PRINTSHOP MAIL SUITE

PrintShop Mail Web

Administrator Guide

Copyright Information

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1 Introduction

PrintShop Mail Web is a modern and versatile software package which integrates workflow processes and introduces a whole new way of thinking about your customers and their print jobs!

This section contains answers to the following questions:

- What are the benefits for you and your customers?
- How does a typical PSM Web workflow look like?

1.1 Benefits for you and your customers

PrintShop Mail Web organizes the print flow processes of your customers and integrates these processes seamlessly within your own production environment.

1.1.1 Serve your customers

PrintShop Mail Web gives your customers far more control and flexibility over print production. With PrintShop Mail Web you can better serve your customers by

- Simplifying your customers print order procedure
- Making it possible to create variable data print orders
- Providing a pre-flight and preview capability so your customer can verify what you will print
- Giving your customers the possibility to Print on Demand: create and order print work, 7 days a week, 24 hours a day
- Safeguarding your customers corporate identity
- Providing your customers with web-entrance to the PrintShop Mail Web System that matches the look and feel of their corporate website
- Managing your customers documents, so they always use the latest version
- Costs lowering for your customers due the compact and efficient ordering and production methods
- Addressing each contact in their preferred language

1.1.2 Benefits

The benefits for your organization:

- No training needed
- No need to build your own web application
- Automatic e-mail notification whenever an order is placed on changes status
- Semi-automated quote process
- Customers produce and approve their own soft proofs
- Clear overview of all print orders in your organization and the status they have
- Export data possibilities
- Easy integration into MIS systems using XML
- Cost savings due the compact and efficient ordering and production methods

1.2 Features

PrintShop Mail Web provides you with a state of the art package, enabling you to promote your own company with unique selling points, with increased added value to your customer!

The key features of PrintShop Mail Web are:

- Multi lingual:
  - Chinese (Simplified and Traditional)
  - Dutch
  - English
  - French
  - German
  - Italian
  - Portuguese
  - Russian
  - Spanish
  - Turkish
  - Japanese
- With an option to add additional languages
- Intuitive, easy-to-use web interface
- Free PrintShop Mail design software included
- Automatically generates a web site for each customer
- B2B (Business to Business) as well as B2C (Business to Customer) capabilities
- Order and print PDF documents using the web
- Order and print variable documents using the web
- Simple print order procedure
- Real time preview, preflight and soft-proof
- Support for industry-standard optimized output formats:
  - Optimized Postscript
  - Creo VPS
  - Fiery Freeform
  - PPML/VDX
  - Xerox VIPP
- Extensive user management with custom rights management.

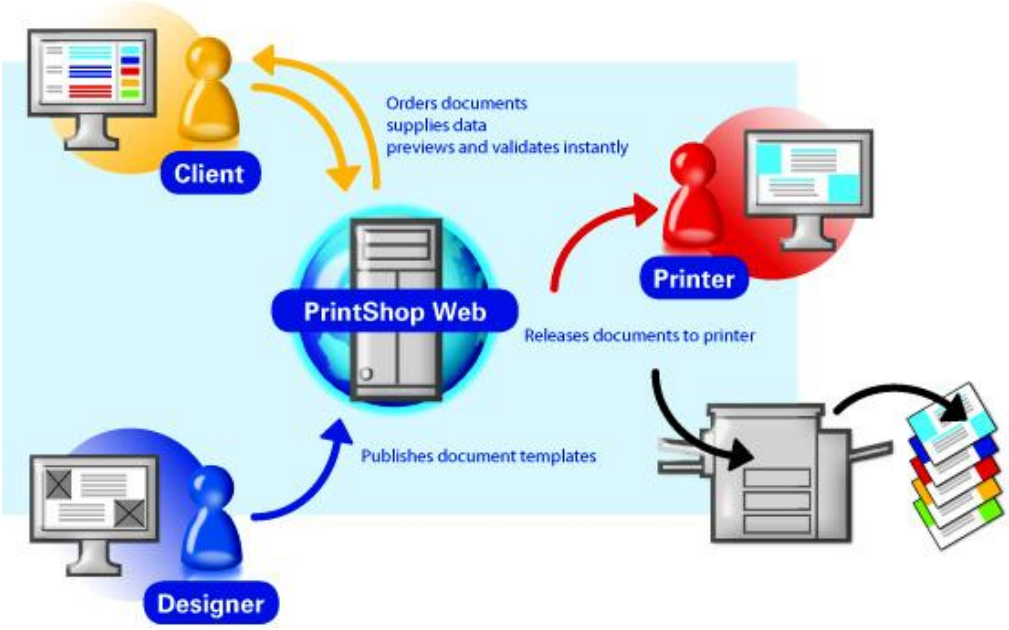
1.3 Key Concepts

To use PrintShop Mail Web effectively, you need to understand a few basic concepts. Read this section if you are new to PrintShop Mail Web or if you need a quick refresher. If you are new to PrintShop Mail Web, we recommend that you read the How to... (Page 11) sections, to familiarize yourself with the individual features of PrintShop Mail Web.

1.3.1 Workflow

The following diagram shows the overall workflow with the following roles:

- **Designer:** The *Designer* produces documents and publishes the documents to the web, taking into account any corporate branding. Designers add companies and subsequently place the documents in a folder specific to each individual company.
- **Production Manager:** The *Production Manager* is able to make modifications to a web form, assigning documents to departments and making documents available to users. The production manager automatically receives an e-mail notification every time an adjustment to the job status is made.
- **Customer:** *Customers* select documents, enter data, connect database-files to documents and order or release print jobs. The *Customers* are able to monitor their print job at any stage during the production process.
- **Operator:** The *Production Manager* or *Operator* places any ordered print jobs in the In-plant folder. The *Operator* prints and on completion dispatches the print jobs. Either the customer or the printer marks the print job as Completed.



