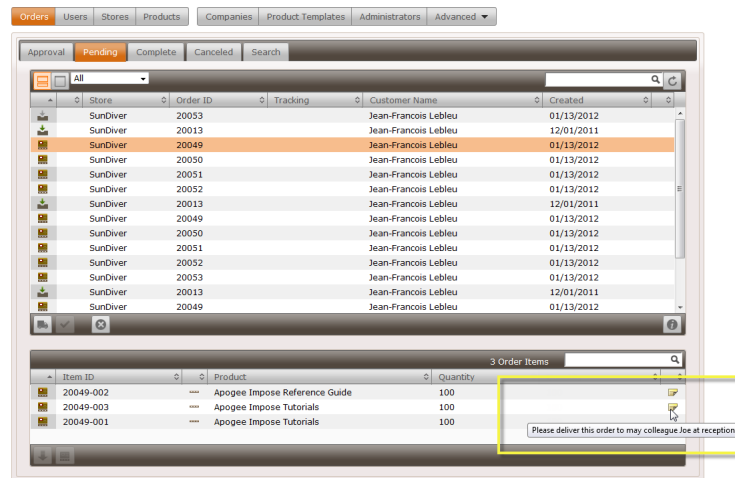
- 2 Select an order to display the order items in the bottom pane.

Order items with a comment are indicated with the following icon:



**NOTE:** Comments may include specific requirements for printing a job or delivering the order and as such play an important role in the monitoring process.

- 3 Hover over the icon to display the comment.



### ▶ Update bank transfer payments

Orders paid by bank transfer require manual intervention when the bank transfer has been received.



- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



Orders paid by bank transfer appear in the order list with a special icon in the payment status column to indicate that a bank transfer is required.



Payment by bank transfer required: the order is on hold until the status is changed to payment complete

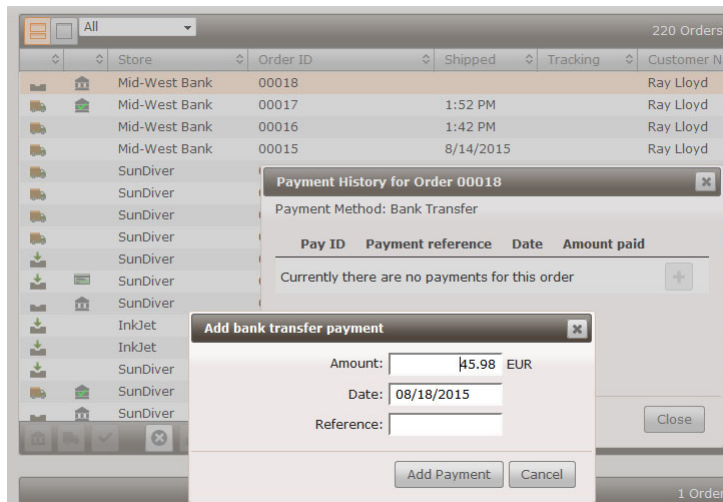
These orders have the Awaiting Payment status until you manually set the payment to Complete.

- 2 Select the order in the list and click the **Update bank transfer payment** button.



The Payment History dialog is displayed.

- 3 Click the **Add** button to confirm the payment.



- 4 Click **Add Payment** and then Close.

The payment status changes to Complete and the processing continues.



Payment by bank transfer is complete: the payment has been received and the status changed; the order can now be processed

**NOTE:** This bank transfer payment verification can be skipped. See “Set up payments by bank transfer” on page 81.



Payment by bank transfer is not required to continue with the order: no manual intervention is required for the order to be processed

### ▷ Return the order or order item

Once an order has been shipped, it's not possible to cancel it. In certain situations (e.g. a digital product) you may need to recall the order, or the shopper may return the order. In these cases, you can change the order status to *returned*.

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



- 2 Select the shipped order or order item in the list and click the **Return the order** button.



- 3 Enter a reason for changing the status and click **Return Order**.

The status of the order changes to *Order is returned*.

	Store	Order ID
	Mid-West Bank	00018
	Mid-West Bank	00017
	Mid-West Bank	00016
	Mid-West Bank	00015
	SunDiver	00014
	SunDiver	00013

For Digital products and Print products ordered as PDF, this means that the link to download the file is deactivated. No notifications are sent.

### ▷ Generate/regenerate an invoice

You may want to create or regenerate an invoice, for example, if you changed the general settings for invoices or you enabled invoice creation for the store after an order was placed (see “Invoice Tab” on page 236).

- 1 In the **Pending** or **Complete** tab, select the order with the Shipped status for which you want to generate or regenerate the invoice.

Orders for which an invoice have already been created are indicated with the following icon:



If a shipped order doesn't have the invoice icon, the order was probably placed before you enabled invoices and you will now create the invoice for the first time.

- 2 Click the **Regenerate invoice** button.



- 3 Click the invoice icon to open the invoice you just generated. You can hover over the invoice icon to see the creation date and time.



To download all your invoices for archiving via the Dashboard, see “Download all invoices” on page 289.

# Complete Orders

Once an order has been processed and shipped, you can mark it as *complete* to move it from the Pending tab to the Complete tab. You reduce the number of orders in the list and obtain a better overview of orders which are still in progress.

## ▷ Mark orders as complete

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



- 2 Select the order you want to mark as complete.

---

**NOTE:** Only Shipped orders can be marked as Complete.

---

- 3 Click the **Mark the order as completed** button.



The status changes from Shipped to Complete in the Pending tab.

- 4 Click the Refresh button or the Complete tab and the completed order is moved to the Complete tab.

## ▷ Mark pending orders as complete

You can mark multiple orders with the In Production, Available or Shipped status as complete by specifying a creation date or date range. This is useful for cleaning up orders in the Pending tab.

- 1 Click the Mark pending orders as complete button, without selecting any of the pending orders in the list.



- 2 Select the Created after and/or the Created before check boxes to display a calendar picker:

- Created after: marks all orders created after this date (From)
- Created before: marks all orders created before this date (To)

Use both check boxes to define a From/To date range.

---

**NOTE:** To prevent you from accidentally deleting recent orders, only orders older than 1 month can be selected.

---

- 3 Click OK to display a confirmation screen specifying the number of orders that will be marked.
- 4 Click OK.

Any orders created during the specified period and with the In Production, Available or Shipped status are moved to the Complete tab. No further actions can be performed on these orders in the Pending tab and no e-mails are sent to confirm that the status of the order has changed.

## Canceled Orders

If you don't want to process an order which is pending in the Pending tab, you can cancel it. Orders are moved to the **Canceled** tab when they have been marked as  *canceled*  in the Pending tab.

Paid orders will be set to the Refunded status before they can assume the Canceled status.

---

**NOTE:** Shoppers need to be refunded via your bank. STOREFRONT allows you to monitor refunds with special status icons in the canceled orders list. You can keep track of refunds and the exact amount, on the payment history page (see "Payment History" on page 320).

---

### ▷ Cancel orders or order items

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.

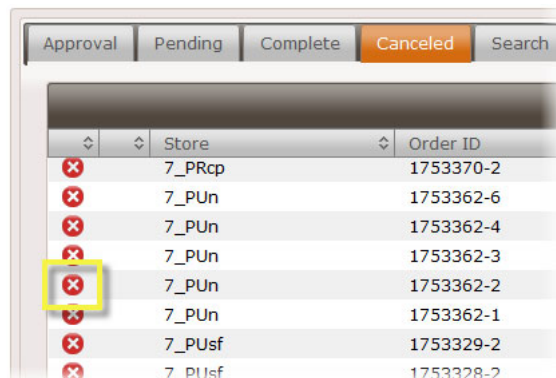


- 2 Select the order or sub-order you want to cancel.
- 3 Click the **Cancel the order** button and confirm that you want to cancel the order.



The status changes from its current status (Incoming, In Production, To Be Shipped) to Canceled in the Pending tab. By default, an e-mail is sent to inform the shopper. Clear the **Send E-mail** check box if you do not want to inform the shopper (i.e. silent cancellation).

- 4 Click the Refresh button or the Canceled tab and the canceled order is moved to the Canceled tab.

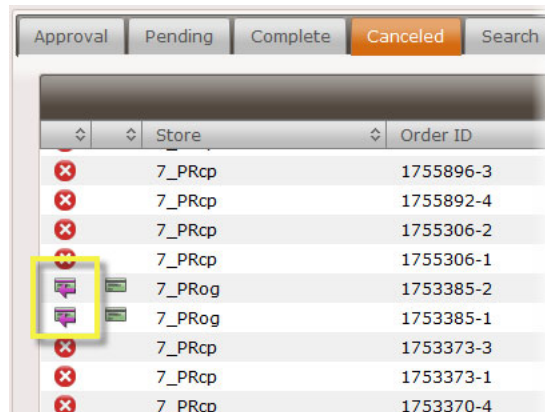


- To cancel an order item, select the order item and click the **Cancel the order item** button.

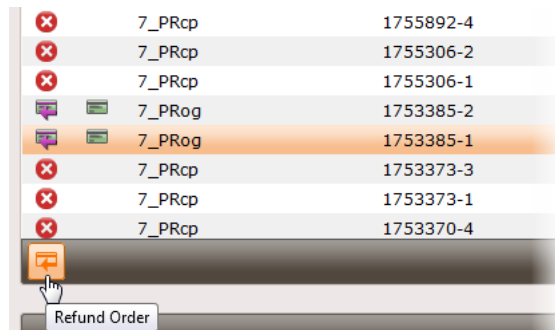
A new order part is then created and sent to the Canceled tab with this canceled item.

### ▷ Refund a canceled order

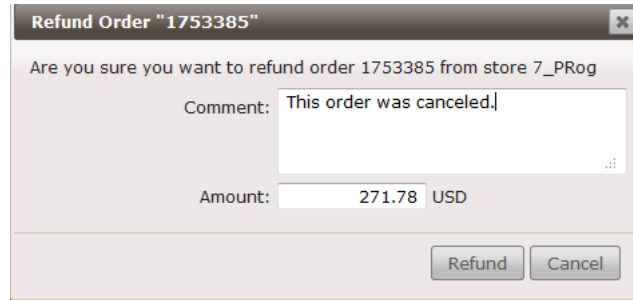
- In the **Canceled** tab, select the order or sub-order that needs to be refunded. These orders are indicated with a *credit card and purple arrow* icon in the list of canceled orders.



- Click the **Refund Order** button.



A dialog is displayed where you can confirm that you want to refund the indicated refund amount. You can enter a comment and also change the amount to be refunded, for example to compensate for administrative costs or other expenses.



Refund Order "1753385"

Are you sure you want to refund order 1753385 from store 7\_PRog

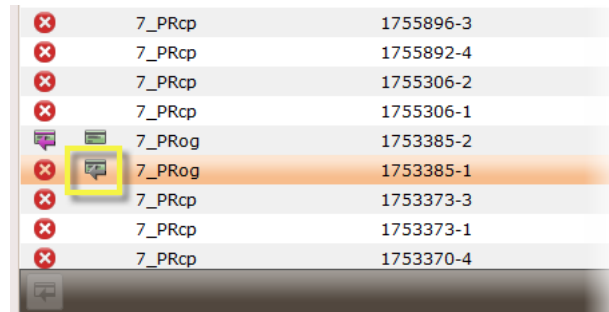
Comment: This order was canceled.

Amount: 271.78 USD

Refund Cancel

### 3 Click **Refund**.

The payment status changes to **Order Refund, Refunded** indicated with a *credit card and gray arrow* icon.



✘	7_PRcp	1755896-3
✘	7_PRcp	1755892-4
✘	7_PRcp	1755306-2
✘	7_PRcp	1755306-1
📄	7_PRog	1753385-2
📄	7_PRog	1753385-1
✘	7_PRcp	1753373-3
✘	7_PRcp	1753373-1
✘	7_PRcp	1753370-4

The order status has now changed to **Canceled**.



## Order Details, Package Slip and Invoice

Order Details provide an overview of all the items of an order, including the prices and a link to the payment history. These details can be consulted at any time during order processing. The invoice PDF file can be downloaded if the order has been shipped.

The Package Slip is meant to be printed and enclosed with the order when it is shipped.

These documents are always in the language of the shopper.

### ▷ View and print the Order Details

- 1 On the menu bar, choose **Orders** and In any of the tabs, select the order you want to view.

OR

Click the order in the Recent Orders pane on the Dashboard.

- 2 Click the information button to view the **Order Details**.



A new browser window opens with the Order Details:

- order status, number and date
  - delivery address, service and order reference
  - link to the tracking service
  - shipping cost
  - discount (promo code)
  - billing address
  - list of all order items with quantities and prices including and excluding tax
  - the total price including and excluding tax
- 3 You can print this page by clicking the link in the top right corner. You can also download the invoice PDF file if this feature has been set and the order has been shipped.

4 Close the browser window or tab to return to the Orders pane.

▶ **View/print the Package Slip**

An itemized list of order items with the shipping address, order details and reference number can be viewed and printed. This slip can be enclosed with the order. The following information is provided:

- store information
- order number and date
- shopper's order reference if provided at checkout
- delivery address
- name of the shipping service
- list of all order items with quantities and SKU codes, but not the prices

1 On the menu bar, choose **Orders**.

2 In any of the tabs, select the order you want to view.

3 Click the **Package Slip** button.



A new browser window or tab opens with an itemized list that can be printed.

4 Click the **Print** link to print this package slip.

5 Close the browser window or tab to return to the Orders pane.

## Order Item Details, Preview PDF, Last Minute Changes

You can easily check the details of an order item at any time during order processing. Approvers can check the details and preview a PDF of the individual order items before approving an order. Operators can immediately check the specifications and a preview PDF before downloading the production package for an order item. Approvers can also open customizable and variable data products in the Online Editor to perform last minute changes.

### ▷ View the Order Item Details

The Information link in the Order Items pane opens a new window with the following Order Item Details (where applicable):

- order number, date, customer and order reference
- shipping info with estimated shipping date and shipping method
- order item number and ordered quantity
- name, type and content of the product
- product template specifications
- product specifications
- product options
- packing details with the calculation of packaging units and weight
- user comment

1 On the menu bar, choose **Orders**.

OR

Navigate to the Orders pane by clicking an order on the Dashboard.

2 In any of the tabs, select the order and then the individual item you want to view.

3 Click the information button to view the **Order Item Details**.



**TIP:** Press the CTRL or SHIFT keys to select multiple order items and view all the details in a single document and then print a PDF for each item.

A new browser window or tab opens with the Order Item Details.

Order Item Details ORD-3461547-Pmr2683-Str223-001	
<u>Store</u>	
Name	56_PU4
<u>Order</u>	
Number	ORD-3461547-Pmr2683-Str223
Date	2/1/23 11:24:48 AM CET
Customer	Geert 56pu4_20
56pu4 Reference	AWP22701 - PRINT
	AWP22701 - PRINT
	AWP22701 - PRINT
Your comments	AWP22701 - PRINT
<u>Shipping Info</u>	
Estimated Shipping Date	2/7/23
Via	USDA_Worldwide_FF10.77
<u>Order Item</u>	
Number	ORD-3461547-Pmr2683-Str223-001
Quantity	250
<u>Product</u>	
Name	14909_CP-UBFI-1p_3pdf1 (23/11)
Type	Customizable Product
<u>Product Template</u>	
Name	14909_UBFI-A4LP-WT150-F-Qf_3pdf1
Type	Unbound - Flat
Finished Dimensions	210 x 297 mm
<u>Page</u>	
Color (Front)	Full Color
Color (Back)	Blank
Sides	1
Media	Glossy W&T - Gloss coated paper
Media Weight	150 g
Media Thickness	151 µm
MIS ID	MIS152
Stock Brand	Glossy W&T
Grade	Gloss coated paper
<u>Product Options</u>	
	Print&PDF: Only Print
	MVO1: MVO1-Option1
<u>Packing Details</u>	
1 x <a href="#">Box1_A4_50g_2kg</a>	208 items & 2 kg (gross) per Packaging Unit dedicated ORD-3461547-Pmr2683-Str223-001   14909_CP-UBFI-1p_3pdf1 (23/11) 208 items & 1.95 kg (net)
1 x <a href="#">Box1_A4_50g_2kg</a>	42 items & 443 g (gross) per Packaging Unit dedicated ORD-3461547-Pmr2683-Str223-001   14909_CP-UBFI-1p_3pdf1 (23/11) 42 items & 393 g (net)
	2.34 kg in total (net)
<u>User Comment</u>	
	Print

- 4 Click the links (Product, Product Template, Packaging Unit) for more detailed information if necessary.
- 5 Click the PDF Preview link under the thumbnail in the top right corner, to view or download a preview of the production PDF which is contained in the production package.
- 6 Close the browser window or tab to return to the Orders pane.

▷ **View/print a production PDF preview**

You can view the PDF of an order item before downloading the actual production package. This is the PDF which is contained in the download package.

- 1 On the menu bar, choose **Orders**.

- 2 In any of the tabs, select the order and then the individual item you want to view.
- 3 Click the **Download Preview PDF** button.



You are prompted to save or open the PDF file.

### ▷ **Edit a customizable product (last-minute changes)**

You can open a customizable product, including variable data products, in the Online Editor to make last-minute changes before processing the order. This is an interesting feature for correcting typos and making last minute changes.

---

**NOTE:** If the order has already been sent for processing, a new revision is re-sent.

---

- 1 On the menu bar, choose **Orders**.
- 2 In any of the tabs, select the order and then the individual item you want to view.
- 3 Click the **Edit Customization** button.



The document is opened in the Online Editor where you can edit the document and/or the uploaded variable data.

- 4 Close the Online Editor and save your changes.

You can now continue the order processing workflow.

Related topics: 

- [Online Editor on page 335](#)

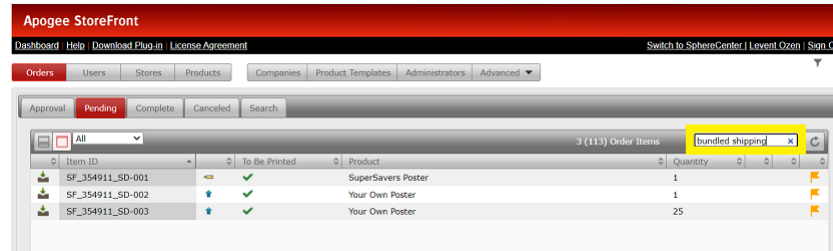
## Order Item Customization

You can customize the order items which require an intervention to facilitate production and/or indicate their production status by creating different order item flags.

You can assign the order items flags independently of order item status. Defined conditions for flags are independent of each other. There is no workflow to proceed to the next or previous status.

**TIP:** You can use View Order Items Only view in the Pending tab to sort the list of all the order items by order items flags.

- You can sort all order items by condition to quickly find all the items those require some action.
- You can use the search box to find all items customized with a certain flag. For example, searching for "bundled" will only display the order items with the status "Bundled shipping".



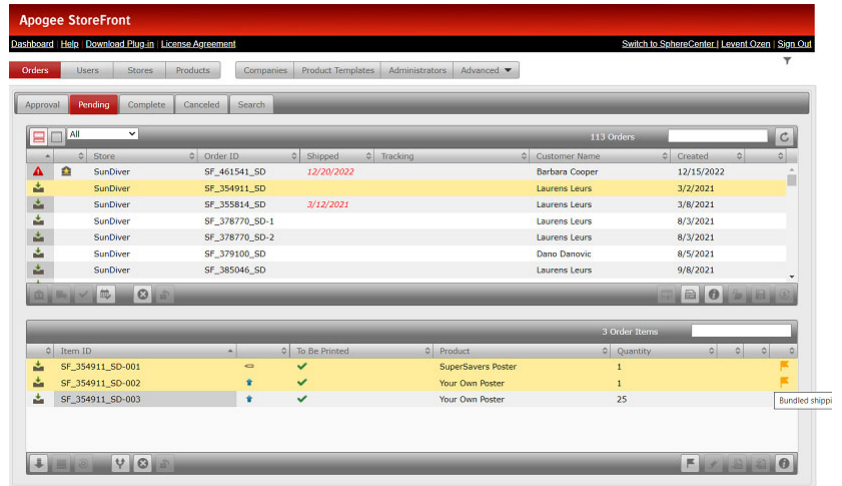
**NOTE:** Order item flags are only visible in StoreCenter, they are not visible in stores.

### ▷ Create/edit Order Item Flag

- 1 In the **Pending** tab, click the View Orders and Order Items button (left) view.



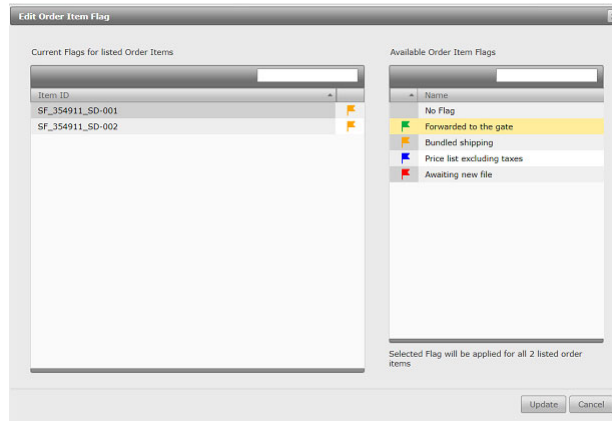
- 2 Select an order to display the order items in the bottom pane.



- Click the **Order Item Customization** button to assign a selected order item flag to one or multiple selected order items.



Select an order item flag from the available order item flags.



Click **Update** to save your changes.

- Related topics:**
- [Order Item Flags on page 95](#)

# Payment Status and History

## ▷ Payment Status

Orders may need to be paid before they can be processed. Icons in the Payment Status column of the orders list indicate the status of the payment and you will be prompted to acknowledge an error when you want to ship an order that contains a payment warning. See “Payment Methods and Tax” on page 81 for more information on direct and deferred payment.

- ◆ Hover over the payment status icons in the Payment Status column for more information about the payment status of an order.



Online payment required (to be captured); only displayed for deferred payments



Online payment in progress (capturing)



The order is paid (captured)



Payment failed



Refunding order



The order is to be refunded



The order is refunded



Payment by bank transfer required: the order is on hold until the status is changed to payment complete



Payment by bank transfer is complete: the payment has been received and the status changed; the order can now be processed



Payment by bank transfer is not required to continue with the order

## ▷ Payment History

The Payment History gives an overview of the payment statuses for the specified order.

- ◆ In any of the tabs, select the order whose payment history you want to view and click the Payment Overview button.





The history of payment statuses is listed with the following details:

- ❑ Payment ID
- ❑ Merchant reference
- ❑ Status of the payment: authorizing, in progress, captured, refunded
- ❑ Date of the status
- ❑ Total amount of the payment
- ❑ etc.

**NOTE:** The information you see in this overview may vary for the different gateway providers. See “Configuring Payment Gateways” on page 563 for more information.

Payment History for Order 1900167 + 48 (1900167)						
Payment Gateway: Ogone						
Pay ID	Merch ref	Status	Date	Total	Action	
1753385	9/11/2013 10:47 AM	Refid:309428516	Order refund, Refunded	271.78 USD		
1753385	7/5/2013 9:52 AM	Ogone 22523999	Order Paid, Captured	610.97 USD		
1753385	7/5/2013 9:40 AM	Ogone 22523999	Online payment in progress, Capturing	610.97 USD		
1753385	7/4/2013 4:35 PM	Ogone 22523999	Online payment required, To be captured	610.97 USD		
1753385	7/4/2013 4:34 PM	Ogone 1753385	Authorizing	610.97 USD		

- Related topics:
- [How to handle a 'Payment failed' order status on page 334](#)
  - [Refund a canceled order on page 311](#)
  - [How to handle a 'Payment failed' order status on page 334](#)

## Downloading and Processing Files

For some incoming orders, files need to be downloaded from STOREFRONT so they can be printed. The files are contained in a ZIP package which can be downloaded manually or automatically for the following product types:

- Customizable, including Variable Data Products
- Uploadable
- On Demand

Two types of zip packages can be downloaded:

- MJD
- PDF/JDF

See “Production Tab” on page 150 for more information.

### ▷ Manual download of order items

In a manual flow, the downloaded files need to be assigned manually to a hot ticket or job ticket for further processing.

- 1 In the **Pending** tab, click the order item you want to download.

You can select the order item in either of the two views.



The order item must have the Prepared status.



- 2 Select the prepared order item and click the **Download** button.



A dialog prompts you to save or open the ZIP file.

- 3 Save the zip package to a location of your choice.

**TIP:** You can use CTRL-select and SHIFT-select to download several order items simultaneously.

---

**NOTE:** Depending on the Production Settings in the Advanced menu, the zip package contains an MJD (mime packaged job definition) file or a PDF and a JDF file. You can toggle between these two types of ZIP files by pressing the ALT key while clicking the Download button.

---

The order item and order statuses change to In Production.



- 4 Upload the files in the zip package to the Apogee Prepress hot ticket or job ticket.

#### ▷ Automatic processing with Apogee Prepress/Asanti

If STOREFRONT is integrated with Apogee Prepress 11.0 and higher, or Asanti Production 4.0 and higher, incoming orders are polled and files are downloaded automatically and submitted to Apogee Prepress/Asanti. The order status is automatically set to *In Production*.

See “Integrating STOREFRONT with Apogee Prepress/Asanti” on page 326.

#### ▷ Send order item files to your FTP server

The Send to FTP feature is specified in your Advanced settings, but you may need to upload the ZIPs manually if the upload fails.

- 1 Go to **Advanced > Production Settings > Prepress Settings** and select the **Automatically send order items to FTP Server** option.
- 2 Enter the FTP Server (you can specify a directory for all the downloads, e.g. `<servername>/foldername`), the Username and Password, and Save your changes.

A ZIP file will now be created for each order item of an incoming order and these ZIP files are uploaded automatically to the specified FTP server.

If uploading to the FTP server fails, for example if the server is not available, an error icon is displayed next to the order item.

	21_PUog	21pu-20140520-0123
	21_PUog	21pu-20140520-0124
	21_PUog	21pu-20140520-0125
	eqap04-ex	04ex-20140604-0129
	21_PUog	21pu-20140611-0130
	21_PUog	21pu-20140611-0131
	21_PUog	21pu-20140611-0132

Click the Retry Order Upload button in the toolbar to re-send the ZIP to the specified FTP server.



#### ▷ Send order item files to your PrintSphere space

The link with your PrintSphere space is set up in your Advanced settings.

- 1 Go to **Advanced > Production Settings > Prepress Settings** and select the **Automatically send order items to PrintSphere** option.

- 2 Specify the Export Directory in your PrintSphere space, for example:

/StoreFront/ExportOrders

A ZIP file will now be created for each order item of an incoming order and these ZIP files are uploaded automatically to the specified directory in your PrintSphere space. You can set up PrintSphere to sync files automatically to your local network. See the PrintSphere online help for more information.

▷ **Bypass automatic downloading/uploading**

You can bypass automatic downloading to your ECO3 workflow system, for example if the Apogee Prepress/Asanti service is not available and you want to download the files and process them manually. This procedure can also be used to bypass automatic uploading to an FTP server.

- 1 In the **Pending** tab, click the order item you want to download.

The order item must have the Prepared status.



---

**NOTE:** If the order has the Created status, the server may be busy. Check back later.

---

- 2 Select the prepared order item and press the SHIFT key while clicking the **Download** button. Press the ALT + SHIFT keys to change the default file type: MJD or PDF + JDF.



The Download Order Item dialog prompts you to download a ZIP containing an MJD file or JDF/JDF files.

- 3 Click **Download** to save the ZIP to a location of your choice.

The order item and order statuses change to In Production.



- 4 Upload the files in the zip package to the Apogee Prepress/Asanti hot ticket or job ticket.

---

**NOTE:** An order item can also be downloaded when it has reached the Shipped or Complete status. The MJD file also includes the PDF file.

---

### ▷ Resubmit an order item to Apogee Prepress/Asanti

If you accidentally deleted the Apogee Prepress/Asanti job an order item was assigned to, you can resubmit it.

- 1 In the **Pending** tab, click the order item you want to resubmit.

The order item has already been downloaded for initial processing so the status is In Production.



- 2 Click the **Resubmit** button to revert the status of the order to Prepared.



The order item will be picked up automatically by the workflow system and a new Apogee Prepress/Asanti job will be created.

### ▷ Manually reprocess an automatically downloaded order item

If you accidentally deleted the Apogee Prepress/Asanti job an order item was assigned to, you can manually download the ZIP which has already been downloaded automatically.

- 1 In the **Pending** tab, click the order item you want to reprocess.

The order item has already been downloaded for initial processing so the status is In Production.



Press the ALT + SHIFT keys while clicking the **Download** button.



The Bypass Apogee Prepress/Asanti dialog prompts you to download a ZIP containing an MJD file or JDF/JDF files.

- 2 Click **Download** to save the ZIP to a location of your choice.

The order item and order statuses change to In Production.



- 3 Upload the files in the zip package to the Apogee Prepress/Asanti hot ticket or job ticket.

# Integrating STOREFRONT with Apogee Prepress/Asanti

Integration with Apogee Prepress/Asanti enables the automatic downloading of orders as they appear in STOREFRONT. You need to create a special hot ticket and dedicated job ticket templates, and set up communication between the two systems.

## How it works

Apogee Prepress/Asanti polls STOREFRONT for new orders that need to be printed and downloads these orders automatically and according to the specified polling frequency.

A special STOREFRONT hot ticket imports the STOREFRONT MJD (Mime packaged Job Definition format) file which includes a JDF (Job Description Format) file that describes the job, and a PDF which is the actual content that needs to be printed. The JDF file specifies the name of a job ticket template that you select in STOREFRONT to create the job in Apogee Prepress/Asanti.

In STOREFRONT you can specify this job ticket template for each product in the product template. In addition, a default job ticket template can be defined in STOREFRONT which can be used as a fallback if no job ticket template is specified in the product template. The product definition in these job ticket templates match the characteristics of the different STOREFRONT product templates (bound, unbound, flat, folded, etc.). The JDF Server resource in Apogee Prepress/Asanti maps JDF data contained in the STOREFRONT MJD file to product definition settings that Apogee Prepress/Asanti understands.

---

**NOTE:** Please contact your ECO3 representative if you need assistance creating job ticket templates that match the characteristics of your STOREFRONT products, or to configure the JDF Server resource.

---

## *Prerequisites*

This feature is only possible with Apogee Prepress 11.0 and higher (Manage or Integrate versions) and Asanti Production 4.0 and higher.

To set this up, perform the following steps in the StoreCenter and in Apogee Prepress/Asanti.

### ▷ **Step 1: Production Settings in STOREFRONT**

- 1 In the StoreCenter, choose **Advanced > Production Settings > Prepress Settings** tab.

- 2 Choose version 9.1 or higher from the Apogee Prepress **version** drop-down list or version 2.0 or higher for Asanti Production.
- 3 For **Order Handling**, choose **Automatically download all order items to Apogee Prepress/Asanti**.
- 4 Leave the **Default Ticket Template** field blank for the time-being.
- 5 In the **Hot Ticket** field, enter the name of a hot ticket you will create in Apogee Prepress/Asanti, e.g. `StoreFront`, without the file extension.

Select the Track Feedback check box to enable an extra button in the Orders tab that can be clicked to see feedback from the workflow system.

- 6 Click **Save** to confirm your changes.

**Save**

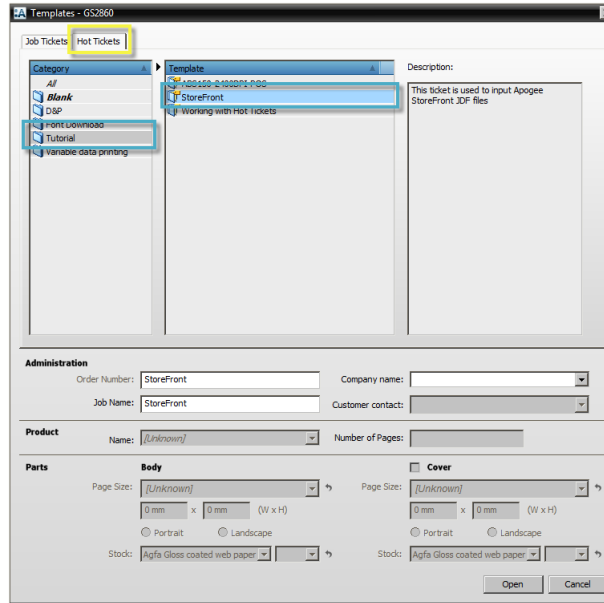
Now go to your Apogee Prepress/Asanti application.

## ▷ Step 2: Create STOREFRONT Tickets in Apogee Prepress/Asanti

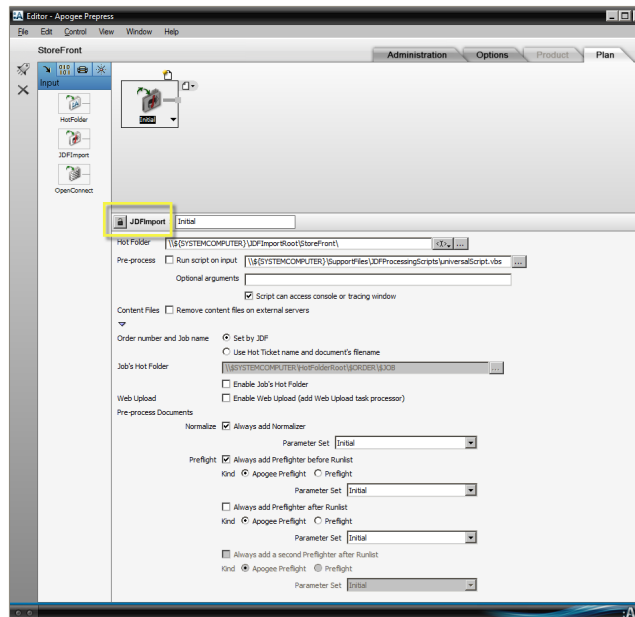
First you create a hot ticket to import the job description and then a job ticket template to create the Apogee Prepress/Asanti jobs.

- 1 In Apogee Prepress/Asanti, create a Hot Ticket with the name `StoreFront` which only contains a JDFImport task processor.

An example of such a hot ticket with the name `StoreFront` is available as a Hot Ticket Template in the Tutorial category in the Apogee Prepress/Asanti client.



- 2 Open this example hot ticket template and you'll see that it only contains the JDFImport input task processor.



- 3 Submit the hot ticket without modifying it, as a new hot ticket with the name StoreFront.

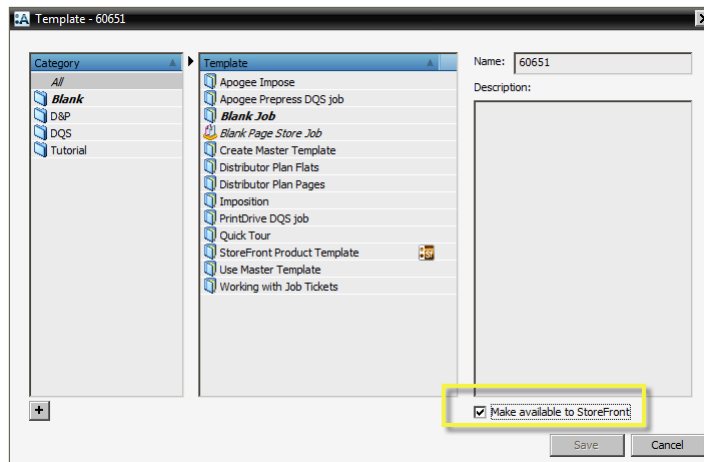


**NOTE:** The name is case-sensitive and must be the same as what you entered in the StoreCenter Production Settings tab.

- 4 Now create a Job Ticket Template. Apogee Prepress/Asanti uses these templates to create new jobs from incoming orders. As a starting point, you can use the Job Ticket Template which is provided with your system in the Tutorial category *StoreFront Product Template*. The following conditions must be met when creating job ticket templates for STOREFRONT:
  - The ticket template must have an input channel Hot Folder and must contain a full production plan.
  - Do NOT set the Hot Folder input to just \$ORDER because a single order in STOREFRONT can result in two Order Items which generate two jobs in Apogee Prepress/Asanti. Therefore you should use \$JOB, \$JOBID or \$ORDER\ \$JOBID (or \$ORDER-\$JOBID).

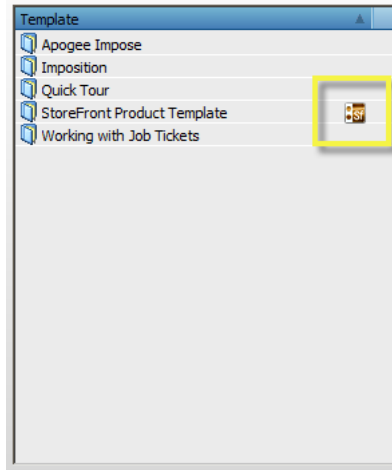
**NOTE:** All possible ticket templates are supported, not only job ticket templates: Job and Hot Ticket templates, Asanti Layout Tickets and Layout Hot Ticket templates.

- 5 Save the template as a template, for example with the name *StoreFront Product Template* and select the **Make available to StoreFront** option in the Save dialog.



**NOTE:** If you don't select the **Make available to StoreFront** option when saving, the template does not appear in the StoreCenter.

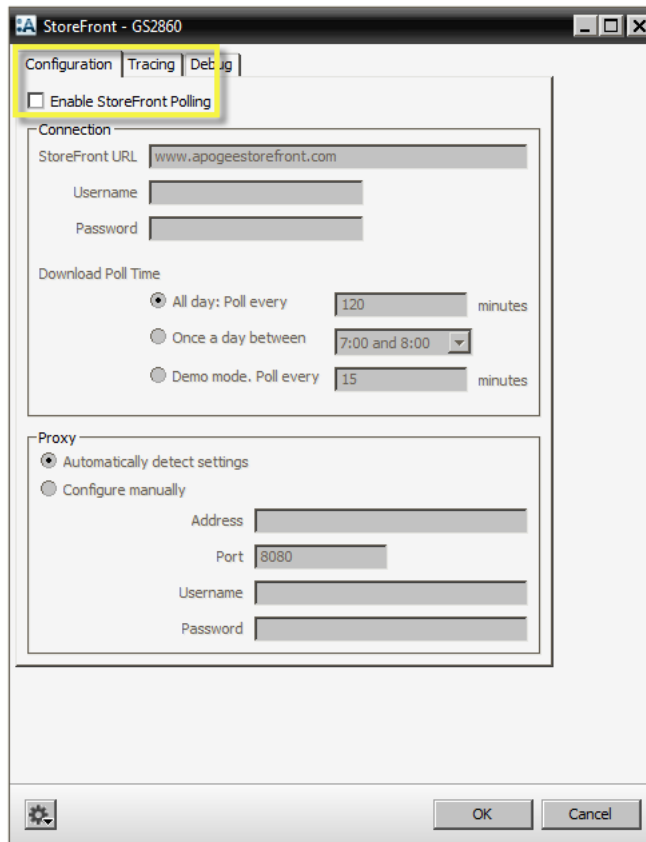
The template is added to the list of templates and a special icon identifies these STOREFRONT templates.



- 6 Create additional Job Ticket Templates as required for different types of jobs.
- 7 In Apogee Prepress/Asanti, go to **System Overview** and open the STOREFRONT resource.

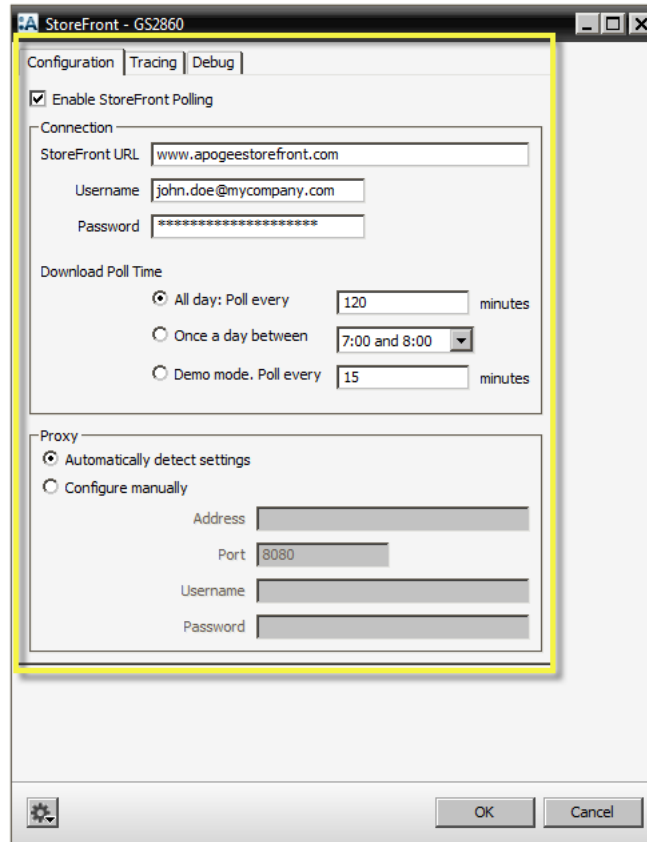


- 8 In the **Configuration** tab, select the **Enable StoreFront Polling** check box.



This controls how and when Apogee Prepress/Asanti polls the STOREFRONT system for new orders that can be downloaded.

- 9 Enter the STOREFRONT URL, and the e-mail address and password of the printer account that you use to log on the StoreCenter.
- 10 Set the **Polling Time** and configure the **proxy server** if you have one.



- 11 Click OK to save your changes.

The connection is established with STOREFRONT. If necessary, resolve any errors that are displayed.

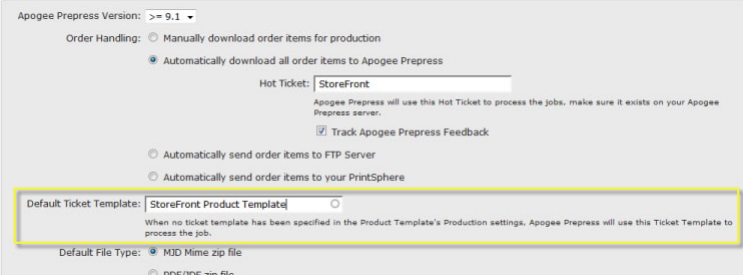
### ▶ Step 3: Refresh the Production Settings in STOREFRONT

- 1 Go back to the StoreCenter and refresh the page with the Production Settings tab or choose **Advanced > Production Settings > Production Settings** tab.

The Ticket Templates you just created in Apogee Prepress/Asanti now appear in the **Default Ticket Template** drop-down list.

- 2 Choose the Ticket Template you want to use as the default for creating jobs from downloaded order items.

**NOTE:** The Ticket Template you choose here is a fallback for when you have not specified a job ticket template at the Product Template level. See “Production Tab” on page 150.



The screenshot shows a configuration form for Apogee Prepress. At the top, it indicates 'Apogee Prepress Version: >= 9.1'. Under 'Order Handling', there are three radio button options: 'Manually download order items for production', 'Automatically download all order items to Apogee Prepress' (which is selected), and 'Automatically send order items to FTP Server'. Below this, there is a 'Hot Ticket:' field containing 'StoreFront'. A note states: 'Apogee Prepress will use this Hot Ticket to process the jobs, make sure it exists on your Apogee Prepress server.' There is a checked checkbox for 'Track Apogee Prepress Feedback'. At the bottom, there are two more radio button options: 'Automatically send order items to your PrintSphere' and 'Automatically send order items to your PrintSphere'. A yellow box highlights the 'Default Ticket Template:' field, which contains 'StoreFront Product Template'. A note below it says: 'When no ticket template has been specified in the Product Template's Production settings, Apogee Prepress will use this Ticket Template to process the job.' At the very bottom, there are two radio button options for 'Default File Type': 'MID Mime zip file' (selected) and 'PDF/JDF zip file'.

3 Click **Save** to confirm your changes.



- Related topics:
- [Integration with Apogee Prepress and Asanti on page 31](#)
  - [Configure Prepress Settings on page 99](#)
  - [Production Tab on page 150](#)
  - [System Requirements on page 35](#)

## Troubleshooting Orders

### ▷ How to handle a 'Payment failed' order status

In stores that use online payment, a problem with the payment transaction can cause a new order to be given the 'Payment failed' status. This status is indicated by a card with a red triangle in the Order List.



It is recommended to cancel an order which has the 'Payment failed' status. A window will appear in which you can specify the reason for the order cancellation. This message is mailed back to the shopper to inform him or her why the order will not be processed. By explicitly letting the shopper know that the order failed, you avoid possible misunderstandings: the shopper may not be aware that the payment was not processed and waits for an order that never arrives. If you cancel the order, the shopper can take the initiative to place a new order.

# Online Editor

The Online Editor is a module in the STOREFRONT StoreCenter which is used to work with Customizable Products and Variable Data Products. These products are created with the STOREFRONT Converter plug-in from InDesign documents and can be further customized in StoreCenter with the Online Editor.

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**NOTE:** Some of the procedures in this section are for the Printer Administrator only.

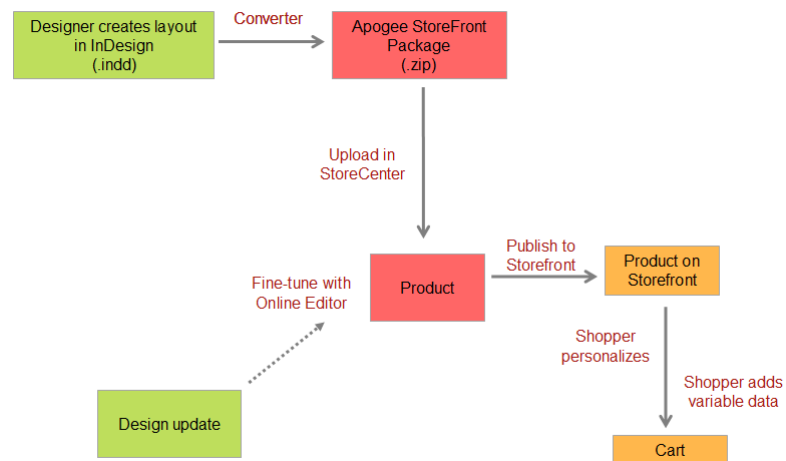
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# Introduction

A Customizable Product is a publication that a shopper can edit to personalize the content before ordering. Typical examples are business cards, letterheads, newsletters, posters, etc. A Variable Data Product (VDP) is a special kind of customizable product that allows a shopper to upload variable data such as names, addresses, images, etc. and merge these data with a product to create multiple publications.

The print service provider's designer creates the base layout in Adobe InDesign and converts them into a StoreFront Package using the StoreFront Converter plug-in. The StoreFront Package is uploaded and administrators can use the Online Editor integrated in STOREFRONT to fine-tune the base layouts and set restrictions on the extent to which the shopper can modify the documents. A similar version of the Online Editor is available on the storefront so shoppers can add or edit their personal content.

Figure 10.82: Customizable/Variable Data product flow



In the following sections, the Customizable and Variable Data product types are discussed together.