The PrintShop Mail Web workflow

1.3.2 User roles

PrintShop Mail Web has two main groups of users:

- Customers
- People within your own organization

Each role has certain privileges assigned to it; therefore assigning a role to users determines not only their level of authority but also the start-up screen they will be able to view when they log in.

PrintShop Mail Web system comes with nine pre defined roles. Five roles are intended for customers, the remaining for people within your own organization. Administrators can create new roles in the *Settings* section. The section provides more information regarding user roles.

Customer roles

Below a list of the predefined customer roles:

- **Customer:** These users can:
  - Retrieve a new password
  - Create and order print jobs
  - Edit job content
  - Request a quote
  - Adjust the job status (on hold and shipping)
  - Request an overview of print jobs
  - Re-order print jobs
  - Search for specific print jobs
- **Customer Plus:** Has the same privileges as the *Customer* and can also:
  - Approve their own print jobs
- **Power User:** Users with this role have the same privileges as the *Customer Plus* role with the following addition:
  - Approve print jobs for users in the same department (or company if there are no departments)
- **Department Manager:** *Department Managers* have control over one or several departments, have the same privileges as power users and can also:
  - Add, assign and delete users within their department(s)
  - Modify details within their department(s)
- **Company Manager:** Have control over one company and its departments, have the same privileges as department managers and can also:
  - Add, assign and delete customers, customers plus, power users, department managers and company managers within the company and within departments
  - Add departments
  - Assign publication types to a department
  - Modify the company, departments and users settings
- **Public Customer:** This role is given to new customers who created an account before proceeding with an order they placed while shopping in a public company (which allows any visitor to use the shopping cart, but requires a logged-in user to proceed with checkout). These users have the lowest functionality. They can:
  - Create and order print jobs
  - Approve their own print jobs

Roles within your organization

Within your own organization it is possible to assign four different user roles (functions), ordered from lowest (less rights) to highest (most rights):

- **Designer:** The *Designer* is responsible for manufacturing and managing the documents and is able to do the following:
  - Add new companies
  - Add new publication types
  - Modify and remove existing publication types
  - Publish documents to PrintShop Mail Web
  - Print "one-off" PrintShop Mail jobs
  - Modify settings of a web form
  - Add operator instructions
- **Operator:** The *Operator* is responsible for taking print jobs in production and is able to:
  - Adjust the job status (to approved, in-plant, shipping or completed)
  - Request an overview of print jobs
  - Preflight print jobs
  - Print PrintShop Mail documents to file
  - Print "one-off" PrintShop Mail jobs
  - Send File upload documents to an output folder
  - Send PrintShop Mail documents to PlanetPress Watch
  - Send print jobs to the printer
  - Re-print a part of a print job
- **Production Manager:** This role is similar to that of an Order Planner. A *Production Manager* is able to perform the following tasks:
  - Adjust the job status (approved, in-plant, shipping, completed and on hold)
  - Request an overview of print jobs
  - Search for specific print jobs
  - Add companies
  - Add, assign and delete customer level users in a company or department
  - Add, assign and delete operators and designers to a company and a department
  - Define publication types within a company
  - Add departments to a company
  - Modify users, department and companies settings
  - Set a price for quote request
  - Add pricing information to publication types and documents
- **Administrator:** The administrator manages all privileges previously mentioned and is able to:
  - Set the Terms and Conditions of the print shop
  - Delete users, departments, companies and documents
  - Change system settings
  - Define output folders
  - Add the companies web design
  - Change the pre defined user roles
  - Add new user roles
  - Connectivity management
  - Job options management
  - Enable/disable printers
  - Add/delete tax rates
  - Add/delete shipping rates
  - Customize the look-and-feel of the e-mail messages

1.3.3 Companies and Departments

A company is an organization that purchases printed material produced by the print shop. Companies may contain one or multiple departments. A department is an organizational unit and are used to define territorial and/or administrative divisions of a company.

1.3.4 Publication types

A publication type is a folder in which template documents of your customers are grouped. These publication type folders can contain multiple documents. For example: a publication type folder to store different language variants of a brochure (e.g. Dutch and English-versions), a publication type folder for house style related document (e.g. Business cards, letterheads, envelopes). Each customer has his own publication types.