Customizable product



Variable data product



## Converter Plug-In

With the Converter plug-in you can save an InDesign document as a STOREFRONT package. This is a ZIP package that can be opened and edited in the Online Editor of StoreCenter. The ZIP package contains all the necessary data as *inherited* from the InDesign document:

- the document with inherited styles in the STOREFRONT format
- embedded fonts
- embedded images
- complex design elements such as gradients and large files which are converted to PDF for optimum online presentation
- inherited layers which are locked or editable as specified

The Converter plug-in can be installed on as many computers as required and you can also give it to freelance designers. It is recommended that you check regularly that you have the latest version of the Converter plug-in. The version number is indicated in the top right corner of the Converter windows.

Three versions of the converter are available to ensure compatibility with the various versions of InDesign:

---

**NOTE:** Plug-ins are also referred to as extensions in Adobe InDesign.

---

### *Prerequisites*

The following procedures are for using the Converter plug-in with Adobe InDesign which needs to be installed on your computer.

STOREFRONT packages can be created on Windows as well as Macintosh computers. See “System Requirements” on page 35.

---

**NOTE:** Read the Technical Information provided with the plug-in for information on installing the latest version of the plug-in.

---

Related topics:

- [Converter Windows \(up to InDesign CS6\) on page 345](#)

### ▷ Install the Converter plug-in

- 1 Click the **Download Plug-in** link in the StoreCenter navigation bar to download the latest STOREFRONT Converter plug-in.
- 2 Save the ZIP file to a location on your computer.
- 3 Browse to this location and unzip this file which contains a folder with the latest version and another with older versions.
- 4 Read the technical note for the installation instructions with your InDesign version.

STOREFRONT Converter is added to the list of extensions.

- 5 Restart InDesign and you can now start the Converter from the File menu or the Window menu, depending on the version of InDesign.

### ▷ Prepare an InDesign document

Documents need to match the specifications of the product templates on which the customizable product will be based. For example, a customizable business card will be based on a business card product template which has specific dimensions. Your InDesign document must have the same dimensions.

It is recommended to prepare an InDesign document with layers so you can lock static content. See “Conversion Recommendations” on page 348 for more details.

You may need to embed instructions for the shopper. For example if the shopper can choose from selected fonts, include sample text in the different fonts on a locked layer.

Your design also needs to take into account the workspace version that you choose for the shopper: Advanced, Basic, Forms or Expert. See “Online Editor Overview” on page 350 for more information.

---

**TIP:** If you need to modify or update the base document or design of an existing customizable product, it is recommended to do this in the Online Editor if possible. Otherwise you will have to redo all the work you performed in the Online Editor (form fields, constraints, etc.).

---

### ▷ Create a package with the Converter plug-in (InDesign CC and later)

- 1 In **Adobe InDesign**, open an existing InDesign document or create a new document that you want to use as a customizable product in STOREFRONT.

The document layout should consist of layers to separate static design elements from the customizable frames. Layers containing static information should be locked so the shopper cannot modify this information.

- 2 Choose **Window > Extensions > StoreFront Converter** to start the Converter.

The **Converter** dialog is displayed.

- 3 In the **Export to StoreFront** panel, choose the document you want to convert from the **Source** drop-down list and choose the other settings as required. See “Converter Windows (InDesign CC and later)” on page 341 for more information.
- 4 Click **Go** to save the document as a STOREFRONT package.

This also starts the preflight checks to check that the Converter translates all design elements in the layout properly into a STOREFRONT Package. Warnings or errors may flag issues in the saved package. If the preflight detects errors, you will not be able to create the package. If this is the case, you need to open the second converter tool to fix the errors. Choose **Window > Extensions > StoreFront Live Preflight** to open the preflight tool, and click the **Preflight document** button. See “STOREFRONT Live Preflight” on page 343.

- 5 Optionally, the preflight step can also be performed before you create the package and when you are creating your document. This give you more control for fixing issues. Choose **Window > Extensions > StoreFront Live Preflight** to open the preflight tool. See “STOREFRONT Live Preflight” on page 343.

A ZIP file is created which is ready for uploading in StoreCenter when you create a customizable product.

- 6 Click the “x” in the top right corner to close the Converter.

### ▷ Create a package with the Converter plug-in (up to InDesign CS6)

- 1 In **Adobe InDesign**, open an existing InDesign document or create a new document that you want to use as a customizable product in STOREFRONT.

The document layout should consist of layers to separate static design elements from the customizable frames. Layers containing static information should be locked so the shopper cannot modify this information.

- 2 Choose **File > Export for Apogee StoreFront** to start the Converter.

The **Converter** dialog is displayed.

- 3 Choose the document you want to convert from the **InDesign file** drop-down list and choose the other settings as required. See “Export for STOREFRONT” on page 345 for more information.

- 4 Click **Create ZIP** to save the document as a STOREFRONT package.

The conversion starts and the Converter checks that all design elements in the layout can be translated properly into a STOREFRONT Package. The results are displayed in the **Converter Preflight Report**. See “Preflight Report” on page 347 for more information.

Warnings or errors may be displayed to flag issues in the saved package. See “Conversion Recommendations” on page 348 for more information.

- 5 Click **Back** to fix the issue.

OR

Click **Save Document** to finish the conversion.

OR

Click **X** in the top right corner of the window to abort the conversion.

A ZIP file is created which is ready for uploading in StoreCenter when you create a customizable product.

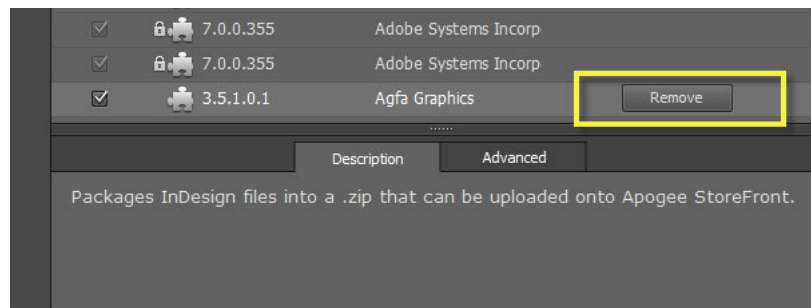
- 6 Click the “x” in the top right corner to close the Converter.

### ▷ Uninstall the Converter plug-in (InDesign CC and later)

- ◆ You can uninstall the converter as you would remove other programs.

### ▷ Uninstall the Converter plug-in (up to InDesign CS6)

- 1 Open the **Adobe Extension Manager** and highlight the STOREFRONT Converter plug-in in the list of extensions.



- 2 Click the **Remove** button.

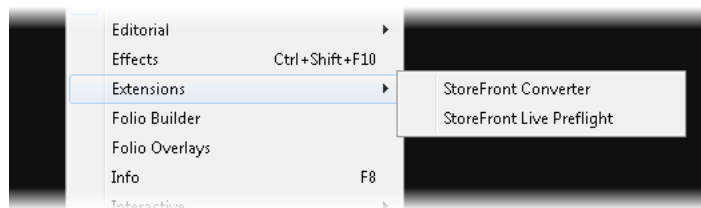
- 3 Click **Yes** to confirm that you want to uninstall the plug-in.

## Converter Windows (InDesign CC and later)

---

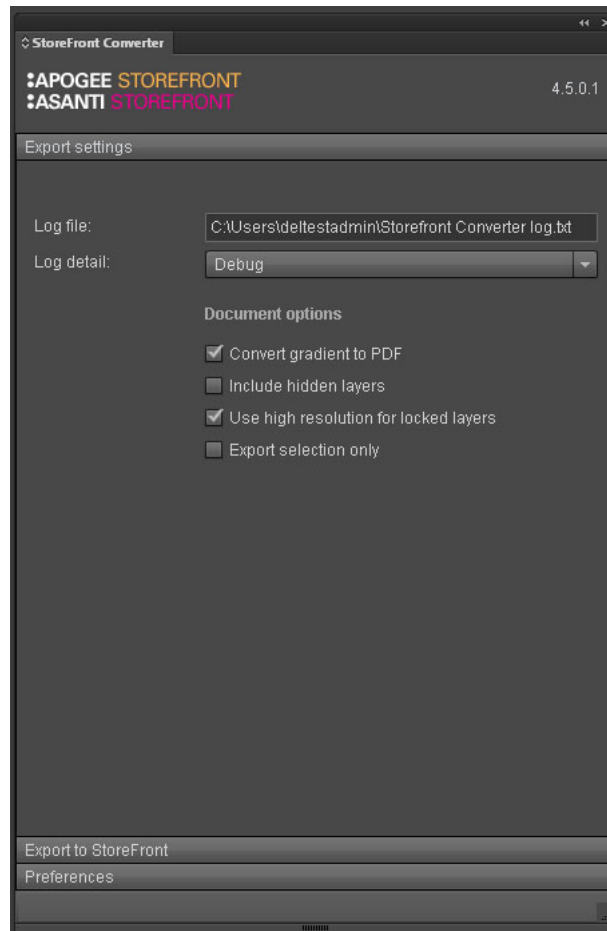
The Convert plug-in for InDesign CC and later consists of two separate tools which can be opened from the Window > Extensions menu:

- STOREFRONT Converter: the tool that creates the package
- STOREFRONT Live Preflight: the preflight tool



### STOREFRONT Converter

This is where you create the ZIP package. The document is always preflighted in the background when you create the ZIP package but you can't fix the issues.



This tool consists of the following three panels:

### Export Settings

**Log File:** The default location for a log file with details about the conversion. You can enter a different location and file name if you want.

**Log Detail:** Select the level of detail that you want to see in the log file: from Debug with the most information, to Verbose, Info, Warning and Error with the least information.

### Document options:

- Convert gradient to PDF:** Select this check box if the document contains complex gradients. Some gradient effects, such as circular multi-tone gradients, are not supported by the Online Editor. By converting such objects to PDF, their visual appearance remains unchanged in the customizable product.

- ❑ **Include hidden layers:** Select this check box to include all hidden layers in the document in your package.
- ❑ **Use high resolution for locked layers:** Converts everything on the selected layer to PDF and places it on the layer. See “PDF Conversion Settings for Locked Layers and Images” on page 349.
- ❑ **Export selection only:** Only converts the frames selected in the document.

## Export to STOREFRONT

**Source:** This is a list of all the files you have open in InDesign. Choose the document you want to convert from the drop-down list.

**Locked Layers:** This is a list of the layers in the selected InDesign document. Select one or more layers that you want to lock. Locked layers are saved as PDFs in the package. If you lock the layers here, you cannot edit them in the StoreCenter Online Editor.

**Go button:** Starts the conversion.

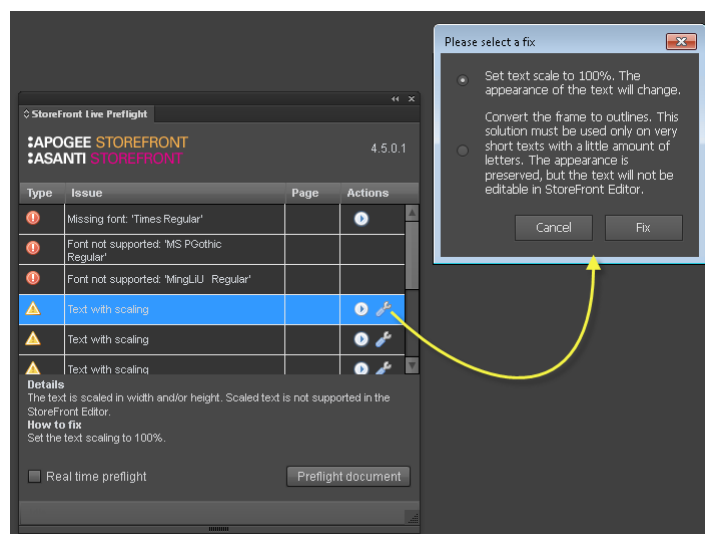
## Preferences

**Language:** Here you can change the language of the Converter plug-in.

The Export Settings and Preferences are saved for the next time you open the Converter plug-in.

## STOREFRONT Live Preflight

The STOREFRONT Live Preflight tool allows you to preflight and fix the document while you are working in it, before you create the package.



- 1 Choose **Window > Extensions > StoreFront Live Preflight** to open the preflight tool.
- 2 Open your document and click the **Preflight document** button to start the preflight.  

A list of issues is displayed: errors have a red exclamation mark icon and warnings have a yellow triangle icon.
- 3 Select an issue in the list to display the details and how you can fix the issue.
- 4 In the Actions column you can click the arrow icon to go to the issue in your document.
- 5 In the Actions column, you can click the spanner icon to open the Fix dialog box which suggests ways to fix the issue. Select one of the fixes and click Fix or click Cancel to close the dialog box without fixing.
- 6 Click the **Preflight document** button again and the issue you just fixed should no longer be displayed in the list.
- 7 Repeat until the critical issues are resolved.

Errors must be fixed to be able to create the package.

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**NOTE:** See “Conversion Recommendations” on page 348 for more information.

---

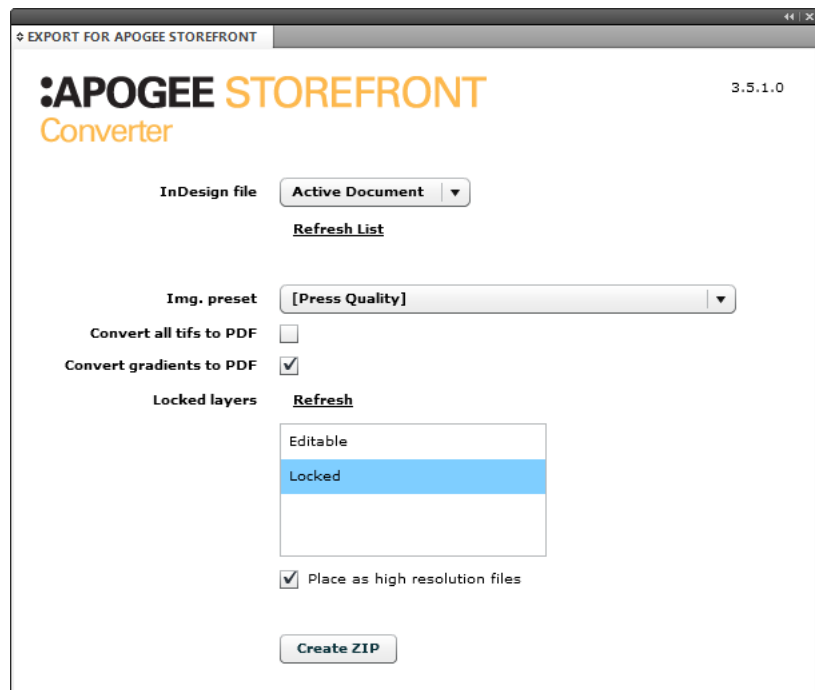
Select the **Real time preflight** check box if you want to see preflight issues while editing your document.



## Converter Windows (up to InDesign CS6)

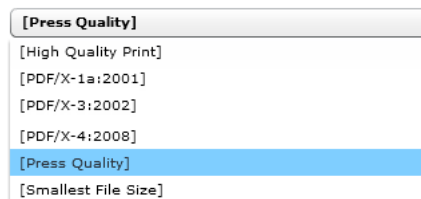
### Export for STOREFRONT

- ◆ In InDesign, choose **File > Export for Apogee StoreFront** to start the Converter.



**InDesign file** This is a list of all the files you have open in InDesign. Choose the document you want to convert from the drop-down list. You may need to click Refresh List if you open new documents while the Converter is open.

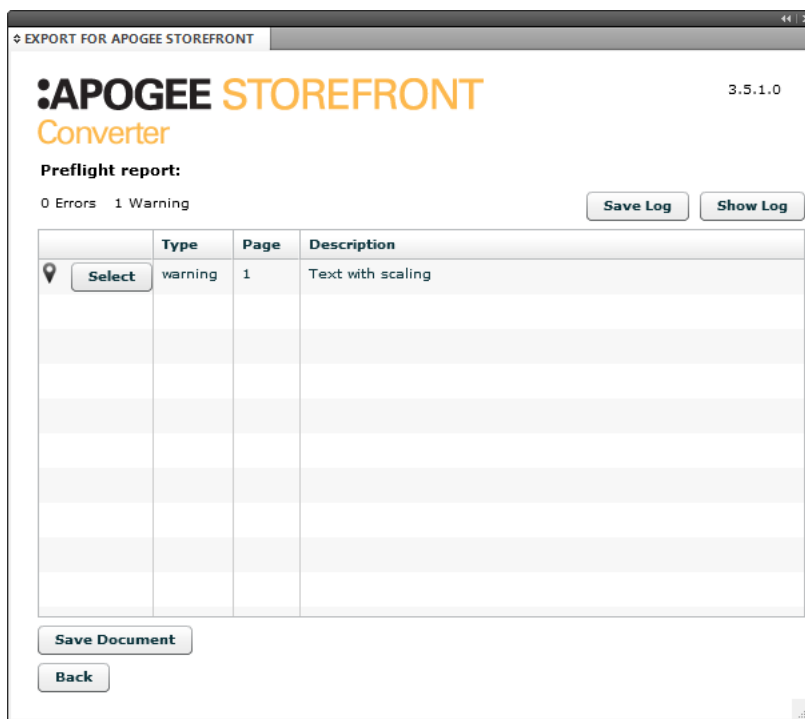
**Img. preset** From the drop-down list you can choose a quality preset for converting TIFFs, gradients and locked layers to PDFs as these elements may be too complex for processing with the Online Editor.



- Convert all TIFFs to PDF** Select this check box if the document has many TIFFs and you want to reduce file size. TIFF files are converted into PDFs using the selected **Img. preset**.
- Convert gradients to PDF** Select this check box if the document contains complex gradients. Some gradient effects, such as circular multi-tone gradients, are not supported by the Online Editor. By converting such objects to PDF, their visual appearance remains unchanged in the customizable product. The gradients are converted into PDFs using the selected **Img. preset**.
- Locked Layers** This is a list of the layers in the selected InDesign document. Select one or more layers that you want to lock. Use the CTRL key to select multiple layers. Locked layers are saved as PDFs in the package using the selected **Img. preset**. If you lock the layers here, you cannot edit them in the StoreCenter Online Editor.
- Place as high resolution files** Select this check box to save the locked layers with a lower compression rate.
- Create Zip button** Click this button to continue the conversion.

## Preflight Report

- ◆ This window is displayed when the conversion is completed and shows the results of the conversion. See “Converter Preflight Messages” on page 539 for more information about these messages.



**More information icon** Click this icon to see a popup with more information about the issue and a solution.

**Select button** Click this button to go to the location of the issue in the document.

**Type** ■ Warning: The issue is not critical and you can continue saving the package.

■ Error: The issue is critical and you must fix the issue before continuing.

**Page** The page number where the issue is located.

**Description** Description of the issue.

**Show Log** Opens a detailed conversion log.

**Save Log** Saves a detailed conversion log.

## Conversion Recommendations

Follow these recommendations when creating your InDesign documents to reduce the number of errors and warnings.

### Font Usage

The Converter embeds the fonts used in the document in the package. You should only use the following supported font formats in your InDesign documents:

- TrueType (.ttf), OpenType TrueType (.otf), OpenType Type 1 (.otf)

Other font formats, such as Type 1 and Online Adobe Fonts, will generate errors/warnings during Converter Preflighting. Replace fonts that are in an unsupported format by their equivalent TrueType or OpenType version.

### Font File Extension

Ensure that fonts are Windows-compatible which means that the file extension must be included.

### Locked Layers

It is recommended to keep locked layers in the background, with editable layers on top. Depending on the layout, it may sometimes be desirable to have locked elements in the foreground. If putting a locked layer in the foreground leads to visual artefacts in the Online Editor, consider putting those elements in the editable layer and locking those frames using the Online Editor.

### Color Palette in STOREFRONT Packages

When an InDesign document is exported to a STOREFRONT package using the Converter plug-in, this document also contains the color palette - the list of colors that were defined in InDesign. However, the Converter plug-in will not export colors for which a duplicate exists, i.e. a color with a different name but the same color values. So if your InDesign color palette contains two colors, e.g. 'Warm Yellow' and 'Logo', with the same CMYK values, only the second color will appear in the list of colors in the Online Editor. It is therefore recommended that each color name has unique color values in the InDesign document.

### Import Error Messages

The Online Editor does not support the entire feature set of Adobe InDesign. This is quite logical as the Online Editor is a web tool that needs to be accessed quickly while Adobe InDesign is a full-blown desktop application. Specific features or effects which are not supported by the Online Editor can always be preserved by putting the affected frame on a locked layer. During the package creation this layer will be converted to PDF, so the desired effect is kept but you will not be able to edit it anymore in the Online Editor. See “Converter Preflight Messages” on page 539 for more information about these messages.

## PDF Conversion Settings for Locked Layers and Images

The first time you convert an InDesign file to a STOREFRONT package with the converter for InDesign CC, the plug-in creates three PDF presets which you can modify if you want:

- **Converter - Images:** This preset defines the settings for the conversion of images used in the InDesign file (TIFF, EPS, PSD, AI). The Online Editor supports these file types natively but when the conversion is done via the plug-in, images are optimized according to their dimensions used in the document (300 dpi, at placed dimensions).
- **Converter - Locked Layers High Res:** This preset defines the settings for the conversion of locked layers when the check box "Use high resolutions for Locked Layers" is selected.
- **Converter - Locked Layers Low Res:** This preset defines the settings for the conversion of locked layers

To change the settings of these presets in InDesign, choose: File > Adobe PDF Presets.

A good reason to change the preset might be to prevent problems with transparencies during the creation of the downsampled low resolution preview PDF from the link in the shopping cart. By changing the compatibility settings to PDF 1.3 you make sure that all transparency is flattened already during the package creation.

You can change basically any setting but be aware that your changes will influence the predefined behavior. Also don't change the name, otherwise the plug in will simply create a new one with the original name.

## Online Editor Overview

Once the STOREFRONT Package has been created and uploaded for use as a customizable product, administrators can use the Online Editor in StoreCenter to fine-tune the document. This may involve:

- adding content
- fine-tuning the design
- setting constraints to control what shoppers can edit
- adding variables (i.e. interactive form fields) to the document
- preparing variable data Excel template (Variable Data Product)

---

**NOTE:** You cannot create a document from scratch in the Online Editor. You must always start with a STOREFRONT Package.

---

A light version of the Online Editor is used by shoppers when they customize the product on the storefront.

When creating the product, you can choose one of four versions of the Online Editor workspace:

- **Basic:** You have the same extensive editing features as in the Advanced version while the shopper can only edit existing frames.
- **Advanced:** You have extensive editing features to add and edit frames, and change the layout of the document. The shopper also has an advanced set of features to customize the product.
- **Forms:** In the Forms tab you can create variables for document form fields. To edit the customizable product, the shopper only has to enter information in the form input fields. A Variable Data Product always uses the Forms version.
- **Expert:** This workspace combines the Advanced and Forms workspaces and enables shoppers to edit certain aspects of the document layout in combination with the forms functionality.

If you don't see one of the features described in this section, the document may not be set to work with the required version of the Online Editor.

## *Prerequisites*

You can only open the Online Editor for a customizable product which has already been created and appears in the list of products. It is recommended to perform this step immediately after defining the customizable product. See “Product Types” on page 155 and “Creating Products” on page 157 for more information.

### ▷ **Open/Close the Online Editor**

- 1 On the menu bar, choose **Products**.
- 2 Select a company in the Company drop-down list.
- 3 Highlight a Customizable Product or a Variable Data Product in the Products list.



Customizable product



Variable data product (VDP)

- 4 Click the **Edit** button.

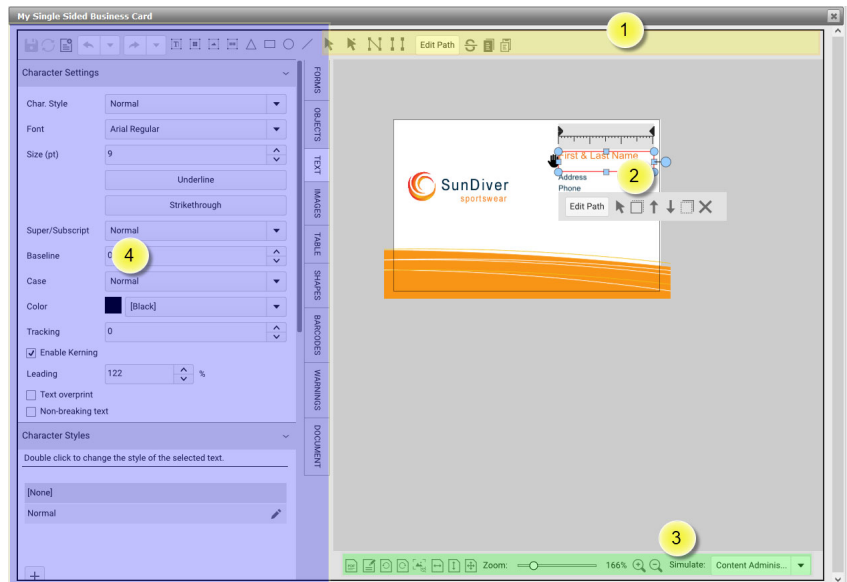


- 5 Choose Online Editor in the list to open the product in the Online Editor.
- 6 Click the “x” in the top right corner to close the Online Editor.

If you did not save the changes to your document, you are prompted to do so before exiting the Online Editor.

## Workspace

Figure 10.83: The Online Editor Workspace



- 1 Document workspace with edit toolbar
- 2 Inline edit toolbar
- 3 Navigation and view toolbar
- 4 Workspace tabs: Forms, Objects, Text, Images, Tables, Shapes, Barcodes, Warnings, Document

## Edit Toolbar

The Edit toolbar at the top of the Online Editor is used to add text frames, image frames and objects to an existing document. The Edit tools work in conjunction with the workspace tabs.

The following tools are available:



Add a text frame



Insert a table



Add an image frame



Add a barcode



Add a shape



Add a rectangle





Add a circle



Add a line

\*

An asterisk indicates that the document has been modified



Pointer: to select a frame



Pointer: to select multiple frames



Create a linked text frame



Break linked text frames



Copy the selected frame



Paste the selected frame



Check the spelling



Browse to the image directories for image variables

Once a document has been modified, the Save, Revert and Undo/Redo buttons are activated.



Save the document



Revert to the last saved version of the document

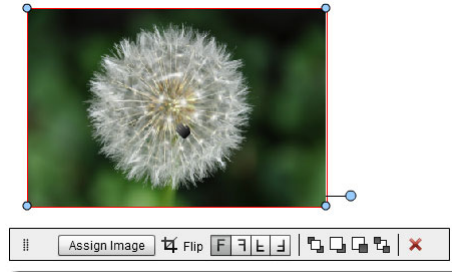
Related topics: 

- [Basic Editing on page 357](#)













## In-line Toolbar

When you select a frame or add a new one using the Edit tools, the in-line toolbar is displayed in the document workspace, under the selected frame.

Figure 10.84: Inline toolbar under an image frame



The following tools are available, depending on the type of frame you select:

-  Hides the in-line toolbar.
-  Edit text mode.
-  Pointer. Edit frame mode.
-  Crops an image.
-  Flips the object back to its original orientation.
-  Flips horizontally.
-  Flips vertically.
-  Flips horizontally and vertically.
-  Brings the frame to the front.
-  Brings the frame forward.
-  Sends the frame back.
-  Sends the frame to the back.



Deletes the frame.



If the in-line toolbar is hidden, click the Show Inline Toolbar button in the top left corner of the workspace.

## Cursor States

The cursor may change as you hover over an object frame to indicate that certain actions are possible.



Indicates that you can move a selected frame.



Indicates that you can rotate a frame.



Indicates that you can resize a frame.

## Navigation and View Toolbar

The Navigation and View toolbar at the bottom of the Online Editor provides several ways to inspect all the pages of the document.

The following tools are available:



Creates a low-resolution PDF of the document for previewing purposes.



Shows/hides bleed and margins.



Show/hides the Help layer (if created for the current document).



View the document as a flipbook.



Rotate document counter-clockwise (preview only).



Rotate document clockwise (preview only).



Show/hide source of all text frames



Zoom the document so it fits the workspace width.



Zoom the document so it fits the workspace height.



Zoom to fit the document in the workspace window.

Use the Slider or magnifying glass icons to **zoom** in and out. Alternatively, hold down the CTRL key and press the plus or minus keys.

The **Simulate** button lets you switch between the following two views in order to test the constraints:

- **Content Administrator:** This is the normal view when working with the Online Editor in StoreCenter to create the customizable product.
- **End-User:** The administrator can switch to this view for a preview of how the shopper will see the document in the Online Editor on the storefront. For example, if you lock frame resizing for end-users you'll see that the frame can no longer be resized when you switch to End-User view.

## Basic Editing

These are the basic procedures for editing your document in the Online Editor workspace.

### ▷ Move, resize, rotate a frame

Text and images are placed in frames in the document.

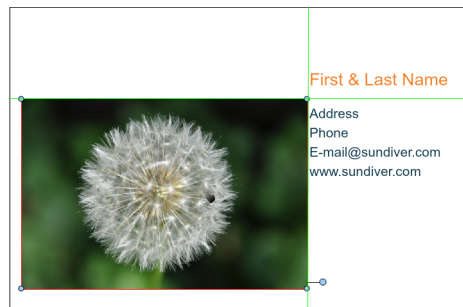
- 1 In the workspace, select a frame and make sure the pointer is activated. If you selected a Text frame, click the Edit Frame button on the in-line toolbar if this is not the case.



- 2 Hover over the frame and the cursor assumes the following states:

**TIP:** Press the CTRL key to temporarily disable the snap guides and automatic placement.

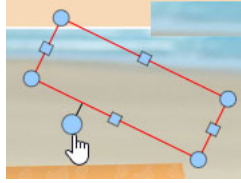
- black hand: You can move the frame; you can use the green snap guides to align the frame with other frames in the document or the page edges.



- black arrows in the corners and along the sides: You can resize the frame.



- white hand to rotate: You can rotate a frame around its center.



### ▷ Place/Edit text

- 1 On the Edit toolbar, click the **Text** tool.



A new text frame is placed on the document.

OR

Select a text frame in the document and make sure the text cursor is activated. Double-click in the frame or click the Edit Text button on the in-line toolbar if this is not the case.



The cursor is positioned in the text frame and a black hand icon is displayed to the left of the selected frame.



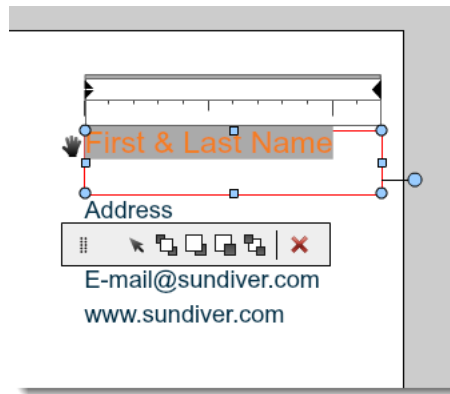
Now you can edit or add text, or add form variables.

In the Text tab, you can inspect and edit the properties of the selected text frame. See “Forms Tab” on page 402 and “Text Tab” on page 431 for more information on formatting text.

- 2 Hover over the text frame and the cursor assumes the following states:
  - black arrows in the corners and along the sides: You can resize the frame.
  - black rotate arrow: You can rotate the text frame around one fixed point.
- 3 To move the text frame while in edit mode, hover over the black hand on the left of the frame until the cursor also changes to a hand.

At this point you can move the text frame.

**TIP:** Press the CTRL key to select a frame that you know is hidden under another frame.



### ▷ Apply a character style to text

- 1 Double-click in a text frame or click the Edit Text button on the in-line toolbar.
- 2 Highlight the text you want to style.
- 3 Open the Character Styles panel and double-click a style in the list to apply it to the selected text. See “Text Tab” on page 431 for more information on styles.

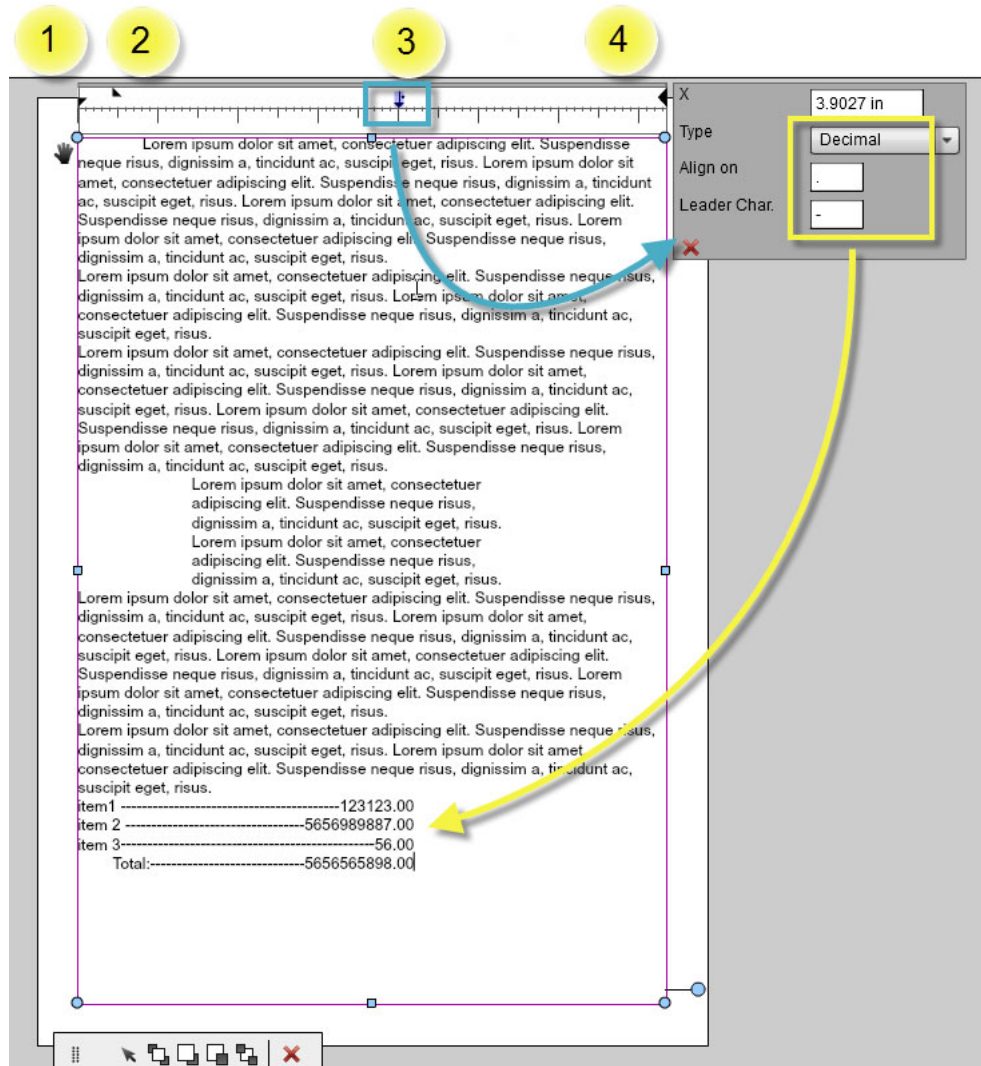
### ▷ Apply a paragraph style to text

- 1 Double-click in a text frame or click the Edit Text button on the in-line toolbar.
- 2 Position the cursor in the paragraph you want to style.
- 3 Open the Paragraph Styles panel and double-click a style in the list to apply it to the paragraph. See “Text Tab” on page 431 for more information on styles.

### ▷ Indenting and tabs

In Edit Text mode, an administrator will see a ruler at the top of text frames for formatting paragraph indents, first line indents and tabs. This is similar to what you have in a regular word processor.

Figure 10.85: Text with various paragraph indents using tabs, and numbers aligned on a decimal point.



- 1 Left paragraph indent (bottom marker)
- 2 First line indent (top marker)
- 3 Tab stop
- 4 Right paragraph indent

- Click the paragraph left indent marker (1) to indent the entire paragraph in which the cursor is positioned.
- Click the first line indent marker (2) to indent the first line of the paragraph in which the cursor is positioned.

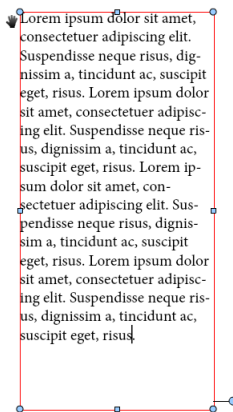


- Click in the ruler to place a tab stop marker (3). Select the tab stop marker to display the tab stop settings panel where you can set the values for a tab stop:
  - Type: left aligned, centered, right aligned or decimal
  - Align on: If you selected Decimal as tab type, you can also set the character to align on. This is used typically for numbers where you can choose to align on a decimal comma or point.
  - Leader Char.: Enter a leader character of your choice, for example a dash, full stop, etc. This character is used to fill the space to the tab stop.
- Click the paragraph right indent marker (4) to indent the entire paragraph in which the cursor is positioned.

### ▷ Hyphenate text

- 1 Select a text frame and open the Text Frame Settings panel.
- 2 Choose a language in the Text Language drop-down list and click the Hyphenate button.

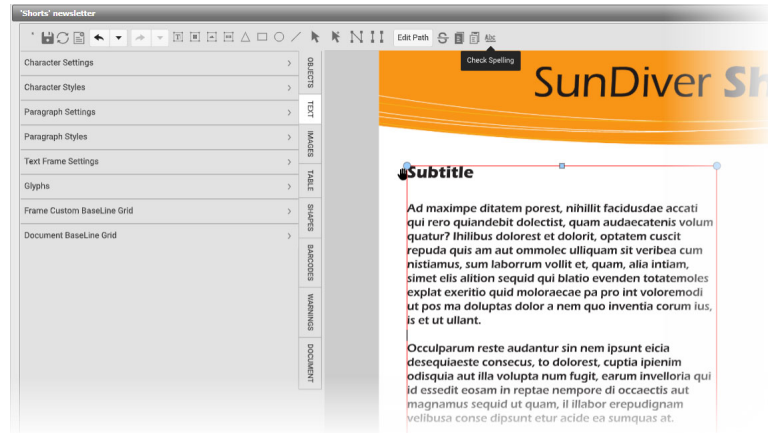
**TIP:** You do not need to select the text for these tasks.



- 3 Click the Unhyphenate or Undo button to revert to text which is not hyphenated.

### ▷ Check spelling

- 1 Select a text frame in the document and make sure the text cursor is activated. Double-click in the frame or click the Edit Text button on the inline toolbar if this is not the case.

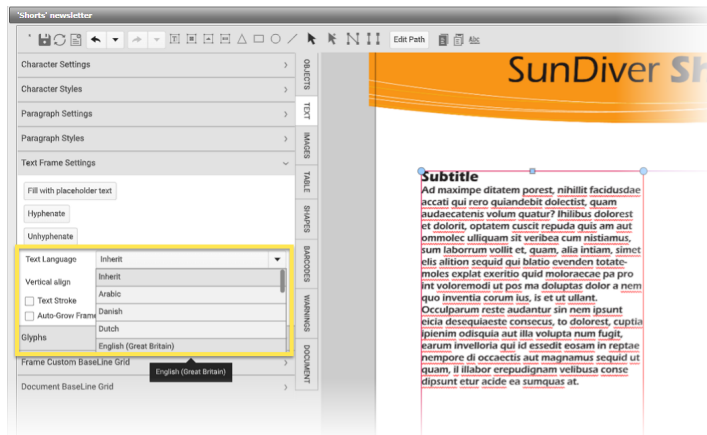


- 2 Click the **Check Spelling** button.



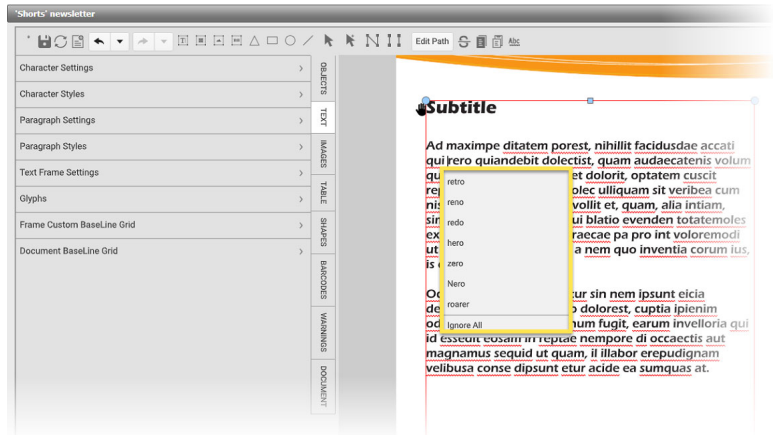
The **Check Spelling** button acts as a toggle, enabling or disabling the spelling check. After you enable the spelling check, squiggly lines appear beneath the misspelled words.

- 3 Configure the text language in the Text Frame Settings panel of the workspace tab TEXT. Select of the language from the drop-down list you want to check the spelling.



**NOTE:** Text Language options are only visible when spell checking is enabled.

- 4 Place the cursor on a misspelled text, suggestions appear below the word.



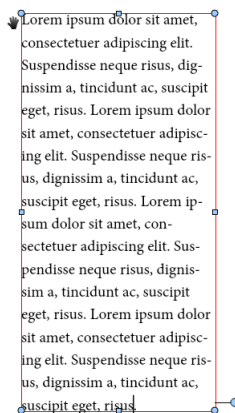
Select a suggestion to include in your document. If you don't agree with any of the suggestions, select **Ignore All**.

- 5 Click **Close** and the **Save** button when you've finished the spelling check.

### ▷ Align text vertically

By default, text is aligned vertically at the top of the text frame.

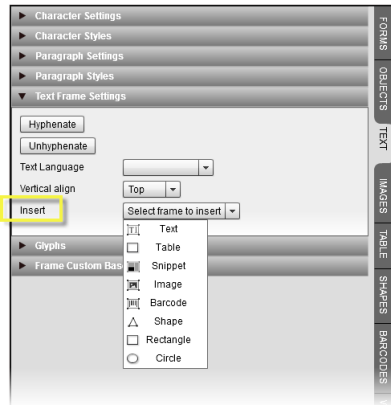
- 1 Select a text frame and open the Text Frame Settings panel.
- 2 In the Vertical Align drop-down list, choose Top, Middle, Bottom or Justify. Choose *Justify* for example to distribute the text vertically within the frame.



### ▷ Insert an in-line frame in a text frame

An in-line frame is a text, image or other frame that is positioned inside a text frame. The in-line frame is linked to the text and moves up or down as new text is added.

- 1 Select a text frame and make sure you are in Text Edit mode.
- 2 In the Text tab, open the Text Frame Settings panel.
- 3 In the **Insert - Select frame to insert** drop-down list, choose the type of frame you want to insert.



- 4 Select the in-line frame and edit as required.

---

**NOTE:** The containing text frame must be selected in order to edit the in-line frames.

---

### ▷ Link (threading) text frames

Text frames can be linked if you want text to flow automatically from one frame to another. You can link two or more text frames to create a thread.

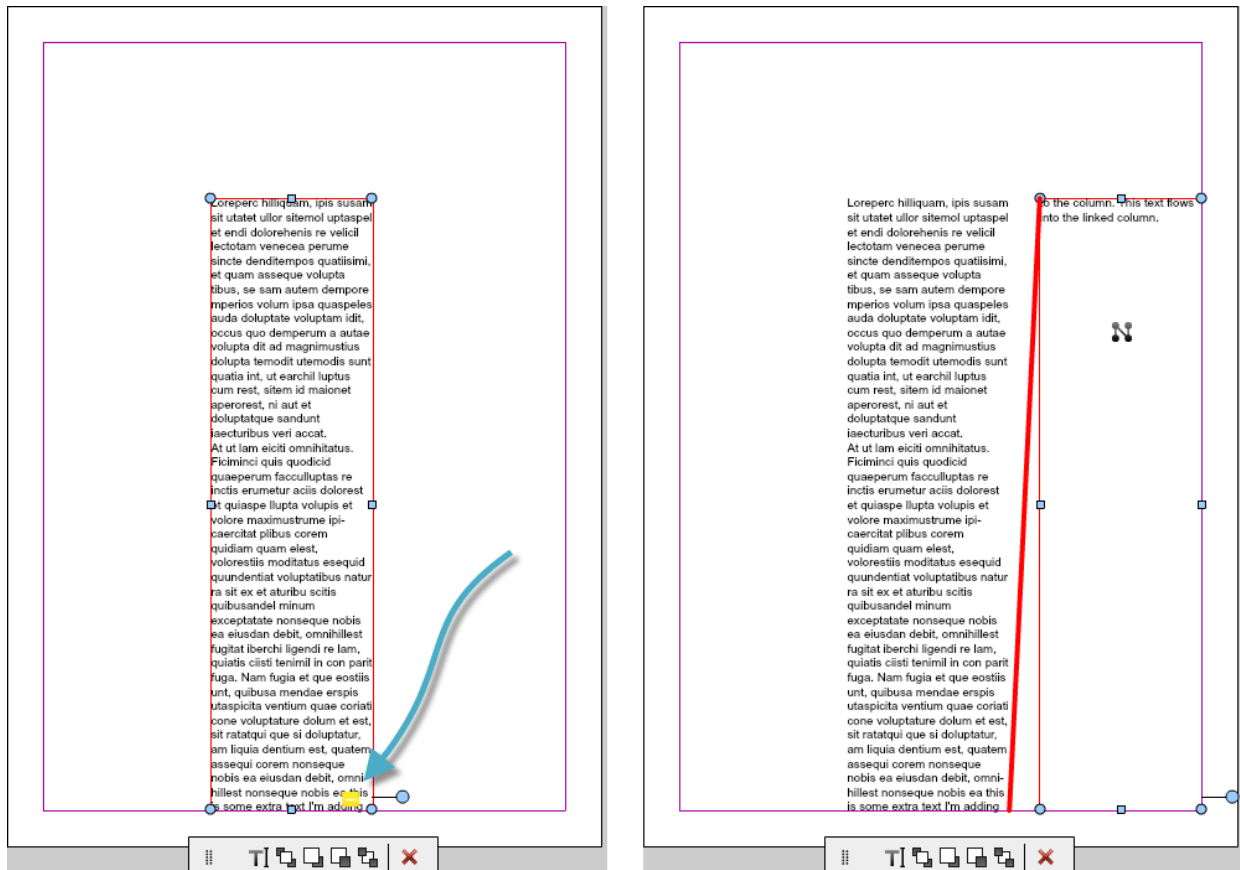
- 1 On the Edit toolbar, click the **Link** tool.



- 2 Select the first text and then the second text frame to link them.

The frames are now linked with a red bar.

Figure 10.86: Text frame with the yellow overflow icon (left page); text frame with text flowing to a linked text frame (right page).



When you type in the first text frame and the frame is full, the text flows into the second frame.

- 3 To unlink the text frames, click the **Unlink** tool and click in one of the linked frames.



**NOTE:** It's recommended to link to a newly created text frame.

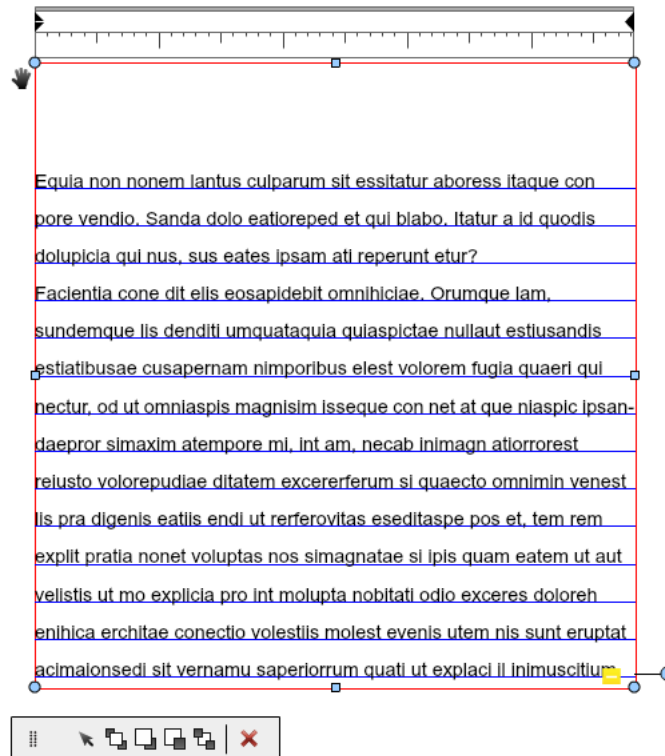
- 4 When you've finished linking/unlinking, click the **Pointer** tool to continue working.



### ▷ Use a custom baseline grid

The custom baseline grid allows you to override the document grid and apply custom line spacing to a paragraph of text.

Figure 10.87: Custom baseline grid with offset from top of frame (Show Guides selected)



- 1 Position the cursor in the text you want to modify and in the Text tab, open the Paragraph Settings.
- 2 Select the **Align to baseline** check box.
- 3 This applies the document grid to the paragraph; this may be different than the text frame grid.
- 4 Click the Edit Frame button on the in-line toolbar and open the Frame Custom Baseline Grid panel.
- 5 Click the Use Custom Grid check box and specify the grid as required. See “Frame Custom Baseline Grid” on page 435 for information about these settings.

## ▷ Place/Edit an image

- 1 On the Edit toolbar, click the **Image** tool.



A new image frame is placed on the document.

- 2 Click the **Assign Image** button to insert an image.

The Select Image dialog is displayed.

- 3 Select a library in the **Assets From** drop-down list.

- 4 Choose an image from the existing assets and double-click the image to insert the image in the frame in your document.

OR

Click the **Browse for local file** button to select an image of your choice.

The image is inserted in the frame and you will see this image in the Assets list the next time you insert an image. See “Images Tab” on page 435 for more information about image libraries.

- 5 You can now use the Crop and Flip tools to position the image in the frame, and subsequently any of the other in-line tools to position the frame in the document.

- 6 Click the **Crop** tool.



The Crop dialog is displayed and you can choose how you want to *fit* and *anchor* the image inside the frame.

- 7 When you have obtained the desired result, click Close to return to the document.
- 8 Click the **Flip** tools to flip the image horizontally, vertically or both, within the frame.



See also: How to use image libraries

## ▷ Wrap text around an image

- 1 Insert a new image or select an existing image in your document.
- 2 Open the **Wrap Settings** panel in the Objects tab.

- 3 Select the **Wrap Text** check box.
- 4 In the **Type** drop-down list, select **Flow Around**.

The text now flows around both sides of the image frame.



OR

Select **Wrap Both Sides**.

The text is now cleared on both sides of the image frame.



You can also clear the text on the left or right side of the image with the **Wrap to left** and **Wrap to right** options in the drop-down list.

- 5 You can increase the clearance around the image by entering a value in the Left, Right, Top and Bottom fields.



## ▷ Place/Edit a free-form shape

- 1 On the Edit toolbar, click the **Shape** tool.



A new frame is placed on the document; you can move, resize or rotate the frame as desired.

OR

Select a shape frame in the document.

- 2 In the top toolbar or in-line toolbar, click the Edit Path button.

Extra path editing tools are displayed in the top toolbar of the workspace.



Select an anchor point to move it.



Add an anchor point: Position the cursor on the path and click to add a new anchor point.



Remove an anchor point: Position the cursor on an anchor point and click to remove it.



Convert an anchor point: Position the cursor on an anchor point and drag it to add a Bézier handle. Double-clicking an anchor point that already has Bézier handles converts it into a regular anchor point.

- 3 Click the **Close Path Editor** button to return to the document.

## ▷ Place/Edit a rectangle, circle or line

- ◆ On the Edit toolbar, click the **Rectangle**, **Circle** or **Line** tool.



Add a rectangle.



Add a circle or oval object.



Add a line.

A new frame is placed on the document; you can move, resize or rotate the frame as desired.

OR

Select an existing frame in the document to edit it.

## ▷ Set constraints and lock a frame

---

**NOTE:** You can only set constraints for existing frames, not for new frames added by the shopper.

---

- 1 Select an existing frame in the document or add a new frame.
- 2 Make sure the **Simulate** button is set to Content Administrator view.
- 3 Open the **Object Constraints** panel in the **Objects** tab.
- 4 At the top of the tab, set the minimum and maximum width and height of the object and where it can be moved in the document. See “Objects Tab” on page 419 for more information.
- 5 Set the **Frame Constraints**. See “Objects Tab” on page 419 for more information.

For example, lock all frame properties for the end user, except *Content*, so the shopper can only change the content of the frame but not change its position in the design.

- 6 Set the **Frame Content** constraints. See “Objects Tab” on page 419 for more information.

For example, set all constraints to **Limited selection for end-users** and select **None** for each property so the shopper cannot change any of these design elements.

---

**NOTE:** If you choose a limited selection for a property, you must select at least one option for that property, otherwise all the options remain available.

---

- 7 Click the **Simulate** button and switch to End-User view to check the effects of the constraints.
- 8 Click the **Save** button on the workspace toolbar to save your changes.
- 9 Close the Online Editor.

## ▷ Set Border and Fill properties

- 1 Select an existing frame in the document or add a new frame, and open the Border and Fill panel in the Shapes tab.
- 2 Choose the settings as required. See “Shapes Tab” on page 447 for more information.

The settings are applied immediately to the object.

## ▷ Assign a shape to Text, Images and Shapes

- 1 Select an existing **Text**, **Image** or **Shape** object in the document or add a new object, and open the Border and Fill panel in the Shapes tab.
- 2 Click the **Assign Shape** button and double-click one of the shapes to apply the shape to the object.

Figure 10.88: Example of a shape assigned to a free-form shape frame, with fill and border colors.



## Advanced Editing

The Online Editor is also used for the following, more advanced editing features:

- “Tables” on page 372
- “Form Field Variables” on page 373
- “Autofill Forms” on page 380
- “Variable Data Processing (VDP)” on page 382
- “Generate QR Codes” on page 394
- “Dynamic Layout Function Formulas” on page 398

## Tables

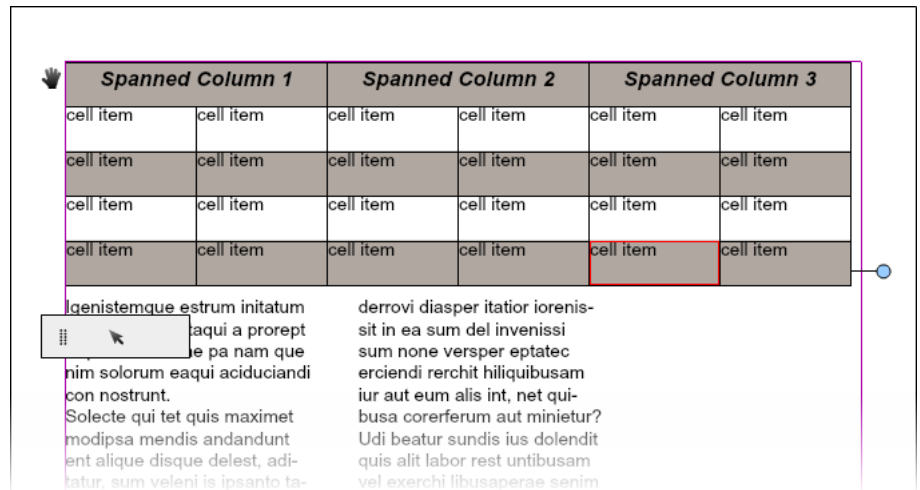
You can edit tables that are present in your STOREFRONT package and which were created in InDesign, or you can create tables from scratch.

### ▷ Insert a new table

- 1 Insert a new table frame by clicking the Table icon in the toolbar and position the table on the page.

It’s possible that the frame of the table is not visible. In the Table tab, open the Table Settings panel and click the Select Table Frame button to highlight the frame of the table.

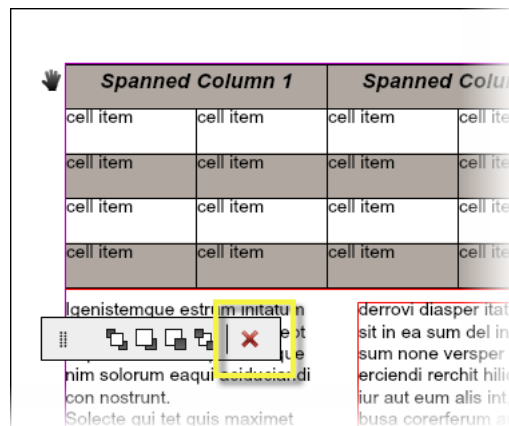
- 2 Click in the table and in the Table tab, open the Table Settings panel and choose Border > Yes, and Default Cell Border > Yes, so you can see the table and cell borders of the new table.
- 3 In the Table Row and Table Column panels, add the number of rows/columns that you require for your table.
- 4 Go back to the Table Settings panel to format the rows and columns as required with fill and borders.
- 5 To format and align the text in cells, go to the Text tab.



### ▷ Delete a table

- 1 Select the table you want to delete.
- 2 It's possible that the frame of the table is not visible. In the Table tab, open the Table Settings panel and click the Select Table Frame button to highlight the frame of the table.

The in-line toolbar is displayed with a delete icon.



- 3 Click the delete icon to delete the table.

## Form Field Variables

Form input provides additional control for customizable products. The shopper enters information in the interactive form fields of the document. These form fields are located in the Forms tab. Each form field is a variable that you, as an administrator, can set up in the Forms tab of the Online Editor.

---

**NOTE:** Form input fields can be combined with editable text frames in the same document.

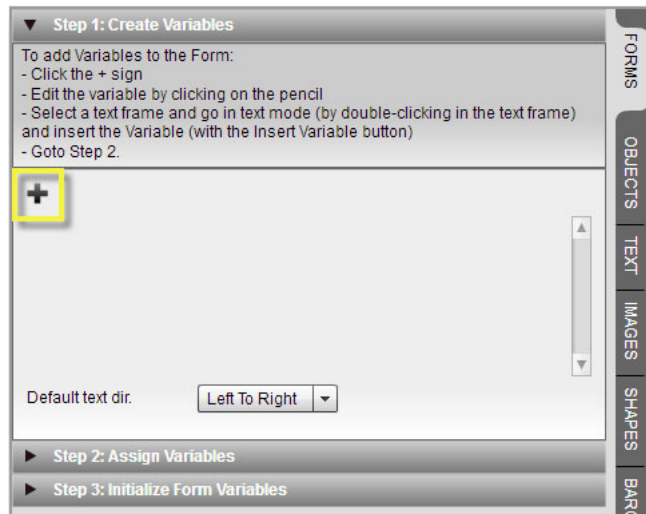
---

- Related topics:
- [Variable Actions on page 458](#)
  - [Variable Actions Samples on page 465](#)

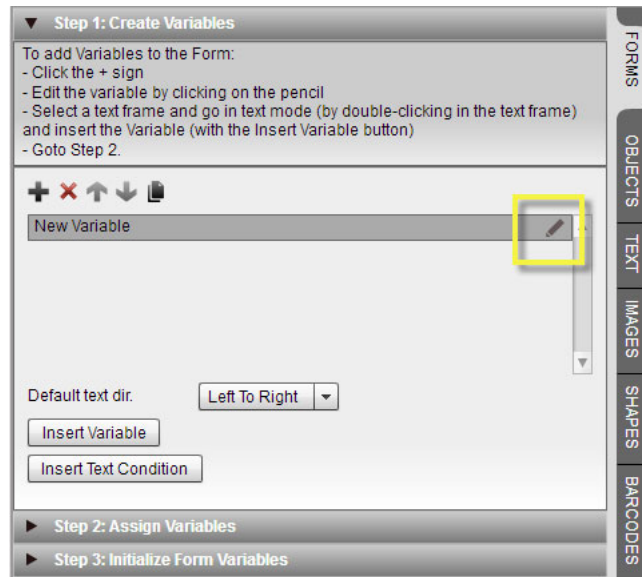
▷ **Insert variables (fields) in a forms document**

This procedure is only possible in the Forms and Expert workspaces which include the Forms tab. See “Forms Tab” on page 402 for more information.

- 1 Place a new text frame on the document.
- 2 Click the **Forms** tab to create the variables (form input fields) for your form.
- 3 Click the **Add** button (*plus icon*) to add a variable to the list.



- 4 Click the **Edit** button (*pencil icon*) next to the variable to set up/edit the variable.



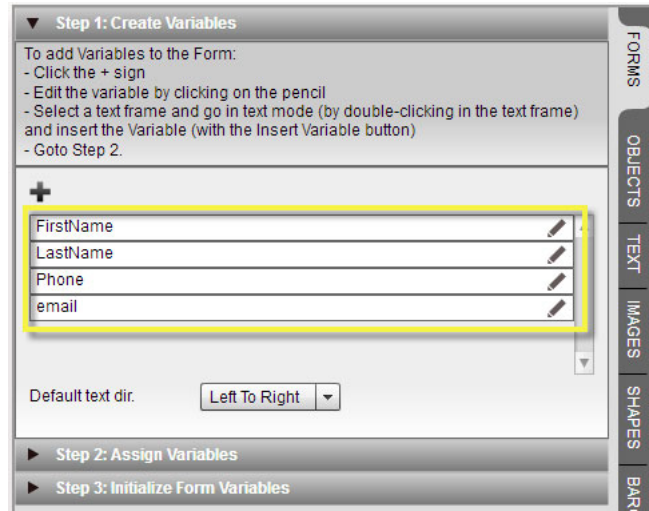
The Settings dialog is displayed.

- 5 Enter a Name and Display Name, and choose a Variable Type.
- 6 Complete the General and Type Specific tabs. See “Variables Settings Editor” on page 406 for more information.
- 7 Click **Close** to close the Settings dialog.

The variable is added to the Variables list.

You have created a variable which can now be used in multiple text frames.

- 8 Add more variables as required.



9 Choose a default text direction:

- Left to Right
- Right to Left

10 Double-click in the text frame or click the Edit Text button on the in-line toolbar.



At the insertion point you can now insert the variable.

11 Select the variable you want to insert in the Variables list and click the **Insert Variable** button.

OR

Double-click the variable in the list to insert it in the document.

The variable is inserted in the text frame. The variable name starts and ends with a “%” character.

OR

Type the variable name.

12 If required, click the **Insert Text Condition** button to insert a condition.

13 In the **Step 2: Assign Variables** pane, select the **Selected frame contains variables** check box to enable the variables in the text frame. See “Step 2: Assign Variables Panel” on page 404 for more information.



**NOTE:** If this check box is not selected, the variable names are displayed as text and it is not possible to enter data in the form fields on the storefront.

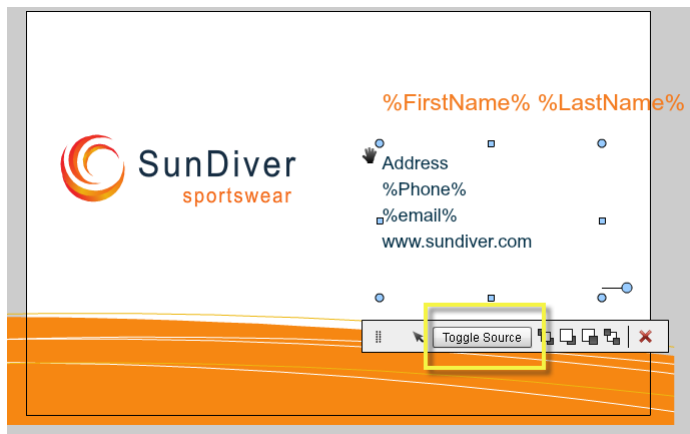
This option also activates the **Toggle Source** button on the in-line toolbar.

**TIP:** Select text in your document and click the Insert Variable button to insert a variable with the selected text as sample text.

- 14** In the **Step 3: Initialize Form Variables** pane, you can enter sample text in the form fields or leave the form fields blank. See “Step 3: Initialize Form Variables Panel” on page 405 for more information.

If you enter sample text, use the Toggle Source button to switch between the variable source code and the sample text.

Figure 10.89: Variables in a document - Online Editor view

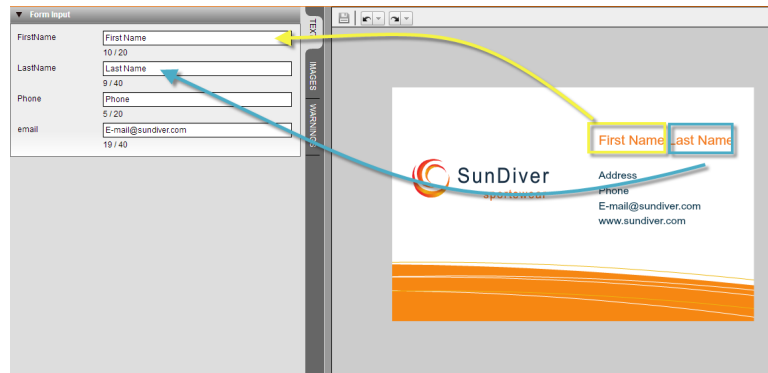


- 15** Repeat the procedure for all text frames with variables.
- 16** Click the **Save** button on the workspace toolbar to save your changes.
- 17** Close the Online Editor and add the product to a store.

**NOTE:** If the product has already been assigned to a store, the changes you made are automatically retrieved for this product on the storefront.

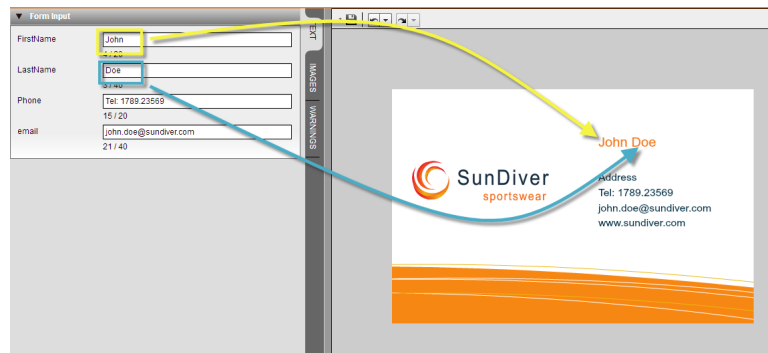
- 18** Inspect the form on the storefront.

Figure 10.90: Form input fields on a storefront – display names



Inspecting the form on the storefront is necessary to ensure that shoppers can use the form fields as expected and submit the order. See “Testing Customizable Products” on page 456.

Figure 10.91: Filled form input fields on a storefront



### ▷ Add an image variable to a form

An image variable adds a drop-down list to the form where the user can select an image to be inserted in the document.

- 1 Create a new variable for the document and choose **Image** as Type.
- 2 Close the New Variable Settings as no other type-specific settings need to be set.
- 3 Draw an image frame in the document.
- 4 To link the image frame with the variable, select the frame in the document and then click the **Attach Image Variable** button in the Forms Step1: Create Variables panel.

- 5 All the image buttons on the form must be associated with one of the image libraries. To do this, click the document tool in the top toolbar and then the folder button to browse to a directory. See “Images Tab” on page 435 for more information about managing image assets and the different image directories. The images in the specified directory can be selected by the user via a drop-down list on the form. The selected image is placed in the document.

Figure 10.92: Image variable on a form

Alternatively, the user can browse to a local folder on his computer to select an image.

---

**NOTE:** Browsing for a local file is only supported for image variables that are linked to the "My Images" directory.

---



---

**NOTE:** The constraints that apply to the inserted images are set on the image frame. See “Objects Tab” on page 419. It is recommended to lock the frame so the shopper cannot delete the image from the image frame while the variable still refers to the image; otherwise the image is reloaded when the document is reopened.

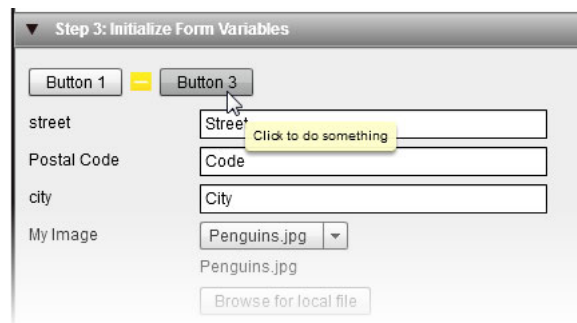
---

### ▷ Add a button bar to a form

- 1 Create a new variable for the document and choose **Button Bar** as Type.
- 2 Click the **Add** button (plus icon) to add a variable item. This is the actual button.
- 3 In the **Label** box, enter the text you want to display on the button.
- 4 Optionally, enter a tooltip (a message that appears when the user hovers over the button in the form).
- 5 Optionally, choose an icon. If you choose an icon, the button will be the icon instead of a button with a label.

- 6 Click the **Edit** button to open the Action editor where you can create the code for the action that you want to assign to the button (e.g. clear all input fields: set variable x value = string <empty>). The action will be activated when the user clicks the button. See “Variable Actions” on page 458 to create actions.
- 7 When you’ve finished creating your action, close the Action editor.
- 8 Click the **Add** button (plus icon) to add another variable item if you want to add another button to the button bar and repeat the procedure for as many buttons that you want.
- 9 Close the New Variable Settings and finish the procedure to add the variable to the form.

Figure 10.93: Button Bar variable on a form

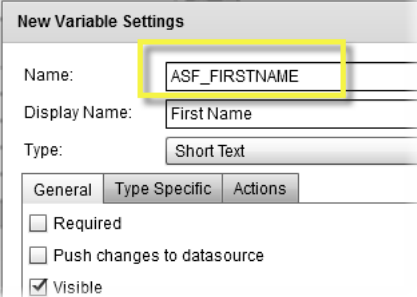


## Autofill Forms

The *autofill form* feature uses the information already available in a shopper’s user profile to autofill form field variables in a customizable product. In other words, a shopper logs in to a storefront, opens a document for editing and her personal details (name, phone number, etc.) are already filled in. In addition, if the shopper changes the value for this variable in a document, the new value is remembered for all subsequent documents using this variable.

### ▷ Set up autofill form fields

- 1 Create a document with form field variables as explained in “Insert variables (fields) in a forms document” on page 374.
- 2 For the name of the variables in Variable Settings dialog, you must follow a convention to retrieve the values which are available in the user profile.



**New Variable Settings**

Name: ASF\_FIRSTNAME

Display Name: First Name

Type: Short Text

General | Type Specific | Actions

Required

Push changes to datasource

Visible

The following values can be retrieved:

User profile variable name	Value returned (autofill)
ASF_COMPANYNAME	company name
ASF_FIRSTNAME	first name
ASF_LASTNAME	last name
ASF_NAME	name
ASF_EMAIL	e-mail address
ASF_PHONE	phone number
ASF_FAX	fax number
ASF_STREET1	street line 1
ASF_STREET2	street line 2
ASF_ZIPCODE	zip code line
ASF_ZIP4CODE	zip code line 2
ASF_CITY	city
ASF_SUBCOUNTRY	sub country line
ASF_COUNTRY	country
ASF_USERMISID	MIS ID code that identifies the user
ASF_COMPANYMISID	MIS ID code that identifies the company

Create as many variables as required using these user profile variables. Ideally, you will enter a different name for the Display Name of your variable.

- 3 Save the document, add it to a store and test that the results are as expected by editing the document in the online editor on a storefront.

The retrieved values are filled in automatically in the document and in the form fields. If necessary, the autofill values can also be edited for this document. The edited values are remembered for subsequent documents created by the user.

---

**NOTE:** The fields are filled with values retrieved from the profile of the user who has log in to a storefront. This means you can only test the document by logging in to a storefront.

---

---

**NOTE:** A user can have more than one address in the address book. The address related user profile variables will be retrieved from the first address in the address book that matches the first and last name of the user who is currently logged in. If no matching address is found, then the variables will not retrieve a default value from the address book.

---

---

**NOTE:** The user profile variable names all start with prefix "ASF\_" (which is short for ApogeeStoreFront). When you create other variables in the Online Editor we advice not to use this "ASF\_" prefix in order not to clash with potential new variables that might be added to future versions and also in order to have a clear distinction for yourself between custom variables names and variables names created by the system.

---

## Variable Data Processing (VDP)

---

**NOTE:** This feature may not be included in your license pack.

---

This procedure is only for a Variable Data Product, a special kind of Customizable Product which is designed for variable data processing (VDP) and typically used to personalize publications. The following are examples of VDP:

- 50 names to create 50 sets of business cards
- 150 addresses to print fashion posters that point customers to the nearest outlet
- 500 letters with a name and address for a direct marketing campaign

Variable Data Products use the Forms or Expert workspace. See “Forms Tab” on page 402 for more information. In addition, when you save a Variable Data Product, a variable data template (Excel spreadsheet) is created which the shopper can use to enter the variable data. This variable data file is subsequently uploaded and the data are merged with the product.

In the following sections you create a Variable Data Product and then simulate an order to retrieve the variable data template and generate a series of documents with merged variable data.

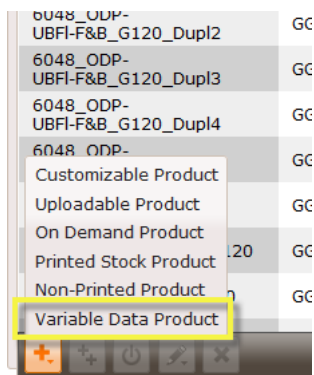
**NOTE:** You cannot use Variable Actions in a Variable Data Product.

### ▷ Insert variable data fields for a Variable Data Product

#### ■ STEP 1: Create a Variable Data Product

- 1 Create a new Variable Data Product as explained in “Creating Products” on page 157.

**NOTE:** The Variable Data Product type is only available if you have the required license pack.



You can use templates based on all base types except Unbound Flat - Variable Size. For bound products you must define a fixed number of pages. Pages will not be added if the variable content does not fit the available space.

- 2 On the first page of the wizard you need to select how the shopper will be able to choose a quantity. In the Miscellaneous panel, choose one of the following options from the Quantity drop-down list:
  - Specified in the Excel file: The shopper uploads an Excel file that includes a column for the quantity of each row (column header label is ASF\_Quantity). The quantity can be different for each row.
  - Specified in the product page: The shopper specifies, on the product page, a quantity for each row in the uploaded Excel file. The quantity is the same for all rows.
  - One copy per record: One unit is produced for each row in the Excel file. This option can be used for direct mail merging of names and addresses.
- 3 Select the check-box **Add “ASF\_EXCLUDE” field to the Excel file** to add an additional column with heading ASF\_EXCLUDE to the Excel file so rows can

be excluded from processing, for example if you only want to process some of the rows in a large master file. See “Downloading/uploading the variable data file” on page 386.

- 4 Continue with the wizard and save the new product.

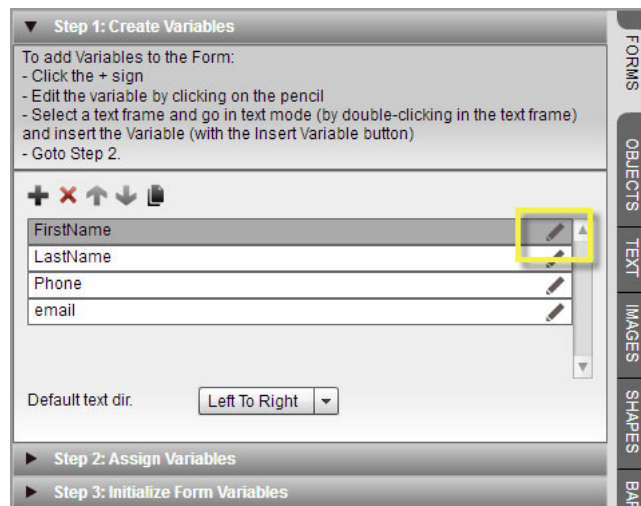
A Variable Data Product is indicated with the following icon in the list of products:



- STEP 2: Edit this product in the Online Editor.
- 1 Create the form fields for your variable data document as explained in “Insert variables (fields) in a forms document” on page 374. Alternatively, save an existing document with form fields and upload this document when creating the Variable Data Product. See “Package Output” on page 452.

Special care is required when creating the form fields because the field names are used to create the variable data template (Excel file) which is made available for downloading by the shopper.

- 2 Select the variable in the list and click the pencil icon to open the **Variable Settings**.



- 3 In the General tab of the Variable Settings dialog, make sure the **Name** does not contain any spaces or forbidden characters.

**NOTE:** Do not use spaces or the following forbidden characters for the Name of the variable: / \ : \* " < > |



- 4 For **Type**, you can select any of the available options (Short Text, Long Text, Formatted Text, Image, Date, etc.) except Divider.
- 5 Make sure the **Push changes to datasource** check box remains selected.

The screenshot shows the 'New Variable Settings' dialog box. The 'Name' field contains 'FirstName', and the 'Display Name' field also contains 'FirstName'. The 'Type' dropdown menu is set to 'Short Text'. Below these fields are two tabs: 'General' and 'Type Specific'. The 'General' tab is active, and the 'Push changes to datasource' checkbox is checked and highlighted with a yellow box. Other checkboxes include 'Required', 'Visible', 'Apply to snippets', 'Show Inline', and 'Remove paragraph if var. is empty'. There are also text input fields for 'Display Filter', 'Prefix', 'Suffix', and 'User Info (help)'. A 'Close' button is located at the bottom left of the dialog.

- 6 Click **Close** to close the Variables Settings dialog.
- 7 Do this for all the form field variables in the document.
- 8 In the Assign Variables panel, you can fine-tune how the variable data will be displayed. For example you can apply copyfitting, however, remember that additional pages will never be created to accommodate overflowing content.

**▼ Step 2: Assign Variables**

Expand the variable by switching on the 'Selected frame contains variables' setting.  
When you now initialize the variable (in Step 3), the content will be displayed immediately in the layout.

Flatten All Variables

View Mode:  ▼

Selected frame contains variables

Remove all empty paragraphs

Apply Copyfitting

Between  ▲▼ and  ▲▼ %  
(current = 106)

Max. Lines  ▲▼

Only when there is overflow

**9** Save the document.

STOREFRONT now saves a variable data template that the shopper can use to supply variable data.

**10** Add the product to your store and go to the storefront to check the variable data template.


▷ **Downloading/uploading the variable data file**

The variable data template (Excel spreadsheet), which is automatically created when you save your Variable Data Product, can only be downloaded from the storefront. In the following procedure you will simulate how a shopper orders a Variable Data Product to retrieve the data template file, enter some variable data in the spreadsheet, and check the results.

- 1** On the storefront of the store where you added the Variable Data Product, simulate an order for this product.
- 2** On the Place Order page, you have two options for downloading the variable data template (Excel file):

Home » My Category

### My Business Card Variable Data



**First Name Last Name**

Address  
Phone  
E-mail@sundiver.com  
www.sundiver.com

**Place Order**

This is a variable data product. The number of rows is retrieved from your Excel file.

Quantity per row

[Upload Data & Start Editing](#)

**Templates**

Excel data template [Download](#)

**Specifications**

**Media Size**  
European business card , 55 x 85 mm

**Media Type**  
Glossy OnlyVV - Gloss coated paper - 100g

**Single sided**  
Full Color

Click the **Excel data template** Download link under Templates to download the file directly.

OR

Click the **Upload Data & Start Editing** button and subsequently the **Excel data template** Download link.

**File Upload**

Upload an Excel file (xls orxlsx)

File Requirements  
Supported quantities per record: 50, 100, 250  
Number of records: 1 up to 200

No file chosen

[Excel data template Download](#)

An Excel file with the name of the product is saved to your Downloads folder.

- 3 Go to your Downloads folder and open the Excel file.

	A	B	C	D	E	F	G	H
1	ASF QUANTITY	FirstName	LastName	Phone	email	email (Single line text, Not Mandatory) Maximum length: 40		
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
20								
21								
22								
23								
24								
25								
26								
27								
28								
29								
30								
31								
32								
33								

The spreadsheet contains 2 worksheets:

- Variables: This is the worksheet where the actual data must be entered. Do not change the first row of cells because these are the column headings that map the data to the variable names used in your document. However, you can change the order of the columns if you want. Each row in this sheet corresponds to a record of your variable data. A tool tip above each column heading displays the variable settings for that particular column: max. line length, mandatory, etc. Warnings are generated if these settings are not respected.

---

**NOTE:** The ASF\_EXCLUDE value can be used to exclude a number of certain rows when parsing the VDP data. In the ASF\_EXCLUDE column, enter '1' to ignore the row, or leave empty or enter '0' to process the row. See “Insert variable data fields for a Variable Data Product” on page 383.

---

- Help: This worksheet provides an overview of the variable settings and instructions for this particular product, including the maximum number of data rows (records) allowed.

**4** Enter your variable data in the Variables worksheet and save the file.

	A	B	C	D	E	F	G	H
1	<b>FirstName</b>	<b>LastName</b>	<b>Phone</b>	<b>email</b>				
2	John	Doe	0852-6589	<a href="mailto:jdoe@mycompany.com">jdoe@mycompany.com</a>				
3	Joe	Bloggs	0852-6587	<a href="mailto:jbloggs@mycompany.com">jbloggs@mycompany.com</a>				
4	Sue	Miller	0852-6521	<a href="mailto:smiller@mycompany.com">smiller@mycompany.com</a>				
5	Anne	Fairclough	0852-6539	<a href="mailto:afairclough@mycompany.com">afairclough@mycompany.com</a>				
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								

**NOTE:** If the Variable Data Product has Quantity set to *Specified in the Excel file*, you can specify the quantity for each record in the first column (ASF Quantity).

- Go back to the Product Page and click the **Upload Data & Start Editing** button and subsequently the **Choose File** button.



- Browse to your variable data file (Excel file, both XLS and XLSX formats are supported) and upload it.

If your variable data includes images, upload a ZIP file containing those images either in the same folder as the spreadsheet or in a sub-folder specified in the spreadsheet.

	A	B	C	D	E	F
1	<b>ASF_QUANTITY</b>	<b>FirstName</b>	<b>LastName</b>	<b>Phone</b>	<b>Email</b>	<b>Picture</b>
2	50	John	Doe	0852-6589	<a href="mailto:john@mycompany.com">john@mycompany.com</a>	John.png
3	50	Sue	Miller	0852-6592	<a href="mailto:Sue@mycompany.com">Sue@mycompany.com</a>	Images/John.png
4						
5						

- After validation, the product opens in the Online Editor.

**NOTE:** See “Troubleshooting the variable data upload” on page 393 if the upload is not successful.

**Uploaded Data**  
Select a row to edit in the form below

#	FirstName	LastName	Phone	email
1	John	Doe	0852-6589	ldoe@mvcompany.com
2	Joe	Bloos	0852-6587	lbloos@mvcompany.com
3	Sue	Miller	0852-6521	smiller@mvcompany.com
4	Anne	Fairclough	0852-6539	afairclough@mvcompany.com

Previous Next  
 Filter

**Form Input**  
Edit the row selected in the list above

FirstName: John (4 / 20)  
 LastName: Doe (3 / 40)  
 Phone: 0852-6589 (9 / 20)  
 email: jdoe@mycompany.com (18 / 40)

The variable data records are displayed in the Uploaded Data panel of the Variables tab with the first record displayed in the Form Input panel.

- 8 Click the **Previous** and **Next** buttons to navigate up and down this list.

The variable data is displayed in the document and you can check for each record whether the layout is correct.

**Uploaded Data**  
Select a row to edit in the form below

#	FirstName	LastName	Phone	email
1	John	Doe	0852-6589	ldoe@mvcompany.com
2	Joe	Bloos	0852-6587	lbloos@mvcompany.com
3	Sue	Miller	0852-6521	smiller@mvcompany.com
4	Anne	Fairclough	0852-6539	afairclough@mvcompany.com

Previous Next  
 Filter

**Form Input**  
Edit the row selected in the list above

FirstName: Sue (3 / 20)  
 LastName: Miller (6 / 40)  
 Phone: 0852-6521 (9 / 20)  
 email: smiller@mycompany.com (21 / 40)

**SunDiver sportswear**  
 Sue Miller  
 Address  
 0852-6521  
 smiller@mycompany.com  
 www.sundiver.com

- 9 If you have many records, you can select the Filter check box to see the records with the shortest and longest values for each field.

The screenshot shows the 'Uploaded Data' section with a table of records. The 'Filter' checkbox is checked, and the 'Filter on' dropdown is set to 'Longest value'. The 'Form Input' panel shows the details for the selected row (Anne Williams-Deville). A yellow arrow points from the 'Longest value' dropdown to the 'Form Input' panel.

#	FirstName	LastName	Phone	email
4	Anne	Williams-Deville	0852-6539	afair

Filter on: Longest value

Form Input:

First-Name: Anne  
4 / 20

Last-Name: Williams-Deville  
16 / 40

Phone: 0852-6539  
9 / 20

email: afairdough@mycompany.com  
25 / 40

Again, this is handy to check that text is not overflowing.

You can also set a custom value to filter on the specified number of digits, for example, to check phone numbers.

The screenshot shows the 'Uploaded Data' section with a table of records. The 'Filter' checkbox is checked, and the 'Filter on' dropdown is set to 'Custom value'. The 'Form Input' panel shows the details for the selected row (Anne Williams-Deville). A yellow arrow points from the 'Custom value' dropdown to the 'Form Input' panel.

#	FirstName	LastName	Phone	email
1	John	Doe	0852-6589	idoe
4	Anne	Williams-Deville	0852-6539	afair

Filter on: Custom value

Form Input:

First-Name: Anne  
4 / 20

Last-Name: Williams-Deville  
16 / 40

Phone: 0852-6539  
9 / 20

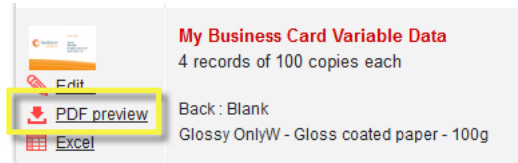
email: afairdough@mycompany.com  
25 / 40

- 10 You can edit and fine-tune the variable data as required in the Form Input panel.

- 11 Save the document to confirm your changes and proceed to the Shopping Cart Items page.

Any modified data is saved with the document.

- 12 On the Shopping Cart Items page, click the PDF Preview link to check how the variable data has been merged with the document.

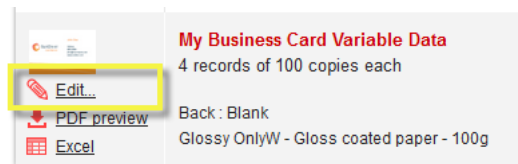


Your default PDF reader opens a PDF that contains the different instances of your variable data document.



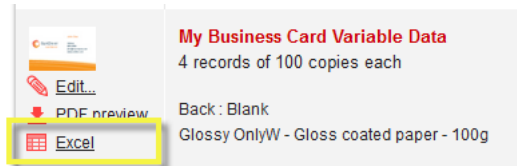
**NOTE:** For the sake of performance, the PDF preview does not contain all the instances of the merged document. The number of merged documents that can be previewed depends on the document in question.

- 13 On the Shopping Cart Items page, you can also re-open the document in the Online Editor to edit the document and/or the variable data.



- 14 On the Shopping Cart Items page, you can also download the variable data Excel file for future reference.






---

**NOTE:** The Excel file you download here is the one you edited and contains the variable data.

---

15 Click the **Checkout** button to proceed to checkout.

### ▷ Troubleshooting the variable data upload

Special care is required when a shopper prepares the variable data file for merging data with a document. This file is based on the template he downloads on the Product page of a storefront. The file can only be used for the product it was initially created for.

When a shopper uploads the Excel file, STOREFRONT validates the file to ensure the variable data can be merged with the document. If the validation fails, a dialog is displayed with a link to your rejected variable data file. This file can be opened and the columns and cells that contain incorrect data are highlighted in red. Shoppers should be informed about the following recommendations:

- ◆ Do not edit the header rows (row 1 on the Variables worksheet).
- ◆ Do not exceed the maximum number of records (data rows in the Excel file). The maximum number of records is specified on the Help worksheet in the Excel file you download.
- ◆ Do not exceed the maximum number of characters and other constraints which are displayed in the cell tool tips.
- ◆ Never leave a cell empty if the data is mandatory.

### ▷ How are VDP orders processed in Apogee Prepress?

- If a single copy is printed of every record:
  - For unbound products either one single job containing all pages is created or multiple jobs are created. The latter happens if the order item exceeds 100 records.
  - For bound self cover products a separate job with 1 part (Body) is created for every record.

- ❑ For bound separate cover product a separate job with 2 parts (Cover and Body) is created for every record.
- If multiple copies are printed of each record:
  - ❑ For unbound products either multiple JDF Parts are combined in one job or multiple jobs are created. The latter happens if the order item exceeds 100 records.
  - ❑ For bound self cover products a separate job with 1 part (Body) is created for every record.
  - ❑ For bound separate cover products a separate job with 2 parts (Cover and Body) is created for every record.
- If a VDP job is split across multiple prepress orders, its descriptive name will indicate this, e.g. 'VDP Direct Mailing [1-100 of 364]' or 'Summer Campaign [1 of 4]'.

## Generate QR Codes

Quick Response (QR) codes are used on printed media to quickly read information into mobile devices for further processing. The following are some examples of the information that can be encoded:

- URL: points to a website; example:  
`http://www.ECO3.com`
- geolocation: points to a location; example  
`geo: 51.172852 ,4.466523`
- E-mail: provides an address for sending an e-mail message; example:  
`mailto: info@ECO3.com`
- SMS: provides a phone number for sending a text message; example:  
`sms: [phone number]`
- calendar event: adds an event to a diary; example code:

```
BEGIN:VEVENT
SUMMARY:Conference
DTSTART:20120411083000
DTEND:20120411173000
END:VEVENT
```

- vCard: adds a person's name and details to a list of contacts; example code:

```
BEGIN:VCARD
VERSION:2.1
N:Doe;John
FN:John Doe
TITLE:CEO
ORG:Sundiver
EMAIL:John@sundiver.com
URL:www.sundiver.com
END:VCARD
```

Visit <http://en.wikipedia.org/wiki/VCard> for more information about vCards.

- and many more.

**TIP:** Watch the online training video on this topic (YouTube).

This feature can be combined with variables to allow a shopper to input the details in a form and create the QR code.

### ▷ Generate a QR code in a barcode frame

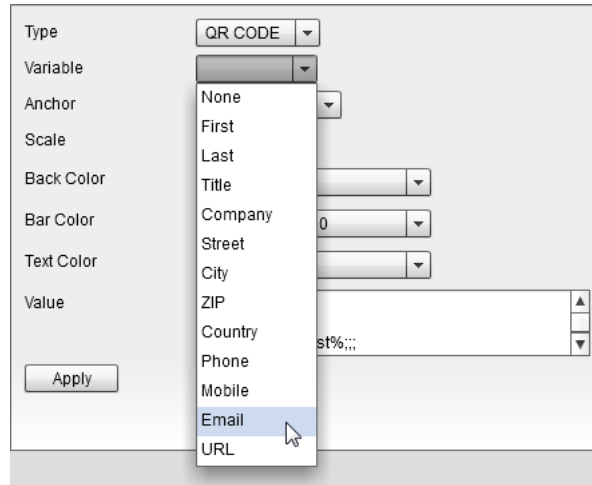
This procedure is only possible in the Forms and Expert workspaces which include the Barcodes tab. See “Barcodes Tab” on page 448 for more information.

- 1 In the Forms workspace, click the **Barcode** tool on the Edit toolbar.



A new frame is placed on the document; you can move and rotate the frame as desired.

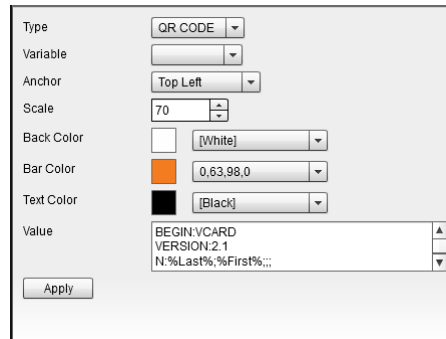
- 2 In the **Barcodes** tab, select QR CODE in the **Type** drop-down list and format as required.
- 3 Select a variable in the Variable drop-down list (only visible if variables have been defined, for example *E-mail*).



The value entered for this variable, in the customizable product, by the shopper will be inserted in the generated QR code.

OR

In the **Value** box, enter the syntax for the QR code, for example, a vCard which allows readers to add a person's name and details to a list of contacts.



This syntax may include one or more variables combined with static text. Variables are enclosed in '%' signs. For example, the code for a vCard which uses variables for all the contact details except the name of the company in the e-mail address, and the company URL, would look like this:

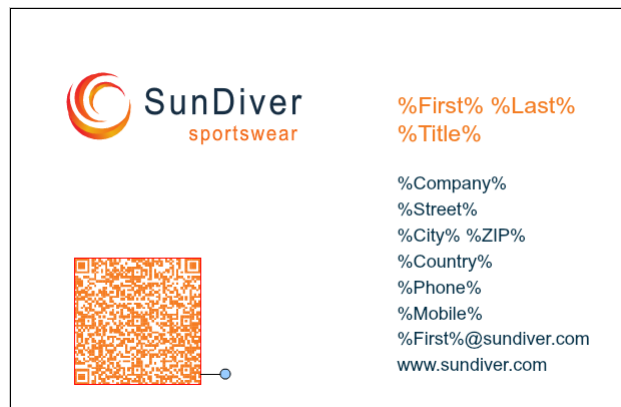
```

BEGIN:VCARD
VERSION:2.1
N:%Last%;%First%;;
FN:%First% %Last%
TITLE:%Title%
ORG:%Company%
ADR;;;%Street%;%City%;;%ZIP%;%Country%
TEL;HOME:
TEL;WORK:%Phone%
TEL;CELL:%Mobile%
EMAIL:%First%@sundiver.com
URL:www.sundiver.com
END:VCARD

```

#### 4 Click **Apply**.

The QR code with vCard information is added to the form. You can scale the QR code if it appears too large on your document.



When a shopper enters his/her personal details in the form, these will be added to the QR code. The same variables can be used for the visible information.

- 5 You can edit the settings by selecting the barcode frame and clicking **Apply** again to re-apply your changes.
- 6 Click the **Save** button on the workspace toolbar to save your changes.
- 7 Close the Online Editor.

Check that the form input fields work as expected on the storefront and test that the QR code can be scanned properly.

Figure 10.94: A card completed on a storefront: the QR code contains the same form input variables as for the visible information



Related topics: • *Special characters in QR codes*

## Dynamic Layout Function Formulas

The Dynamic Layout feature allows you to create documents whose objects are positioned using relative values with formulas, as opposed to a static layout with absolute values and anchors.