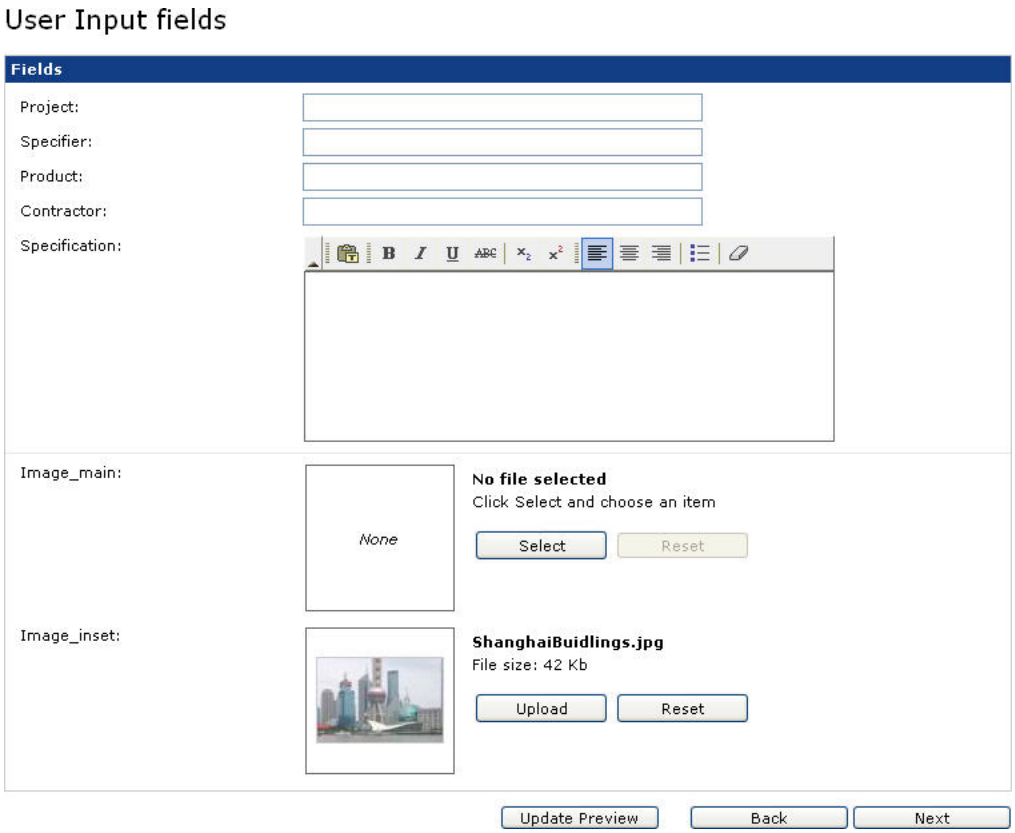
Pricing details and/or volume discount tables are linked to the publication type's folders. Pricing details and/or volume discount tables can apply to all documents which are in the publication types folder if the inherit option is selected.

PrintShop Mail for windows can publish PrintShop Mail documents to a publication type folder in PrintShop Mail Web. The free designer version of PrintShop Mail can be used for that. From PrintShop Mail you can also create new publication type folders.

The publication types overview shows all enabled and disabled publication types.

1.3.5 Web forms

Documents that require user input use a web form to collect information entered by the customer. Such a form consists of one or more modifiable elements called input fields (e.g. text fields, checkboxes, radio buttons, etc.).

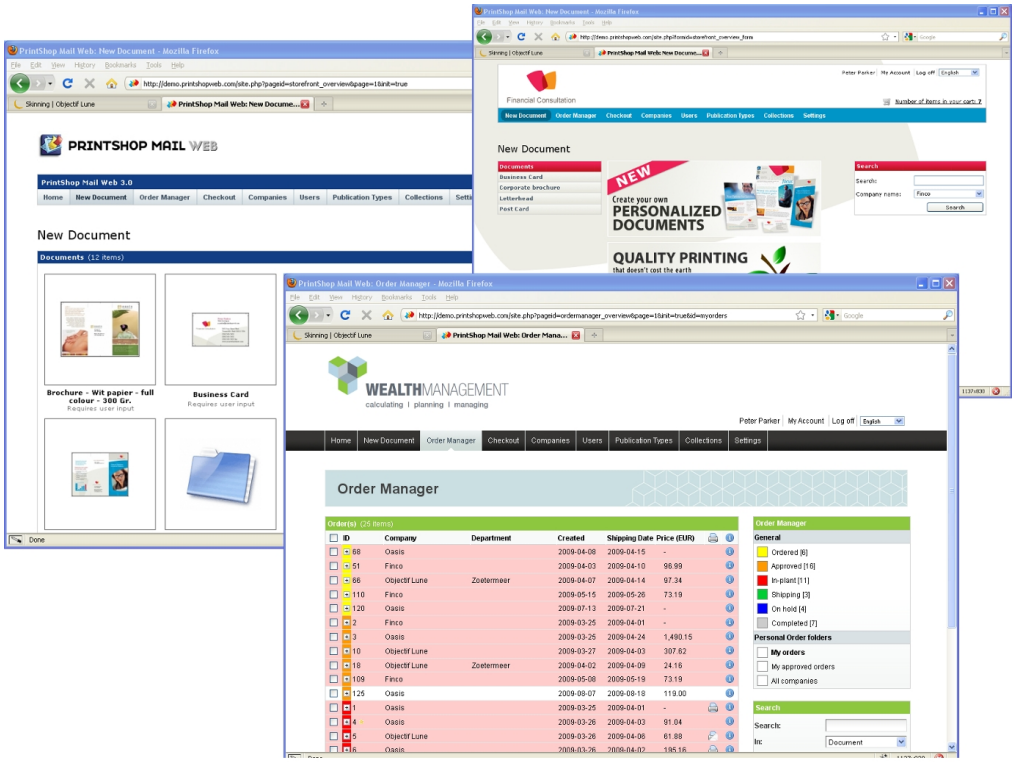


A sample web form

Therefore web forms specify what your customer sees and which fields require data entry when selecting certain documents. The provides more information regarding modifying the web form settings.

1.3.6 Skins

The PrintShop Mail Web web site is fully *skinnable*. A skin is a series of files that control the presentation of the web site. Everything except the actual textual content of the page can - and will - vary from skin to skin. To allow PrintShop Mail Web to be skinnable, style is completely separated from contents. The web page use standard HTML elements, user defined classes and unique IDs. The style information is stored in *Cascading Style Sheets* (CSS) documents, allowing the styles to be changed and manage the styles without the need to change the source code.



1.3.7 Order statuses

A customer orders documents to be printed by the print shop. An order can contain multiple documents. Every order goes through the following stages:

- Ordered
- Approved
- In-plant
- Shipping
- Completed

In addition to this there is the *On hold* status. This folder contains orders that require a quote from the print shop, these orders remain in this status until pricing is agreed.

1.4 Quick start guide

Perform the following steps to set up PrintShop Mail Web:

1. After login as administrator click *Settings* in the *Menu* bar and register your version of PrintShop Mail Web. For more information see Settings.
2. Add a company to the system. For more information see Add companies.
3. Add departments to a company if necessary. For more information see Add departments.
4. Add users to a company and assign them to a department. For more information see Add users and Assign users to a department.
5. Add publication types and assign them to a company and/or department. For more information see Add publication types and Assign a publication type to a department.
6. Define user roles within your own company (Designer, Production Manager and Operator) and assign these roles to the companies you have defined. For more information see Add users.
7. The Designer can now publish documents to PrintShop Mail Web and assign them to the companies and the publication types folder that are in the system already. For more information see the *PrintShop Mail guide*.
8. Edit the documents-web form: define pricing details, add a volume discount table and enable the document for the users. For more information see Setting up Web Forms.
9. Setup e-mail messaging to communicate with your customers. For more information see Settings.
10. Enable the company, publication type(s) and documents.

Your system is now ready for your customers to use. There are many other settings that can be modified. Please see the other chapters in this manual for the possibilities.

2 How to

Company related tasks are typically performed by Product Managers and some of them by Company and Department Manager. This chapter desrcibes common tasks in the Company section of PrintShop Mail Web. These tasks include:

2.1 Common Tasks

This section describes how to perform some common tasks in PrintShop Mail Web.

2.1.1 Remember me

The *Login* page lets the user log on to the system. The *Remember me* option is found on the Login page. By default the remember me checkbox is unchecked.

When the *Remember me* checkbox is checked a cookie is created. This cookie stores the user name and password of the user. The next time the PrintShop Mail Web web site is visited by the user the system will check for the cookie and automatically log in the user in order to show the appropriate content.

Cookies are in fact only data, not program code. Cookies cannot erase or read information from the user's computer. A cookie is a piece of text that a Web server can store on a user's hard disk. Cookies allow a Web site to store information on a user's machine and later retrieve it. Internet Explorer and other browsers store cookies on your computer. If you use Microsoft's Internet Explorer to browse the Web, you can see all of the cookies that are stored on your machine. The most common place for them to reside is in a directory called c:\windows\cookies. You can see which Web site placed the file on your machine by looking at the file name (the information is also stored inside the file). You can open each file by clicking on it.

2.1.2 Lost password

The *I lost my password* option allows users to retrieve a new password for their account and is based on the users e-mail address. An e-mail with the new password is send to the e-mail address of the given user. To get a new password:

1. Click the I lost my password link on the login screen. The following screen appears:

Enter the e-mail address of your account to receive a new password

2. Enter the e-mail address associated with your account.
3. Confirm the entered e-mail address.
4. Click Proceed to generate a new password.

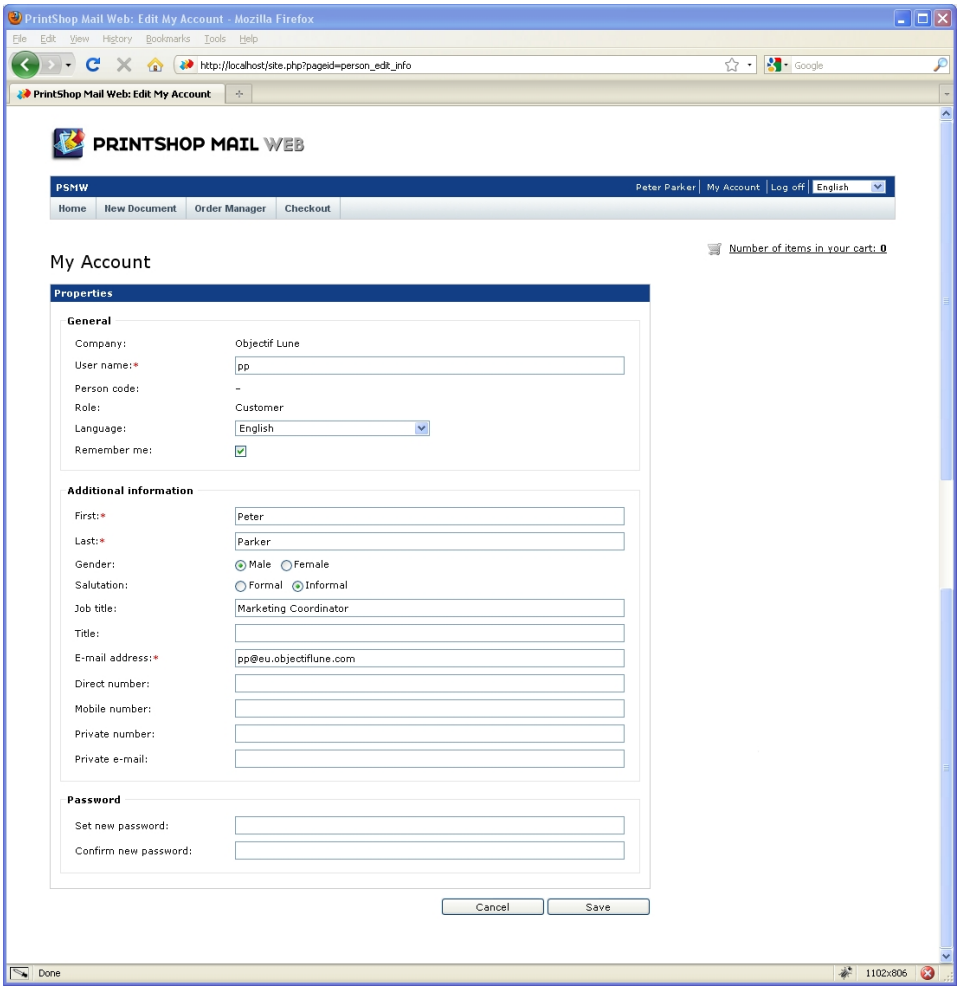
The user receives on the entered e-mail address a new password. The user can use this password to logon. Once logged on the user can decide to change the password or keep using this new password.