---

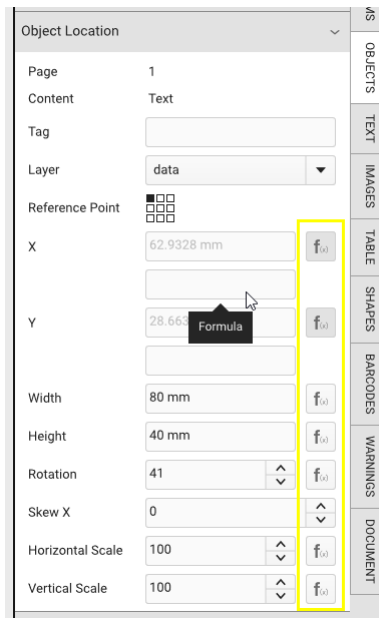
**NOTE:** Changing an anchoring setting will instantly update the corresponding dynamic layout setting, however, changing the dynamic function breaks the link with applied anchor settings.

---

- 1 Click the function buttons (f) next to the various property fields to display the formula field.

If a warning is displayed that the link with currently applied anchor settings will be broken, click Yes to continue.

- 2 Enter a formula to specify the object's location dynamically. The formula will refer to other element properties and variable values:



### □ Supported operators in formulas

+	adding
-	subtracting
*	multiplying
/	dividing
()	parentheses

### □ Reference to other elements in formula

**Frame tag names:** By typing the frame tag followed by a dot and the name of the property you want to reference. If frame tag contains a space or special character, the frame tag can still be used in the function but must be put between brackets. e.g.: [My frame tag].X

**Page:** By typing “Page” followed by a dot, and the name of the property you want to reference. e.g.: Page.Width

**Paragraph tag names within a text frame:** A text paragraph can be tagged, and can also be referenced in a Dynamic Layout function. This is possible by first typing the name (tag) of the frame, followed by a dot, followed by the name of the paragraph (tag). e.g.: [My frame tag].MyParagraphTag.Bottom

**Variable:** Variable types Number and Coordinate can be used inside a function.

Refer to the variable by simply typing the name of the variable, or by specifying `variable.value`. Both will resolve to the value of the variable. e.g.: [My Number variable]

---

**NOTE:** Note that functions, tags and references are case insensitive.

---

□ Properties

X	The X position of the referenced rotated frame (note reference point) (or 0 for page)
Y	The Y position of the referenced rotated frame (note reference point) (or 0 for page)
Top	The Y value of the top of the referenced rotated frame (or 0 for page)
Bottom	The Y value of the bottom of the referenced rotated frame or page height
Left	The X value of the left of the referenced rotated frame (or 0 for page)
Right	The X value of the right of the referenced rotated frame or page width
CenterY	The Y value of the center of the referenced rotated frame or page
CenterX	The X value of the center of the referenced rotated frame or page
Width	The width of the referenced frame or page (note value is scaled)
NonScaledWidth	The non scaled width of the referenced frame
Height	The height of the referenced frame or page (note value is scaled)
NonScaledHeight	The non scaled height of the referenced frame
Rotation	Rotation of the frame (note doesn't exist on inline frames)
ScaleX	X Scale of the frame
ScaleY	Y Scale of the frame

- Self: When creating a function for a certain frame in which you want to use a property of that particular frame, you can use the tag of the frame, but you can also use "self". e.g.: `Y = page.height - self.height`



### □ Specific predefined functions

MinMax(min, max, input)	Clamps a given value between a minimum and maximum value. e.g. MinMax(300, 700, myVariable) When the width of myVariable is lower than 300, the function will return 300. If the width is above 700, the function will return 700. If myVariable is somewhere between, it will return the actual value (e.g. 450)
ClampMin(min, input)	If the input value is less than the minimum, return the minimum value otherwise return the input value
ClampMax(max, input)	If the input value is greater than the maximum, return the maximum value otherwise return the input value

- Units: The supported units are millimeters, inches, points, pixels (or mm, in, pt, px). If no unit are specified, the Dynamic Layout engine will assume the value is in points. Multiple units can be used within a single function. e.g.: `frameA.width=50mm+10in+5pt`
- Errors: Invalid formulas are displayed in red with a warning; you need to correct the syntax.

#### Related topics:

- Object Location on page 422
- Anchors on page 423
- Customizable Product with User-Definable Size on page 508

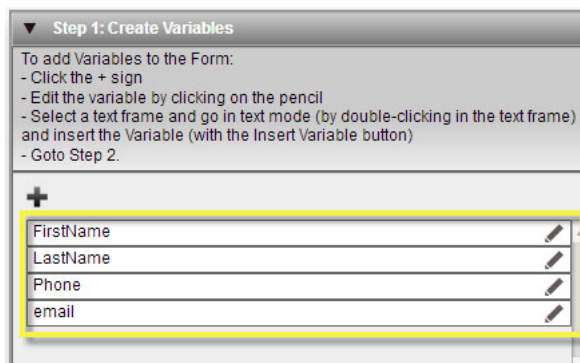


- “Step 1: Create Variables Panel” on page 403
- “Step 2: Assign Variables Panel” on page 404
- “Step 3: Initialize Form Variables Panel” on page 405

## Step 1: Create Variables Panel

This is the first panel to be completed when creating a forms document.

Figure 10.96: Example of a Variables list



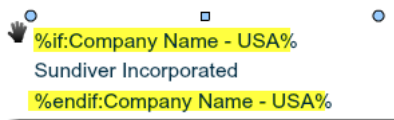
**Default text dir.** Choose Left to Right or Right to Left for the text direction of the variable.

**Insert Variable** This button inserts a variable from the Variables list in the document.

**Insert Text Condition** A variable to show/hide content: empty value = False; filled value = True.

Example 1: Insert the variable as a check box whereby the static text entered between the `if` and `endif` tags is only displayed if the check box is selected by the shopper.

```
%if:Company Name-USA% Sundiver Incorporated %endif:Company Name-USA%
```



Example 2: The e-mail line is not displayed if no e-mail is entered.

```
%if:Email% Email: %Email% %endif:Email%
```

This panel also provides access to the Variable Settings Editor. See “Variables Settings Editor” on page 406 for more information.

## Create Variables Tools



Creates a new variable and adds it to the Variables list.



Deletes the selected variable from the Variables list.



Moves the variable up in the Variables list.



Moves the variable down in the Variables list.



Creates a duplicate of the selected variable and adds it to the Variables list.



Opens the Variables Settings Editor.

## Step 2: Assign Variables Panel

---

This is the second panel to be completed when creating a forms document. This pane is activated if a variable is selected in the document.

**Flatten All Variables** Removes all the variables.

**View Mode** You can switch between 2 view modes:

**Preview:** displays the sample text for the form fields

**Source:** displays the source code of the variables

**Edit Story** Displays the text of the selected frame in a full-page editing window on the right, making it easier to edit variables in a long article which may span multiple pages.

**Selected frames contain variables** This check box must be selected to activate the variables in the selected frame.

---

**NOTE:** If this check box is not selected, the variable source code is displayed on the input document on the storefront and the shopper cannot edit the form fields.

---

- Flatten Variables** Replaces all variables by their current values. This is useful if a document was initially created for the Forms workspace but needs to be reworked to use the Basic or Advanced workspace.
- Remove all empty paragraphs** If a variable is not resolved, a paragraph may be left empty in the form. Select this check box if you want these empty paragraphs to be removed. For example: if your form provides fields for fax and telephone numbers, the fax paragraph will be deleted if no fax number is provided.
- Apply Copyfitting** Copyfitting refers to the process of making sure that the available text fits within the frame. Depending on the settings, this may mean the font size of the text is increased to fill up empty space, or it may mean the font size is decreased so that the text fits within the frame. Use copyfitting if you are not sure that there is sufficient space in the frame for all of the variables and static text.

**Style:** The default style is the *Custom setting* which enables you to specify specific settings for the selected text frame. However, you can choose a copy fitting style from the drop-down list if you want the copy fitting to be consistent across selected text frames. See “Copy Fitting Styles and Style Settings” on page 418.

**Between x and x%:** Sets lower and upper font size limits after copyfitting is applied. If, for example, 'between 75% and 100%' is used, this means the font size can never become bigger than it is right now but if the text does not fit the available space, the font size can automatically be reduced by up to 25%. If 'between 75% and 150%' is used, this means the font size may become up to 50% larger if the available text does not completely fill the available frame.

**Max. Lines:** Sets a maximum number of lines after copyfitting is applied. The default value is “-1” which is the same as an empty field and means that Max. Lines will not be applied.

**Only when there is overflow:** Copyfitting is only applied when there is too much text for the text frame.

For example: if copyfitting is selected with Max. Lines set to 3, copyfitting is no longer applied when the text exceeds 3 lines.

**Enable Leading and/or Tracking:** Leading will be adjusted; the minimum value cannot be greater than the value set in the text frame; if this is the case, the value of the text frame will be applied as minimum.

### Step 3: Initialize Form Variables Panel

---

This panel shows your variables as interactive form fields, similar to how they are displayed in the Forms tab on the storefront.

You can enter sample text in each field and this appears immediately in the document, or you can leave the fields empty.

## Variables Settings Editor

- ◆ The Variables Settings Editor is opened by clicking the Edit button (pencil icon) in the Variables list of the Step 1: Create Variables panel.

**Name** The name of the variable as it appears in the variable list. Variable names should not start with 'ASF\_' (e.g. ASF\_discount\_rate) because the prefix 'ASF\_' is reserved for system use. See “Autofill Forms” on page 380 for the list of ASF\_ variables

**Display Name** The name of the variable as displayed for the shopper, i.e. the form field label.

**Type** Describes the type of information to be entered in the form field. Choose a variable type from the drop-down list: Short Text, Long Text, Formatted Text, Image, Number, Checkbox, Date, List, Divider, Button Bar, etc. See “Type Specific Tab” on page 408 for more information about these variable types.

Figure 10.97: The different variables as they appear on the input form on a storefront.

The screenshot shows a 'Form Input' section with the following fields and variables:

- 1**: A yellow circle highlighting the 'Country' dropdown menu, which is currently set to 'United Kingdom'.
- 2**: A yellow circle highlighting the 'Subsidiary' list box, which contains 'London' and 'Cardiff' (the latter is selected).
- 3**: A yellow circle highlighting the 'Sundiver International' checkbox, which is checked.
- 4**: A yellow circle highlighting the 'Display country website' checkbox, which is checked.
- 5**: A yellow circle highlighting the 'URL' text input field.
- 6**: A yellow circle highlighting a dashed horizontal line above the 'Display country website' checkbox.

Additional elements include a vertical sidebar on the right with 'TEXT', 'IMAGES', and 'WARNINGS' tabs, and a tooltip at the bottom that reads: 'Select this check box to insert the UK website'.

- 1 Short text variable used as condition for (2)
- 2 List variable with list items dependent on (1)
- 3 Check box variables with text condition
- 4 Check box variable
- 5 Divider with dashes
- 6 Divider with '=' characters

Each type has its own specific settings. See “Type Specific Tab” on page 408 for more information.

## General Tab

These settings are the same for all variable types.

**Required** Select if the field must be filled by the shopper. If selected, a warning icon with tooltip is generated if the field is left empty.

**Visible** The form field can be hidden from the shopper with only the value entered by the administrator being visible. A complex variable that uses the value of another variable may not need to be visible.

**Prefix** The text you enter here is placed before the variable (if filled), e.g. a currency unit.

**Suffix** The text you enter here is placed after the variable (if filled), e.g. a measurement unit.

**User Info (help)** The text you enter here is displayed as a Help tool tip when the shopper hovers over the form field.

**Show in-line** Select this check box to also display the User Info under the form field.

**Remove paragraph if var. is empty** Select this check box to remove empty lines and paragraphs if the form field is not filled in.

## Type Specific Tab

Each variable type has additional specific settings.

**Short Text** The form field can contain one line of text. The style of the text is inherited from the layout and cannot be changed by the shopper. An example of its use is a business card where this variable can be used for entering the first and last name of a person

**Max. Characters:** The maximum number of characters allowed for the form field.

**Show max. length in input form:** Select this check box to display the maximum number of allowed characters on the input form.

**Text Direction:** Choose a text direction for the text typed in the form field: Inherit, Left to Right, Right to Left

**Long Text** The form field can contain several lines of text. The style of the text is inherited from the layout and cannot be changed by the shopper. This variable can be used for entering the address on a business card. The settings are the same as for Short Text, plus the option to set the height of the form field.

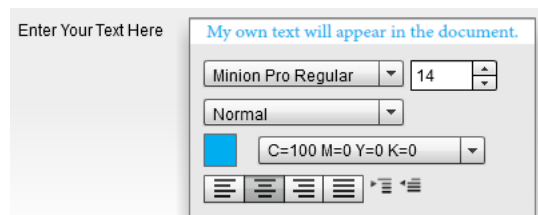


**Formatted Text** A form field where the shopper can add text and modify fonts and other formatting.

**Height:** Enter a value to specify the height of the form field in pixels.

**Editor Options:** Select the options as required to give the shopper more control when entering text in the form field. Some options can only be controlled if they are present in the InDesign document.

- Font:** The fonts used in the InDesign source document can be selected.
- Font Size:** The font size can be specified in points.
- Font Style:** Select this option if different font styles (bold, italic, etc.) were used in the source document.
- Color:** The list of colors used in the source document are available for selection.
- Baseline Position:** Normal, superscript or subscript
- Alignment:** Left, center, right, justification.
- Bullet Lists:** provides automatic formatting of bulleted lists.



**Calculated field** A Calculated Field has no input option, and the value for this field can only be set by using an action script in which the return value is calculated. Note that the "Online Editor Actions" license option must be enabled in order to use this field. When this license is available, an additional "Actions" tab will be shown in the variable settings dialog. A Calculated Field variable has an additional "Value" option:

Make sure that the action script for the "Value" option returns the result at the end of the script. In this example the calculated field returns the value of another "Short Text" variable.

**Image** This variable creates a drop-down list of images on the form that can be clicked to insert an image in the document. Alternatively, users can also click a button to browse for a local file on their computer. See “Add an image variable to a form” on page 378.

**Number** This form field can only contain a number.

**Minimum:** The lowest number the shopper can enter in the form field. Example: if the minimum is set to 100 and the shopper enters 59, the value reverts to 100.

**Maximum:** The highest number the shopper can enter in the form field. Example: if the maximum is set to 1000 and the shopper enters 1500, the value reverts to 1000.

**Snap Interval:** The interval of the allowed intermediate numbers between the minimum and maximum numbers. If the minimum number is set to 2 and the snap interval to 3, the user is allowed to enter 2,5,8,11,14,etc. Set to “1” if you want to allow all intermediate numbers.

**Step Size:** The amount that the number increases when using the up and down buttons in the form.

**Decimal Separator:** Choose a decimal separator for your locale: full stop, comma or leave blank.

**Thousands Separator:** Choose a thousands separator for your locale: full stop, comma or leave blank.

**Precision:** Select the number of decimal digits for the number from the drop-down list.

**Rounding:** Choose an option from the drop-down list (None, Nearest, Up, Down) for rounding off numbers that the shopper enters and which are not allowed.

**Checkbox** This variable adds a check box to the input form. If the shopper selects the check box, the line of text is replaced by an alternative line.

For example on a business card, the check box variable could be used to add a check box labeled 'Display country website'. If the shopper selects this option, the URL of the company website is inserted on the business card.

The screenshot shows a dialog box titled "New Variable Settings" with a close button in the top right corner. It contains the following fields and options:

- Name:** A text input field containing "UK site".
- Display Name:** A text input field containing "Display country website".
- Type:** A dropdown menu currently showing "Checkbox".
- General / Type Specific:** Two tabs are visible. The "General" tab is active, showing:
  - Checked Val.:** A text input field containing "www.sundiver.co.uk".
  - Unchecked Val.:** An empty text input field.
- Close:** A button at the bottom left of the dialog.

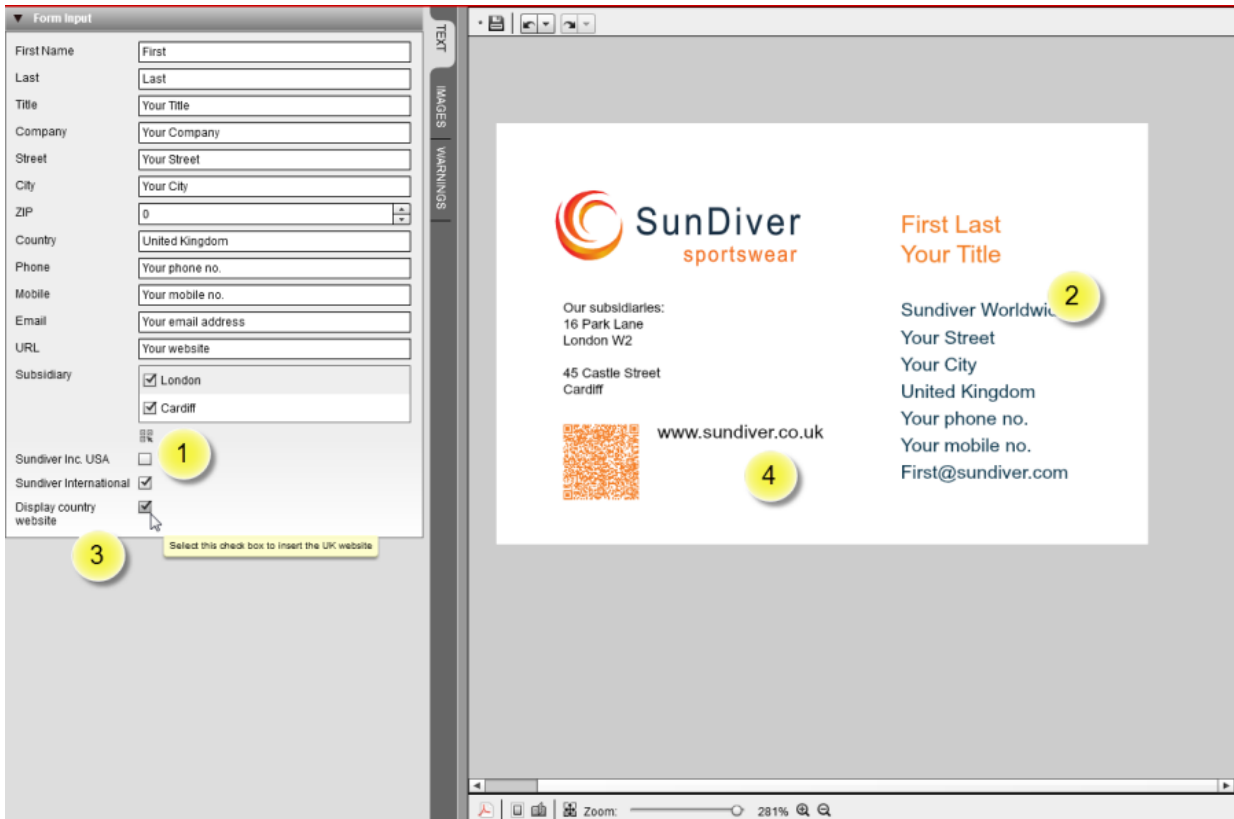
**Checked Value:** The value shown on the input form if the check box is selected.

**Unchecked Value:** The value shown on the input form if the check box is not selected.

**NOTE:** You cannot leave the Unchecked Value field blank. Type a space if you do not want anything to be displayed if the check box is not selected.

With the *Checkbox* variable you can also use the Insert Text Condition. See “Insert Text Condition” on page 403.

Figure 10.98: Storefront input form with check boxes: Selecting the check box (1) inserts static text in the document using Insert Text Condition (2). Selecting check box (3) replaces an empty or static line of text (4).



**Date** The shopper will be able to choose a date on a pop-up calendar and insert it in the document.

**Display format:** You can specify your own format using D (day), M (month) and Y (year) and the separator of choice. The date is always expressed with numerals. For example, 5 October 2016:

/MM/DD/YYYY generates 10/05/2016

D-M-YY generates 5-10-16

**Start week on Monday:** Select to start a week on Mondays in the calendar; otherwise the weeks start on Sunday.

**Selectable days in the past:** Enter the number of days that the calendar must show in the past; set to “0” if you don’t want to allow days in the past.

**Selectable days in the future:** Enter the number of days that the calendar must show in the future.

**Between:** Select a start date and an end date for the calendar.

**Disable days:** Choose the days that you want to disable in the calendar, e.g. Saturday and Sunday.

**List** This variable generates a list. Click the + button to add list items. List items can be deleted (x) or rearranged in the list with the Up and Down buttons.

For example, suppose a company has subsidiaries and when creating a business card, a shopper has to insert the address of one of these subsidiaries. You can define a list that contains the names of all of the subsidiaries and their addresses. When a user selects a subsidiary in the form, the corresponding address is inserted on the business card. Each address is a list item and the address is entered in the Value box as shown in the following example. You can also define a condition to only show certain addresses depending on the country the shopper has entered:

**New Variable Settings** [X]

Name:

Display Name:

Type:

**General** | Type Specific

Brussels  
Bruges  
London  
Cardiff  
Austin  
Boston

Name:

Value (optional):

Only show when:  
Country:   
Is:

Include Empty Item  
 Allow multiple items to be selected

Concat. Prefix:

Concat. Suffix:

**Name:** The label of the list item in the form.

**Value (optional):** An optional value that's resolved when the list item is selected by the shopper.

**Only show when:** You can choose an existing variable in this drop-down list and use it as a condition to display specified list items.

Figure 10.99: Storefront input form with a list depending on the input of another variable: Entering a country (1) on the form generates a list of relevant addresses (2) that a shopper can insert on a business card (3).

The screenshot displays the Storefront online editor interface. On the left, the 'Form Input' panel contains various fields: First Name (First), Last (Last), Title (Your Title), Company (Your Company), Street (Your Street), City (Your City), ZIP (0), Country (Belgium), Phone (Your phone no.), Mobile (Your mobile no.), Email (Your email address), URL (Your website), and Subsidiary. The Subsidiary list is expanded, showing 'Brussels' (checked) and 'Bruges' (unchecked). On the right, a business card preview for SunDiver sportswear is shown. The card features the SunDiver logo, contact information (First Last, Your Title, Your Company, Your Street, Your City, Belgium, Your phone no., Your mobile no., First@sundiver.com, www.sundiver.com), and a QR code. A red box highlights the QR code area, labeled with a yellow circle containing the number 3.

**Include Empty Item:** Select this check box if the user is allowed not to choose from the available list items. The list will then contain a blank line which the shopper can select to indicate none of the available choices is appropriate and avoid empty lines.

**Allow multiple items to be selected:** Displays all the list items (that fulfill the optional condition) in a list with check boxes. The shopper can select one or more list items on the form. If this option is not selected, the list items are displayed in a drop-down list.

City: Your City

ZIP: 0

Country: Belgium

Phone: Your phone no.

Mobile: Your mobile no.

Email: Your email address

URL: Your website

Subsidiary:  Brussels  Bruges

**Concatenation Prefix/Suffix:** Enter a prefix or suffix to join list items. For example 2 hard returns as a suffix to separate resolved variables.

Figure 10.100: A suffix can be used to separate 2 addresses (1).

SunDiver sportswear

Our subsidiaries:  
Avenue Louise 12  
1000 Brussels

Vesten 15  
2036 Bruges

1

First Last  
Your Title

Your Company  
Your Street  
Your City  
Belgium  
Your phone no.  
Your mobile no.  
First@sundiver.com  
www.sundiver.com

**Color/Paragraph Style/  
Character Style/Font**

Allow for selection (and in some cases modification) of resource items. Note that these input types are mostly used by actions and do not offer a lot of control over use throughout the document.

**Coordinate**

Coordinate variables are presented to the user as an input of a measurement unit. The unit (mm, in, inch, pt, etc.) can be added to the input and will be converted to the unit that was selected for your storefront or for your account in StoreCenter (Imperial, Metric or US Customary). Basic calculations can also be executed with this variable, typing in e.g. 50+30 will result in 80 mm. This type of variable is mostly used in action scripts.

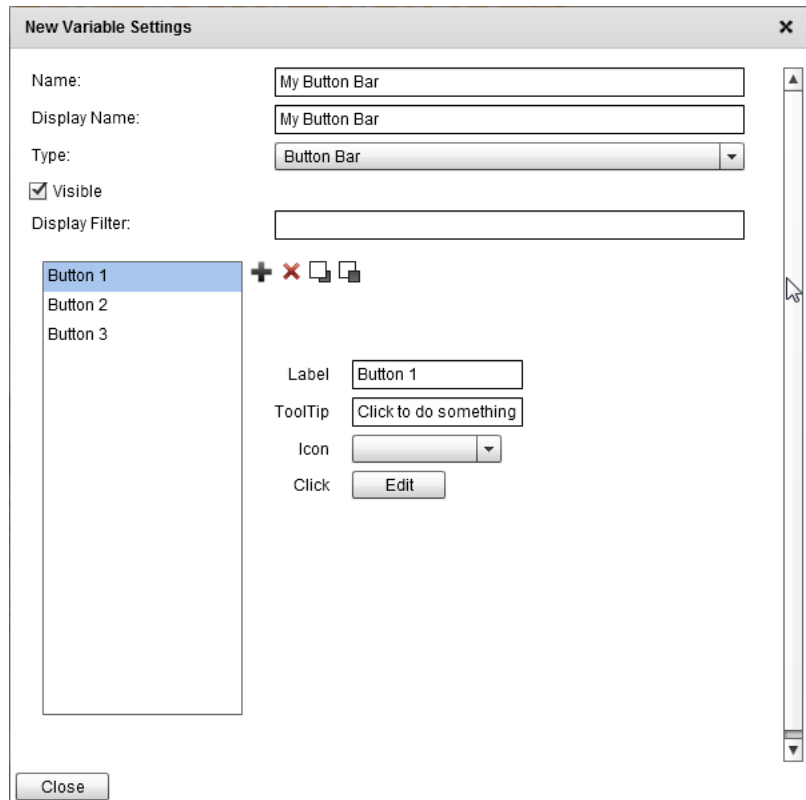
**Divider**

Places a blank space on the form — not in the document — and can be used to group form fields or enhance the layout. You must leave the Display Name field blank or type a series of dashes or '=' characters to create a line. Use the arrow buttons to position the divider or dividers in the list of variables.





**Button Bar** A Button Bar variable consists of one or more variable items and each variable item represents a button on a Button Bar on the form, not in the document; a different action can then be defined for each button. The buttons can be used to enhance the usability of the form: for example, a Clear All button to empty all the input fields, or a Page button to jump to a specific page in a document. See “Add a button bar to a form” on page 379.



## Copy Fitting Styles and Style Settings

---

Copy fitting styles make sure the same copy fitting percentages are applied to all selected text frames. For example, if a user customizes a business card and enters a long address, applying a copy fitting style can make sure the font size of the e-mail address, company URL, and other data use the same font size. Applying the same copy fitting style to the selected text frames ensures the use of consistent font sizes throughout the document.

You create the Copy Fitting Style in this panel and then apply the style to selected text frames in Step 2: Assign Variables Panel.

### ▶ Create a copy fitting style

- 1 Go to the Copy Fitting Styles pane in the Forms tab.
- 2 Click the **Add** button (*plus* icon) to add a style to the list.
- 3 Click the **Edit** button (pencil icon) next to the style in the list or open the Copy Fitting Style Settings pane to rename the style and specify its settings:

- Affected frames behave as a group:** When selected, text frames with the same style behave as a group. This allows you to quickly make changes to the font size in multiple frames.
- Minimum/Maximum:** Sets lower and upper font size limits after copyfitting is applied. If, for example, 'between 75% and 100%' is used, this means the font size can never become bigger than it is right now but if the text does not fit the available space, the font size can automatically be reduced by up to 25%. If 'between 75% and 150%' is used, this means the font size may become up to 50% larger if the available text does not completely fill the available frame.
- Max. Lines:** Sets a maximum number of lines after copyfitting is applied.
- Only when there is overflow:** Copyfitting is only applied when there is too much text for the text frame.

For example: if copyfitting is selected with Max. Lines set to 3, copyfitting is no longer applied when the text exceeds 3 lines.

- 4 The new copy fitting style can now be selected in the Apply Copyfitting dropdown list in the Step 2: Assign Variables Panel.

## Objects Tab

In the Objects tab you can control how the shopper will be able to modify *or not modify* your design and its content.

Constraints can be applied to all object types (text, images, free-form and predefined shapes) and layers initially created in InDesign as well as new objects and layers that you create in the Online Editor. The set of constraints differs slightly for each object type.

Constraints are initially inherited from the containing level, but these can be overruled by the constraints you set in the Objects tab. The hierarchy of levels is as follows:

- Document (default constraints)
- Layer
- Object
- Frame
  - Frame
  - Frame Content

The Objects tab is available for all versions of the workspace, however, it is never displayed in the storefront version of the editor.

---

**NOTE:** The constraints for objects are set in the Object Constraints panel and constraints for layers are set when you edit the layer settings in the Layers List panel.

---

The Objects tab consists of the following panels:

- Object Constraints
  - Object Constraints - General
  - Frame Constraints (locking)
  - Frame Content Constraints
- Object Location
- Anchors

- Wrap Settings
- Layers List
- ◆ Click in the panel headers to open the individual panels.

## Object Constraints

---

### Object Constraints - General

**Min. Max Width, Height** Here you can enter a minimum and maximum height and width of the object in millimeters, and choose to preserve the aspect ratio or not.

**Min. Resolution (image box)** The minimum allowed resolution.

---

**NOTE:** Set to -1 to use the document setting.

---

**Allowed Resize (image box)** You can set a minimum and maximum resize ratio as a percentage of the original.

---

**NOTE:** Set to -1 to use the document setting.

---

**Move Region** Anywhere: The frame can be positioned anywhere, even outside the page.

Page: The frame can only be moved within the page.

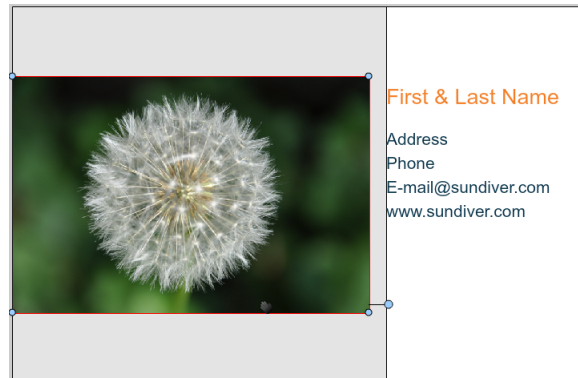
Page Margins: The frame can only be moved within the page margins.

Bleed Box: The frame can be moved outside the page but within the bleed area.

Custom Region: Choose this option to specify a region where the frame can be moved. The area is highlighted in gray and defined by 4 coordinates:

- X: the distance of the move region from the left of the page
- Y: the distance of the move region from the top of the page
- X2: the distance of the move region from the right of the page
- Y2: the distance of the move region from the bottom of the page

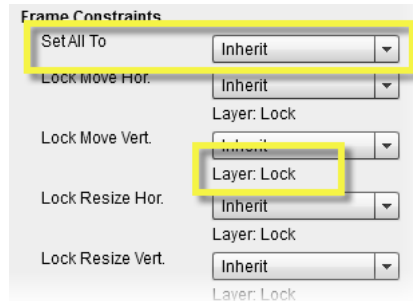
Figure 10.101: Custom move region with coordinates



## Frame Constraints (locking)

Frame constraints are set by choosing one of the following constraints for the different frame properties:

- **Inherit:** The constraint is inherited from the object's layer (parent element). The layer constraint level is indicated under each property.



- **No:** The constraint does not apply and the administrator and shopper (end-user) can change the setting.
- **Lock:** The constraint applies for the content administrator and the shopper.
- **Lock for end-users:** The constraint applies only for the shopper on the storefront.

**NOTE:** In the Forms workspace, all objects except Content are locked by default. These constraints are inherited from the so-called Document level and are meant to prevent the shopper from modifying the frames. The Inherit constraint consequently keeps these objects locked and you must set them to *No* if you really want to unlock them.

<b>Set All To</b>	The constraint you choose here is set for all the following properties.
<b>Lock Move</b>	Choose a constraint to allow/prevent the shopper moving the frame.
<b>Lock Resize</b>	Choose a constraint to allow/prevent the shopper resizing the frame.
<b>Lock Rotate</b>	Choose a constraint to allow/prevent the shopper rotating the frame.
<b>Lock Delete</b>	Choose a constraint to show/hide the Delete button on the in-line toolbar.
<b>Lock Content</b>	Choose a constraint to allow/prevent the shopper editing the content of the frame. For example, lock the content of an image frame to prevent the shopper assigning a different image.
<b>Lock Frame Settings</b>	Choose a constraint to show/hide the frame settings buttons on the in-line toolbar (Move Back, Forward, etc.).

---

**NOTE:** To see the effect of these constraints, switch between Text Edit and Frame Edit modes.

---

## Frame Content Constraints

Frame content constraints are set by choosing one of the following constraint levels:

- **Inherit:** The constraint is inherited from the object's layer (parent element). The layer constraint level is indicated under each property.
- **All items allowed:** The property is not locked and all the available options can be used by the administrator and shopper (end-user).
- **Limited selection:** Only a selection of options is available for the property. The constraint applies for the content administrator and the shopper.
- **Limited selection for end-users:** Only a selection of options is available for the property. The constraint applies only for the shopper on the storefront.

<b>Set All To</b>	The constraint you choose here is set for all the listed properties: Border Colors, Fill Colors, Font Selection, Font Size, Text Colors, Paragraph Styles and Character Styles.
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## Object Location

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This panel provides details on the position and dimensions of a selected object as it appears in the document. These fields are filled with absolute values, or by

clicking the function buttons next to the fields you can enter formulas to make the layout dynamic. See “Dynamic Layout Function Formulas” on page 398.

<b>Page</b>	The number of the page in the document where the object is located.
<b>Content</b>	The type of frame (shape, text, etc.) of the current object.
<b>Tag</b>	A frame identifier for use in actions and anchors. See “Moving frames using a variable action” on page 499 and “Anchors” on page 423.
<b>Layer</b>	Indicates the layer the object is located on. Select a different layer from the drop-down list if you want the object to appear on different layer. The top layer in the list is the default layer.
<b>Layouts</b>	Clear the Include In All Layouts check box to select layouts for this object from the list.
<b>Reference Point</b>	Choose one of the nine points in the grid as a reference for the X and Y coordinates.
<b>X, Y</b>	The X and Y co-ordinates of the object on the canvas.
<b>Width, Height</b>	The current dimensions of the object.
<b>Rotation</b>	Increase the value to rotate clockwise; decrease the value to rotate counterclockwise.
<b>Skew</b>	Increase the value to skew the object from right to left; decrease the value to skew from left to right.
<b>Horizontal/Vertical Scale</b>	The horizontal and vertical scale factor; default is 100%.

## Anchors

---

An anchor can be used to control the position of a frame in a document if other frames are modified or page dimensions change. For example, if the Auto Grow feature is used (see “Text Tab” on page 431) to change the dimensions of a frame or if an action is used to change its position, anchors can be applied to maintain the initial alignment.

### Anchor settings

Use the cross to indicate on which side you want to align. You can align multiple sides of the frame with one or more frames.

- Target** The component type to anchor the frame to:
- Page: the page dimensions
  - Frame: another frame
  - Text
- Frame** A list of all the tagged frames in the document.
- Point** The point for aligning the frame with the target frame: Left, Right, Top, Bottom, Center X, Center Y
- Offset** A distance for offsetting the alignment.
- Min./Max.** Minimum and maximum values to the alignment point.

▶ **To anchor frames**

- 1 First you need to tag the target frame (e.g. Frame 2) that you want to anchor to. This is done in the Object Location panel. Select the target frame and in the Object Location panel of the Objects tab, enter a name in the Tag box. You need to be in Frame Edit mode.

The new frame tag will appear in the Frame drop-down list in the Anchor panel.

- 2 Select the frame you want to anchor (e.g. Frame 1) and specify how you want to anchor it in the Anchors panel: see Anchor settings.




Object Location ▾

Page 1

Content Text

Tag

Layer

Reference Point 

X

([Frame 2].Bottom + 2 r

Y

Width

Height


Rotation

Skew X

Horizontal Scale

Vertical Scale

Anchors ▾



Target

Frame

Point

Offset

Min.

Max.

## Wrap Settings

---

In this panel you can select the Wrap Text option to control how text flows around image and text boxes.

In the Type drop-down list, you have the following options:

- Flow Around: the text flows around the image or text box
- Wrap to left: the text is cleared along the left side of the image or text box
- Wrap to right: the text is cleared along the right side of the image or text box
- Wrap both sides: the text is cleared on both sides of the image or text box

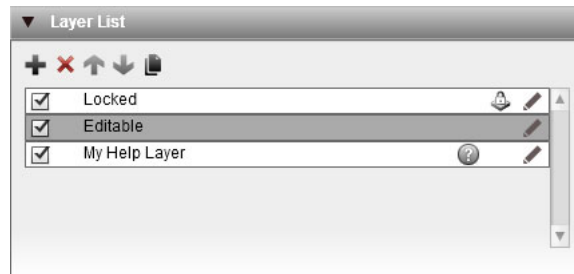
You can also specify the clearance.

## Layers List

---

You can use layers to organize and group content in a document as you would in other layout programs.

In this panel you see a list of the layers in your document. Select or clear a layer check box to show or hide the layer in the document. When you save the customizable product, only the selected layers will be included.



Initially the list contains the layers from your InDesign document. You can edit, set constraints and copy these layers or create your own new layers. You can also add a Help layer, which can contain information to assist the shopper.

New objects you add to your documents are added by default to the top layer in this list. You can rearrange the order of this list with the up and down arrows.

---

**NOTE:** The sorting order does not affect the objects on the layer, and you can only use the arrange buttons in order to change the object order.

---

## Layer Settings

◆ Click the Edit button (pencil icon) in the layer list to specify the layer settings.

<b>Name</b>	The name of the layer as it appears in the list.
<b>Visibility Variable</b>	Choose a variable from the drop-down list. Only <i>Check box</i> type variables appear in the list. The check box variable appears in the form input and the shopper can select/clear the check box to show/hide the layer.
<b>Include in output</b>	The layer is visible in the final PDF of the customizable product (default state). Clear this check box to prevent a layer appearing in the final PDF.

<b>Is Help Layer</b>	Select this check box if you want to make the layer a Help layer. A Help layer can contain prompts — in the actual document — for the shopper on how to edit the document. This layer is never included in the ordered product.
<b>No Text Wrap if Invisible</b>	Wraps the text on visible layers when the option is enabled on hidden layers.
<b>Opacity</b>	Set the opacity level for the layer. 100 is the maximum opacity and hides content below the layer; lower values increase transparency so lower layers are visible.
<b>Content Type</b>	Choose a type from the drop-down list: <ul style="list-style-type: none"><li>■ Unspecified</li><li>■ Background</li><li>■ Variable Data</li></ul>
<b>Layouts</b>	Clear the Include In All Layouts check box to select layouts for this object from the list.
<b>Move Region</b>	See “Object Constraints - General” on page 420.
<b>Frame Constraints</b>	See “Frame Constraints (locking)” on page 421.
<b>Frame Content Constraints</b>	See “Frame Content Constraints” on page 422.

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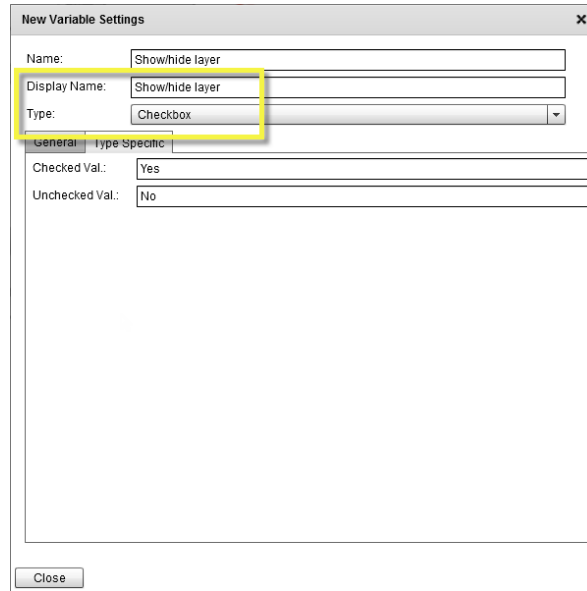
**NOTE:** If you choose **Inherit** constraints, this has the same effect on underlying objects as **Lock for end users** in the Forms workspace, and **Not Locked** in the Advanced and Basic workspaces.

---

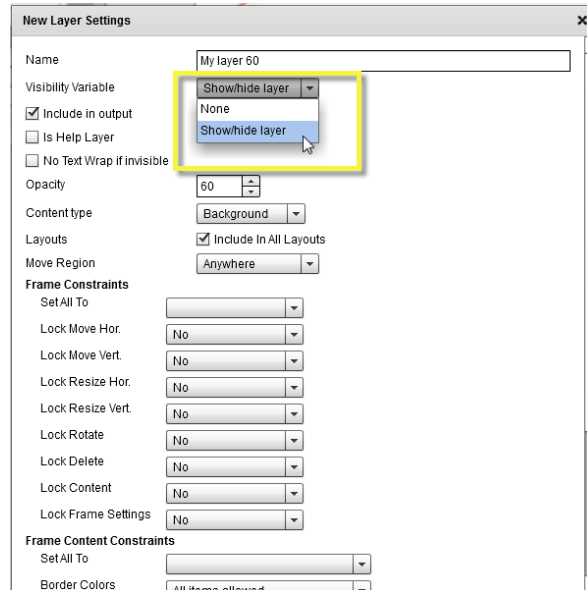
### ▷ Show/hide a layer (check box variable)

The visibility of a layer can also be controlled in the storefront Online Editor. You first need to create a Check box type variable and link this variable to the layer.

- 1 In the Forms tab, create a new variable and set the Type to check box. For example, enter ‘Show/hide layer’ for the Display Name.

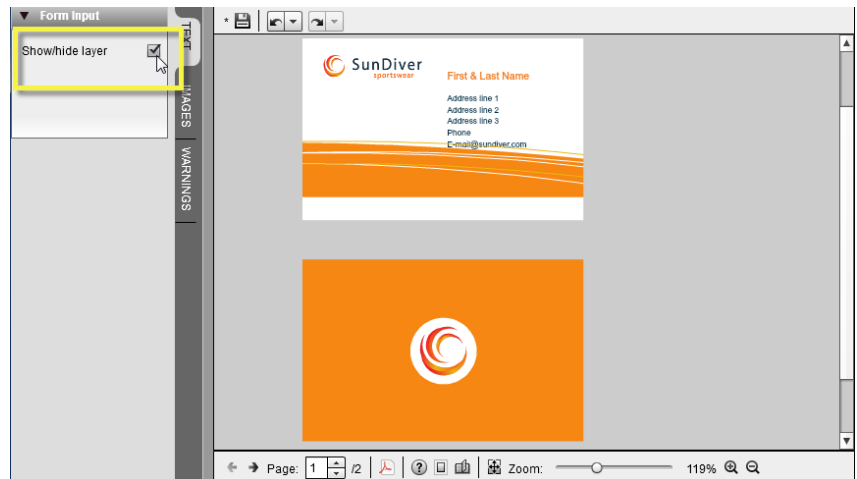


- 2 In the Objects tab, create a new layer and in the layer settings, choose your new variable from the Visibility Variable drop-down list.



- 3 Specify the other settings for the layer and close the Layer Settings.
- 4 Put the content you want to show/hide on this new layer. The layer can contain text or images, for example specific artwork for a business card.
- 5 Save your customizable product.

In the storefront Online Editor, a shopper will now see a check box that can be used to show/hide the layer that contains an image.



### ▷ Create a Help layer

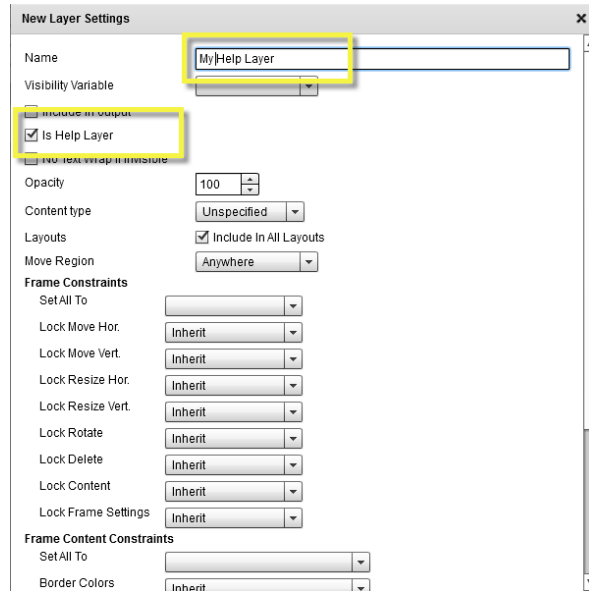
A Help layer is a layer which is included in a customizable product but never output in the finalized product (i.e. when the shopper has finished editing). You can put Help information on this layer to guide a shopper through the editing process.

- 1 In the Objects tab, open the layer List panel, create a new layer and edit the settings.
- 2 Enter a name that appears in the Layer List and select the Help Layer check box.

---

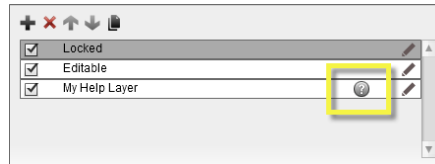
**NOTE:** Selecting the Include in Output check box has no effect for a Help layer.

---

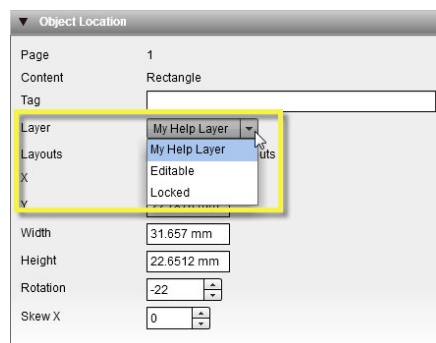


- 3 Specify the other settings for the layer and close the Layer Settings.

The new layer is indicated in the Layer List with a Help icon.

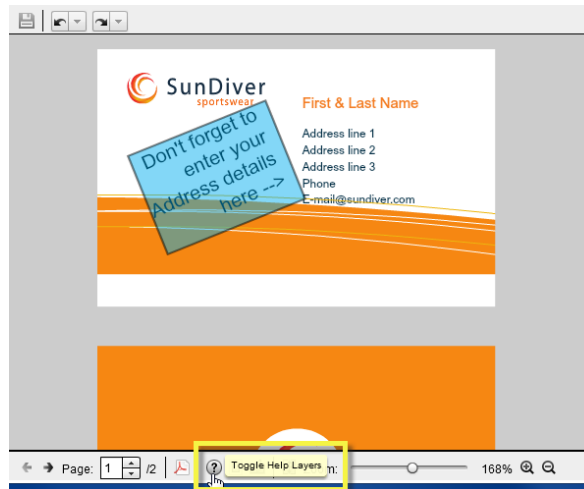


- 4 Place your Help prompts on the layer. These can be text or images.
- 5 Check that your Help prompts are on the Help layer in the Object Location panel.



- 6 Save your customizable product.

In the storefront Online Editor, a shopper will now see the Help prompts which can be switched on and off with the Help icon in the toolbar.