Note: It is not possible to reset the PrintShop Mail Web password if the PrintShop Mail Web installation authenticates against a LDAP directory. Reset the password in the corporate LDAP system. When the password is changed in the corporate LDAP system, it is automatically changed in PrintShop Mail Web.

2.1.3 Modify user info

Each user can modify his personal account information. To change these parameters:

1. Click *My Account* in the *Menu* bar. The following screen appears:



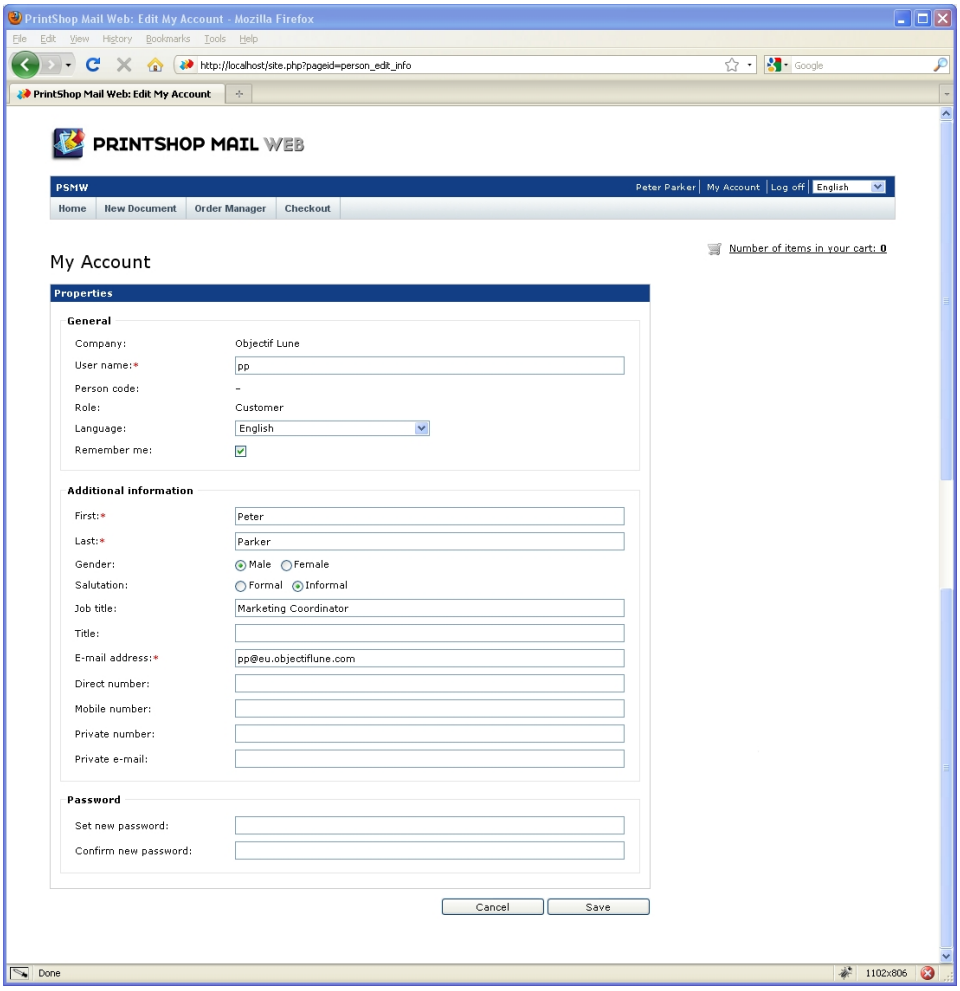
Change user information in this screen

2. The following items can be changed:
   - **User name:** This field defines the user name required to logon to the system.
   - **Language:** The selected language is used for the e-mail message the user receives when creating an order or when the status of an order is changed. The language selected in the login window defines the application language.
   - **Person Code:** This value is a unique code which can be used to link to an administration or ordering system. Users with the appropriate privilege (role) can edit this field.
   - **Remember me:** When the *Remember me* checkbox is checked a user is recognized by the system and automatically logged in and re-direct to the *Welcome* page.
   - **Additional Information:** The fields in this section are used in the ordering processs and can be used as default values for user input fiields in the *New Document* section.
3. Click *Save* to store the changes.

2.1.4 Set New Password

Each user can set a new password. To set a new password :

1. Click *My Account* in the *Menu* bar. The following screen appears:



Set a new password in this screen

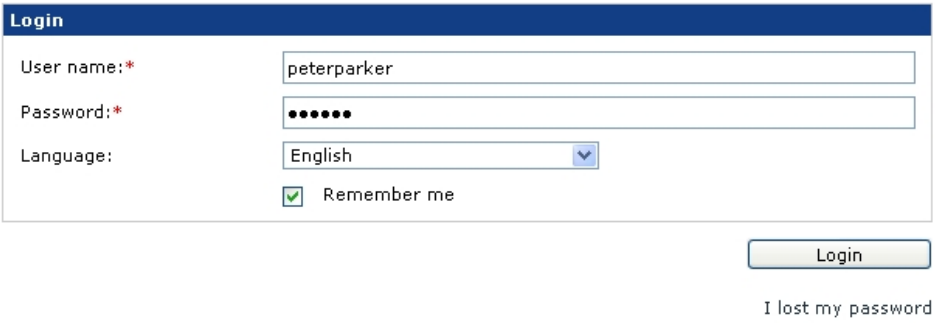
2. Enter a new password.
3. Confirm the new added password.
4. Click *Save* to store the changes.

2.1.5 Change the language of the web site

When using PrintShop Mail Web the user can specify which language is displayed in the menus, dialogs and pages. This allows the customer to work in the language they are most familiar with. The customer can choose the language from any of the available languages.

To specify the interface language:

1. Launch a web browser and enter the URL of the system. The *Login* page appears.
2. Choose a language from the *Language* pop-up-menu, the interface will be change accordingly. The selected language will be stored with your web browser (cookie). The next time the customer visits the system the language of the interface is automatically set based on the stored value.



The Login page.

It is also possible to change the language of the web site in the *User info bar*.

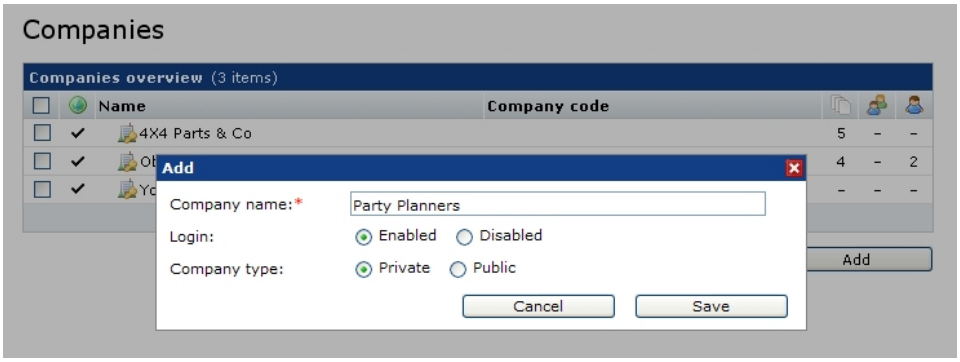
2.2 Company Tasks

Company related tasks are typically performed by Production Managers and Company Managers. This chapter describes common tasks in the Company section of PrintShop Mail Web.

2.2.1 Add companies

To add a new company in PrintShop Mail Web:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Click *Add*. The following dialogappears:



Enter company name to create a new company

3. Enter the *Company name*.
4. Click *Save* to create the new company. You have now added a company, which is added directly to the *Companies overview*.

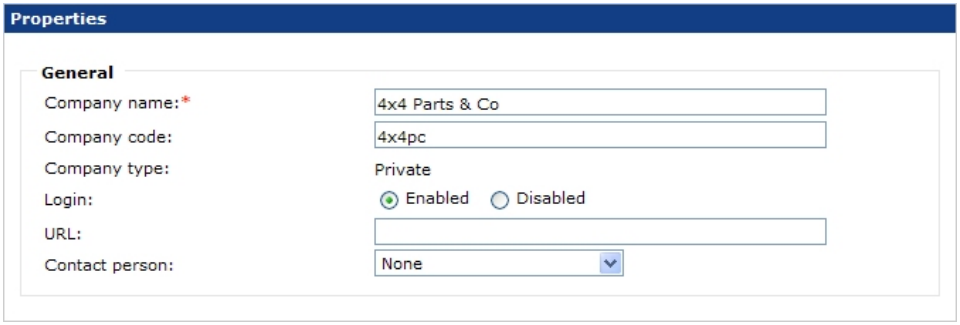
Notes:

- Newly created companies are initially *disabled* and must be *enabled* once user accounts and publication types are added. Users belonging to a disabled company will not be able to access the items in the *Menu* bar. A company can be enabled via the summary abd/or properties page of that company. Typically Administrators, Production Managers and Designers can test the templates of these disabled companies via the *New Document* section.
- About Company Type:
  - The *Company Type* can be set to *Public* to enable B2C (Business to Customer), so that visitors (i.e. non logged-in users) are able to view the company's enabled publication types and documents without logging in to PrintShop Mail Web, and add items to their shopping cart. Visitors of a public company will nevertheless have to create an account in order to proceed to checkout.
  - Companies of type *Private* can only be accessed by users who have been either created within the company or assigned to it. This is for regular B2B (Business to Business) transactions.

2.2.2 Modify properties

After creating a new company or department it is possible to modify all company or department properties. To modify the company properties:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking on the company name. The *Companies Summary* page is shown and on the right hand side a menu is displayed. This side menu allows management of the following items of the currently selected company:
   - Properties
   - Addresses
   - Users
   - Publication Types
   - Web Design
   - Departments
   - Pricing and Ordering.
3. On the *Company Summary* page the basic company information is displayed in the *Properties* section. To modify the information in the *Properties* section click the *Edit link* or click *Properties* in the side menu.
4. Click *Edit*. The following screen appears:



Change the company properties in this screen

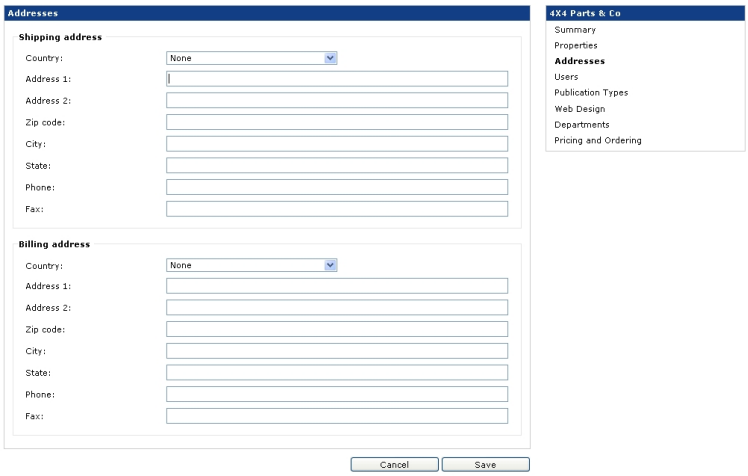
5. Enter additional information for the company:
   - **Company Code:** This value is a unique code which can be used to link to an administration or ordering system.
   - **URL:** The customers company URL can be entered here.
   - **Contact Person:** When users have been added to the company, a company contact person should be selected in the *Contact person* pull-down-menu.
6. Click *Save* to store the changes. The company properties page is shown.