The Help layer is never included in the final PDF of the document, irrespective of whether it is switched on or off in the online editor.

Related topics: • [Show/Hide Layers on page 466](#)

## Text Tab

The Text tab consists of the following panels:

- Character Settings
- Character Styles
- Paragraph Settings
- Paragraph Styles
- Text Frame Settings
- Glyphs
- Frame Custom Baseline Grid

### Character Settings

Use the settings in this panel for one-off adjustments to the in-line styling of selected text: Font, Size, Underline, Strikethrough, Position (Normal, Superscript, Subscript), Baseline, Case, Color, Tracking (word spacing), Enable Kerning, Leading (line spacing), Text Overprint and Non-breaking text.

- ◆ To apply kerning to selected text, specify a value in the Tracking field. The Enable Kerning check box does not need to be selected. This check box enables the customized kerning when importing documents from InDesign.

## Character Styles

Use character styles to apply consistent in-line styling to selected text. The character styles list shows all the styles inherited from the InDesign document. You can create new character styles or delete styles from the list.

- ◆ Click the Add button (*plus icon*) to add a style to the list and then click the Edit button (*pencil icon*) to set the character properties.



Creates a new style and adds it to the list.



Deletes the selected style from the list.



Opens the Character Settings.

## Paragraph Settings

Use the settings in this panel for one-off adjustments to the paragraph where the cursor is positioned, or to multiple selected paragraphs.

<b>Indent left and right icons</b>	Indents with a bullet and then space between the bullet and the indented paragraph; this is the margin of the paragraph as shown in the Left Margin box.
<b>Align icons</b>	Left, center, right, justify
<b>Direction</b>	Left to Right or Right to Left
<b>Align to Baseline</b>	Alignment with the document baseline guide (can be different than the alignment of the text frame)
<b>Space Before, Space After</b>	Adds space before/after a paragraph.
<b>Indent</b>	Indents the first line of the paragraph
<b>Left Margin, Right Margin</b>	Space to the left and right of the paragraph

## Paragraph Styles

Use paragraph styles to apply consistent styling to paragraphs. The paragraph styles list shows all the styles inherited from the InDesign document. You can create new paragraph styles or delete styles from the list.



- ◆ Click the Add button (*plus icon*) to add a style to the list and then click the Edit button (*pencil icon*) to set the properties.



Creates a new style and adds it to the list.



Deletes the selected style from the list.



Opens the Character Settings.

**Name** You can rename your style.

**Next Style** Choose a style from the drop-down list to apply after the current style.

**Apply to new frames** Select this check box if you don't want your changes to apply to existing frames.

**Paragraph** Specify the paragraph settings.

**Indents** Specify the indentation.

**Character** Specify the character settings for this paragraph style. For example, set the font, font size, color and leading (line spacing) for this paragraph style.

### Text Frame Settings

These are general settings that apply to all the text in the text frame.

**Fill with placeholder text** Fills the frame with Lorem Ipsum text.

**Hyphenate/Unhyphenate** Inserts hyphenation to flow words to the next line; the rules of the selected Text Language are used for the hyphenation.

**Text Language** The language for hyphenation

**Vertical Align** Vertical alignment of text is possible in all shapes.

- Top
- Middle
- Bottom
- Justify

**Text Stroke** Creates an outline of the font of your text. Select the check box and you can set the Weight and the Color of the outline. Use together with the text color to obtain creative effects.



**Auto Grow Frame** Select to automatically resize a frame to accommodate the text. When enabled, you can specify the Direction of the expansion and how much.

**Insert** This option is for inserting in-line frames in a paragraph, to ensure the frame flows with the text. See “Insert an in-line frame in a text frame” on page 363. You can choose the following frames in the drop-down list:

- Text
- Table
- Image
- Barcode
- Shape
- Rectangular

Here you specify the vertical alignment of the text within the text frame, and a language for hyphenating the text in the selected text frame.

## Glyphs

Use the Glyphs panel to insert special characters and symbols in text.

- **All:** Shows all the characters available for the font used in the document; characters in red are not supported; double-click a symbol to insert it in your document at cursor.
- **Common:** Displays a selection of common symbols; double-click a symbol to insert it in your document at cursor.

- **Special Characters:** Displays a drop-down list with special characters; choose one of the following special characters in the list and click the + button to insert it in your document at cursor:

- Page break
- Column break
- Frame break
- Discretionary hyphen
- Non-breaking space
- Soft return

### Frame Custom Baseline Grid

A frame can have its own baseline grid that overrides the general document baseline. You need to be in Edit Frame mode to see the settings in this panel. See “Use a custom baseline grid” on page 366 for the procedure.

- Use Custom Grid** Selecting this check box overrides the document baseline grid so you can set your custom line spacing.
- Start** Select from where you want the custom baseline grid to be applied:
- Top of frame inset
  - Top page margin
  - Top of frame
- Offset** The distance from the top of the object you selected in the Start drop-down list.
- Increment** The line spacing value.
- Show guides** Select this check box to display the grid lines.

### Document Baseline Grid

Here you can set the document level grid which can be selected in the Paragraph Settings. The parameters are the same as for the Frame Custom Baseline Grid.

## Images Tab

The panels on the Images tab provide an overview of the image assets and their settings.

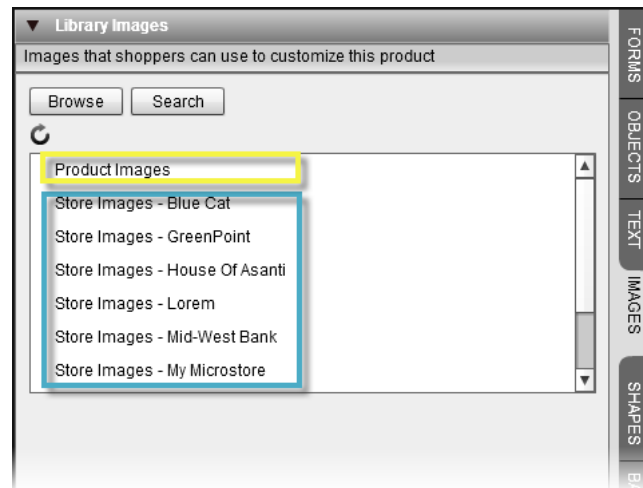
The Images tab consists of the following panels:

- Library Images
- Design Images
- Image Settings
- Image Dimensions

## Library Images

In this panel you can upload images to the STOREFRONT server for use when editing and designing your customizable product. Images are organized in different categories so you can choose to make some or all of them available to shoppers on the storefront.

- Product images: This is where you put images that can be used for this particular product by shoppers. A selection of images can be uploaded and shoppers can choose an image of their choice from the library, for example, to replace an image in the initial design.
- Store images: A separate library is available for every store and microstore in the system. This is where you keep images such as logos and clip-art that you would only use with a particular store. By default, this category cannot be used by shoppers.



- My Images: A shopper can also upload images to the STOREFRONT server and these are managed in the My Images library.

---

**NOTE:** The My Images library is only visible on the storefront.

---

## Design Images

This panel lists all the images which were included in the document when it was converted from InDesign. You can add images to this list if you need them while editing the original design of your document in the Online Editor. For example, if you want to assign a new image to an image frame in your document, you can add it here first.

## Image Settings

In this panel you have the same image editing tools as on the in-line toolbar. You can crop and flip, or replace an existing image in an image frame, or assign an image to a new frame.

- ◆ Select an image frame in the document to see its settings in the Image Settings panel.
- ◆ Add a new frame in the document and use the Image Settings panel to select an image from the libraries and position the image in the document.

**Assign Image button** Click this button to select an image from your assets library and assign it to the selected frame. If the frame already has an image, this image is removed from the frame and replaced with the new one.

**Clear Image button** Click this button to remove the image from the selected frame, not the library.

**Flip** Click the icons to flip the selected image:



Flips the object back to its original orientation.



Flips horizontally.



Flips vertically.

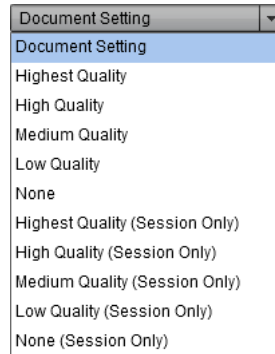


Flips horizontally and vertically.

In addition, you have the following options for extra control:

**Display Quality** This setting specifies how you see images and PDF elements in the preview of your documents. Select a quality setting from the drop-down list if you want to override the quality setting of the document. You may also want to do this if your document contains complex image elements (e.g. gradient fills or gradient text),

and the preview is not processed correctly. You can see a better preview by specifying a quality setting here.



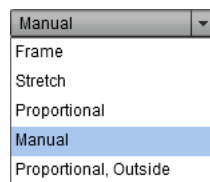
- Document Setting: Displays the preview as set in the document; this is the default setting when you open the document.
- Session Only: These settings are only used for previewing during the current working session; when you open the document again after saving, the quality setting is reverted to the document setting.

---

**NOTE:** The locked layers of your document are converted to PDF, so these are also affected by the image setting.

---

**Fit** Several fitting options are available if the image you assign to a frame is not the same size as the frame.

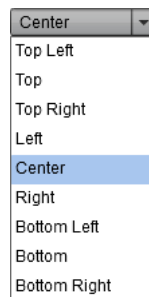


- Frame: The frame is expanded on all sides so the image fits in the frame in its original proportions.
- Stretch: The image is resized to fit inside the frame, without maintaining its proportions. Select the **Allow crop contents** check-box to crop, resize and move the image within the frame while the stretched proportions are preserved.
- Proportional: The image is resized until the height or width fits inside the frame. If the proportions of the frame are not the same as the image

proportions, you will see empty bands along the sides of the frame. You can change the alignment of the image inside the frame by choosing one of the Anchor options.

- Manual:** You can resize the image by dragging the image handles (only proportional), and crop the image by dragging it beyond the frame borders.
- Proportional, Outside:** The image is resized until the height or width fits inside the frame; if the proportions of the frame are not the same as the image proportions, parts of the image appear outside the frame. You can change the alignment of the image in the frame by choosing one of the Anchor options.
- Original Size:** The size of the frame adapts to the original size of the image and will fit the image in that frame.
- Smart Fit:** Allows you to automatically position an image within a smaller frame based on a specific focus on part of that image. See “Smart Fit an image” on page 445.

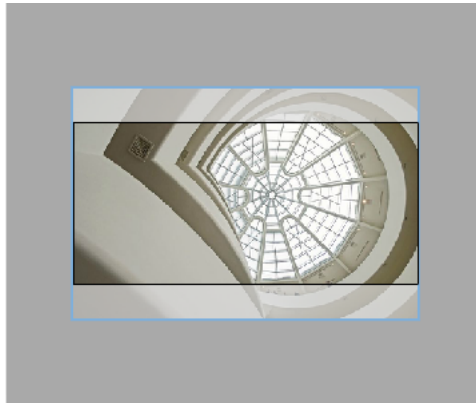
**Anchor** You can select one of the following anchor points within a frame to position an image whose size does not match the frame size, for example after applying fitting.



- Top Left
- Top
- Left
- Center

- Right
- Bottom Left
- Bottom
- Bottom Right

Figure 10.102: Fit: proportional, outside; Anchor: center



## Image Dimensions

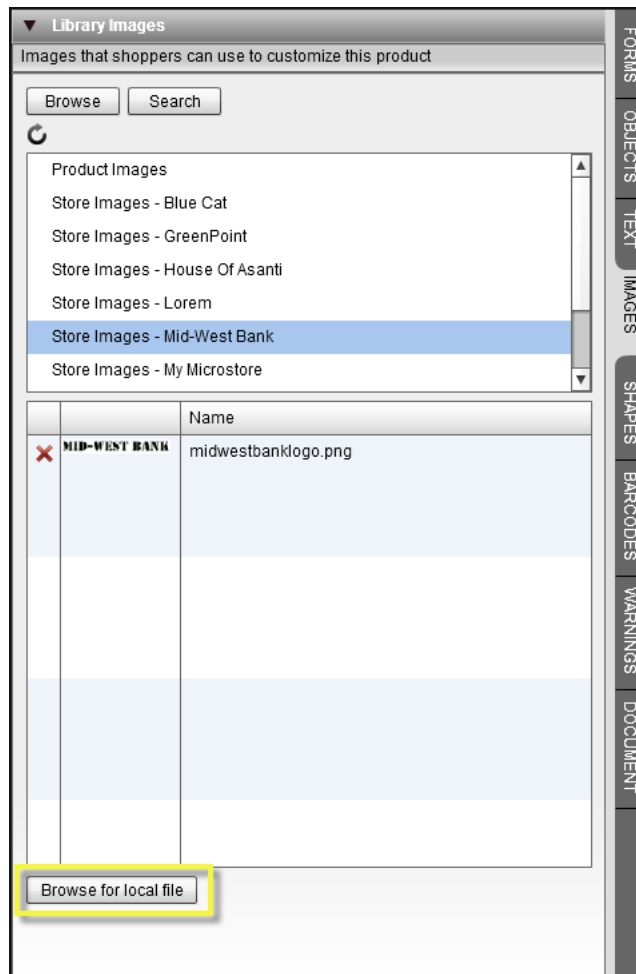
This read-only panel displays the image properties of a selected image.

### ▶ To add an image to the library

- 1** In the **Images** tab, select a library category in the list and click the **Browse** button.

The images list is displayed.





2 Click the **Browse for local file** button to add an image to the library list.

The following file formats are recommended:

- JPG
- TIF
- EPS (fonts embedded)

The following files are supported but the quality may be insufficient for printing:

- PNG

- GIF

The following files can be used but not all the features are supported:

- PDF (fonts embedded)
- AI (fonts embedded)
- PSD (fonts embedded)

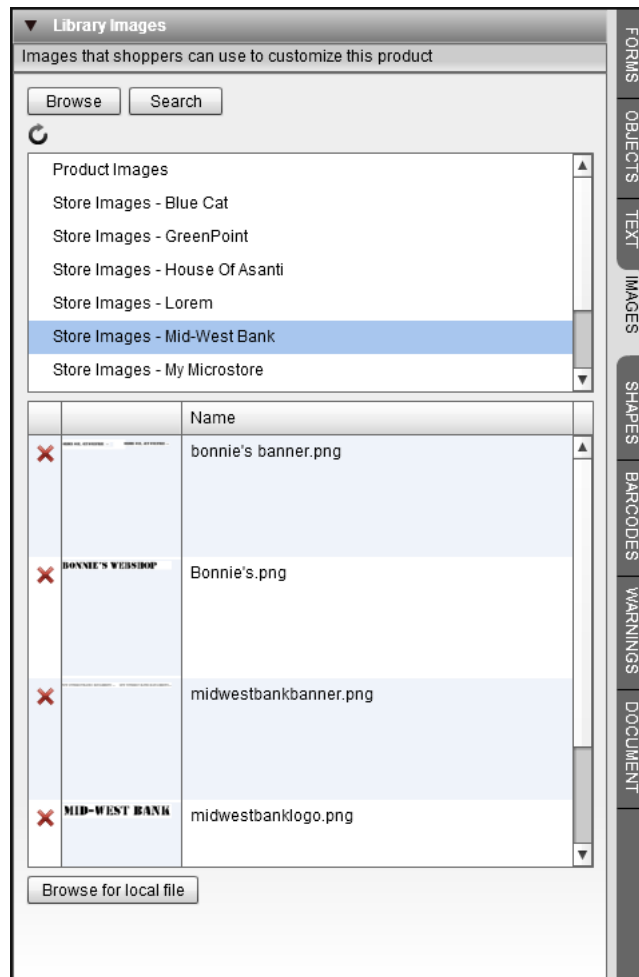
Some of these image file formats offer advanced functions such as layers or embedded transfer curves that may not be supported in the Online Editor. In some cases it may be required to convert files to PDF or another format before using them in the Online Editor.

Files must be added one by one. The selected images are added to the list.

---

**NOTE:** See “Use PrintSphere to upload images in bulk” on page 443 for uploading images in batches.

---



3 Click the X button next to an image if you want to remove it from the library.

### ▷ Use PrintSphere to upload images in bulk

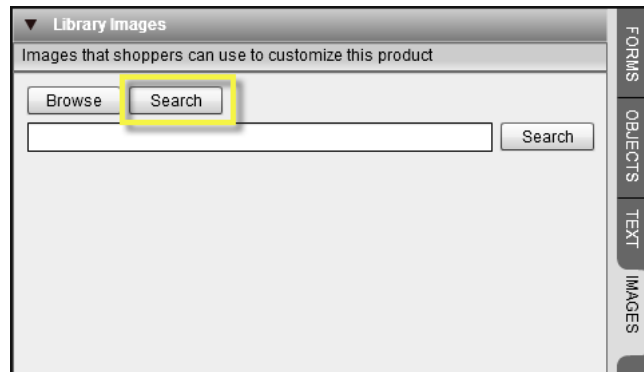
As an alternative to uploading images to the STOREFRONT server, you can also upload them to PrintSphere ([www.printsphere.com](http://www.printsphere.com)), a file-sharing service hosted by ECO3. This alternative allows you to create folders and sub-folders where your image files can be uploaded in bulk. You can share selected folders with other users and let them collaborate by contributing files to these folders.

See “External Accounts” on page 101 to configure the link between STOREFRONT and PrintSphere and add folder locations.

**NOTE:** Images in a PrintSphere folder cannot be used in image variables nor can they be inserted using the Insert image button on an image frame in the Online Editor. The PrintSphere folders are only visible in the Images tab of the Online Editor.

▷ **To filter/search the image library**

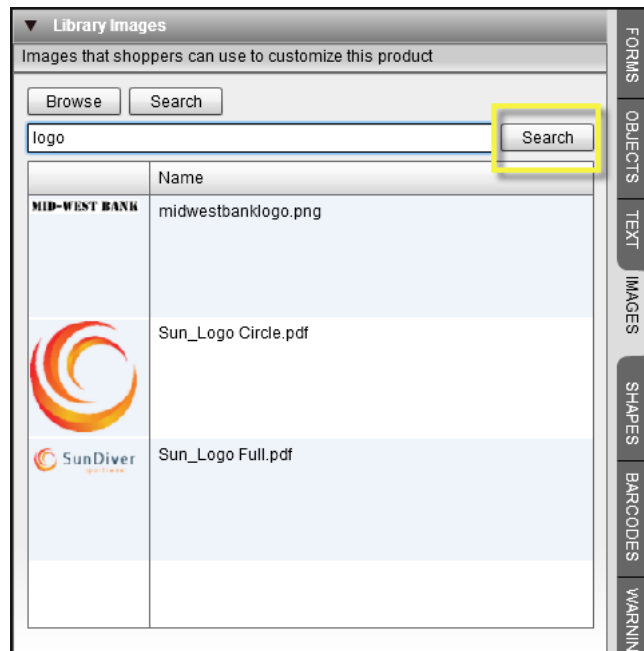
- 1 Click the **Search** button.



The search box is displayed.

**TIP:** Use Search and leave the search field empty to see a list of all the library images in the system.

- 2 Enter your search keywords and click the **Search** button on the right.



The results panel first goes blank and then displays the search results.

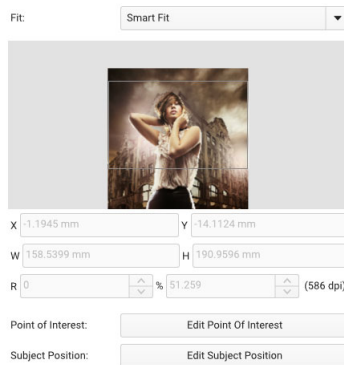
**NOTE:** The search is performed across all the library categories even if you selected a library category, and you may need to wait a few moments before the results appear.

- 3 Clear the search box and click **Search** again to see a list of all library images in the system.

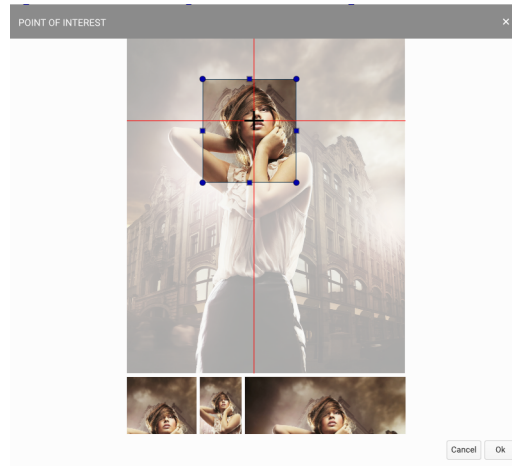
### ▷ Smart Fit an image

The Smart Fit option lets you automatically position an image within a smaller frame based on a specific focus on part of that image. The focus is defined by specifying a "Point of Interest" on the image and the "Subject Position" which is the position in the frame where you want this focus point to be shown. This option ensures that the right part of the image is shown in the right proportion, especially in dynamic layouts where an image frame can have different width and height ratios.

- 1 Choose Smart Fit in the Image Settings. See “Image Settings” on page 437.

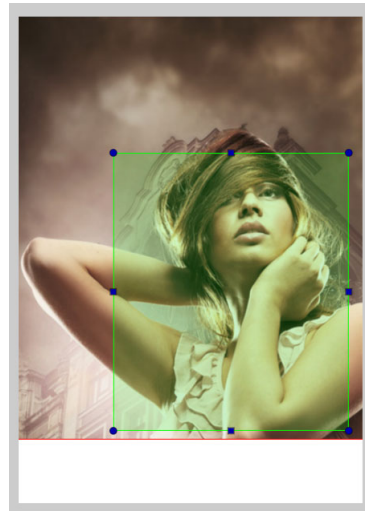


- 2 Choose Edit Point of Interest to specify the subject area.



Drag the red cross to the desired location and specify the subject area by resizing the frame with the blue handles.

- 3 Define the Subject Position (the location in the image frame where the focus should be) by dragging the green area which is superimposed on the image.



The coordinates change accordingly.

Point of Interest:

Subject Position:

X:    Y:

W:    H:

The subject area is positioned relative to the coordinates of the image frame. In the example, the X position of the subject frame is 28.4% of the width of the image frame, and the same applies to Y, W(idth) and H(eight).

## Table Tab

This tab contains the settings for the rows, columns and cells of a table. This includes settings for borders, fills, etc. To position text in cells, go to the Text Tab.

- ◆ Select a table in the document or create a new one and then go to the Table tab to configure the table.

Refer to “Tables” on page 372 for instructions on creating/editing tables.

## Shapes Tab

This tab contains the *Border and Fill* settings for a selected frame.

The available settings depend on the object type and they are similar to what you find in popular image editing software.

- ◆ Click in the Border and Fill header to open the settings panel.

### Assign Shape button

You can assign shapes to text, image and shape frames. The button opens the Select Shape dialog where you can choose the shape you want to apply to the object. See “Assign a shape to Text, Images and Shapes” on page 371.

The following properties can be set:

### Border

These options depend on the frame type of the object you want to assign a shape to.

- Weight
- Color
- Style (Normal, Inset, Outset)
- Join (Miter, Round, Bevel)
- Corner Radius
- Overprint border

### Fill

- Color: Choose a color from the drop-down list. Choosing *Custom* activates the Edit button. Click the **Edit** button to create a new color using the color sliders.

- Overprint fill

## Drop Shadow

- Opacity
- Color: Choose a color from the drop-down list. Choosing *Custom* activates the Edit button. Click the **Edit** button to create a new color using the color sliders.
- X, Y
- Blur

## Opacity

## Blend Mode

- Normal
- Multiply
- Darken
- Difference
- Hardlight
- Lighten
- Overlay
- Screen

## Inset (left, right, top, bottom)

The insets inside a text or image frame.

## Barcodes Tab

- ◆ Click the Barcode tool in the toolbar and place a new barcode frame, or select an existing barcode frame to display the following Barcode settings:

**Type** Choose one of the following barcode types:

- Code 128 A, Code 128 B, Code 128C: used in logistics for ordering, distribution and transportation



- Code 39 & Code 39 Extended: the ancestor of code 128, mainly used in the automotive industry
- DataMatrix: 2D barcode
- EAN 8 & EAN 13: mainly used on consumer products outside of the United States
- QR Code: Quick Response (QR) codes are used on printed media to quickly read information into mobile devices for example.
- UPC-A & UPC-E: mainly used on consumer products in the United States
- Code 25, Code 25 Interleaved
- Datamatrix
- GS1-128
- GS1 DataBar Expanded
- GS1 DataBar Expanded Stacked
- ISBN
- ITF-14
- PDF417
- Pharmacode 1-bar

**Variable** If you already created variables for this form, you will see them in this drop-down list. Otherwise the list is empty. Choose a variable that you want to generate in the barcode or leave blank if you want to enter code with or without variables in the Value box. When a shopper enters a value in the form input fields, this variable information is generated in the barcode.

**Anchor** Positions the barcode within the frame. Choose a position from the drop-down list.

**Scale** Scales the barcode within the frame. The value can be higher or lower than the initial value (100).

**Colors** Choose a background color, the color for the barcode and a color for the barcode text.

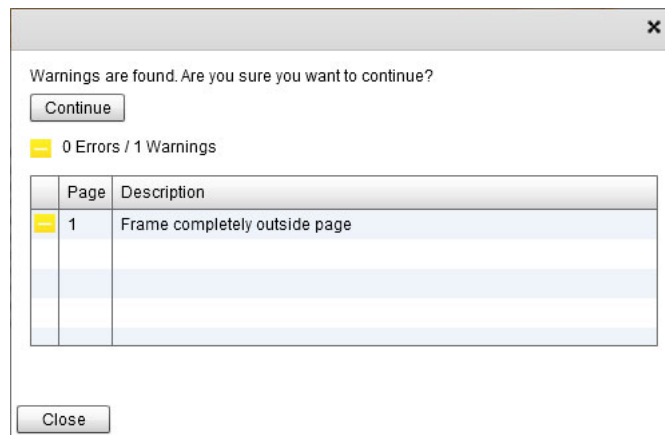
**Value** Enter the code for the barcode. For example, if you selected QR Code as type, you can enter code to create a QR Code with vCard, URL, geolocation or other information. You can include one or more variables in this code so the shopper can use form input fields and this variable information is generated automatically in the barcode.

Related topics: • [“Generate a QR code in a barcode frame” on page 395](#)

## Warnings Tab

The Online Editor has its own preflight engine to validate documents before they are saved by you or the shopper.

Figure 10.103: On a storefront, potential warnings and errors are displayed when a shopper saves a document.



The behavior is controlled in the Warnings tab which consists of the following panels:

### Preflight Settings

In this panel you can set the parameters for validating the document while you are editing and when it's saved in the Online Editor by yourself or the shopper. You can set the severity (Ignore, Warning, Error) or values to be checked. The actual results of the preflighting are shown in the Preflight Results panel. You can also prevent saving and PDF creation if your document has errors, and also show warnings before saving.

**Frame outside page** Frames positioned outside the page will not appear on the printed document.

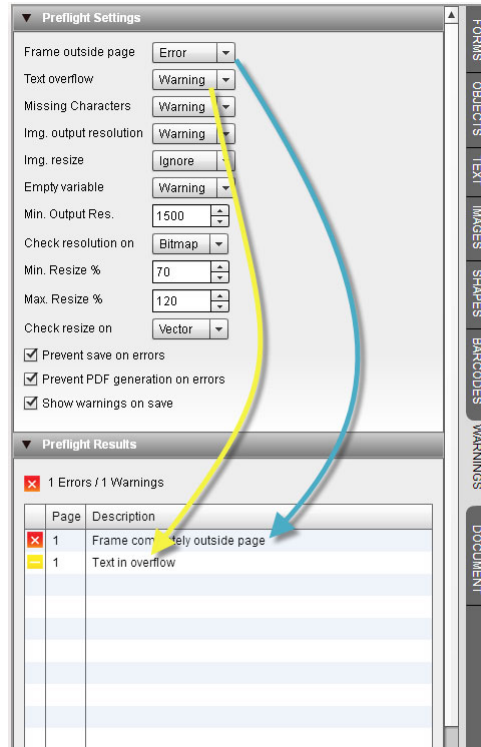
**Text overflow** When text is too long to fit in its frame, part of the text will not be printed.

<b>Missing characters</b>	The user can use accents or non-Latin characters in a frame, then alter the typeface and accidentally select a font in which some of those characters are not supported. The missing characters might appear as spaces or small rectangles.
<b>Img output resolution</b>	The resolution of images must be high enough to avoid pixilation.
<b>Img resize</b>	Some companies do not want their logo to appear too small on documents.
<b>Empty variable</b>	In a document using the Forms or Expert workspace you may want to ensure that the user fills in all the fields. Only applies for “required” variables, so make sure the “Required check box is selected if you want this option to take effect.
<b>Min. Output Res</b>	The threshold value for ‘Img output resolution’
<b>Check resolution on</b>	Defines if the resolution is checked on bitmap or vector images or both
<b>Min. Resize %</b>	The lower threshold value for ‘Img resize’
<b>Max. Resize %</b>	The upper threshold value for ‘Img resize’
<b>Check resize on</b>	Defines if image resizing is checked on bitmap or vector images or both

### Preflight Results

This panel provides a list of errors and warnings generated according to the Preflight Settings. Errors are indicated with a red error icon and warnings have a yellow icon.

<b>Prevent save on errors</b>	Forces the shopper to fix errors before the publication can be saved.
<b>Prevent PDF generation on errors</b>	It is recommended to clear this check box. Only applies for generating PDFs in the StoreCenter Online Editor, not on the storefront.
<b>Show warnings on save</b>	Informs the user explicitly about potential issues. Shoppers can however ignore warnings, close the window and order the product.



## Import Warnings

This panel provides log information relating to the original STOREFRONT package created by the Converter. See “Preflight Report” on page 347 for more information. This panel is only visible for administrators in the StoreCenter.

## Document Tab

The Document tab consists of the following panels:

### Document Settings

Here you can choose a language for the check spelling feature.

### Package Output

Here you can create a STOREFRONT package from your document.

- ◆ Click the **Create Package** button to create a package of the document and all its assets.

The STOREFRONT package can be used when creating other customizable products.

## Tips and Tricks

The following tips and tricks are useful for advanced users of the Online Editor:

- Version Handling
- Automating Similar Forms-Based Products
- Testing Customizable Products

### Version Handling

When a customizable product needs to be modified, this has an impact on documents that have already been created using that product. Take the example of a business card that shoppers can edit and order:

- The card was initially added to a store as a forms-based customizable product.
- A number of users ordered their customized version of that card.
- The layout of that card now needs to be adapted: a different logo is used or users need to be able to add their Twitter account to the business card or some other change is needed.

There are several ways in which the new card can be created. Each approach has its advantages:

- 1 The company removes the old product from the store and creates a new product from scratch.
  - The admin who creates the new business card has to do all the product creation work again, such as defining access restrictions and setting up a form in the Online Editor.
  - When users try to reorder previously customized business cards, STOREFRONT is aware that the product their order is based on is no longer available. The software will not allow users to reorder cards with the old layout. They will have to create a new business card using the new product.
- 2 The company edits the existing card in the Online Editor.
  - The administrator who creates the new product only needs to update the layout in the Online Editor - a lot of product setup work is reused.

- The new layout is only available in STOREFRONT. If the modifications also need to be applied to an InDesign template, this needs to be done separately.
  - When users try to reorder previously customized business cards, they can do so and get cards that do not use the new layout. This remains true if they still do some last minute modifications.
- 3 The company duplicates the existing product, removes the old card from the store, updates the layout of the copy in the Online Editor and puts that new copy in the store.
- The admin who creates the new product only needs to update the layout in the Online Editor – a lot of product setup work is reused.
  - The new layout is only available in STOREFRONT. If the modifications also need to be applied to an InDesign template, this needs to be done separately.
  - When users try to reorder previously customized business cards, STOREFRONT is aware that the product their order is based on is no longer available. The system does not allow users to reorder cards with the old layout. They will have to create a new business card using the new product.

## Automating Similar Forms-Based Products





If you need to add several versions of a document to a store as customizable products, defining all the variables for each document and assigning them to the proper frame in the Online Editor involves considerable effort. You can save time by adding the form field variables to multiple Adobe InDesign source documents so they are imported automatically in the customizable product. This is possible with the Data Merge function in Adobe InDesign as explained below.

### ▶ Create a data source file for InDesign

The data source file is a tab- or comma-separated text file that contains all the variables that will be used in the document. This file is created in a text editor on a Windows or Macintosh computer.

- 1 Open the text editor and type all the variables on the first line of the document with each variable separated by a TAB.
- 2 Copy the first line and paste it on the second line.
- 3 Save this document as a .txt file.

```

1 first_name → last_name → street → zip → city → phone → email  
2 first_name → last_name → street → zip → city → phone → email  
3

```

### ▷ Add variables to the InDesign document

- 1 Open your layout file in Adobe InDesign.
- 2 Choose **Window > Utilities > Data Merge** to open the Data Merge panel.
- 3 In this panel, choose the Data Source menu option to import your data source .txt file.
- 4 The Data Merge panel now displays all the variables. Insert them all at the correct location in the document.

For example, the imported data can be inserted into the layout of a business card:



```

<<first_name>> <<last_name>>
<<street>>
<<zip>> <<city>>
<<phone>>
<<email>>@sundiver.com
www.sundiver.com

```

- 5 Export the document as a STOREFRONT Package. See “Create a package with the Converter plug-in (up to InDesign CS6)” on page 339.
- 6 Repeat this procedure for each version of your document, reusing the data source file.

### ▷ Finish the documents in the Online Editor

- 1 Create a new customizable product using the exported STOREFRONT Package.
- 2 Edit the product in the Online Editor.

All the variables are present and linked. The frames containing a variable are already marked as **Selected frame contains variables**.

All the imported variables are of the type **Short text**. All you need to do is give each variable a suitable Display Name.

- 3 Select each variable and click the pencil icon to edit the Display Name.

You may also still want to change the order of the variables and give them proper default values.

- 4 Repeat this procedure for each version of your document.

## Testing Customizable Products

After creating a new Customizable Product, it is recommended that you check that shoppers can customize the text, images, forms, etc., and order the product as expected. You should create a test order on the storefront to be sure.

Testing on the storefront is also essential for Variable Data Products. See also “Troubleshooting the variable data upload” on page 393.

- **Step 1: Create a test order**

Add the product to a store, log in as a user and order the product.

- **Step 2: Test layout editing**

Open the product in the Online Editor and perform some basic checks:

- If a form is used for data entry, fill the fields with long words or sentences to check if sufficient space was foreseen or the copyfitting settings are configured properly.
- With forms you should also check if the layout is OK when fields are left blank.
- If the 'Basic' or 'Advanced' workspace is used, check if all the locked layers are also locked within the layout. You do not want shoppers to accidentally move locked content.
- Check all of the other constraints that were configured to make sure the shopper is limited to making only those changes that are allowed. This applies to the use of fonts and styles and to the user's ability to modify or move all of the frames in the layout.
- Check if the image libraries are configured correctly and the shopper has access to all the artwork he or she is meant to have access to.
- For Variable Data Products, check that the variable data is merged as expected in final documents.

Personalize the customizable product and add it to your shopping cart.

- **Step 3: Check the softproof (PDF Preview)**

Click the PDF Preview link of the product in the shopping cart to validate that the softproof that users can access matches the print-ready PDF file. Keep in mind that PDF preview files are different from print-ready PDF files in a number of ways. In preview files:



- ❑ the high resolution images are downsampled to minimize the file size and speed up access.
- ❑ PDF security settings and a watermark are added depending on the settings in Advanced > Production Settings > PDF Preview.
- ❑ non-printing layers are included while these are excluded in the print-ready PDF.
- ❑ no bleed is added while print-ready PDF files have a 12 mm (0.47 inch) border for bleed and crop marks.

There are some exceptional cases in which a softproof might look different from the print-ready PDF. This can confuse the shopper and cause him or her to cancel the order. Artifacts in PDF preview files are typically caused by transparency getting processed differently in the STOREFRONT web environment. If this occurs, you will have to rework the InDesign source file and recreate the product. Many issues can be resolved by replacing complex InDesign objects by easier to process bitmap files. For example: if a logo with a drop shadow on a gradient background is too complex to process and the background gradient disappears on the PDF preview, then replacing that gradient in InDesign by an identical bitmap gradient may resolve the problem.

- Step 4: Process the order item (optional)

Processing the order item in the prepress workflow system assures that the base layout is correct and does not cause any problem because of low-res images, incorrect color spaces, not enough bleed, etc. This step is recommended if the InDesign source file was created by an external agency or designer.

## Variable Actions

Variable Actions are snippets of code that you can assign to your variables. They add automation to documents and give you more control. They also enable shoppers to work more effectively when editing customizable products.

Variables primarily represent fields on a form and they are generally set to *visible* so they are actually displayed as field labels with an input box or drop-down list. However, variables can also be defined for use in the background, for example to calculate values, without being visible for the shopper on the form.

See the code samples in “Variable Actions Samples” on page 465 to get started immediately.

---

**NOTE:** You cannot use Variable Actions in a Variable Data Product.

---

Related topics:

- See “Form Field Variables” on page 373.
- Variable Actions Samples on page 465

## Action Types

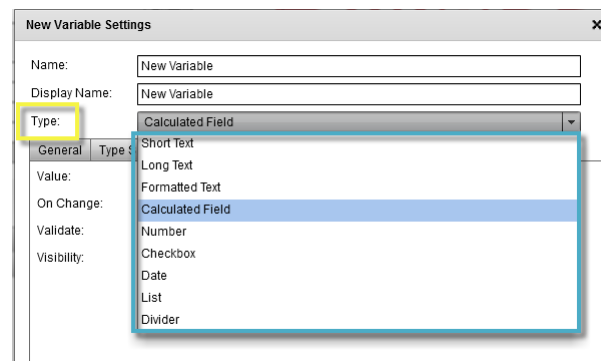
If you have the Online Editor Actions license, you will see an extra Actions tab in the Variable Settings Dialog.

The screenshot shows the 'New Variable Settings' dialog box. It has three tabs: 'General', 'Type Specific', and 'Actions'. The 'Actions' tab is highlighted with a yellow box. Inside the 'Actions' tab, there are four rows: 'Value:', 'On Change:', 'Validate:', and 'Visibility:'. Each row has an 'Edit' button next to it. The 'Name:' and 'Display Name:' fields are both set to 'New Variable'. The 'Type:' dropdown is set to 'Calculated Field'. A 'Close' button is at the bottom left.

This tab displays the different types of actions:

## Value

The Value action is only displayed for the Calculated Field action type.



This action is triggered when the value of another variable is changed.

## On Change

This is the most common action and it is used to change something in the document:

- set values of other variables
- show/hide multiple layers
- modify color, font and other properties of text
- show/hide variables on the input form

## Validate

This action returns a warning in a tooltip if the condition is not fulfilled.

## Visibility

This action returns whether the variable is visible or not.

## Action Editor

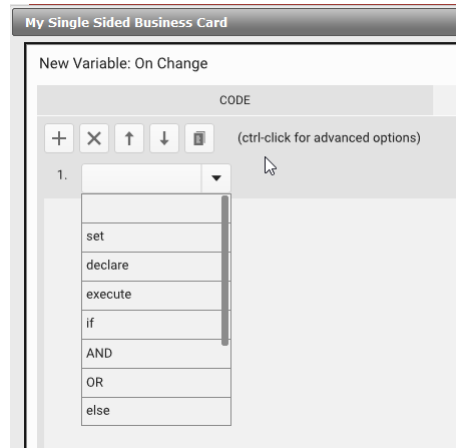
A special Action editor is provided to help you create the code for your variable actions. You create the code by adding lines and then selecting commands and parameters from drop-down lists. This is a wizard-type editor that only shows objects which are relevant for the preceding object.

## Action Basics

The Action Editor is designed for non-programmers but it is useful to know some basic concepts.

### Command Statements

The first drop-down on a line of code contains commands (scroll down to see them all):

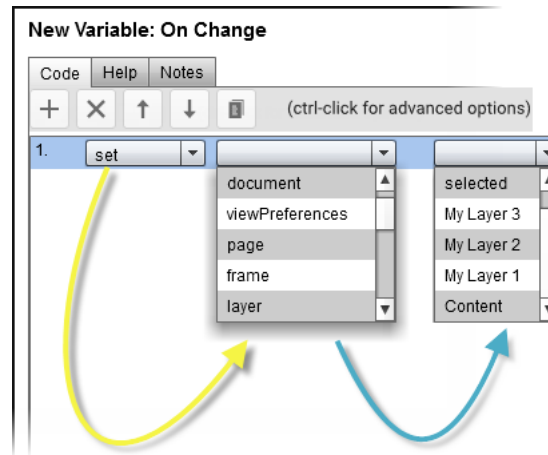


- set: sets properties inside the document model
- declare: declares local variables
- execute: executes a function
- if/else/else if/end if
- AND
- OR
- return: returns a value
- comment: adds comments to your actions

Although all the commands are always available, some commands are only relevant on certain lines and for certain action types. For example, you cannot start an On Change action with a return statement on line 1. If the command is not relevant, you cannot continue to write the line.

## Objects and Properties

Commands affect objects (frame, page, layer, etc.) and properties that you can also select in drop-down lists.

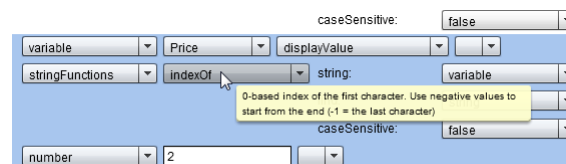


## Execute Functions

Typical functions as used in the examples in this section are:

- selectItemName
- applyFromColor
- replaceRegExp

Hover over the drop-down lists to see an explanation in the tooltip.



## Conditional Statements

Conditional statements are used to control when a specified function is executed. They can also help you create actions with less code lines.

- if, else, else if, end if (to close if statement).

These statements are combined with the following operators:

- is, is not, contains, starts with, ends with, <, <=, >, >=
- & (to concatenate (join) strings), +, -, /, \*

You will typically have a series of statements and one of these statements is executed if the condition is met.

### Local Variables

Local variables are used for more complex calculations or if a calculation is used multiple times in the action code. First you need to declare the local variable and then you can start reusing in other variables.

You can see how local variables are declared and use in the following examples:

- “Example 2: Footer combining variables with function” on page 482
- “Example 3: Footer combining variables with regular expression” on page 484

## Action Editor Toolbar

### Toolbar Tools



Creates a new line of code for the variable action. Hold down CTRL/CMD to add multiple empty lines below the current line.



Deletes the selected code line. Hold down CTRL/CMD to delete multiple empty lines below the current line.



Moves the code line up in the action editor. Hold down CTRL/CMD to move a line: one up, one down; to the top, bottom; x times up relative to the current position; to a specified line number.



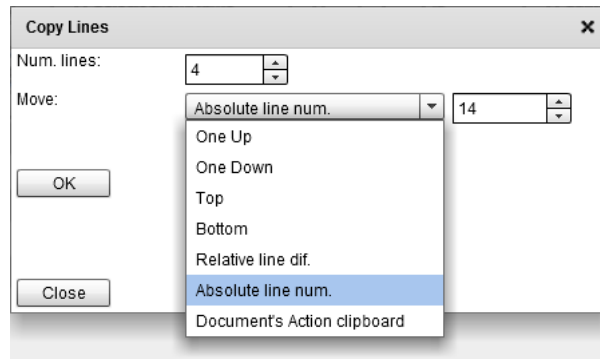
Moves the code line down in the action editor. Hold down CTRL/CMD to move a line: one up, one down; to the top, bottom; x times down relative to the current position; to a specified line number.



Creates a duplicate of the selected code line immediately under the selected line. Hold down CTRL/CMD to duplicate one or multiple lines: one up, one down; to the top, bottom; x times down relative to the current position; to a specified line number.

### Advanced Tools

Hold down the CTRL (Windows)/CMD (Mac) key while clicking the toolbar icons to display a dialog where you can perform advanced copying, deleting and moving, as explained in the Toolbar Tools table.



You can also copy a specified number of lines to the Document's Action clipboard for reuse in the same action or in a different action of the same document.

---

**NOTE:** The contents of the clipboard is emptied when you close the document.

---

### ▷ Copy action code to clipboard for reuse

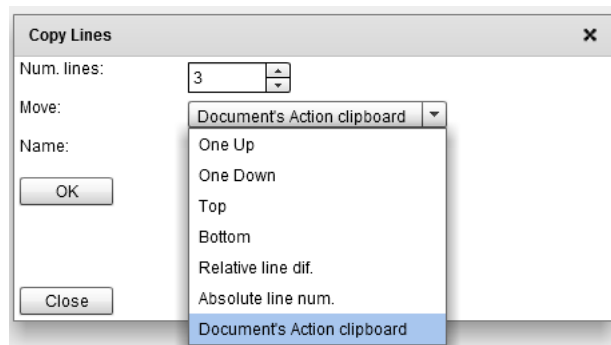
If you want to use the same action for multiple variables in the same document, you can copy the code to the clipboard and reuse it.

---

**NOTE:** You can only duplicate an action within the same document.

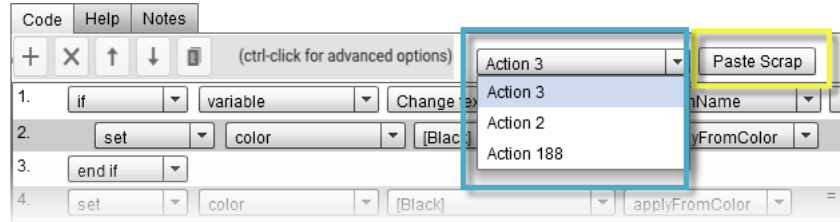
---

- 1 Press CTRL/CMD and click the Copy icon.  
The Copy Lines dialog is displayed.
- 2 Enter the number of lines you want to copy to the clipboard.
- 3 In the Move drop-down list, select Document's Action clipboard.



- 4 In the Name field, enter a name for this piece of code.
- 5 Click OK.

- 6 The new piece of code is added to the Paste Scrap list in the toolbar.



- 7 To add a saved piece of code to your action, select the name of the code in the drop-down list and click Paste Scrap.

The specified piece of code is added below the current line.

## Regular Expressions

Some of the examples in this section use regular expressions. See “Form Validation” on page 488 for code samples.

The following table gives an overview of the basic syntax for regular expressions.

^	matches the beginning of a string
\$	matches the end of the string
[0-9]	any digit from 0 to 9
X{m,n}	m to n occurrences of X
X*	matches 0 to more occurrences of X
X+	matches 1 to more occurrences of X
X Y	matches X or Y
()	groups the expression
/X/gi	the gi modifier does a global case insensitive search of all occurrences of X

Read this [article on Wikipedia](#) for more information about regular expressions or visit [regex101](#) for a complete reference guide.

## Unsupported Actions

To preserve the integrity of the STOREFRONT application, you must not create actions that do one of the following:

- add or delete one or multiple pages
- change the page size
- replace a spot color with a process color or vice versa, as this will affect your pricing



## Variable Actions Samples

This section provides several examples with sample code that you can re-use and tweak for your own variable actions. We recommend that you try out some of these examples as this is probably the easiest way to learn about variable actions.