Note: The Company Type is a static value indicating whether the company has been defined as Private (for B2B) or Public (for B2C).

2.2.3 Add or modify address

To add the company address in PrintShop Mail Web:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking the company name. The *Company Summary* page is shown. On the company summary page the basic company information is displayed. The *Company Address* is placed in a collapsible information window.
3. To make the *Address information* visible, click the text. The address information can add or modified by clicking the *Edit link* or click *Addresses* in the side menu.
4. Click *Edit*. The following screen appears:



Enter or modify the company address information in this screen

5. The *Shipping and Billing address* information is used during the ordering process and can be used as default value for input fields in the *New Document* section. Enter the required information:
   - **Country:** Select a country in the pull-down-menu. By default the value *None* is selected.
   - **Address Fields:** Enter the address information in this fields. Maximal 255 characters can be typed or pasted in this fields.
   - **Zip code:** The *Zip code* is related to the selected country. In some cases a regular expression is added to check the entered zip code.
   - **State:** The *State* is also related to the selected country. When selecting US or Canada a pull-down-menu is shown, presenting the states of the US or Canada. State is a required field than. In all other cases an entry field is visible.
6. Click *Save* to store the changes.

2.2.4 Add departments

To add a department to a company:

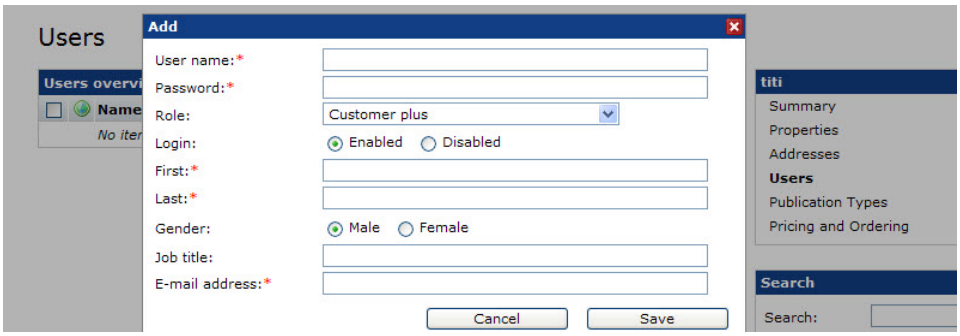
1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking on the company name.
3. Click *Departments* in the side menu. The *Departments overview* page is shown.
4. Click *Add*. The *Add Department* dialog appears.
5. Enter the *Department name*.
6. Click *Save* to store the changes. You have now added a department, which is added directly to the companies' *Departments overview*.

Note: After creating a new department it is possible to modify the *Department Properties* and add the *Department Address* information. On the department's address page the checkboxes for *Use company address* are enabled by default; the system automatically takes shipping and billing addresses from the company. If this option is not required, please click in the checkbox to allow different shipping and billing addresses to be entered.

2.2.5 Add users

To create a new user account for a company:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking on the company name.
3. Select *Users* in the side menu.
4. Click *Add*. The following dialog appears:



Enter basic information about the user

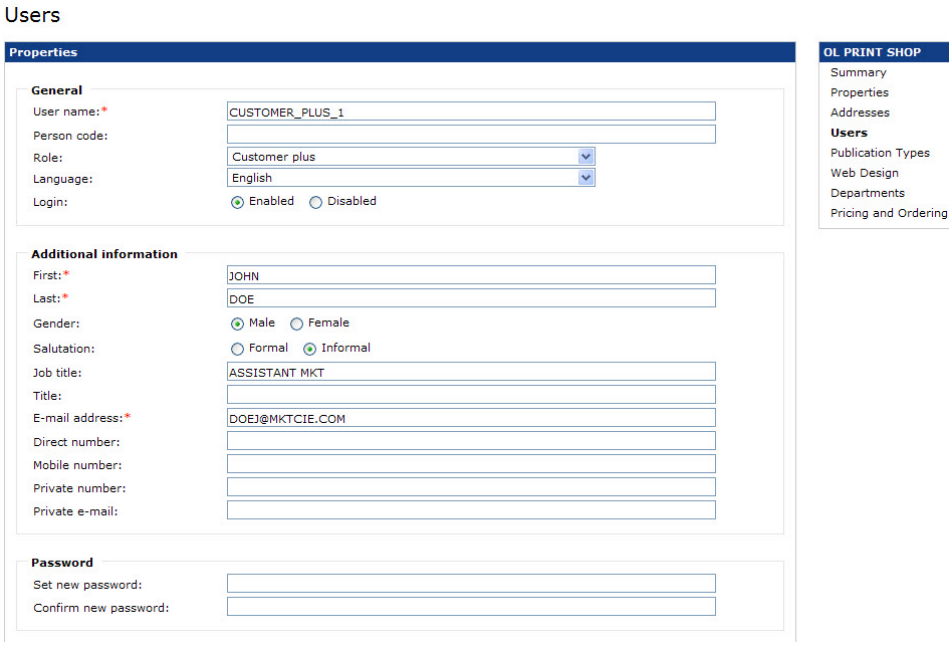
5. Enter the required information:
   - **User Name and Password:** These fields define the information required to logon to the system and need to be entered in the *Login* page.
   - **Role:** The selected role defines the privileges and access level of the user.
   - **Department:** Select a department to which the user belongs (if available). It is possible to assign users to more than one department, by holding the shift key and clicking all the departments to which the users belongs.
   - **Login:** Set this option to *Enabled* to allow the user logon to the system.
   - **First, Last, Gender, Job Title and E-mail address:** The values of these fields are used in the ordering process and can be used as default values for user input fields in the *New Document* section.
6. Click *Save*. You have now added a user, which is added directly to the companies' *User overview*. When more users need to be added click *Add* again.