This section describes the following examples of actions:

- Show/Hide Layers
- Change Text Color
- Jump to Page on Input
- Combine Variables
- Form Validation
- Form Validation with Correction
- Strip Formatting
- Clear fields
- Insert MIS ID Profile data
- Moving frames using a variable action
- Removing trailing carriage returns
- Capitalize names
- Generate an E-mail Address
- Change a Font
- Change Typeface for Copy Fitting
- Insert special characters in variables
- Switch between oldstyle and lining typefaces for numerals
- Switch between languages (multilingual form)
- Compare date variables

## Prerequisites

The following are needed for all the examples in this section:

- Online Editor Actions license to work with the Action editor
- Customizable product with the Forms or Expert workspace.

## Conventions:

The following conventions are used in the code samples:

- `<space>`: type a space
- `<blank>`: leave blank

Related topics:

- [See “Form Field Variables” on page 373.](#)
- [Variable Actions on page 458](#)

## Show/Hide Layers

In this example you will set up a document to enable the shopper to select one of 3 layers by simply choosing an item in a drop-down list.

---

**NOTE:** Use actions if you want to make multiple layers available. To show/hide just a single layer, you can also use a Check box variable. See “Show/hide a layer (check box variable)” on page 427.

---

## Summary

- Action type: On Change (In the Actions tab, edit On Change.)
- Variable type: List with 3 items
- Document with 3 layers
- Action code:

```

1 set layer My_Layer_1 visible = false
2 set layer My_Layer_2 visible = false
3 set layer My_Layer_3 visible = false
4 if variable Change image selectedItemName is string my_item_1
5 set layer My_Layer_1 visible = true
6 else if variable Change image selectedItemName is string my_item_2
7 set layer My_Layer_2 visible = true
8 else if variable Change image selectedItemName is string my_item_3
9 set layer My_Layer_3 visible = true
10 end if

```

## How it works

Your document has multiple layers. These layers are created in the original InDesign document or in the Online Editor, and can contain visual elements such as images, transparencies, background fills, etc., that can be switched to obtain differentiating effects as chosen by the shopper.

In this example, we have 3 layers, to create 3 variations of the same business card. Each layer applies a different color design without affecting the other design elements. The layers have the following names:

- My\_Layer\_1
- My\_Layer\_2
- My\_Layer\_3

The shopper can select one of these 3 layers by choosing an item from a drop-down list. The drop-down list and its items are created in the Online Editor as a list type variable. In this example, the list type variable is called `Change image` and the 3 list items have the following names:

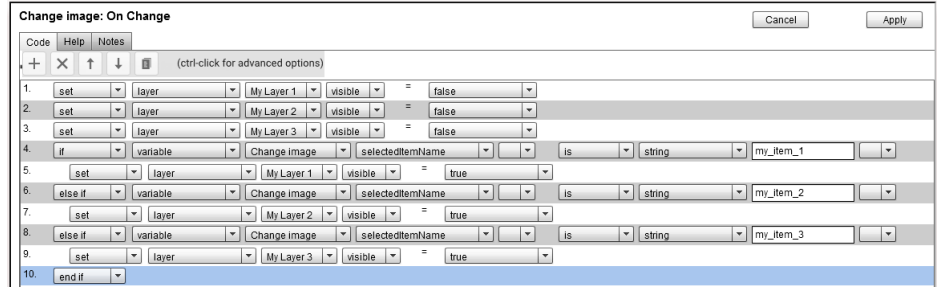
- Change image:
  - my\_item\_1
  - my\_item\_2
  - my\_item\_3

Each list item has an `On Change` action which sets the visibility of a specified layer:

- my\_item\_1 displays My\_Layer\_1
- my\_item\_2 displays My\_Layer\_2
- my\_item\_3 displays My\_Layer\_3

In the Action editor, you create lines of code by selecting statements and parameters from drop-down lists. You first use the set statement `visible = false` so all the layers are hidden when the shopper opens the document to start editing (lines 1 to 3). An `if/else` conditional statement is then used to show the respective layers when a list item is selected. Each statement is on its own code line, and all of these lines are referred to here as the action code.

Figure 10.104: The code lines in the Action editor: an On Change action with statements that allow a shopper to switch layers by choosing an item in a drop-down list.



### ▶ On Change Action to show/hide layers

This example is for a document with 3 layers, and uses the naming convention explained above.

#### 1 Edit a customizable product in the Online Editor.

Before creating the variable, check in the **Objects tab > Layers List** that your document has layers. For this example, we have 3 layers called:

- My\_Layer\_1
- My\_Layer\_2
- My\_Layer\_3

If you have the 3 layers, you will now create a List type variable with 3 list items to control which layer is visible.

#### 2 In the **Forms** tab, click the Add button and then the pencil icon to open the New Variable dialog.

#### 3 In the **General** tab of the New Variable dialog, complete as follows:

- Name: Change image
- Display Name: Change image
- Type: Choose **List** from the drop-down.

#### 4 In the **Type Specific** tab, click the **Add** button and create 3 list items:

- my\_item\_1
- my\_item\_2

□ my\_item\_3

**New Variable Settings**

Name:

Display Name:

Type:

General | Type Specific | **Actions**

my item 1  
my item 2  
my item 3

**+**

Name:

Value (optional):

Only show when:

Include Empty Item  
 Allow multiple items to be selected

Concat. Prefix:

Concat. Suffix:

Close

**TIP:** It is recommended to close the variable settings dialog and save your document before you start creating the action.

- 5 Click the **Actions** tab and then the **On Change Edit** button to start the Action editor.

**New Variable Settings**

Name:

Display Name:

Type:

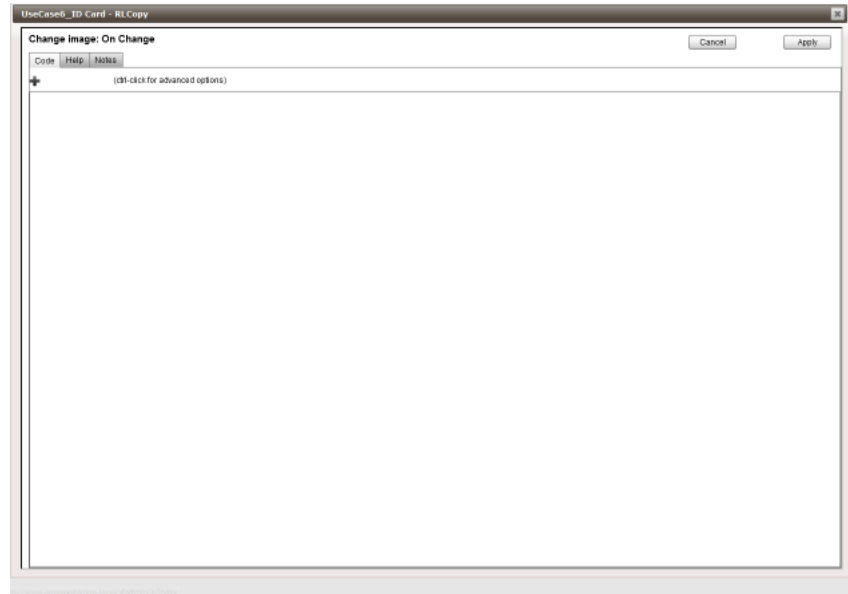
General | Type Specific | **Actions**

**On Change:**

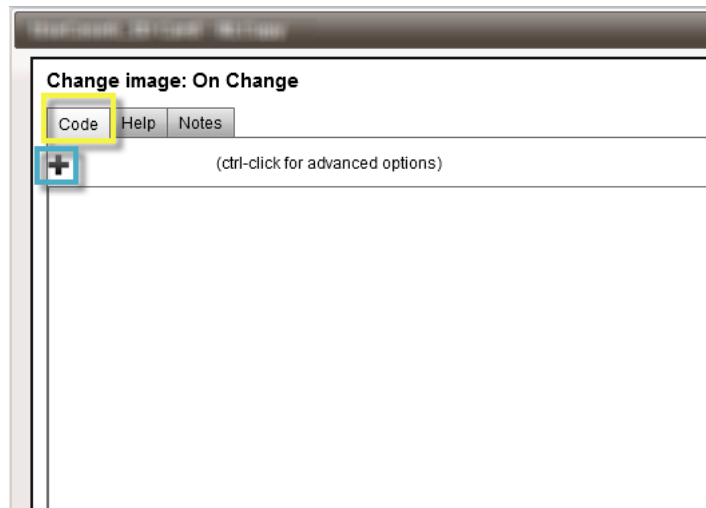
Validate:

Visibility:

The Action editor is opened without any code lines if this is a new variable. If you are editing an existing variable with actions, you will see the code lines for the variable.

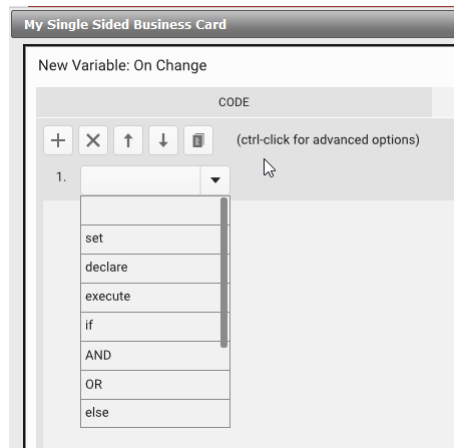


- 6 In the Code tab, click the Add button to add your first line of code.

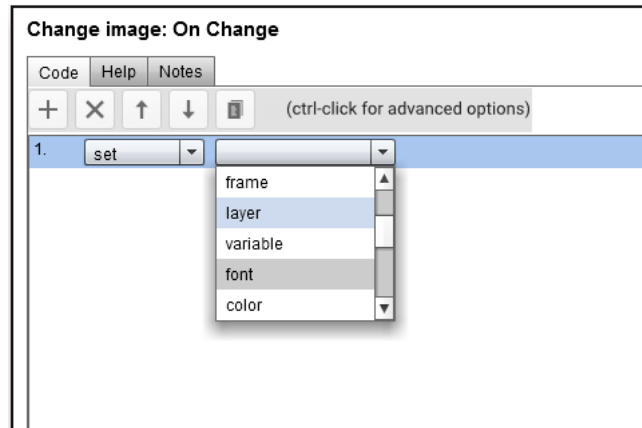


The first line is displayed with a drop-down list. This drop-down list is the first step in the code wizard.

- 7 Click the first drop-down list, and select `set` to write the first set statement.



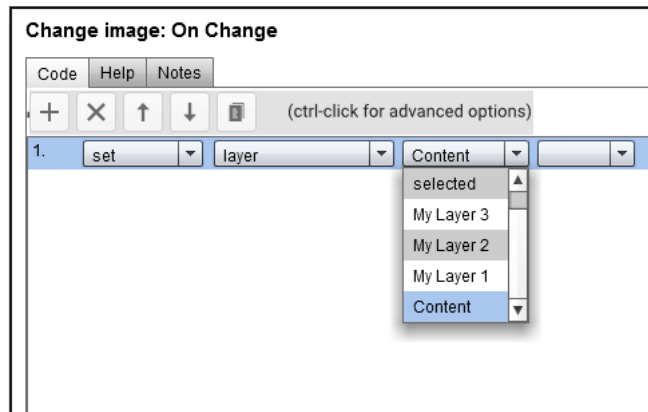
A second drop-down list is displayed where you can select the object to be set.



- 8 In the second drop-down list, select **layer**.

**TIP:** You can select an item in the lists by typing the first letter once, or multiple times if multiple items start with the same letter.

A third drop-down list is displayed where you can select one of the 3 layers available in your document.



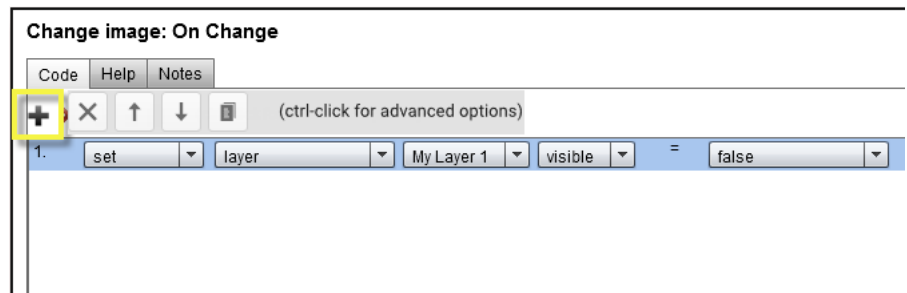
- 9 In the third drop-down list, select **My\_Layer\_1**.

**NOTE:** These are the names that you have given to the layers in your document.

- 10 Continue the wizard until you have the following statement on line 1:

```
1 set layer My_Layer_1 visible = false
```

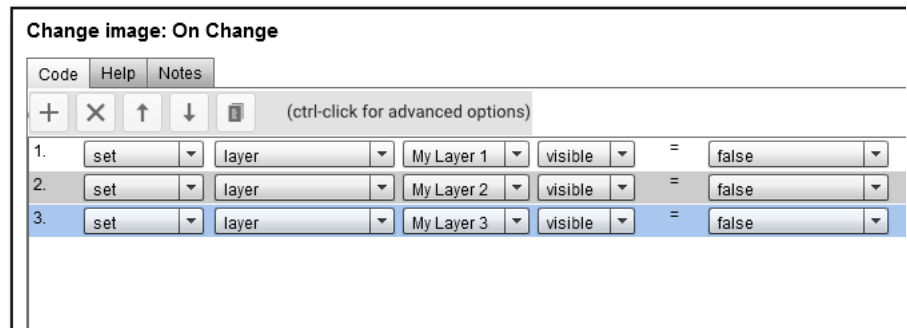




- 11 Click the **Add** button to add the second line of code and write the second line of code using the drop-down lists:

```
2 set layer My_Layer_2 visible = false
```

- 12 Continue the wizard, and add 1 more line so you have the first 3 lines of your code.



These are the *set statements* that initially hide the layers.

**TIP:** You can use the Delete, Move Up, Move Down, Copy buttons to work faster when creating your code lines.

- 13 Now continue with the *if/else statements*. Click the Add button to add line 4 of your code:

```
4 if variable Change image SelectedItemName is string my_item_1
```

- 14 Complete the action with lines 5 to 10 until you have all code lines as follows:

```
1 set layer My_Layer_1 visible = false
2 set layer My_Layer_2 visible = false
3 set layer My_Layer_3 visible = false
4 if variable Change image selectedItemName is string my_item_1
5 set layer My_Layer_1 visible = true
6 else if variable Change image selectedItemName is string my_item_2
7 set layer My_Layer_2 visible = true
8 else if variable Change image selectedItemName is string my_item_3
9 set layer My_Layer_3 visible = true
10 end if
```

**NOTE:** The string value for the list item names (`my_item_1`, etc.) has to be typed in the field; they do not appear in a drop-down list. Make sure you enter the correct value, otherwise your variable will not work properly.

**15** When you have created all the lines of code, click **Apply** to save your changes.

**16** Click **Close** to finish your variable settings and save the document.

**17** In the **Step 3: Initialize Form Variables** panel, you can check that your variable is working as expected and emulate the shopper experience.

The `Change Image` variable has three items in the drop-down list. The shopper can select a different layer for the document by choosing one of the items in the list.

Figure 10.105: The first item in the list makes `My_Layer_1` visible and hides the other layers.

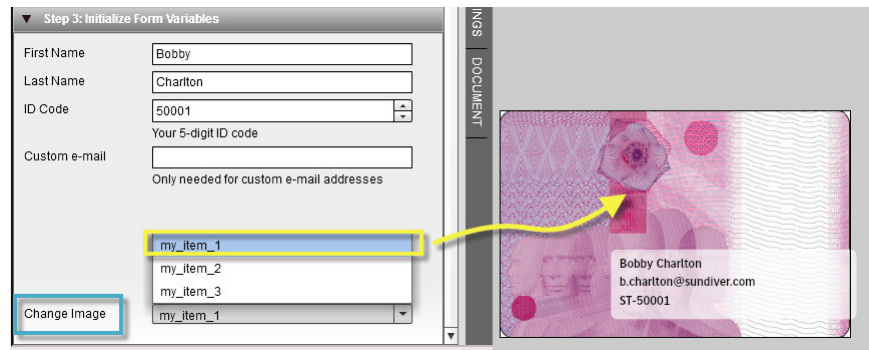


Figure 10.106: The second item in the list makes `My_Layer_2` visible.

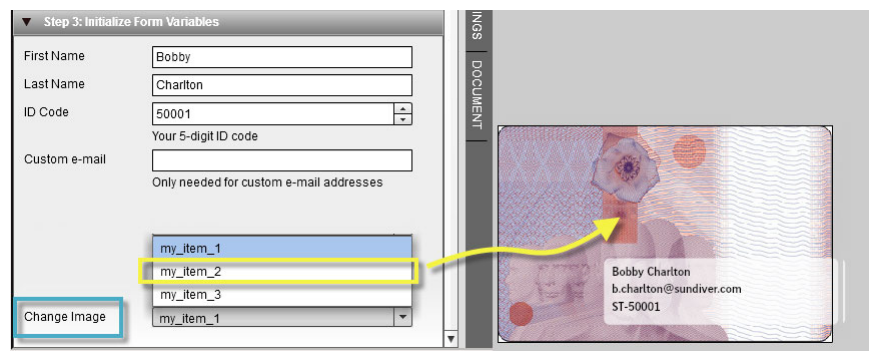
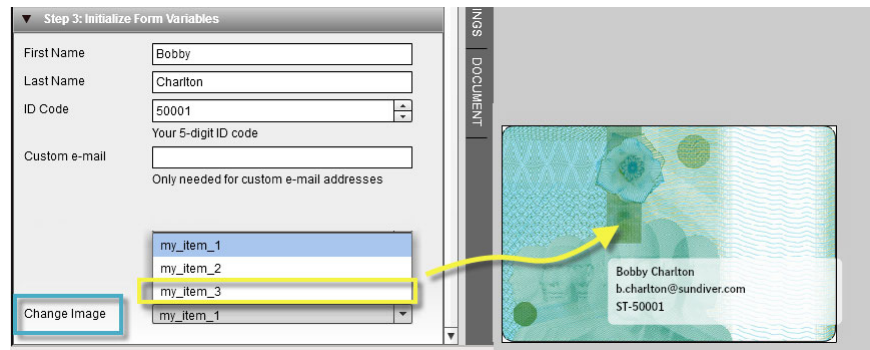


Figure 10.107: The third item in the list makes My\_Layer\_3 visible.



**18** If the action works as expected, save your document. If the action does not work as expected, go back to the **Step 1: Create Variables** panel, and edit the actions in the variable. In the Action editor, check that you:

- selected the correct statement parameters in the various drop-down lists.
- entered the correct values for the list items: the string values must be identical to the list item names you created in the Type Specific tab.

**19** Close the Online Editor and add your newly created, customizable product with On Change action to a store.

## Change Text Color

In this example you will set up a document to enable the shopper to change the color of the text throughout the document by simply choosing an item in a drop-down list.

---

**NOTE:** You should not create actions that change process colors to spot colors or vice versa because the changes are not taken into account in your pricing.

---

### Summary

- Action type: On Change (In the Actions tab, edit On Change.)
- Variable type: List with 3 items: my\_color\_1, my\_color\_2, my\_color\_3
- Document with the following colors:
  - My\_Default\_Color: Apply this color to the text that you want to change with the action

- My\_Blue, My\_Green, My\_Red: colors applied to the text formatted with My\_Default\_Color, depending on the selected list item

■ Action code:

```
1 if variable Change text Color selectedItemName is string my_color_1
2 set color My_Default_Color applyFromColor = color My_Red id
3 else if variable Change text color selectedItemName is string my_color_2
4 set color My_Default_Color applyFromColor = color My_Green id
5 else if variable Change text color selectedItemName is string my_color_3
6 set color My_Default_Color applyFromColor = color My_Blue id
7 end if
```

▷ On Change Action to change text color

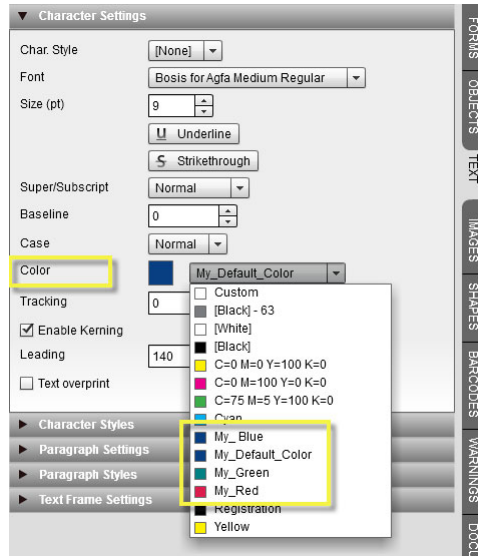
---

**NOTE:** This procedure is similar to the one for creating an action to switch layers in a document. Refer to “On Change Action to show/hide layers” on page 468 for more details on creating the action, but replace the action code as specified below.

---

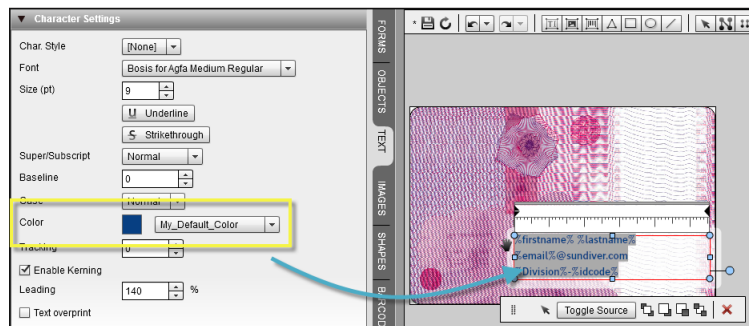
- 1 Edit your document in the Online Editor and check in the **Text** tab that the text frame contains the colors that you want to use in your variable action:
  - My\_Default\_Color
  - My\_Blue
  - My\_Green
  - My\_Red

In Edit Text mode, select the text and open the **Character Settings** panel.



It is recommended to create your colors in the original InDesign document. However, you can also create these colors at this stage, in the Online Editor, by renaming and overwriting colors in the list which are not being used in the document: select a color in the drop-down list, and click the color patch to open the Color editor.

- 2 Assign `My_Default_Color` to the text you want to modify with the action.



**NOTE:** Do not assign dedicated InDesign colors such as [Black] and [White] to the text you want to modify. These colors cannot be modified by the variable action and will generate errors when you try to save your document.

- 3 Save the document and go to the **Forms** tab, to create the variable with actions.
- 4 In the **Forms** tab, click the Add button and then the pencil icon to open the New Variable dialog.

- 5 In the **General** tab of the New Variable dialog, complete as follows:
  - Name: Change text color
  - Display Name: Change text color
  - Type: Choose **List** from the drop-down.
- 6 In the **Type Specific** tab, click the **Add** button and create 3 list items:
  - my\_color\_1
  - my\_color\_2
  - my\_color\_3
- 7 Click the **Actions** tab and then the **On Change Edit** button to start the Action editor.

The Action editor is opened without any code lines.

- 8 In the Code tab, add the following lines of code.

```
1 if variable Change text color selectedItemName is string my_color_1
2 set color My_Default_Color applyFromColor = color My_Red id
3 else if variable Change text color selectedItemName is string my_color_2
4 set color My_Default_Color applyFromColor = color My_Green id
5 else if variable Change text color selectedItemName is string my_color_3
6 set color My_Default_Color applyFromColor = color My_Blue id
7 end if
```

---

**NOTE:** The values after `string` must be typed in the fields.

---

---

**NOTE:** Instead of switching color swatches, it's also possible to specify color values. In this case the code is:

```
set color My_Default_Color colorValue = colorvalue cmyk 20 100
90 0
```

---

- 9 When you have created all the lines of code, click **Apply** to save your changes.
- 10 Click **Close** to finish your variable settings and save the document.
- 11 In the **Step 3: Initialize Form Variables** panel, you can check that your variable is working as expected and emulate the shopper experience.



The `Change text color` variable has three items in the drop-down list. The shopper can select a text color for the text frame by choosing one of the items in the list.

## Jump to Page on Input

When a shopper opens a document and enters information in a form field, he may not see anything happen if the variable is placed on a page which is not visible in the current view. This example uses an action to jump to the page where the form field input appears when the shopper begins to type in the field.

Figure 10.108: The variable for this form field is placed on page 2 of this document and is initially not visible.

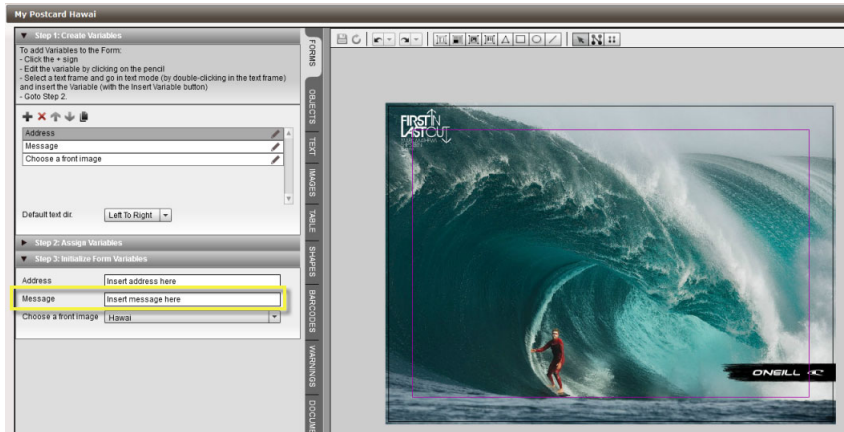
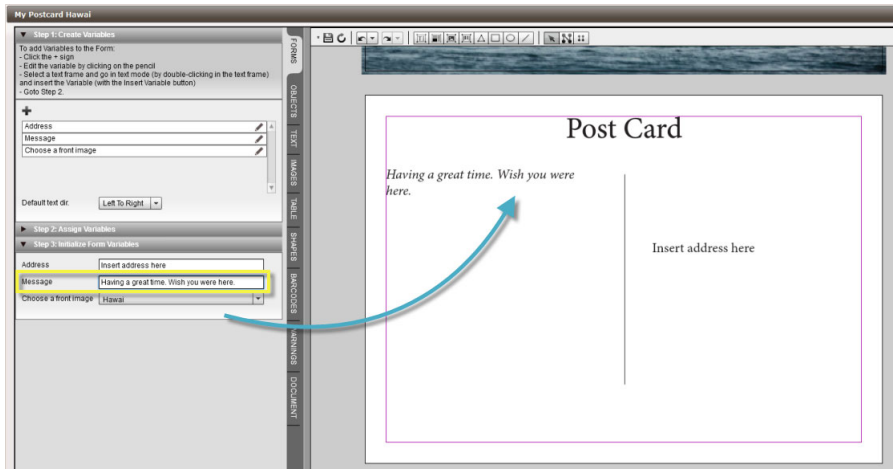


Figure 10.109: The relevant page is displayed when the shopper starts entering input in the form field.



## Summary

Use this single-line action to jump to the page where the variable in question is placed.

- Action type: On Change (In the Actions tab, edit On Change.)
- Variable type: all
- Action code: to jump to page 2 of the document:



1 execute page 2 select

- Action code: to jump to page 1 of the document:

1 execute page 1 select

## Combine Variables

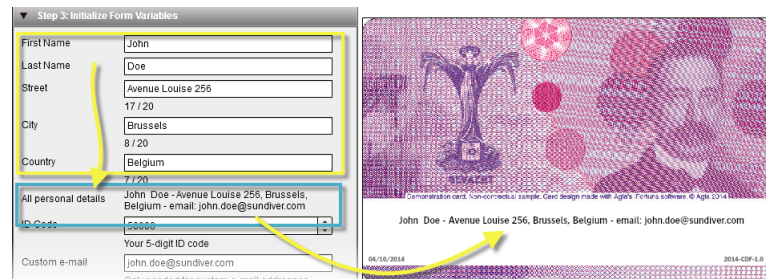
The following examples put multiple variables of a form on a single line with the necessary separators or special formatting. This is typically used for letterhead footers, business cards, special price formatting, etc.

**NOTE:** This procedure is similar to the one for creating an action to switch layers in a document. Refer to “On Change Action to show/hide layers” on page 468 for more details on creating the variable with an action, but replace the action code as specified below.

### Example 1: Footer with simple combination

This example inserts different separators, commas, spaces, dashes, depending on the variable.

Figure 10.110: Multiple variables are combined in an variable action to create a single line.



The code for this action is one line with a statement that returns as many variables as you want. The variables are joined in the actions code by selecting the “&” operator. All the variables that will be combined must be set to `Required` in the General tab of the Variable Settings dialog, otherwise the separators will not make sense if a field remains empty.

### Summary

- Action type: Value (In the Actions tab, edit Value.)
- Variable type: Calculated Field

- Document with multiple variables (all variables are set to `Required`):
  - `First_Name`
  - `Last_Name`
  - `Street`
  - `City`
  - `Country`
  - `Email`

- Action code for new variable:

```

1 return variable First_Name value & string <space>
  & variable Last_Name value & string <space>-<space>
  & variable Street value & string ,<space>
  & variable City value & string ,<space>
  & variable Country value & string <space>-<space>email:<space>
  & variable Email value

```

## Example 2: Footer combining variables with function

This example is the same as Example 1, but with only one separator, a dash. Logic has been added to remove the separators if one or more form fields are not filled in by the shopper. This means the variables that will be combined must not necessarily be set to `Required`.

Figure 10.111: All the combined variables have a value and separator.

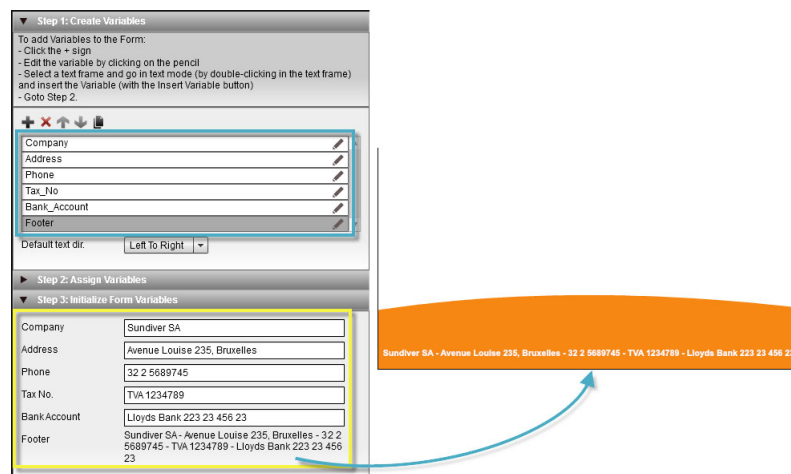
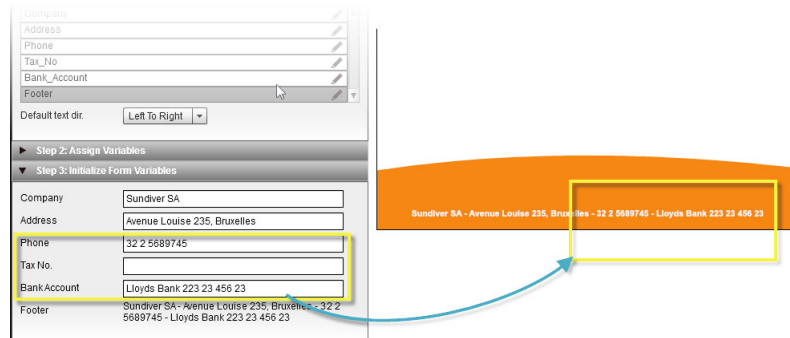


Figure 10.112: The separator is omitted if a variable has no value entered.



## Summary

- Action type: Value (In the Actions tab, edit Value.)
- Variable type: Calculated Field
- Document with multiple variables:
  - Company
  - Address
  - Phone
  - Tax\_No
  - Bank\_Account
- Action code: for new variable Footer:

The code starts with 2 lines that each declare a local variable (`localStrTemp` and `localBlnAddHyphen`) which are subsequently used in the rest of the code. Lines 3 to 9 are a conditional statement that checks whether a variable is filled with a string value or not, and then sets the dash separator or leaves it out. These 7 lines can be repeated for as many variables that you want to include in the new combined variable. Use CTRL Copy and add the 7 lines to the clipboard, and then paste these lines and change the variable name.

```

1 declare string localStrTemp = string
2 declare boolean localBlnAddHyphen = false
3 if variable Company value is not string
4 if local localBlnAddHyphen is true
5 set local localStrTemp = local localStrTemp & string <space>-<space>
6 end if
7 set local localStrTemp = local localStrTemp & variable Company value
8 set local localBlnAddHyphen = true
9 end if
10 if variable Address value is not string
11 if local localBlnAddHyphen is true
12 set local localStrTemp = local localStrTemp & string <space>-<space>
13 end if
14 set local localStrTemp = local localStrTemp & variable Address value
15 set local localBlnAddHyphen = true
16 end if
17 if variable Phone value is not string
18 if local localBlnAddHyphen is true
19 set local localStrTemp = local localStrTemp & string <space>-<space>
20 end if
21 set local localStrTemp = local localStrTemp & variable Phone value
22 set local localBlnAddHyphen = true
23 end if
24 if variable Tax_No value is not string
25 if local localBlnAddHyphen is true
26 set local localStrTemp = local localStrTemp & string <space>-<space>
27 end if
28 set local localStrTemp = local localStrTemp & variable Tax_No value
29 set local localBlnAddHyphen = true
30 end if
31 if variable Bank_Account value is not string
32 if local localBlnAddHyphen is true
33 set local localStrTemp = local localStrTemp & string <space>-<space>
34 end if
35 set local localStrTemp = local localStrTemp & variable Bank_Account value
36 set local localBlnAddHyphen = true
37 end if
38 return local localStrTemp

```

### Example 3: Footer combining variables with regular expression

This example is the same as Example 2, but uses regular expressions for the dash separator, and one declare statement. The result is the same, but you use less code than for example 2.

In this example we add <space>-<space> to each variable and concatenate all of them into one single local and temporary variable "localStrTemp". This means

that in case not all variables are filled in we might end up with multiple `<space>-<space>` values after each other, or in front or behind the final string.

To solve this, we create two regular expressions:

- one to replace the double occurrences of `<space>-<space>` (at least 2 and maximum 10 occurrences in this example) with just one occurrence.
- one to remove the `<space>-<space>` in the beginning or at the end of the result by replacing it with a `<blank>` string.

### Summary

- Action code:

```

1 declare string localStrTemp = string
2 set local localStrTemp = local localStrTemp & variable Company value & string <space>-<space>
3 set local localStrTemp = local localStrTemp & variable Address value & string <space>-<space>
4 set local localStrTemp = local localStrTemp & variable Phone value & string <space>-<space>
5 set local localStrTemp = local localStrTemp & variable Tax_No value & string <space>-<space>
6 set local localStrTemp = local localStrTemp & variable Bank_Account value
7 set local localStrTemp = stringFunctions replaceRegExp
  string: local localStrTemp
  regexp: string /(<space>-<space> ){2,10}/g
  replace: string <space>-<space>
8 set local localStrTemp = stringFunctions replaceRegExp
  string: local localStrTemp
  regexp: string /^<space>-<space> |<space>-<space> $/g
  replace: string <blank>
9 return local localStrTemp

```

### Example 4: Price formatting with smaller decimals

This example creates a price with 2 decimals which are smaller and aligned with the top of the number before the decimal point. The visible price is a combination of two variables which are not visible on the form but only visible in the document.

Figure 10.113: Two variables, which are not visible, are combined to create a price variable with small decimals which are aligned along the top and without the decimal point



### Summary

- Action type: On Change (In the Actions tab, edit On Change.)
- Variable type: Number
- Document with multiple variables

First create these two variables:

- A1: digits before the decimal point
- A2: digits after the decimal point

Then use these two variables in a third variable with an action

- Price: new variable with action
- Action code for the *Price* variable:

```

1 set variable A1 value = stringFunctions subString string: variable Price displayValue
  startIndex: number 0
  length: stringFunctions indexOf string: variable Price displayValue
  find: string .
  caseSensitive: false

2 set variable A2 value = stringFunctions subString string: variable Price displayValue
  startIndex: stringFunctions indexOf string: variable Price displayValue <blank> +
  number 1
  find: string .
  caseSensitive: false
  length: number 2

```

### ▶ Price with smaller, top-aligned decimals

- 1 In your document, create the following 3 variables in the Forms tab:

- ❑ **A1**: the digits before the decimal point; a variable of type Short Text; not visible on the form
- ❑ **A2**: the digits after the decimal point; a variable of type Short Text; not visible
- ❑ **Price**: the price label which is visible on the form and to which the action code is applied; this is a variable of type Number; set the Snap Interval, Decimal Separator, Precision and Rounding as follows:

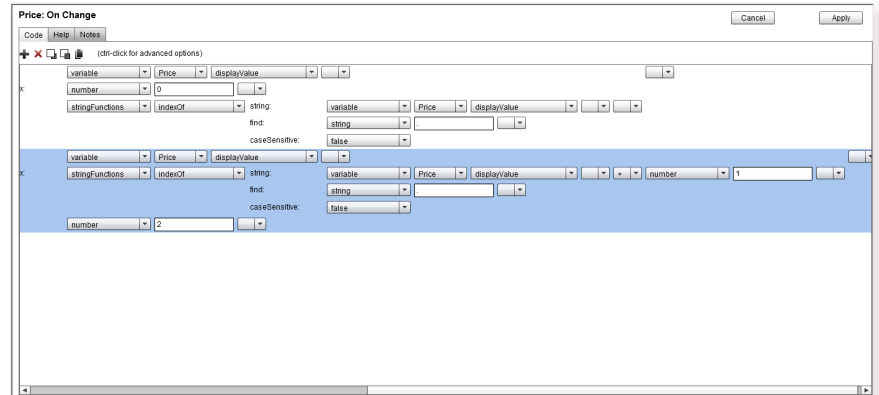
The screenshot shows the 'New Variable Settings' dialog box with the following configuration:

- Name:** Price
- Display Name:** Price
- Type:** Number
- General Tab:**
  - Minimum:** 0
  - Maximum:** 50000
  - Snap Interval:** 0.01
  - Step Size:** 0.1
  - Decimal Separator:** .
  - Thousands Separator:** .
  - Precision:** 2
  - Rounding:** Up

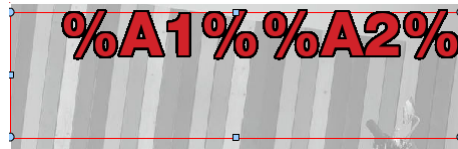
In the Actions tab, create the code as follows:

- 1 set variable **A1** value = stringFunctions subString string: variable **Price** displayValue  
startIndex: number **0**  
length: stringFunctions indexOf string: variable **Price** displayValue  
find: string .  
caseSensitive: false
- 2 set variable **A2** value = stringFunctions subString string: variable **Price** displayValue  
startIndex: stringFunctions indexOf string: variable **Price** displayValue <blank> +  
number **1**  
find: string .  
caseSensitive: false  
length: number **2**

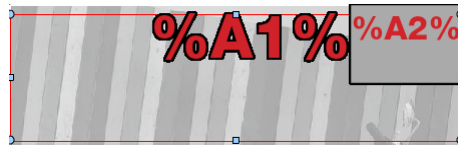
The screenshot below gives you an idea of how this code actually looks in the editor:



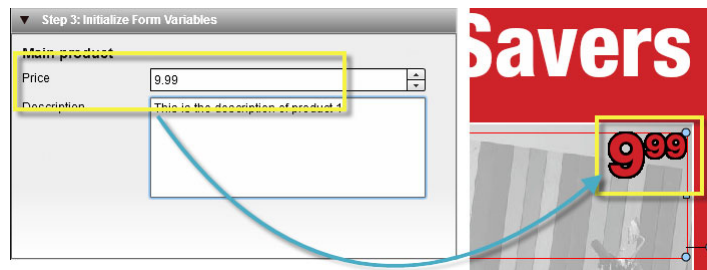
- 2 Insert variables A1 and A2 in the document.



Format these two variables in the Text Tab; set the Font Size of variable A2 so it's smaller than A1 and increase the base line of A2 so it aligns with the top of A1.



- 3 Save the document and go back to the Forms tab and check that the Price variable works as expected.



## Form Validation

This example checks the syntax of the value entered by a shopper and creates a yellow icon with a warning in the tooltip.



Figure 10.114: A Validate action checks the syntax of an e-mail address and generates a warning icon with tooltip.



## Summary

The action code uses a regular expression to validate the shopper's input on the form. Several action code samples are given below to validate an e-mail address, a car license plate and a bank account number.

- Action type: Validate (In the Actions tab, edit Validate.)
- Variable type: Short Text
- Document with variables defined and set to `Visible`
- Regular expressions used in the action code for the `regexp` string:

- an e-mail address: e.g. john.doe@mycompany.com

```
^([a-zA-Z0-9.\-]+)@([a-zA-Z0-9.\-]+)$
```

- a license plate: e.g. 1 ABC 234

```
^(([0-9]{0,1}[ ]*[A-Z]{3}[ ]*[0-9]{3})|([0-9]{3}[ ]*[A-Z]{3}))$
```

- a bank account number: e.g. 123-4567891-23

```
^[0-9]{3}-[0-9]{7}-[0-9]{2}$
```

- a phone number: e.g. 123 45 678

```
^[0-9]{3}[ ]?[0-9]{2}[ ]?[0-9]{3}$
```

- Action code:  
to validate an e-mail address:

```
1 if stringFunctions matchesRegExp string: variable My_Email value is not true
   regexp: string ^[a-zA-Z0-9.\-]+@[a-zA-Z0-9.\-]+$
2 return string The e-mail you entered is not correct.
3 end if
```

- Action code: to validate a license plate:

```

1 if stringFunctions matchesRegExp string: variable My_License value is not true
  regexp: string ^((0-9){0,1}[ ]*[A-Z]{3}[ ]*[0-9]{3})((0-9){3}[ ]*[A-Z]{3}))$
2 return string The license plate you entered is not correct.
3 end if

```

- Action code: to validate a bank account number:

```

1 if stringFunctions matchesRegExp string: variable My_Account value is not true
  regexp: string ^[0-9]{3}-[0-9]{7}-[0-9]{2}$
2 return string The account you entered is not correct.
3 end if

```

- Action code: to validate a phone number (with `return long string` to create a tooltip with multiple lines):

```

1 if stringFunctions matchesRegExp string: variable My_Phone value is not true
  regexp: string \\d\\d\\d <space> \\d\\d <space> \\d\\d\\d
2 return long string This phone number is not formatted correctly. The expected format is: 123 45 678
3 end if

```

Figure 10.115: Return long string creates a validation tooltip with multiple lines.

The screenshot shows a form with the following fields and values:

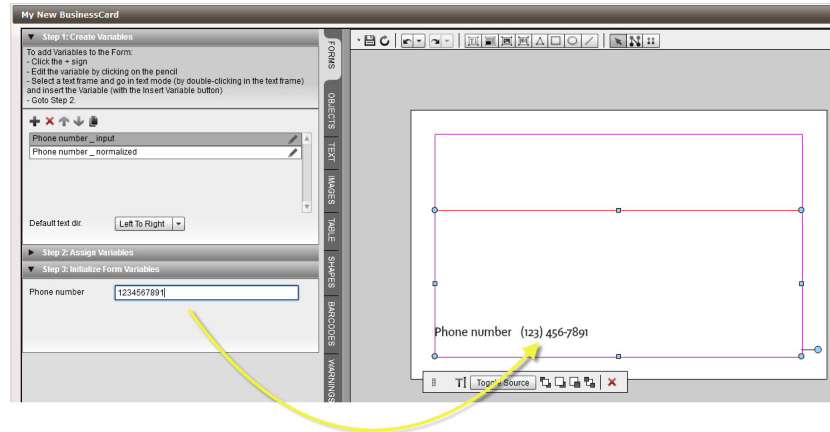
- First Name: Johnny
- Last Name: Doe
- My E-mail Address: john.doe-mycompany.com (with a yellow warning icon)
- My License Plate: 222 ABC
- My Phone No.: 123 45678 (with a yellow warning icon)

A tooltip is displayed for the 'My Phone No.' field, containing the text: "This phone number is not formatted correctly. The expected format is: 123 45 678".

## Form Validation with Correction

This example uses two variables to check the format of the value entered by a shopper for a phone number, corrects the input and generates warnings until the number is entered according to the correct format.

Figure 10.116: Actions insert brackets, spaces and dashes for a phone number and generates warnings until the input is correct.



## Summary

A phone number must have the following format:

- (123) 456-7890

You want to cope with the following examples of incorrect input:

- 1234567890
- 123-456.7890
- 123/456\_7890
- (123) 456 7890

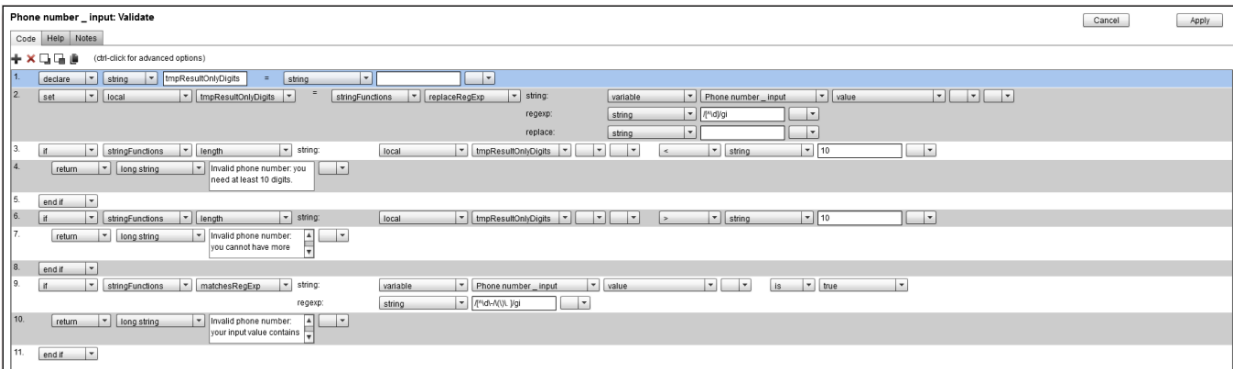
Two variables are required to accomplish the validation and correction. One visible variable that validates the input of the user and another hidden variable that corrects the input of the first variable to the expected format. Only the hidden variable is used in the source code of the text frame in the document.

### variable 1: Phone number\_input

If the user types fewer or more than 10 digits, a warning is displayed. The action also displays a warning if the user enters a character which is not a digit, a space, a hyphen or round brackets. In addition to the warning, the action automatically omits the unsupported characters. This input variable is visible on the form.

- Action type: Validate (In the Actions tab, edit Validate.)

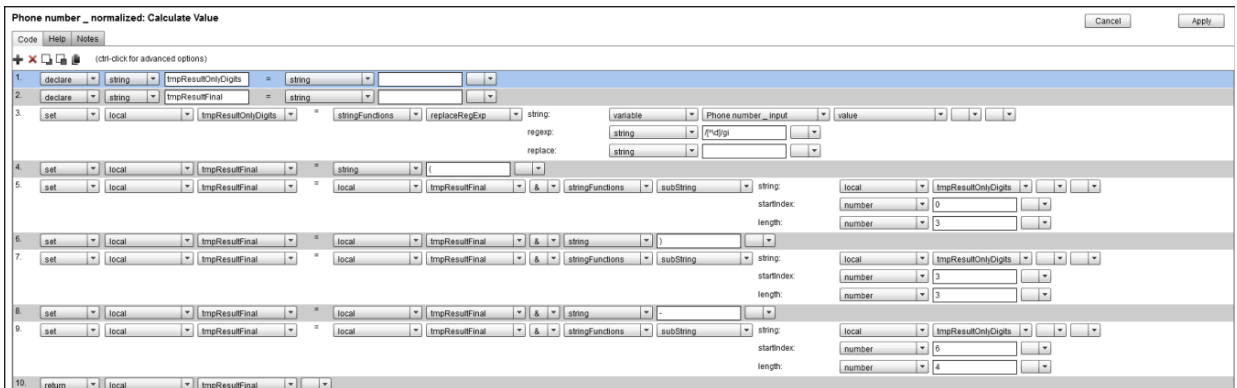
- Variable type: Short Text
- Set to `Visible`
- Regular expressions used in the action code for the `regexp` string:
  - `/[^\d]/gi`
  - `/[^\d\-\v\(\)\. ]/gi`
- Action code: see screenshot



## variable 2: `Phone number_normalized`

A second variable, in this example called *Phone number\_normalized*, has a Value action type. This variable is used in the first variable but is not visible on the form.

- Action type: Value (In the Actions tab, edit Value.)
- Variable type: Calculated Field
- `Visible` not selected
- Regular expressions used in the action code for the `regexp` string:
  - `/[^\d]/gi`
- Action code: see screenshot



## Strip Formatting

Formatted Text type variables are variables that a shopper can format (for example, change the font type, color, size, etc.) and these need to be stripped of their formatting if you want to use them in another variable which is not in a text frame. This is because all variables are enclosed in XML formatting that can interfere with the new variable. A typical example of this is the re-use of variable values in barcodes. The formatting is stripped using a Calculated Field type variable with an action that includes a regular expression to strip the formatting and only return the value of the variable. Your form can be set up so that the shopper does not see the calculated form fields.

### Summary

In the following example, a QR code is generated which includes a company URL that the shopper can format for its original position on a business card. This text variable is called `Company_URL` and the shopper can change the color and font size as required, for example to make it larger if the URL text is short, or change the color so it stands out. To insert this URL in a QR code, a new calculated field variable, called `Company URL_TXT` is created. This variable is based on the first variable and set up so it is not visible on the form.

- Action type: Value calculation (In the Actions tab, edit Value calculation.)
- Variable type: Calculated Field
- Document with Formatted Text variable set to `Visible: Company_URL`
- Regular expressions used in the action code for the `regexp` string to strip formatting:

```
/<[>]*>/gi
```

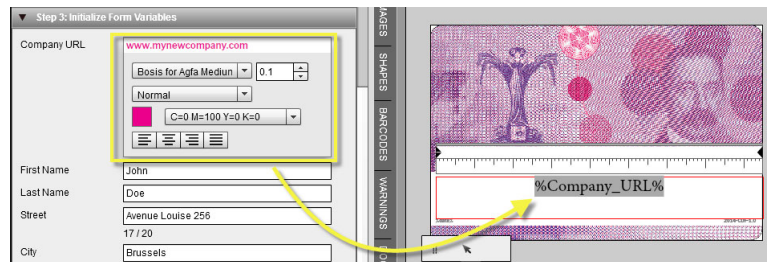
- Action code for `Company_URL_TXT`:

- 1 return stringFunctions replaceRegExp string variable **Company\_URL** value  
 regexp: string /<[^>]\*>/gi  
 replace string

### ▷ Strip formatting from text for use in QR code

- 1 In the **Forms** tab, check that your document has the following variable defined:
  - Name: Company\_URL
  - Display Name: Company URL
  - Type: Formatted Text; in the Type Specific tab, enable Font, Font Size, Color, Alignment, so the shopper can modify the formatting.
  - Visible check box selected

This variable is used in the document.



The intention is to re-use this variable in a QR code, but first we need to create a calculated field version of this variable.

- 2 In the Forms tab, create a new variable with the following settings:
  - Name: Company\_URL\_TXT
  - Display Name: Company URL TXT
  - Type: Calculated Field
  - Visible check box cleared
- 3 In the **Actions** tab, click **Value: Edit** to open the Action Editor, and add a code line.
- 4 Specify the code line as follows:

- 1 return stringFunctions replaceRegExp string variable **Company\_URL** value  
 regexp: string /<[\*]>\*/gi  
 replace string

**NOTE:** The values after `string` must be typed in the fields.

string:	variable	Company_URL	value		
regexp:	string	/<[*]>*/gi			
replace:	string				

- 5 Click **Apply** to save your changes.
- 6 Click **Close** to finish your variable settings and save the document.
- 7 Go to the **Barcodes** tab and add a barcodes frame to the document.
- 8 In the **Type** drop-down list, choose **QR Code**.
- 9 In the Variable drop-down list, choose your calculated variable: `Company_URL_TXT`, not the formatted text variable.

- 10 Specify the settings for the QR code as desired and click **Apply**.

The QR barcode is placed on the document and includes the URL without formatting to ensure that the URL functions correctly when scanned.

If you selected the unstripped version of the variable, `Company_URL`, you would see the following code in the value field:

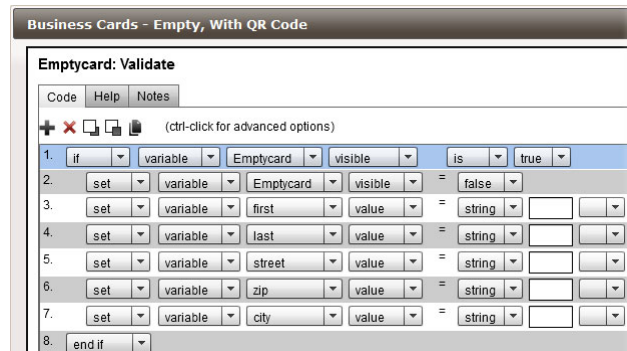
```
Value <TextFlow columnCount="inherit"
columnGap="inherit" columnWidth="inherit"
direction="ltr" fontLookup="embeddedCFF" >
```

The frame for the QR barcode remains empty because the QR code cannot be generated with this formatted variable.

## Clear fields

A variable can be used to clear the fields of a form each time the document is opened for editing.

- Action type: Validate (In the Actions tab, edit Validate.)
- Variable type: any type set to `Visible`
- Action code:



**NOTE:** Make sure that the 'Visible' check box is activated whenever you save your product.

## Insert MIS ID Profile data

Data from a user profile, such as the first name and last name, can automatically be inserted into customizable documents using Autofill Forms, which is limited to the fields that are available in the user's profile. But say you want to retrieve other data, such as a person's job title and personnel ID code, to use in a business card. These could be stored in the MIS ID field: the data is separated with a colon.



Figure 10.117: Additional profile data in the MIS ID field

The screenshot shows a user profile form with the following fields and values:

- Store: SunDiver
- First Name: John
- Last Name: Smith
- E-mail: sfdemo@agfa.com
- MIS ID: Marketing Manager:456789 (highlighted with a yellow box)
- Language: English

### ▷ Insert MIS ID profile data

- 1 Create a business card using the Online Editor.
- 2 Add two variables 'title' and 'id' and mark these as *hidden* so they do not show up in the form that the user needs to fill in.
- 3 Insert these two variables in the layout.
- 4 Create a variable called `ASF_USERMISID` and set it to be *visible*. This variable is used to retrieve the data from the MIS ID field of the user profile, so its name must be `ASF_USERMISID`.
- 5 Create an additional variable of any type called **dofirst** which is set to *visible*. This variable will contain the action that does all the work.
- 6 Add a Validate action for the `dofirst` variable. Its syntax is:

```

1 if variable dofirst visible is true
2 set variable dofirst visible = false
3 set variable title value = stringFunctions substring string variable ASF_USERMISID displayValue
4 startindex number 0
5 length stringFunctions indexOf string variable ASF_USERMISID displayValue
6 find string :
7 caseSensitive false
8 set variable id value = stringFunctions substring string variable ASF_USERMISID displayValue
9 startindex stringFunctions indexOf string variable ASF_USERMISID displayValue + number 1
10 find string :
11 caseSensitive false
12 length number 6
13 set variable ASF_USERMISID visible = false
14 end if

```

### How it works

The **dofirst** and ASF\_USERMISID variables initially need to be visible because otherwise the action does not work. Since they should not be visible to the user, the script hides them.

The bulk of the code is for pulling apart ASF\_USERMISID and putting the data in the **title** and **id** variables. In this script it is done using the 'substring' function. For more complex sets of data you can use regular expressions.

The following restrictions apply:

- The MIS ID field is limited to 255 characters.
- If you change the MIS ID field of a user while that user is logged in, the old values remain in use while that user customizes the document.
- Whenever you tweak this document in StoreCenter using the Online Editor, you need to make sure that the **dofirst** and ASF\_USERMISID variables are visible in the form when you save the customizable document. If they are hidden, the script will not work when a user attempts to edit a business card.

## Insert current date

A variable action can be used to automatically insert the current date into a customizable document. Within that action, JavaScript is used to retrieve the date and format it properly.

### Summary

- Action type: Validate (In the Actions tab, edit Validate.)
- Variable: Short text and set to *visible*
- Action code:

```
1 if variable InsertDate visible is true
2 set variable InsertDate visible is false
3 set variable InsertDate value = JavaScript eval long string 'JavaScript code
4 end if
```

### How it works

Create a short text variable called **InsertDate**. Make sure it is visible each time you save the document.

Create a Validate action that contains the action code above.

In the action, this is the code you could use for 'JavaScript code':

```

var d = new Date();

var day = ("0" + d.getDate()).slice(-2);

var month = ("0" + (d.getMonth() + 1)).slice(-2);

var year = d.getFullYear();

return year + "-" + month + "-" + day;

```

Or this JavaScript code which only adds the month and year:

```

return [01,02,03,04,05,06,07,08,09,10,11,12]

[(new Date()).getMonth()] + '-' + (new Date()).getFullYear();

```

## Moving frames using a variable action

A variable action can be used to move a specific text or image frame on a page in a customizable document. This is done by tagging the frame and then changing the x or y coordinate of the frame with that tag:

Select the frame in the document layout. Give it a name using the 'Tag' field in the Objects > Object Location pane.

Here are two examples for changing the x and y coordinates of this frame, based on either the value of a variable or a fixed value:

```

set frame 'frame name' x variable 'var name' value

set frame y number 'value'

```

## Removing trailing carriage returns

An invitation card can contain the address of the event and additional data such as the start and end date. If all of this data is inserted in the same frame and for the address a 'long text' variable is used, you may run into the following problem: if the user enters the street name, number, postal code and city in the address field and presses the ENTER button after typing the city name, the invitation has a blank line of text between the city and the start date of the event.

A variable action can be used to remove such trailing carriage return(s) and other unwanted content. This is done by using the original variable for data entry, copying a cleaned-up version of the content to the second variable and using that second variable in the document:

Assuming 'address' is the name of the forms variable, create a second 'Long Text' variable called 'address\_final'.

Make this variable invisible and insert it in the text frame in the layout.

Add an 'On change' action in the original 'address' variable to replace undesired returns and full stops by a blank string.

- Action code: to remove trailing carriage returns

```
1 set variable address_final value = stringFunctions replaceRegExp string: variable
  address value
2 regexp: string [\r\n]+$
3 replace string <blank>
```

- Action code: to remove trailing carriage returns, other unwanted returns and full stops

```
1 set variable address_final value = stringFunctions replaceRegExp string: variable
  address value
2 regexp: string ^[\r\n]+\.[\r\n]+$
3 replace string <blank>
```

## Capitalize names

If the company style guide states that the first character of first and last names must be uppercase, then a variable action can automatically correct users who are unaware of this rule.

Two variables are required to accomplish the validation and correction. One visible variable that validates the input of the user and another hidden variable that corrects the input of the first variable to the expected format. Only the hidden variable is used in the source code of the text frame in the document.

### variable 1: firstname\_input

- Action type: On change
- Action code:

```
1 declare string temp = stringFunctions toUpperCase string StringFunctions substring
  string variable firstname_input value
2 startIndex number 0
3 length number 1
4 set local temp = local temp & stringFunctions substring string variable firstname_input
  value
5 startIndex number 1
6 length stringFunctions length string variable firstname_input value
7 set variable firstname value = local temp
```

### variable 2: firstname

- Set to “hidden”

## Generate an E-mail Address

When ordering an ID card, users need to fill in their first name and last name. These are stored in the variables `firstname` and `lastname`. The e-mail address needs to be created automatically using these two variables. It consists of the first digit of the first name, a period and then the last name. The '@domain' part of the e-mail address is added using a suffix. All characters must be lower case. If the last name contains spaces these must be converted to a period.

On the ID card, a variable named `email` is used with type set to 'Calculated Field'. The 'Value' action below is used for this `email` variable. It creates a temporary variable named `tmpEmail`, copies the first digit of `firstname` and appends it with a period and the `lastname` variable. Next, all spaces in `tmpEmail` are replaced by periods and all characters are converted to lower case. The result is then returned to the `email` variable.

- Action type: Value
- Variable type: Calculated Field
- Action code:

```
1 declare string tmpEmail =  
2 set local tmpEmail = stringFunctions subString string variable firstname value  
startIndex number 0  
length number 1  
3 set local tmpEmail = local tmpEmail & string . & variable lastname value  
4 set local tmpEmail = stringFunctions replace string local tmpEmail  
find string <space>  
replace string .  
caseSensitive false  
5 set local tmpEmail = stringFunctions toLowerCase string local tmpEmail  
6 return local tmpEmail
```

## Change a Font

In a forms-based document users may need to stylize text by selecting a font from a drop-down menu. Such a menu can be created using a list variable that contains a list of all the fonts you offer to users. It is essential that these fonts are embedded in the original InDesign document that was used to create the customizable product. Below is the code of an action that alternates the font for the paragraph style 'Subtitle' between Arial and Myriad, depending on the choice made in a list variable called 'font'.

- Action type: On Change
- Variable type: List
- Action code:

```

1 if variable font selectedItemName is string Arial
2 set paragraphStyle Subtitle font = font Arial Regular id
3 else if variable font selectedItemName is string Myriad
4 set paragraphStyle Subtitle font = font Myriad Web Pro Regular id
5 end if

```

## Change Typeface for Copy Fitting

Fitting text in a frame (see “Copy Fitting Styles and Style Settings” on page 418) by simply scaling text is not always desirable. An alternative solution is to apply a narrow typeface when a line becomes too long. This switching between a regular and a narrow typeface as the user types the text can be automated with the following action.

For the example below, two fonts are available in the document: Micron-Regular and Micron-Narrow. The text uses a character style called 'Title' and the action changes the typeface of this character style if the user enters more than 25 characters in a variable called 'City'. The 'On Change' action is applied to this variable.

- Action type: On Change
- Action code:

```

1 set characterStyle Title font = font Micron-Regular id
2 if stringFunctions length string variable City value > string 25
3 set characterStyle Title font = font Micron-Narrow id
4 end if

```

## Insert special characters in variables

You must use an action to insert special characters such as a non-breaking space, a tab, a carriage return, etc. in a variable.

For the example below, the user must fill in two fields, var1 and var2. You want to combine both variables in a third variable, var3, with a non-breaking space between var1 and var2. Var3 is defined as a calculated field type of variable. Use the following 'Value' action to combine the variables:

- Action type: Value
- Variable type: Calculated Field
- Action code:

```
1 declare string total = long string
2 set local total = variable var1 value & JavaScript eval script: long string return
  String.fromCharCode(160)
3 set local total = local total & variable var2 value
4 return local total
```

In line 2 `return String.fromCharCode(160)` needs to be entered in the empty field for defining the JavaScript string. '160' refers to the UTF-8 code for a non-breaking space. There are other codes that might be useful: use 9 for a horizontal tab, 13 for a carriage return and 173 for a soft hyphen.

## Switch between oldstyle and lining typefaces for numerals

Some typefaces include two different styles for numerals: oldstyle and lining. You choose the style by typing either upper case or lower case numbers. If the regular lower case numbers are used, oldstyle numbers are displayed. If upper case numbers are used, then the numbers are lined.

The action below explains how you can make sure the address on a business card uses both upper and lower case characters for the street name but only upper case characters for all numbers.

- Create two variables for handling the address. The first variable is a long string type variable. In the script below it is called `fcaddress_INPUT`. This variable is to enter an address in the form. The second variable is called `fcaddress` and it is of the type Calculated Field. This variable is set to be invisible in the form because it is used to insert the correctly styled address in the business card.
- Define a Value Action for the `fcaddress` variable.
- Action code:

1.	declare	string	upper0	=	JavaScript	eval	script	long string	return String.fromCharCode(57778);
2.	declare	string	upper1	=	JavaScript	eval	script	long string	return String.fromCharCode(57779);
3.	declare	string	upper2	=	JavaScript	eval	script	long string	return String.fromCharCode(57780);
4.	declare	string	upper3	=	JavaScript	eval	script	long string	return String.fromCharCode(57781);
5.	declare	string	upper4	=	JavaScript	eval	script	long string	return String.fromCharCode(57782);
6.	declare	string	upper5	=	JavaScript	eval	script	long string	return String.fromCharCode(57783);
7.	declare	string	upper6	=	JavaScript	eval	script	long string	return String.fromCharCode(57784);
8.	declare	string	upper7	=	JavaScript	eval	script	long string	return String.fromCharCode(57785);
9.	declare	string	upper8	=	JavaScript	eval	script	long string	return String.fromCharCode(57786);
10.	declare	string	upper9	=	JavaScript	eval	script	long string	return String.fromCharCode(57787);
11.	declare	string	tmp	=	variable	fcmaddress_INPUT	value		
12.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/0/g
							replace:	local	upper0
13.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/1/g
							replace:	local	upper1
14.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/2/g
							replace:	local	upper2
15.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/3/g
							replace:	local	upper3
16.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/4/g
							replace:	local	upper4
17.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/5/g
							replace:	local	upper5
18.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/6/g
							replace:	local	upper6
19.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/7/g
							replace:	local	upper7
20.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/8/g
							replace:	local	upper8
21.	set	local	tmp	=	stringFunctions	replaceRegExp	string:	local	tmp
							regexp:	string	/9/g
							replace:	local	upper9
22.	return	local	tmp						

## Switch between languages (multilingual form)

In a multilingual form you can use a variable to switch to the language of the store so the shopper sees the form labels in his own language.

- Create a variable named `translation_keep_visible`. Its type is not important, leave it set to 'Short Text'. Make sure the variable is visible.
- Add an action of the 'Validate' type that contains the code below. In this example it is assumed there are two variables `firstname` and `lastname` that need their display name or label translated to French and German



### ■ Action code:

```

1 if variable translation_keep_visible visible is true
2 set variable translation_keep_visible visible = false
3 declare string language = document languageName
4 if local language is string FR
5 set variable firstname displayName = string Prénom
6 set variable lastname displayName = string Nom
7 end if
8 if local language is string DE
9 set variable firstname displayName = string Vorname
10 set variable lastname displayName = string Familienname
11 end if
12 end if

```

## Compare date variables

You can compare a date variable with other date variables or string variables formatted as `YYYY/MM/DD`.

The screenshot shows a configuration interface for action code. It consists of several rows of controls:

- Row 1: A dropdown menu set to 'declare', followed by a dropdown for 'date', a dropdown for 'localDate', an equals sign, a dropdown for 'date', and a text input field containing '12/31/2021'.
- Row 2: An 'if' dropdown, a 'variable' dropdown, a 'Campaign date' dropdown, a 'value' dropdown, a greater-than sign, a 'local' dropdown, and a 'localDate' dropdown.
- Row 3: A 'set' dropdown, a 'layer' dropdown, a 'Layer 2022' dropdown, a 'visible' dropdown, an equals sign, and a 'true' dropdown.
- Row 4: An 'end if' dropdown.
- Row 5: An 'if' dropdown, a 'variable' dropdown, a 'Campaign date' dropdown, a 'value' dropdown, a greater-than sign, a 'string' dropdown, and a text input field containing '2022/02/01'.
- Row 6: A 'set' dropdown, a 'layer' dropdown, a 'Layer 2022 SPE...' dropdown, a 'visible' dropdown, an equals sign, and a 'true' dropdown.
- Row 7: An 'end if' dropdown.

## Shortcuts

To	Press
Select a frame that is hidden by another frame (cycle through stacked layers)	CTRL + click
Undo the last change	CTRL + Z
Redo the last change	CTRL + Y
Copy selected frame, text	CTRL + C
Paste selected frame, text	CTRL + V

## Use an Excel file for Autofill

In products like business cards or promotional posters, shoppers may want to fill in data that are already available elsewhere, for example, a list of employees with their name, job title and contact details. The autofill feature allows you to link a spreadsheet containing data to a customizable product. This way shoppers only need to select a record and the details are inserted automatically. This feature can also be used to automatically insert product specifications and prices in a sales document or populate data sheets, saving time, reducing the risk of errors, and eliminating typos. This is done by uploading an Excel file, which works together with the uploaded STOREFRONT package, when you create your customizable product.

### ▶ Link a file with data for autofill

- 1 Start the wizard to create a customizable product. See “Creating Products” on page 157.
- 2 In the Uploaded Files window, go to the **Data** panel and download one of two Excel templates:
  - without Identifier column: shoppers will see the data present in the first column of the Excel file
  - with Identifier column: shoppers will see the data present in the ASF\_IDENTIFIER column
- 3 Enter the data in one of the above templates (in Excel).

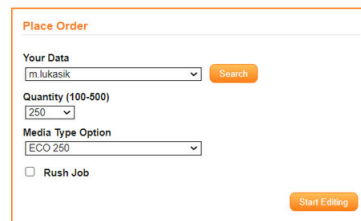
---

**NOTE:** Sheets with up to 1000 rows are supported.

---

- 4 Upload the populated file using the **Choose File** button and click the **Validate File** button to check that the file has been completed correctly.

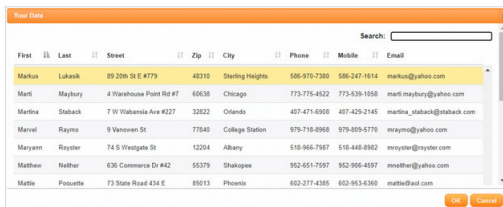
Shoppers can now use the data when ordering the customizable product.



The screenshot shows a 'Place Order' form with the following fields and options:

- Your Data:** A dropdown menu with 'm.lukasik' selected and a 'Search' button.
- Quantity (100-500):** A dropdown menu with '250' selected.
- Media Type Option:** A dropdown menu with 'ECO 250' selected.
- Rush Job
- Start Editing** button

Clicking Search displays the entire list which can be filtered using the Search box.



The screenshot shows a window titled "Your Data" with a search bar at the top right. Below the search bar is a table with the following columns: First, Last, Street, Zip, City, Phone, Mobile, and Email. The table contains seven rows of data, with the first row highlighted in yellow.

First	Last	Street	Zip	City	Phone	Mobile	Email
Markus	Luskak	89 26th St E #779	48310	Sterling Heights	586-970-7360	586-247-1614	markus@yahoo.com
Marti	Maybury	4 Warehouse Point Rd #7	60638	Chicago	773-776-4522	773-536-1658	marti.maybury@yahoo.com
Martina	Staback	7 W Wabasha Ave #227	32822	Orlando	407-421-6908	407-429-2145	martina_staback@staback.com
Marvel	Rayme	9 Vanowen St	37848	College Station	979-718-8968	979-809-5770	mrayme@yahoo.com
Maryann	Reyster	74 S Westgate St	12204	Albany	518-966-7987	518-448-8982	maryann@reyster.com
Matthew	Neither	638 Commerce Dr #42	55379	Shakopee	952-451-7597	952-906-4597	mneither@yahoo.com
Mattie	Provette	73 Stone Road 434 E	85013	Phoenix	602-277-4385	602-953-8360	mattie@aol.com

At the bottom right of the window, there are two buttons: "OK" and "Cancel".

## Customizable Product with User-Definable Size

A shopper may want to use the Online Editor to create documents from scratch and not use a predefined size. This is possible for products that use the *Unbound flat - Variable Size* template base type, e.g. for posters, signs and cards. You can add content to the document and make it scale or move with the applied document size by using the Dynamic Layout settings (see “Dynamic Layout Function Formulas” on page 398).

### ▶ Create a Customizable Product with user-definable size

- 1 Create an InDesign document that contains a single blank page. Ideally the page size matches the most popular size shoppers will order, but this is not a requirement.
- 2 Add a text frame that uses all the fonts that you want to make available in the Online Editor and for which you have a license that allows online use. Put this text frame on a hidden layer.
- 3 Create color swatches if you that you want to make these available in the Online Editor. Users will not be able to add their own swatches in the Online Editor.
- 4 You can add content such as images or text frames that will be retained in the Online Editor. Keep in mind that STOREFRONT uses the top-left corner of the document as the point of origin when the source document is cropped or enlarged to the dimensions defined by the user. Use Dynamic Layout Function Formulas to make the content move or scale to the document size.
- 5 Export the InDesign document to a STOREFRONT package. Clear the option to include hidden layers. All the fonts you added to a hidden layer will still be maintained.
- 6 Create a product template with base type ‘Unbound – Flat – Variable Size’.
- 7 To avoid shoppers seeing a blank white rectangle if your document does not contain any image content, create a preview image that shows the shopper what he is buying.

- 8 Create a customizable product using the above-mentioned product template.
- 9 Upload the STOREFRONT Package and Preview Image you created.
- 10 Set the workspace to 'Advanced' or 'Expert' so that shoppers have the creative freedom to personalize the document.

---

**NOTE:** Maximum recommended dimensions: 508 x 508 cm.

---



# Multilingual Storefronts

---

**NOTE:** Some of the procedures in this section are for the Printer Administrator only.

---

The default design components of the storefront are already translated in several languages. However, the actual content of the storefront needs to be translated separately.

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▶ Supported Languages .....	513
▶ Translating Your Content .....	515

# Overview

A multilingual storefront requires that the following components are translated:

- Storefront Pages, including Custom Footer, Shipping Services, Shipping Regions, Payment Methods, Invoice if custom layout is used
- Product Templates (including options and media sizes)
- Categories
- Products

Figure 11.118: Components of a multilingual storefront

The screenshot shows the SunDiver sportsweare storefront with the following components highlighted by numbered circles:

- 1:** User account area: "Bonjour Jean-François", "Votre compte", "Se déconnecter", and a shopping cart icon with "1 élément dans le panier".
- 2:** Main navigation bar: "SUNDIVER", "QUESTIONS FRÉQUENTES", "PROMOTIONS", and a search bar with "Rechercher".
- 3:** Product title and category: "Cartes de visite" under "Papeterie".
- 4:** Order form: "Passer commande" section with "Quantité" (100), "Media type" (ECO 250), "Colors & Sides" (Front Colour - Back Blank), and "Prix total: €9.00".
- 5:** Product specifications: "Spécifications Produit" section including "Dimension papier", "Type de papier", and "Couleurs".
- 6:** Product description: "Détails de l'article" section with "Créez vos cartes de visites personnalisées".

Additional visible elements include a sidebar menu with "Catalogs", "In-Store Decoration", "Promotion", "Papeterie", "O'Neill Specials", "Spring 2012", "Summer 2012", "Autumn 2012", and "Winter 2012".

- 1 Default design components (already translated)
- 2 Page content including links
- 3 Product name and category name
- 4 Product template options in the Place Order box
- 5 Product specifications
- 6 Product description



## Supported Languages

The following languages are currently provided for storefronts:

- Chinese - Simplified
- Chinese - Traditional
- Czech
- Danish
- Dutch
- English (US and British English)
- Faroese
- Finnish
- French
- German
- Italian
- Japanese
- Korean
- Norwegian
- Polish
- Portuguese
- Portuguese (Brazil)
- Russian
- Spanish
- Swedish

Before setting up a multilingual storefront, check that the extra languages you want are supported in the store. The Printer Administrator may need to set the extra languages for the company so they are available for the store.

▷ **Are extra languages supported for the Company?**

The Printer Administrator must check that extra languages have been assigned to a Company.

- 1 On the menu bar, choose **Company** and select a company in the list.
- 2 Click the **Languages** tab.

The Supported Languages for the Company are in the right column and these are the available languages for the stores of this Company.

▷ **Are extra languages available for the store?**

The Company Administrator can check whether extra languages have been assigned to his store.

- 1 On the menu bar, choose **Stores** and select the store in the list.
- 2 Click the **Languages** tab.

The Available Languages column lists the languages supported by the Company. The Supported Languages for the store are in the right column.

If the language you need is not in the Available Languages list, ask your Printer Administrator to add this language to your Company.

# Translating Your Content

If your store supports other languages, the default storefront design components will be translated. However, the content specific to your store needs to be translated separately.

## ▷ Translate Pages, Categories, Products, Custom Footer and Custom Invoice

Page content, category names, product descriptions, store name, etc. are translated in **Store Translations**.


- 1 On the menu bar, choose **Stores**.
- 2 Select the store you want to translate.
- 3 At the bottom of the Store list, click the **Translations** button.



OR, for Administrators

On the menu bar, choose **Advanced > Translations > Store Translation**.

The Store Translation dialog is displayed with a tree structure for each store.

**TIP:** Click the Snap Back button  to navigate from the translation sub-tab to the overview of stores.

- 4 Click the store you want to translate and choose the language you want to translate into (target language) in the drop-down list in the StoreFront Translation pane.

---

**NOTE:** The languages available in the drop-down list depend on the Store set-up.

---

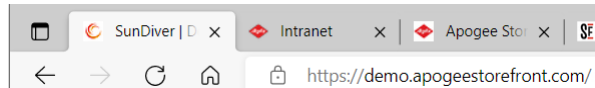
- 5 Enter your translation for Display Name, Fixed Delivery Address Label, and Additional Fee Labels.

- 6 Click **Save** to confirm your changes for the Store Translations.

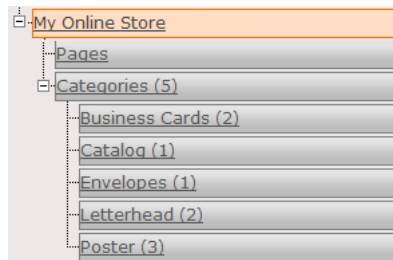


**TIP:** Click the Copy from Source Language (arrow) button to copy the source text to the target box and edit the translation.

This is the name of your storefront that appears in the browser title bar and tabs, on the logon page and in e-mail communications.

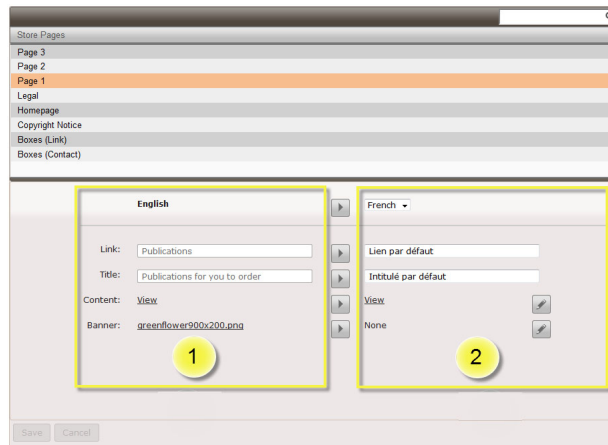


- 7 Expand the Store by clicking the + icon to reveal the Pages and Categories of the selected store.



- 8 Select **Pages** in the tree structure to display an overview of the Store Pages available for translation and then select a Page, e.g. Page 1, in the Store Pages list.

The translation pane is displayed under the Store Pages list.



- 1 Source language
- 2 Target language

- 9 Choose the language you want to translate into (target language) in the drop-down list at the top of the right column.

The default translations for the chosen target language appear in the right column.

- 10 Click in the fields to overtype the default translations or click the **Copy from Source Language** button if you want to keep the original text in these fields.
- 11 Click the **Edit** button to open the HTML WYSIWYG Editor where you can type your translation of the actual content. You can also add images specifically for this language.

**TIP:** Clear all the target translation fields by clicking Cancel.

- 12 If you want the same **Banner** to appear on the translated page, click the **Copy from Source Language** button; if you want to use an alternative image for the Banners, click the **Edit** button and browse to the location of the alternative image.
- 13 You can also use the **Copy all from Source Language** button at the top of the columns to copy all the information from the source language to the target language column.

---

**CAUTION:** Clicking the **Copy all from Source Language** button replaces any translations you may have already typed in the target language column.

---

- 14 Click **Save** to confirm your translations for the selected page and repeat for all pages.

Save

- 15 When the translation of the Pages is completed, select **Categories** in the Stores tree structure.

The list of categories is displayed on the right

- 16 Select each Category in the list to display the translation pane and translate the following field in the required languages:

- Name: the name of the category as used for the title of the storefront Category page and the name of the category on the home page

---

**NOTE:** The Category Image is the same for all languages and cannot be set per language.

---

- 17 Expand **Categories** and click one of the Categories to display all its **Products**.

- 18 Select a Product in the list to display the translation pane and translate the following fields in the required languages:

- Name: the name of the product as used for the title of the storefront Product page and the name of the product on the Category page
- Description
- Detailed description
- Tags: Tags must be translated to be effective. Try to use consistent translations for the various products.

You can type your translation in the various fields or copy the source text to the target fields as described for the pages.

Figure 11.119: Translated product name and description on the Category page



- 19 Click **Save** to confirm your translations for the Product and repeat for all languages and all Products.

Save

In the lists of products and categories, the blue **Translated** icon is displayed in the corresponding language columns. The gray icon indicates that the translation has not been started.

	Czech	Dutch	Finnish	French	German	Italian
	🗨️	✅	🗨️	🗨️	🗨️	🗨️
	🗨️	✅	🗨️	🗨️	🗨️	🗨️
	✅	✅	🗨️	🗨️	🗨️	🗨️
	🗨️	✅	🗨️	🗨️	🗨️	🗨️
	✅	✅	🗨️	🗨️	🗨️	🗨️
	🗨️	🗨️	🗨️	🗨️	🗨️	🗨️
	🗨️	🗨️	🗨️	🗨️	🗨️	🗨️

**NOTE:** Ensure that all fields are translated. The blue Translated icon only indicates that at least one of the fields is translated.

## ▶ Translate Product Options

### Printer Administrator only

Product options are visible in the storefront when visitors view the specifications of a product they may want to order, e.g. the media type, etc.

- 1 On the menu bar, choose **Product Templates**.
- 2 Select the Product Template you want to translate.
- 3 At the bottom of the Product Template list, click the **Translate** button.




OR

On the menu bar, choose **Advanced > Translations > Options Translation**.

The Option Names sub-tab is displayed with the translatable options for the selected Product Template.

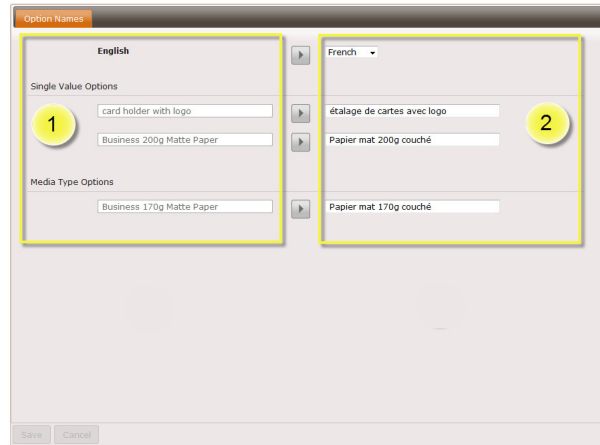
- 4 Choose the language you want to translate into (target language) in the drop-down list at the top of the right column.

**TIP:** Click the Snap Back button  to navigate from the translation sub-tab to the overview of Product Templates.

**NOTE:** The languages you see here in the drop-down list are all the languages available in STOREFRONT.

The option fields for the chosen target language in the right column are empty.

- 5 Click in the fields to type the translations or click the **Copy from Source Language** button if you want to re-use or overtype the original text in these fields.



- 1 Source language
- 2 Target language

- 6 You can also use the **Copy all from Source Language** button at the top of the columns to copy all the information from the source language to the target language column.

**CAUTION:** Clicking the **Copy all from Source Language** button replaces any translations you may have already typed in the target language column.

- 7 Click **Save** to confirm your translations for the options and repeat for all languages and all Product Templates.

Save

- ▶ **Translate Media Sizes, Shipping Services and Regions, Payment Methods, Custom User Attributes**

**Printer Administrator only**



- ◆ On the menu bar, choose **Advanced > Translations > Media Size Translation/Shipping Services Translation/Shipping Regions Translation/Payment Methods Translation/Customer User Attributes Translation.**

The rest of this procedure is the same as for translating Product Options.

- Related topics:
- [Edit a Company on page 47](#)
  - [Languages Tab on page 214](#)











# Icons and Buttons Overview

This section gives an overview of the icons and buttons used in StoreCenter.

▶ Product Types .....	524
▶ Product Status (Product tab) .....	525
▶ Order Status .....	526
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# Product Types

-  Customizable product
-  Variable data product
-  Uploadable product
-  On-Demand product
-  Printed stock product
-  Non-printed product
-  Digital product
-  Product Kit

## Product Status (Product tab)



Unassigned (not in use by a store)



Price list is not complete



Stock alarm level is reached



Product is out of stock



Free shipping: for product with free shipping enabled or for a digital product (shipping does not apply)



The product will become available (scheduling is applied)




















The product will become unavailable (scheduling is applied)



















Expired: the product is no longer available (scheduling is applied)

# Order Status

-  Order or order item to be approved (approval tab)
-  Order has been approved and continued to production (approval tab)
-  Order item has been rejected
-  Order item has been approved
-  Awaiting inventory for Printed Stock or Non-Printed products ordered in backorder
-  Created: incoming but not yet prepared by the system for downloading (Pending tab)
-  Prepared: incoming and all data has been prepared by the system for downloading
-  In production: the item has been downloaded and is being processed (prepress, printing, finishing)
-  To be shipped, i.e. available (stock and non-print products are assigned this status immediately); Product Kit order items with Prepared status
-  Shipped: the order has been shipped to the shopper
-  Order or order item returned
-  Completed: the order has been shipped and requires no further action
-  Canceled: the order or order item has been canceled by an administrator and requires no further action
-  The order item has a comment made by the shopper
-  The order item has workflow feedback information; click the icon to open the workflow feedback
-  The order or order item has encountered a problem that prevents the order from being fulfilled. The issue will be fixed by the STOREFRONT team. Contact your ECO3 Service support or dealer if the issue is not resolved automatically.
-  An order cannot be downloaded to the workflow system or uploaded to the specified FTP server.

## Orders Toolbar Buttons

-  Refresh the list of orders
-  Continue with the selected order to production (send from the Approval tab to the Pending tab)
-  Display the order package slip
-  Display the payment history for the selected order
-  Display details of the selected order or order item
-  Display packing instructions
-  Download the shipping instructions file
-  Generate/Regenerate the invoice (e.g. after modifying the Store invoice presets)
-  Update the payment by bank transfer status
-  Mark the order as completed
-  Mark pending orders as completed (with date range)
-  Mark the order as shipped
-  Cancel the selected order or order items
-  Return the order or order item
-  Approve the selected order item
-  Reject the selected order item



Retry order item upload to FTP (upload to FTP failed)



Download the selected order items



Mark the order or order item as to be shipped (available)



Put the order items in a new, separate shipment (splitting an order)



Resubmit: Reverts the order item status to Prepared so it can be submitted again to the workflow. (Apogee Prepress/Asanti)



Order item customization (order item flags)



Edit the order item in the online editor (for customizable or variable data products)



Download a preview PDF



Download the Variable Data Processing file attached to an order item (Excel file)



Display workflow information (Apogee Prepress/Asanti)



View order list with order items in separate panel



View order items list



## Shipping (Orders tab)



All media needs a weight and thickness definition for this service to work



A file with the shipping instructions can be downloaded



An invoice can be downloaded

# Payment Status



Online payment required (to be captured); only displayed for deferred payments



Online payment in progress (capturing)



The order is paid (captured)



Payment failed



Refunding order



The order is to be refunded



The order is refunded



Payment by bank transfer required: the order is on hold until the status is changed to payment complete



Payment by bank transfer is complete: the payment has been received and the status changed; the order can now be processed



Payment by bank transfer is not required to continue with the order

## Translation Status



Translated



Language supported but content not translated

# Online Editor

## Workspace Edit Tools



Add a text frame



Insert a table



Add an image frame



Add a barcode



Add a shape



Add a rectangle



Add a circle



Add a line

\*

An asterisk indicates that the document has been modified



Pointer: to select a frame



Create a linked text frame



Break linked text frames



Copy the selected text or frame



Paste the selected text or frame



Check the spelling



Save the document



Revert to the last saved version of the document



Browse to the image directories for image variables

## Text Frame



Indicates any possible preflight warning or error in a text or image frame. Clicking this icon in the frame will open the list of preflight warnings/errors.

## Cursor States



Indicates that you can move a selected frame.



Indicates that you can rotate a frame.



Indicates that you can resize a frame.

## Inline Toolbar



Hides the inline toolbar.



Edit text mode.



Edit frame mode.



Crops an image.



Flips the object back to its original orientation.



Flips horizontally.



Flips vertically.



Flips horizontally and vertically.



Brings the frame to the front.



Brings the frame forward.



Sends the frame back.



Sends the frame to the back.



Deletes the frame.



If the inline toolbar is hidden, click the Show Inline Toolbar button in the top left corner of the workspace.

## Workspace Navigation and View



Creates a low-resolution PDF of the document for previewing purposes.



Shows/hides bleed and margins.



Show/hides the Help layer (if created for the current document).



View the document as a flipbook.



Rotate document counter-clockwise (preview only).



Rotate document clockwise (preview only).



Show/hide source of all text frames



Zoom the document so it fits the workspace width.



Zoom the document so it fits the workspace height.



Zoom to fit the document in the workspace window.

## Create Variables Tools



Creates a new variable and adds it to the Variables list.



Deletes the selected variable from the Variables list.



Moves the variable up in the Variables list.



Moves the variable down in the Variables list.



Creates a duplicate of the selected variable and adds it to the Variables list.



Opens the Variables Settings editor.

## Action Editor Tools



Creates a new line of code for the variable action. Hold down CTRL/CMD to add multiple empty lines below the current line.



Deletes the selected code line. Hold down CTRL/CMD to delete multiple empty lines below the current line.



Moves the code line up in the action editor. Hold down CTRL/CMD to move a line: one up, one down; to the top, bottom; x times up relative to the current position; to a specified line number.



Moves the code line down in the action editor. Hold down CTRL/CMD to move a line: one up, one down; to the top, bottom; x times down relative to the current position; to a specified line number.



Creates a duplicate of the selected code line immediately under the selected line. Hold down CTRL/CMD to duplicate one or multiple lines: one up, one down; to the top, bottom; x times down relative to the current position; to a specified line number.

## Edit Path Toolbar (Shapes)



Select an anchor point to move it.



Add an anchor point: Position the cursor on the path and click to add a new anchor point.



Remove an anchor point: Position the cursor on an anchor point and click to remove it.



Convert an anchor point: Position the cursor on an anchor point and drag it to add a Bézier handle. Double-clicking an anchor point that already has Bézier handles converts it into a regular anchor point.

## Layers List - Status



Help layer



Locked layer



Opens the Layer Settings editor.



# Troubleshooting

The purpose of this section is to help you troubleshoot issues that arise when working in StoreCenter or when a shopper places orders on the storefronts.

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▶ Converter Preflight Messages .....	539
▶ Shopper Issues .....	559
▶ E-mail Issues .....	560
▶ Service Status .....	561

## Converter Issues

These issues are related to using the STOREFRONT Converter plug-in.

▷ **Error message: 'The extension 'Apogee StoreFront Converter' does not contain valid signature'**

This message may appear during the installation of the STOREFRONT Converter plug-in. Two causes are possible:

- The Adobe Extension Manager may be outdated. Go to [https://www.adobe.com/exchange/em\\_download/](https://www.adobe.com/exchange/em_download/) to download the most recent version of the Extension Manager and install it. Take into account that some plug-ins block the auto-updater of Adobe. A manual update may be the only way of making sure you have the latest version of the Adobe Extension Manager installed.
- You may be trying to install an outdated version of the Apogee StoreFront Converter plug-in. Download the most recent version in StoreCenter, by clicking the *Download Plug-in* link in the left part of StoreCenter navigation bar.

▷ **'Error #1009' message when exporting an InDesign document**

When exporting an InDesign document to a StoreFront Package, the process stops with a '1009' error message if there are missing fonts in either the InDesign document or any of its embedded files. To avoid this notification, make sure all fonts are loaded and export the document again.

▷ **Fonts shown in the Online Editor are not the same as those of the original InDesign document**

To solve this problem you must make sure the computer on which InDesign is running has full access to all the fonts used in the document. Sometimes the STOREFRONT Converter doesn't have the same access rights as InDesign.

Add the fonts to the InDesign Fonts folder inside the InDesign application folder. Now create an InDesign package and check if all the fonts are present in the Fonts folder included in this package. If so, use this InDesign package to create the STOREFRONT package.

If this doesn't remedy the problem, try installing the fonts in your operating system and create a STOREFRONT package again.

## Converter Preflight Messages

The preflight engine which is incorporated in the Apogee StoreFront Converter plug-in for Adobe InDesign checks if a document uses functions that are not supported by the Online Editor. Below is a list of possible warnings and errors that it can report. There are two types of messages:

- **Warnings:** These can be ignored if you are willing to accept that the layout in the Online Editor will be different from that of the original InDesign document. It is recommended however to cancel the export process, adapt the layout of the InDesign document and then export the file again to create a StoreFront Package.
- **Errors:** These need to be solved first before you can create the StoreFront Package.

Related topics: 

- [STOREFRONT Live Preflight on page 343](#)

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
align_to_base-line_grid	warning	TextFrame with align to baseline grid and no top justification	The Editor only supports BaseLine Grid Alignment for text frames with a vertical justification set to top.		
cap_to_small_cap	warning	Small caps used	Small caps is used in the text. The Editor only supports uppercase or lowercase letters only.	Use All Caps instead.	"Remove the small caps formatting. The text will result in uppercase and lowercase letters, depending on how you typed it. This fix preserve the original text digits and formatting.Simulate small caps with caps letters reduced by a percentage. The percentage used is defined in the InDesign preferences. This fix tries to preserve the appearance of the text, but will change some formatting parameters."

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
cell_fillTint	warning	Cell tint	A cell is filled with a color tint (less than 100%). Only 100% tint is supported for cells.	Set the tint to 100% or create a specific color for this cell.	Set the fill of the cell to 100%. The appearance of the cell will change. No other colors will be modified in the document. Calculate a specific color for this cell. The appearance of the cell is preserved. In some cases a new Swatch could be created.
cell_textRotation	warning	Text Rotation in cell	The text of the cell is rotated using the Text Rotation option. This is not supported by the StoreFront Editor.	Set the Text Rotation to 0? in the Cell Options window.	Set the Text Rotation to 0?
character_kerning	warning	Custom kerning	"A custom kerning value is used between letters. Custom kerning is not supported in the online editor, and will be ignored during the conversion."	"Set the kerning to Metric, or try to achieve the same result using tracking."	"Remove any custom kerning value. The spacing between letters will be reset to the default value. This is the cleanest way, as any other formatting values will be untouched. Try to reproduce the same result using kerning instead of tracking. This will preserve the appearance of the text, but a lot of local tracking formatting will be applied, resulting in a less manageable text."
color_too_many	warning	Too many swatches	"There are %0% swatches. A large amount of swatches has negative impact on the performance of the online editor. Usually this is caused by a large color library loaded in the document, which aren't really used. Removing unused colors can make a difference for performance."	"In the Swatches panel menu, execute the 'Select All Unused' command, then delete those unused swatches."	Remove the unused swatches from the document.

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
color_wrong_space	error	Unsupported color space (%0%): %1%	"Only CMYK, RGB and Lab colors are supported"		
corner_mismatch	warning	Different corners	The frame has different corner radius: the top left corner radius will be used during the conversion. The corner radius should be the same for every corner.	Set the same corner radius the Corner options panel from the Object menu.	"Apply the same radius to every corner, using the value from the top left corner. This solution is the safest and will preserve the geometry of the object. Convert the item to outlines. This will preserve the design, but will transform the object to shape with loss of layout flexibility."
diagonal_Lines	warning	Diagonal lines in cell	The Diagonal line formatting is used in the cell. Diagonal lines cells will be ignored by Store-Front.	Remove the diagonal line from the cell.	Remove the diagonal line from the cell.
different_borders	warning	Table cell with different borders	The cell has different borders setting. The online editor only supports a single border setting for table cells. Adobe InDesign tables and Store-Front Editor tables uses different technologies: a perfect conversion is possible with a little compromise.	"Use the same settings for every border of the cell. A well designed table for optimal Store-Front conversion should have only one kind of border. If you need more refined design, please consider to draw the table in background and create standard text frame on top."	"Set the same border to any side of the cell, using the formatting of the TOP border. Set the same border to any side of the cell, using the formatting of the RIGHT border. Set the same border to any side of the cell, using the formatting of the BOTTOM border. Set the same border to any side of the cell, using the formatting of the LEFT border."
different_tabLeader	warning	Tab leader characters	A paragraph contains different tab leader characters. The same tab leader character can be used over the paragraph.	Please review the tab leader characters and use the same character for all the tab stops.	Set the same tab leader character for tab stop in the paragraph (when a tab leader character is specified). The first tab leader character will be used.

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
document_fonts	warning	Document fonts	This document is using the Document fonts folder. Document fonts activated directly by Adobe InDesign can give unexpected results during conversion.	Remove or rename the Document fonts folder you find next to the document file. Install the fonts in your system or in your font manager.	
facing_pages	warning	Facing pages	Facing pages is set to false but there are more than one pages on spread.	Use only single pages in this document.	
file_without_extension	error	File without extension: %0%	"The linked image file has no extension. It is probably from an old workflow on Mac use files without an extension (.jpg, .eps). These cannot be uploaded to the Windows Server."	Rename the file and include the proper extension.	
first_line_alignment	warning	First Line Only alignment	The paragraph has the Align to Grid set to First Line Only. The paragraph will be fully aligned to the baseline grid.	Use the All lines alignment option.	
firstBaselineOffset	warning	First baseline offset	The offset of the first baseline of the frame is not Ascent. Only Ascent is supported as by the StoreFront Editor.	Set the offset to Ascent using the panel 'Text Frame option' from the Object menu. An adjustment of the layout could be required.	Set the first baseline offset to Ascent.

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
flip_inLine	warning	Flipped inline image	An image anchored in the text is flipped horizontally or vertically. The flipped image content may not be exported correctly. Please check after uploading.	"Check after uploading to StoreFront Editor. To avoid problems remove the flipping attribute, and flip the content of the image using Apple Preview, Adobe Photoshop or any other image editor."	Remove any flip attribute. The aspect of the image content will change.
font_missing	error	Missing font: '%0%'	The font %0% is used in the document but is not installed on your system.	"Make sure that all fonts are available to InDesign when attempting to import a document. You can find the missing fonts using the 'Find font' panel in the Type menu. Missing fonts are highlighted there, and should be installed either on the System or within the InDesign Fonts directory. Alternatively, you may use the same panel to replace the missing fonts with a version which is available."	

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
font_not_available	error	Font not available: '%0%'	The font %0% is used in the document but is not correctly installed on your system.	"Make sure that all fonts are available to InDesign when attempting to import a document. You can manage fonts using the 'Find font' panel in the Type menu. Missing or corrupted fonts are highlighted there, and should be installed either on the System or within the InDesign Fonts directory. Alternatively, you may use the same panel to replace the fonts with a version which is available."	
font_not_supported	error	Font not supported: '%0%'	The font %0% is a %1% format and it's not supported. Only OpenType or TrueType original fonts are supported in the StoreFront Editor.	Replace the font with either a TrueType or OpenType version. You can manage fonts using the 'Find font' panel in the Type menu. The quality of the font is highly important for the conversion result.	
font_without_extension	error	Font without extension: %0%	"The source file of the font %0% has no extension. Certain older workflows on Mac still use fonts without an extension ('.otf', '.ttf', ...). These cannot be uploaded to the Windows Server."	You should either provide an extension for the font or replace it with an OpenType or TrueType alternative. You can manage fonts using the 'Find font' panel in the Type menu. The quality of the font is highly important for the conversion result.	



Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
frame_content_ef-fects	warning	Content Unsup-ported effects	One or more content unsupported effects are applied to this frame. Only Drop shadow is sup-ported in the Store-Front Editor. Unsupported effects will be ignored during the conver-sion process.	Disable the content unsupported effects. You can manage the effects applied to a frame selecting 'Effects' in the Object menu.	Remove all the unsupported effects. The aspect of the image content will change. Any other attribute will be pre-served.
frame_effects	warning	Unsupported effects	One or more unsupported effects are applied to this frame. Only Drop shadow is sup-ported in the Store-Front Editor. Unsupported effects will be ignored during the conver-sion process.	Disable the unsupported effects. You can manage the effects applied to a frame selecting 'Effects' in the Object menu.	Remove all the unsupported effects effect. The aspect of the image content will change. Any other attribute will be preserved.
frame_fill_effects	warning	Fill Unsupported effects	One or more fill unsupported effects are applied to this frame. Only Drop shadow is sup-ported in the Store-Front Editor. Unsupported effects will be ignored during the conver-sion process.	Disable the fill unsupported effects. You can manage the effects applied to a frame selecting 'Effects' in the Object menu.	Remove all the unsupported effects. The aspect of the frame content will change. Any other attribute will be pre-served.
frame_scaled	warning	Frame scaled	The frame is scaled to a percentage different from 100%. Scaling of frames is not supported in the StoreFront Editor.	Use 'Redefine Scaling As 100%' from the Transform or Control panel to reset the scaling percentages to 100%. You may also set 'Adjust Scaling Percentage' to off in the General Preferences of Adobe InDesign.	"Redefine scaling to 100% for this object. The aspect, size and geometry of the object will be preserved.Redefine scaling to 100% for this object and for any nested object (shapes anchored in the text, shapes pasted into the object, etc.). The aspect, size and geometry of all objects will be preserved."

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
frame_sheared	warning	Frame with shear	"Shearing is applied to the frame, and is not supported by the StoreFront Editor."	Set the shear value to 0 or design the object from scratch.	"Remove the shear effect by setting the shear value to 0. This solution will preserve the native the original structure of the object.Convert the item to outlines. This will preserve the design, but will transform the object to shape with loss of layout flexibility. Conversion to outline is not available when the object is grouped, nested or anchored in text."
frame_stroke_effects	warning	Stroke Unsupported effects	One or more stroke unsupported effects are applied to this frame. Only Drop shadow is supported in the StoreFront Editor. Unsupported effects will be ignored during the conversion process.	Disable the stroke unsupported effects. You can manage the effects applied to a frame selecting 'Effects' in the Object menu.	Remove all the unsupported effects. The aspect of the image content will change. Any other attribute will be preserved.
gradient_multiple_stops	warning	Too many gradient stops in %0%	The swatch %0% has %1% gradient stops. Only two gradient stops are supported in the StoreFront Editor.	Edit the gradient and remove any gradient stop except the first and the last.	Remove the incompatible gradient stops. Only the first and the last gradient stops will be preserved
gradient_stroke	warning	Gradient stroke color	The frame has a gradient applied to the stroke. Stroke color cannot be gradients in the StoreFront Editor. This color will be converted to black during import.	Apply a solid color to the stroke.	Set the stroke color to [Black]Set the stroke color to [None]
gradient_text_fill	warning	Text with gradient fill	A gradient is applied to the text fill. Only solid colors can be used for texts.	Use a solid color for the text fill.	Set the fill color to [Black]
halfTone_Effect	warning	Halftone effect	An halftone effect is applied to the image. Halftone is not supported in the StoreFront Editor.	Remove halftone effect by applying the [Black] color to the content of the image.	Remove the halftone effect and set the content color to [Black]

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
hasNoNormalBlend-Mode	warning	Blend mode on Text Frame	A blend mode different from Normal is applied on a Text-Frame. This can give unexpected results and will be reset to Normal during the conversion.	"To preserve the blend effect, create a separate rectangle for the background."	Set the Blend Mode to Normal. Generate a separate rectangle on the background. This solution will visually simulate the blend mode on the Text frame: please check the result before convert the document to StoreFront.
hasNoNormalBlend-Mode	warning	Blend mode on text frame	The text frame has blend mode different from Normal. Blend modes on a text frame can give unexpected results.	"Set the blend mode to Normal. To preserve the blend effect, please create a separate rectangle for the background."	"Set the blend mode of the text frame to Normal, and create a separate frame for the background. The layout appearance will be preserved. Set the blend mode of the text frame to Normal. The layout appearance could change."
image_embedded	warning	Embedded link.	A link is embedded into the document. All the images should be linked to an external resource to be uploaded to the StoreFront Editor Server.	Link the image to an external file.	Unembed the image and save it to a temporary location.
image_scaled	warning	Image scaled	The image is scaled to a percentage different from 100%. Scaling of frames is not supported in the StoreFront Editor.	Use 'Redefine Scaling As 100%' from the Transform or Control panel to reset the scaling percentages to 100%. You may also set 'Adjust Scaling Percentage' to off in the General Preferences of Adobe InDesign.	"Redefine scaling to 100% for this object. The aspect, size and geometry of the object will be preserved. Redefine scaling to 100% for this object and for any nested object (shapes anchored in the text, shapes pasted into the object, etc.). The aspect, size and geometry of all objects will be preserved."
inLineObject_position	warning	Unsupported inline settings			
invalid_end_of_line	warning	Unsupported stroke end or start	The Start or End type of the stroke is unsupported. Only plain ends are supported by the StoreFront Editor.	Set stroke End and Start of line to None	Convert the end or start of line to None.

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
invalid_paragraph_alignment	warning	Binding side alignment	The paragraph alignment is relative to the binding side. Only absolute alignment are supported in the StoreFront Editor.	"Use an absolute alignment: Left, Right, Center, Justified"	Set an absolute alignment (left or right) depending on page facing. This will preserve the aspect of the layout. Align to left. Align to right.
invalid_strike-through	warning	Unsupported strike-through	"The text has unsupported strike-through properties. Some strikethrough properties will be ignored. Supported strikethrough properties are: solid stroke type, automatic offset, automatic color."		
invalid_stroke	warning	Unsupported stroke type: '%0%'	The frame has unsupported stroke type. Only solid strokes are supported in the online Editor. The stroke type will be ignored and converted to solid type.	Set the stroke type to Solid.	Convert the stroke type to solid. Any other attribute (like size or color) will be preserved.
invalid_underline	warning	Unsupported underline	"The text has unsupported underline properties. Some underline properties will be ignored. Supported underline properties are: solid stroke type, automatic offset, automatic color."		
kerning_method	warning	Kerning	The text has custom or Optical kerning. Only Metric kerning is supported by the StoreFront Editor.	Set the kerning method to Metrics.	Set the kerning method to Metrics.

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
max_errors	error	Too many errors	The InDesign document contains %0% or more errors. This document can't be converted to a StoreFront document. Only the first %0% errors are listed.	Please start to fix some errors before continuing.	
max_warnings	warning	Too many warnings	The InDesign document contains %0% or more warnings. This could result in a bad conversion. Only the first %0% warnings are listed.	Please consider to fix some warnings before the conversion.	
missing_link	error	Missing link: %0%	The original linked file '%0%' is missing. All links must be available to InDesign before exporting the document.	Update or replace the missing file using the Links panel from the Window menu. Missing links are highlighted in the panel.	
multiple_page_sizes	warning	Multiple page sizes	Pages with different sizes are found in the document. The size in Document Setup is used for all pages.	Remove or resize the pages that differs from the base document size.	
nested_frames	warning	Nested frames	"The object contains nested frames, pasted into it. Nested frames may not import correctly."	Create simple object without nested frames. The Pathfinder panel can help to transform the shapes.	

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
nested_Style	warning	Nested styles in '%0%'	Nested style are used in the Paragraph style '%0%'. This can give unexpected results in the conversion.	Use character styles instead as well as local text formatting.	"Replace nested styles with plain Character styles. This will parse all the paragraphs using this Paragraph style. The appearance of the text will be preserved, but please check the result after this fix. Nested style instruction will also be removed from the Paragraph style. This is one of the most intelligent fix, enjoy it! Just remove the nested style instruction from the Paragraph style. The Paragraph style will be clean, but the text appearance on the page will change."
overload	info	Overload	The objects you selected are too much for a fast live preflight. The preflight has stopped.		
paragraph_with_dropcaps	warning	Paragraph with dropcap	A dropcap is used in this paragraph. Dropcaps are not supported in the StoreFront Editor.	"Use a separate frame for the dropcap, and format it with local formatting."	"Replace the drop cap with a separate text frame. The appearance of the text will be preserved, but please check the result after this fix. Dropcap instruction will also be removed from the paragraph settings. Just remove the drop cap instruction from the paragraph. The paragraph will be clean, but the text appearance on the page will change."
paragraphStyle_dropCast	warning	Drop cap used in Paragraph Style %0%	The paragraph style '%0%' uses drop caps. Drop caps are not supported by the StoreFront Editor and can give unexpected results.	"Use a separate frame for the dropcap, and format it with local formatting"	"Just remove the drop cap instruction from the Paragraph style. The Paragraph style will be clean, but the text appearance on the page will change."

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
pasted_image_data	error	Pasted image	The image has been pasted directly in InDesign and has no link. Pasted images can't be extracted and can't be imported in Store-Front.	Find the original image file and link it using File > Place	Remove the image. Select the original image file and link it to the document. This will replace the image.
paths_too_many	warning	Large amount of shapes/paths (%0%).	A large amount of shapes/complex paths may have a negative impact on online performance.	In many cases these paths are not required to be editable objects. You can move these items to a locked layer.	
right_to_left_paragraph	warning	Right to left text direction	The paragraph is formatted with Right to left text direction. This can give unexpected result as the StoreFront Editor supports only western languages.	Use the Left to right direction for texts.	"Set the text direction to Left to right. The appearance of the text on the page may change, please review it"
stroke_nonStroke-Combination	warning	Combination of text with and without stroke	"In a single text frame, only one kind of stroke is admitted."	Use a single setting for text stroke throughout the entire text frame	"Unify the text stroke for this frame, using the aspect of the first occurrence. Remove text stroke for the entire text frame"
table_and_cell_style	warning	Table or Cell with style %0% applied	"Style %0% is applied to the Table or Cell, and is not supported by the StoreFront Editor."		
table_header_and_footer	warning	Table with header or footer rows	"%0% %1% rows is applied to the Table, and is not supported by the Store-Front Editor."		
table_not_align_to_left	warning	Table with alignment different from left align	Apply to table left align		

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
table_on_multiple_frame	warning	Table overlapping frames or columns	A table should be entirely contained in a single column. Table flowing between columns (or frames) can give unexpected result in the StoreFront Editor.	"Put the table inside a single column, or break the table in two or more parts."	
text_on_a_path	warning	Type on a Path	Type on a Path requires a complex conversion process to be reproduced in the StoreFront Editor. The conversion of some properties is not guaranteed.	Please check the appearance of the text in the StoreFront Editor after conversion.	
text_rotated	warning	Text with rotation	The text has rotation applied to individual characters. This is not supported in the StoreFront Editor.	Can't be fixed manually. Please use the 'Fix it for me' function	Set text rotation to 0?
text_scaled	warning	Text with scaling	The text is scaled in width and/or height. Scaled text is not supported in the StoreFront Editor.	Set the text scaling to 100%.	"Set text scale to 100%. The appearance of the text will change. Convert the frame to outlines. This solution must be used only on very short texts with a little amount of letters. The appearance is preserved, but the text will not be editable in StoreFront Editor."
text_skewed	warning	Text with skewing	The text is skewed. Skewed text is not supported in the StoreFront Editor.	Set the text skew to 0?.	"Set text skew to 0?. The appearance of the text will change. Convert the frame to outlines. This solution must be used only on very short texts with a little amount of letters. The appearance is preserved, but the text will not be editable in StoreFront Editor."



Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
text_stroke	warning	Text with stroke	"While texts with stroke can be imported, this is performed for the entire text frame, rather than for individual text ranges. The first character of the text frame in InDesign is used for this"		
textframe_overflows	warning	Text overflow	The text frame has text in overflow	"Enlarge the text frame, or add new frames to the text frame sequence. You can also use 'Fit Frame to content' in the Object menu."	Fit the text frame to the text contained
textframe_spacing	warning	Low margins on text frame	Small differences in text spacing between InDesign and the Editor may result in a text frame being placed in overflow in the Editor even though the text may be visible in InDesign. You may want to enlarge the text frame so that there is less chance of this happening		
textframe_vertical_align	warning	Vertical alignment	The text frame has the Vertical alignment not set to 'top'. It may render differently in the Editor.	Set the Vertical alignment to 'Top'. You may have to adjust the frame position to preserve the layout.	"Set the vertical alignment to 'Top' and try to adjust the frame position in order to preserve the layout appearance. If the vertical alignment is set to 'Justify', this could give unexpected results. Set the vertical alignment to 'Top'. This will preserve the object geometry, but the text will probably flow differently."

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
too_many_frames	warning	Too many frames	The document contains too many frames. This can affect the user experience online and the conversion speed.	"Reduce the number of objects, for example using links for complex graphics."	
unsupported_blendmode	warning	Blend mode: %0%	"The object uses the %0% blend mode, which is unsupported. Supported types are: Normal, Multiply, Darken, Difference, Hardlight, Lighten, Overlay, Screen."	Set the blend mode to one of the supported modes.	Set to Normal Set to Multiply Set to Darken Set to Difference Set to Hardlight Set to Lighten Set to Overlay Set to Screen
unsupported_character	warning	Unsupported character	The text contains an unsupported character. The character could be out of the UTF scope.	Use a character supported by the UTF encoding.	
unsupported_content_blendmode	warning	Content blend mode: %0%	"The object uses the %0% content blend mode, which is unsupported."		Set to Normal
unsupported_corner	warning	Corner type	The object use special corner effect. Only round and square corners are supported.	You can view the corner options applied to a frame using the Object>Corner Options menu.	"Remove the special corners and set them to square corner. This solution is the safest and will preserve the geometry of the object. Convert the item to outlines. This will preserve the design, but will transform the object to shape with loss of layout flexibility."
unsupported_file_type	warning	Unsupported file type	The placed file has format '%0%'. This file cannot be converted to online previews.	"Please convert the image to one of the supported formats: TIFF, JPEG, Adobe Illustrator, PSD, PDF, PNG, GIF."	
unsupported_fill_blendmode	warning	Fill blend mode: %0%	"The object uses the %0% fill blend mode, which is unsupported."		Set to Normal

Table B.3 Preflight Messages in InDesign CC Converter

ItemName	Type	Text	Description	Tip	Fix
unsupported_font-size	warning	Font size	The font is outside the supported size range (1-720 pt).	Change the font size up to 1 point or down to 720 points	"Change the font size to the supported values. Small text will be set to 1 point, big text will be set top 720 points. Text appearance could change, and long text could reflow in the sequences."
unsupported_stroke_blend-mode	warning	Stroke blend mode: %0%	"The object uses the %0% stroke blend mode, which is unsupported."		Set to Normal
unsupported_wrap	warning	Unsupported text wrap	The frame has text wrap set to %0%. Only bounding box wrap is supported at this time. You can view the wrap settings applied to a frame using the Text wrap panel from the Window menu.	Set the text wrap to Bounding box using the Text Wrap panel in the Window menu.	Change the text wrap setting to Bounding box. The layout appearance could change.

Table B.4 Preflight Messages in InDesign CS6 and earlier Converter

ItemName	Message Text	Help
align_to_baseline_grid	Text Frame with align to baseline grid and no top justification	The Editor only supports Baseline Grid Alignment for text frames with a vertical justification set to top.
cap_to_small_cap	Text with 'OpenType All Small Caps' option used	The Editor only supports uppercase or lowercase caps settings
cell_fillTint	Table cell's fill tint not supported	Fill color will be 100%
character_kerning	Characters found with custom kerning	Kerning is not supported in the online editor
color_too_many	Large amount of colors. Try removing unused to increase online performance	"A large amount of colors has negative impact on the performance of an online editor. Usually this is caused by a large color library loaded in the document, which aren't really used. Removing unused colors can make a difference for performance. You can do this by going to the Swatches panel, executing the 'Select All Unused' command, and deleting those from the document."
color_wrong_space	Unsupported color space	Only CMYK, RGB and LAB colors are supported
corner_mismatch	Frame with different settings for corners	"Only a single corner radius is supported in the Editor. This setting is applied from the top left corner in the document which is imported. You can view the corner options applied to a frame using the Object>Corner Options menu."
diagonal_Lines	Table with unsupported diagonal lines	Diagonal lines in table cells will currently be ignored
different_borders	Table cell with different border settings	The online editor only supports a single border setting for table cells (which can be toggled on/off for the four sides separately)
different_tabLeader	Different tab leader characters in paragraph	Only a single tab leader character can be configured for a paragraph in the online editor
file_without_extension	File without extension	Certain older workflows on Mac still use files without an extension ('.jpg', '.eps', ...). These cannot be uploaded to the Windows Server. You should rename the file and include the proper extension.
firstBaselineOffset	First baseline offset is not Ascent	Only Ascent is supported as the first baseline offset option
flip_inLine	Flipped Inline Image frame	The flipped image content may not be exported correctly. Please check after uploading!
font_missing	Missing Font	"Make sure that all fonts are available to InDesign when attempting to import a document. You can find the missing fonts using the Type>Find Font menu item. Missing fonts are highlighted there, and should be installed either on the System or within the InDesign Fonts directory. Alternatively, you may use the same panel to replace the missing fonts with a version which is available."

Table B.4 Preflight Messages in InDesign CS6 and earlier Converter

ItemName	Message Text	Help
font_not_available	Font not available	"Make sure that all fonts are available to InDesign when attempting to import a document. You can find the missing fonts using the Type>Find Font menu item. Missing fonts are highlighted there, and should be installed either on the System or within the InDesign Fonts directory. Alternatively, you may use the same panel to replace the missing fonts with a version which is available."
font_not_supported	Font type not supported	Only OpenType or TrueType fonts are supported in the Editor.
font_without_extension	Font without extension	Certain older workflows on Mac still use fonts without an extension ('.otf', '.ttf', ...). These cannot be uploaded to the Windows Server. You should either provide an extension for the font or replace it with an OpenType or TrueType alternative.
frame_effects	Frame with unsupported applied effect(s)	"Frame effects other than BlendMode are not supported at this time. You can view the effects applied to a frame using the Object>Effects menu."
frame_scaled	Frame with scaling	Scaling of frames is not supported at this time
frame_sheared	Frame with shear	Shearing of frames is not supported at this time
gradient_multiple_stops	Gradient has too many gradient stops	Only two gradient stops are supported in the Editor
gradient_stroke	Frame with gradient stroke color	Stroke color cannot be gradients. This color will be converted to black during import
gradient_text_fill	Text with gradient fill	Only solid colors can be used for texts
halfTone_Effect	Halftone effect applied to image	Remove halftone effect
hasNoNormalBlendMode	Blend modes on a TextFrame can give unexpected results and will be reset to Normal	To preserve the blend effect, please create a separate rectangle for the background
inLineObject_position	Inline Frame will be on the same line of text	
invalid_paragraph_alignment	Paragraphs with unsupported alignment	Alignment to spine is not supported in the online Editor
invalid_stroke	Frame with unsupported stroke type	Only solid strokes are supported in the online Editor
max_results	Stopped checking for: maximum results encountered	More occasions of this warning/error may have occurred, but they are not reported to keep a reasonable overview in the preflight report.
missing_link	Missing Link	"All links must be available to InDesign before exporting the document. You can find the list of links using the Window>Links menu item. Missing links are highlighted in the panel. These should either be replaced by a new file, or updated so they point to the right location."
multiple_page_sizes	Multiple page sizes found in document	While the editor also supports multiple page sizes, these are not imported from the InDesign document. The size in Document Setup is used for all pages
nested_frames	Nested frames may not import correctly	Nested frames may not import correctly

Table B.4 Preflight Messages in InDesign CS6 and earlier Converter

ItemName	Message Text	Help
nested_Style	Paragraph Style Nested styles can give unexpected results	Use character styles (or local formatting) instead
paragraph_with_dropcaps	Paragraph with dropcap settings	Dropcaps are not supported in the online Editor
paragraphStyle_dropCast	Paragraph Style drop cap can give unexpected results	
paths_too_many	Large amount of shapes/paths.	A large amount of shapes/complex paths may have a negative impact on online performance. In many cases these paths are not required to be editable objects, so moving these items to a locked layer may be a good idea.
right_to_left_paragraph	Right to left paragraph direction can have unexpected behavior	Use the same text direction for character and paragraph
ruleAboveOverPrint	Overprint on rules is not support by the editor at this moment, this option will be ignored	
ruleBelowOverPrint	Overprint on rules is not support by the editor at this moment, this option will be ignored	
stroke_nonStrokeCombina- tion	Combination of text with and without stroke in a text frame	Use a single setting for text stroke throughout the entire text frame
table_on_multiple_frame	Table overlapping frames or columns	
table_used	Table used	A table was used in a textframe. These are not yet supported (although they are pretty high on the feature list, and will definitely be added in the future).
text_on_path	Text on a complex path	Only text inside textframes is supported
text_rotated	Text with rotation	Text rotation on individual characters is not supported in the online Editor
text_scaled	Text with scaling	Text scaling is not supported in the online Editor.
text_skewed	Text with skewing	Text cannot be skewed in the online editor
text_stroke	Text with stroke	While texts with stroke can be imported, this is performed for the entire text frame, rather than for individual text ranges. The first character of the text frame in InDesign is used for this
textframe_inline_elements	Text Frame with inline elements	Inline elements are not supported at this time, and will be ignored when exporting the document
textframe_overflows	Text frame in overflow	A text frame was found which has text in overflow (in the InDesign document)
textframe_spacing	Low margins around text frame	"Small differences in text spacing between InDesign and the Editor may result in a text frame being placed in overflow in the Editor even though the text may be visible in InDesign. You may want to enlarge the text frame so that there is less chance of this happening"

Table B.4 Preflight Messages in InDesign CS6 and earlier Converter

ItemName	Message Text	Help
textframe_vertical_align	Frame with vertical alignment not set to 'top'	Text frames with vertical alignment which isn't 'top' may render slightly differently in the Editor
unsupported_blendmode	Unsupported blend mode	Supported types are: normal, multiply, darken, difference, hardlight, lighten, overlay, screen.
unsupported_corner	Frame with unsupported corner type	"Only round and square corners are supported at this time. You can view the corner options applied to a frame using the Object>Corner Options menu."
unsupported_file_type	Unsupported file placed	This file cannot be converted to online previews at this time
unsupported_fontsize	Font size outside of supported range (1-720 pt)	Flash does not support font sizes outside of the range between 1 and 720 points
unsupported_wrap	Frame with unsupported text wrap settings	"Only wrap on the frame's bounding box is supported at this time. You can view the wrap settings applied to a frame using the Window>Text Wrap menu."

## Shopper Issues

Storefront shoppers may encounter the following errors when using a storefront.

### ▷ Error message: 'The content type is not supported'

This message is displayed when a shopper uploads a file for an uploadable product. Two causes are possible:

- The shopper overlooked the drop-down menu at the top of the upload window and attempts to upload a TIFF or JPEG file even though the menu is set for uploading a PDF file.
- The shopper is trying to upload an unsupported file format. An example of this is attempting to upload a JPEG2000 file even though this is not a supported file format.

### ▷ Error validating a variable data product

See "Troubleshooting the variable data upload" on page 393.

### ▷ Troubleshooting orders

See "Troubleshooting Orders" on page 334.

## E-mail Issues

### ▷ Avoid spam issues with Sender Policy Framework

STOREFRONT sends e-mails to users and administrators on behalf of the print service provider or the company that uses a store. To avoid that such e-mails are incorrectly identified as spam, the print service provider or company may want to use Sender Policy Framework (SPF).

SPF is an e-mail validation mechanism that allows administrators to specify which hosts are allowed to send e-mail from a given domain. This is done by creating a specific SPF record in the Domain Name System (DNS).

The following entry should be used for SPF:

- `include:spf-a.agfa.com`

Read this internet *article* to learn more about SPF.

To check the SPF record for your domain, you can use this tool:

<https://mxtoolbox.com/spf.aspx>



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## Service Status

Printer administrators receive notifications in advance about maintenance activities on the STOREFRONT server.



# Configuring Payment Gateways

The security of online payments is ensured by payment gateway services integrated in STOREFRONT. The supported gateway services depend on your location and include Ingenico (Worldline brand), PayPal, Mercado Pago, Stripe, Bambora and Inicis. These systems handle all payment aspects and do not require that credit card data is stored on the STOREFRONT web servers.

You can download the document *Configuring Payment Gateways* which has the latest information on setting up these services. Always check that you have the latest version of this document.



# Third-Party Web Services

This section provides information on useful third-party web services that can be integrated with STOREFRONT and help you improve the efficiency of your storefronts.

▶ TaxCloud Integration .....	566
▶ Google Analytics .....	569

# TaxCloud Integration

Print service providers located in the United States can integrate the online TaxCloud service into their storefronts. This service immediately calculates the sales tax for orders, based on the shipping location (*nexus*) and the location of the shopper, and the TaxCloud Taxability Information Code (TIC).

You can set a default TaxCloud Taxability Information Code (TIC) for all products in a store and if necessary specify a different code when creating your products.

A shopper who is not required to pay sales tax select the **Tax Exempted** check box when checking out the order. Selecting this check box displays a window where the shopper can enter an exemption certification ID.

## *Prerequisites*

- Your place of business is located in the United States of America. Otherwise you will not see the TaxCloud integration panel. See “Payment Methods and Tax” on page 81
- When creating a store, select the **Use TaxCloud for US sales tax calculation** check box. See “General Tab” on page 196.

## ▷ **TaxCloud registration and account set-up**

Follow these steps to implement the TaxCloud integration for your stores. It is recommended that you also read the TaxCloud merchant guide for more details about TaxCloud registration and setting up your account.

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**CAUTION:** Setting up TaxCloud is easy but requires that you fulfill a number of registration conditions. Please visit <https://taxcloud.com/> for more information about the TaxCloud service.

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- 1 Go to <https://taxcloud.com/> to register for TaxCloud.
- 2 Click the **Register Now** button and complete your details, including:
  - your Website Address: Enter the URL of one of your storefronts.
  - Online Marketplace/Commerce Platform: Choose **Other** from the drop-down list.

- 3 Click **Register** and follow the instructions you receive by e-mail to confirm your account and log on to TaxCloud.
- 4 Go to the **Locations** section and click the Add Location button to add a physical location. Follow the instructions to let TaxCloud look up the address.

This physical location is the nexus state where you must collect the tax. This location is used for calculating the tax.

- 5 Click Locations again and highlight your storefront in the table.

At the bottom of the window you'll see that the online service has generated an API ID and an API Key.

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**NOTE:** There is no need to select the Default TIC code here.

---

- 6 Click the **Manage Tax States** button to display a map of the United States and add nexus states (i.e. states where you have offices or are located and you are required by law to collect sales tax) and SSUTA states (i.e. states that have adopted the Streamlined Sales and Use Tax Agreement). Read section 1.5 Where You Want to Collect Sales Tax in the TaxCloud user guide for more information.
- 7 Click the **Bank Information** button to add your bank account. Read section 1.6 Add a Bank Account (Optional) in the TaxCloud user guide for more information.

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**NOTE:** Your bank account must be provided if you selected SSUTA states in the previous step.

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This is all the information you need to provide to get started with the TaxCloud service in STOREFRONT. Setting up Address Verification as described in section 1.8 of the TaxCloud merchant guide is not necessary because STOREFRONT uses the US Postal service for address verification.

### ▷ Integrate Your TaxCloud Account in STOREFRONT

- 1 In StoreCenter, choose **Advanced > Payment Methods and Tax > TaxCloud Integration**.

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**NOTE:** The TaxCloud Integration button is only visible if your location is set to **United States** (mandatory). Choose **Advanced > Production Settings > Production Center** to check your location. You need to sign out and sign back in for this change to take effect.

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- 2 Enter or copy/paste the API ID and an API Key which were generated on the TaxCloud website.
- 3 Click **Save** to confirm your changes.

**Save**

Now you can enter the Default TIC code.

- 4 Choose **General Goods and Services** as the default TIC and click **Save** to confirm your changes.

**Save**

The TIC code is now displayed next to the TIC category.

- 5 Choose **Stores** and select a store. In the **General** tab, select the **Use TaxCloud for US sales tax calculation** to enable sales tax calculation for your store.

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**NOTE:** Repeat for all stores.

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- 6 Click **Save** to confirm your changes.

**Save**

The default TIC code will be used to calculate the sales tax for all items ordered through this store.

If you want to set a different TIC code for a specific product, edit the product in question and select a different TIC code in the product description.

- 7 Now you've activated TaxCloud on your storefront, run a test by actually buying an item.

Once the purchase is finished, the transaction appears:

- on the **Transactions** page on the TaxCloud website
- at the storefront checkout, in the **Secure Payment** tab

- 8 If the test was successful, go back to the **Websites** page and click the **Go Live!** button to promote your test account to a real account which is tracked by the TaxCloud service. TaxCloud now calculates sales tax for orders made on your storefront.

Related topics:

- [Payment Methods and Tax on page 81](#)
- [Creating Products on page 157](#)
- [General Tab on page 196](#)



# Google Analytics

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**NOTE:** This documentation describes the procedures for Google’s Universal Analytics which will be replaced in the short term by Google Analytics 4. Standard Universal Analytics properties will stop processing new hits on July 1, 2023. If you still use Universal Analytics, we recommend that you prepare to switch to Google Analytics 4 going forward.

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Google Analytics is a free web service that allows website owners to monitor traffic on their websites. You can also use Google Analytics with STOREFRONT to track the activities of your storefront visitors. For example:

- How did your visitors find your website?
- Which products are popular?
- How many visits are converted to sales?
- When did a shopper decide to abort a purchase?

If you are serious about your web-to-print activity with public or private storefronts, we recommend that you sign up for an account on the *Google Analytics website*. This is where you generate an Analytics ID that needs to be added to your storefront. Once you have this ID, you can easily insert it on all the pages of your storefront with a single setting in StoreCenter.

## Step 1: Create an Analytics ID

Visit the *Analytics Help Center* for detailed information on setting up Google Analytics.

- 1 Navigate to the *Google Analytics website*.
- 2 Sign in to Google Analytics if you have a Google account, or create a Google account first.
- 3 Click the **Sign Up** button to create a new Analytics account.

---

**NOTE:** If you already have an Analytics account, click **Admin**, select an account, and set up a new property in the existing account.

---

- 4 Complete the New Account form.

- track a Website
  - Google Analytics 4
- 5 In the **Setting up your account** section, enter an account name.
  - 6 In the **Setting up your property** section, set up a new property for this account:
    - Enter a Website Name; this is a name used in Google Analytics to refer to your website.
    - Enter a Website URL: choose `http://` in the drop-down list, and then copy the domain name of your storefront in the adjacent field; you can find the domain name in the General tab: this will be something like `mystore.apogeestorefront.com/storefront` if you are using the default URL, or `mystore.com` if you are using your own domain name.
    - Choose an Industry Category and Reporting Time Zone from the drop-down lists.
  - 7 Click the **Get Tracking ID** button.

Your tracking ID is displayed, for example `UA-12345678-00`.
  - 8 Copy the tracking ID.

## Step 2: Set the Analytics ID in StoreCenter

- 1 In StoreCenter, choose the store you want to monitor and click the **General** tab.
- 2 Click the **Edit** button in the Analytics ID field and paste the ID you obtained on the Google Analytics website in the dialog.
- 3 Navigate back to your Analytics account to add the URL of your storefront to the Referral Exclusion List: choose Admin > Tracking Info > Referral List, and enter the domain name or names listed in the StoreCenter dialog (e.g. `mystore.apogeestorefront.com`). You can read why this is important in the information on the *Analytics Help Center*.
- 4 Save your changes to the store in StoreCenter.

Your storefront is now published with the Analytics ID on every page of the storefront.

**NOTE:** If you change any of these details for this store (Site ID, Custom Domain Name, Payment Method), you must update the Referral Exclusion List in Google Analytics.

### Step 3: Tracking

Once the Analytics ID has been added to your storefront, you are ready to track your visitors on the Google Analytics website. Read the information on the *Analytics Help Center* for getting started with Google Analytics and consulting your traffic statistics. The data provided by STOREFRONT allows you to set up Goals (basic analytics) and Funnels (advanced analytics).

The analytics data refer to the URLs of your storefront. These URLs can be quite complex and consist of programming parameters which are appended to the domain name. The following tables can help you decipher the URLs.

#### URL parts

The following URL parts help you track the actions of a shopper. For example, the `receipt` parameter in the URL indicates that an order has actually been placed.

URL part	Description
/billing-and-review.ep	The second step in the checkout. If a payment gateway is used this is also the third step in the checkout before being redirected to the payment gateway.
/customers/impersonate	Impersonate user page is viewed.
/customers/login	Login page is viewed.
/customers/new	Registration page of public store is viewed.
/order-details.ep	An order's details were viewed via a user's account page.
/shipping.ep	The first step in the checkout.
/view-cart.ep	Cart is viewed. The user can arrive here via several paths, for example by adding a product to his cart or by clicking the cart link at the top-right.
c.*-p1.html	Category page is viewed.
cancel=	This parameter is appended to billing-and-review.ep when a checkout is canceled by the user and he is redirected back to billing-and-review.ep.
error=	This parameter is appended to billing-and-review.ep when a checkout fails and the user is redirected back to billing-and-review.ep.

URL part	Description
product-view.ep prod.*\ .html	Product page is viewed
receipt=	This parameter is appended to order-details.ep when a checkout is completed and the order details are shown.

*Example:*

The shopper has put an item in her shopping cart and proceeds to checkout:

```
https://mystore.apogeestorefront/storefront/view-cart.ep
```

The shopper has placed and finalized the order with ID 1900363:

```
https://mystore.apogeestorefront/storefront/order-
details.ep?oID=1900363&receipt=nopaymentCheckout
```

### Online Editor Events

User interaction in the Online Editor can also be monitored.

**NOTE:** In Google Analytics 4, the STOREFRONT categories and actions in the table below can be used as Event Tracking Parameters in Tag Configuration of Google Analytics Tag Manager.

Description	Category	Action	Label	Value
Start Editing is clicked on product page (data-tid="product-content-addToCart-Cmd". If the editor and document are successfully loaded an editorLoaded event followed by a documentLoaded event will be logged after this event.	product-content	addToCartCmd		
Editor has loaded. A documentLoaded event will be logged next.	product-chili	editorLoaded	product name	time (millisec) to launch the Editor
Document has loaded in the editor. The workspace will be loaded next (not tracked because Chili does not send an event for this).	product-chili	documentLoaded	product name	time (millisec) to launch Editor & load document
Save button is clicked in the editor. When the document has been successfully saved the documentSaved event will be logged.	product-chili	documentSaveCmd	product name	
Document has been saved.	product-chili	documentSaved	product name	
Editor was closed by clicking a bread-crumbs link, back navigation, or closing the window/tab. Unless a documentSaved event was previously logged, the document was not saved before closing the editor.	product-chili	editorClosed	product name	

Description	Category	Action	Label	Value
Go to Shopping Cart button clicked in editor. This closes the editor, prompting the user to save the document if it has not been saved. If the user saves the document, a documentSaved event will be logged after this event. Once the editor is closed an editorClosed event will be logged.	product-chili	editorCloseAnd GoTo-CartCmd	product name	
Edit... link of a product clicked in the shopping cart (data-tid="cart-shopping-Item-editDocumentCmd". If the editor and document are successfully loaded, an editorLoaded event followed by a documentLoaded event will be logged after this event.	cart-shopping-Item	editDocumentCmd		

*Example:*

A shopper has a customizable product in the cart and decides she wants to edit it before proceeding to checkout; this is indicated in the URL with the `editDocument` action:

```
https://mystore.apogeestorefront/storefront/a/shoppingItems/4829947/editDocument
```

### UTM parameters (customized)

You can use UTM parameters to see how a visitor found a URL, and typically to monitor the hit rate of e-mail campaigns. Different types of UTM parameters (`utm_source`, `utm_medium`, `utm_campaign`, etc.) can be added to the URL of links, and these parameters are also visible in Google Analytics. URLs with UTM parameters can easily be created with a tool like Google Campaign URL Builder.

*Example:*

A potential customer clicked a link to your storefront which was sent to her in a newsletter e-mail. The link not only points to a product on the storefront, but also includes 3 UTM parameters which identify the source, medium and campaign name:

```
https://mystore.apogeestorefront/storefront/catalogs/mycatalog/prod0D0078F7_2CDF_7B76_1FC7_52DC94F085B0.html?utm_source=Newsletter_02_2014&utm_medium=email&utm_campaign=teaser
```

### UTM parameters (system)

The STOREFRONT system also uses UTM parameters in the e-mails it generates. You can also monitor this traffic once you have set up Google Analytics.

The following parameters are used:

- `utm_medium=email`

- `utm_source=` identifies the type of e-mail, e.g. `orderConfirmation`
- `utm_campaign=` identifies the object, e.g. `order ID, store, printer account`

*Example:*

```
https://mynewprivatystore.apogeestaging.local/storefront/order-
details.ep?oID=1900679&utm_source=orderConfHtml&utm_me-
dium=email&utm_campaign=02014-
MyStore&cdt=0fM6H1RBPzqdu6QV8GrLZM6dCA7XiJ1tqg0e3zSa
```

## Step 4: Setting Goals and Funnels

Google Analytics allows you to define goals. The primary goal of any store is to convert visitors to buyers, so defining the conversion rate as a goal in Google Analytics is very useful. When defining such a goal:

- Set the goal type to 'Destination'
- The goal destination should be a regular expression that matches this syntax:  
`/storefront/order-details.{1,}receipt={1,}`
- Defining a funnel also makes sense. The suggested setup is:
  - Step 1 has the name 'Cart'. The Screen/Page field is set to `/storefront/view-cart.ep`. It is not required.
  - Step 2 has the name 'Checkout - Shipping'. The Screen/Page field is set to `/storefront/shipping.ep`.
  - Step 3 has the name 'Checkout - Review'. The Screen/Page field is set to `/storefront/billing-and-review.ep`.

Related topics:

- [General Tab on page 196](#)
- [Search Engine Optimization \(SEO\) on page 33](#)
- [Legal Considerations on page 37](#)

# Glossary

This glossary explains key terms and abbreviations used in this documentation.

- Apogee/Asanti STOREFRONT** ECO3' web-to-print solution for printers and print service providers.
- Approver** The role with rights to approve and rejects orders placed by users of the same approval group.
- Breadcrumb** A navigation aid that helps shoppers keep track of their location on the storefront website.
- Capture** The submission of a credit card transaction for processing and settling a payment whereby funds are moved from the bank account of the shopper into that of the merchant.
- Company** A customer or business relation of the Printer or Print Service Provider for whom stores are created in STOREFRONT.
- Company Administrator** The role in a Company with the rights to perform certain actions in the StoreCenter. These actions mainly involve approving and rejecting the orders.
- Constraints** Restrictions defined in the Online Editor to control the extent to which shoppers can customize a customizable product.
- Dashboard** The Dashboard is a page in the StoreCenter that displays statistics for all the stores. The Dashboard is also the landing page when you log on to StoreCenter.
- Deferred payment** When a shopper uses a credit card for a purchase on a storefront with deferred payment method, the payment is postponed until all the order items are shipped.
- Direct payment** When a shopper uses a credit or debit card for a purchase on a storefront with direct payment method, the payment is charged immediately.
- Favicon** A favicon is a small image which appears in the address bar, tabs and favorites bar of the browser.
- GDPR** General Data Protection Regulation: see “GDPR” on page 39.
- Grammage** Weight in grams of a quantity of paper cut to sheets that measure one square meter. Expressed in grams per square meter (g/m<sup>2</sup>).
- JDF** Job Definition Format (JDF) is an extensible, XML-based format that can be used to create job tickets in Apogee Prepress.
- Merchant** The owner of an e-commerce website (payment gateway parlance).

**MIS** Management Information System.

**MJD** Mime packaged job definition format file.

**Online Editor** The editing environment which is opened in StoreCenter and on the storefront to edit customizable products.

**Price List** A price list ideally contains all the prices for all product templates and consequently for all the products of a store.

**Printer Administrator** The role at a Printer or Print Service Provider with the most rights to perform actions in the StoreCenter.

**Printer Operator** The role at a Printer or Print Service Provider with limited rights to perform certain tasks in the StoreCenter (e.g. monitoring and processing orders).

**Printer, Print Service Provider** An organization that uses STOREFRONT to set up stores for themselves or other organizations.

**Resources** Common settings that need to be defined before you can create stores: Product Templates and settings in the Advanced menu.

**SaaS** Software as a Service.

**Shopper** A person who visits a private or public storefront and proceeds to checkout to order items.

**SKU** Stock Keeping Unit

**Snippet** A document placed inside another document in the Online Editor.

**Store** A store in STOREFRONT consists of the web-to-print website and back-end functionality set up by an Administrator in the StoreCenter.

**StoreCenter** The back-end application of STOREFRONT where the stores are created and managed.

**Storefront** A storefront is the front-end, web-to-print website with a dedicated URL where shoppers can order items.

**StoreFront Converter** A STOREFRONT plug-in for Adobe InDesign used to create ZXP packages.

**StoreFront package** A ZIP package that contains the template for a customizable product and which can be edited in the Online Editor. The package is created with the STOREFRONT Converter plug-in from Adobe InDesign documents.

**System Administrator** The administrator of the STOREFRONT system.

**Trim size** The final size of a page after all excess paper and bleed areas have been trimmed off. This is indicated by the trim box in a PDF.

**User** A person who is granted access to a private storefront and who can order items. A person who visits a public storefront and identifies himself at checkout.

**VDP** Variable Data Processing.



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**Visitor** A person who visits a public storefront.

**ZXP** StoreFront Converter package file format. See StoreFront Converter.





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