Important: When users have been assigned to departments, a department contact person should be selected: click on *Departments* in the side menu, select a department from the overview, click *Properties* in the side menu and click *Edit*. This will open the *Department Properties* page, where the correct contact person can be selected from a pull-down-menu. Click *Save* to store the changes.

2.2.6 Modify user info

To modify the user information:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking on the company name.
3. Click *Users* in the side menu.
4. Select a user from the overview by clicking the user name.
5. Click *Edit*. The *Edit Account* page appears:



Change the user information

6. Enter the required user information:
   - **Person Code:** This value is a unique code which can be used to link to an administration or ordering system.
   - **Language:** The selected language defines the language used for the e-mail messages send by PrintShop Mail Web. The language of the web site is defined by the language selected in the *Login* page.
   - **Login:** Set this option to *Enabled* to allow the user logon to the system.
   - **Additional Information:** The values of these fields are used in the ordering process and can be used as default values for user input fields in the *New Document* section.
7. Click *Save* to store the changes.

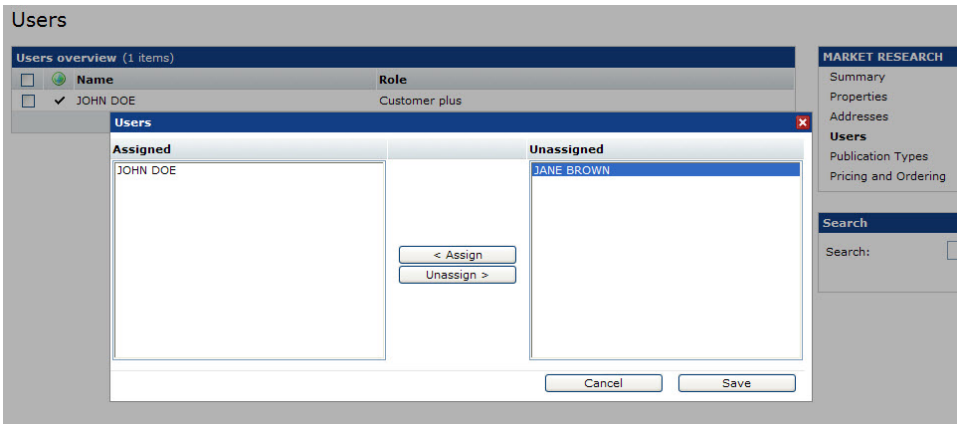
2.2.7 Assign users to a department

To assign a user account to a department:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking its name.
3. Click *Departments* in the side menu and select a department from the overview.
4. Click *Users* in the side menu. An overview shows the user accounts in that department:

With the assign button users can be assigned to a department

5. Click *Assign*. The following dialog appears:



Users can be assigned to a department

6. Select a user from the *Unassigned* list and click *Assign* or double click a name to assign.
   The *Unassigned Users* are those users that are not part of the department. The users shown in the list depend on the role of the currently logged on user. A role defines which roles the user can assign when creating new accounts. The list shows those users of which the role can be assigned by the current user.
7. Click *Save* to store the changes. The assigned user(s) will be visible from the *Users overview* of the department.

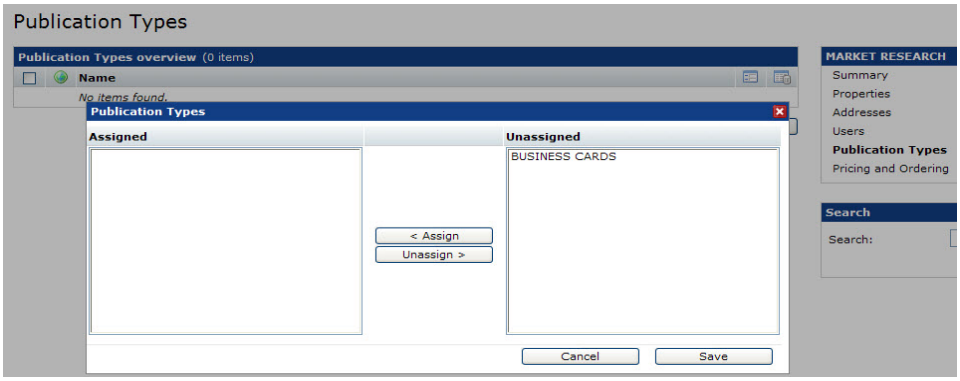
User accounts can be added directly to a department. To create a new account at department level:

1. Click *Companies* in the *Menu* bar. The *Companies* overview page is shown.
2. Select a company from the overview by clicking its name.
3. Click *Departments* in the side menu and select a department from the overview.
4. Click *Users* in the side menu. An overview is shown with the user accounts of the department.
5. Click *Add* and fill in the required user info (see Add users and Modify user info). Users who are added directly to a department can be (re)assigned to other departments later.

2.2.8 Assign a publication type to a department

Documents published by a Designer, are automatically assigned to a company as a whole. In order to assign these documents to a department:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview by clicking the company name.
3. Click *Departments* in the side menu and select a department.
4. Click *Publication types* in the side menu.
5. Click *Assign*. The following dialog appears:

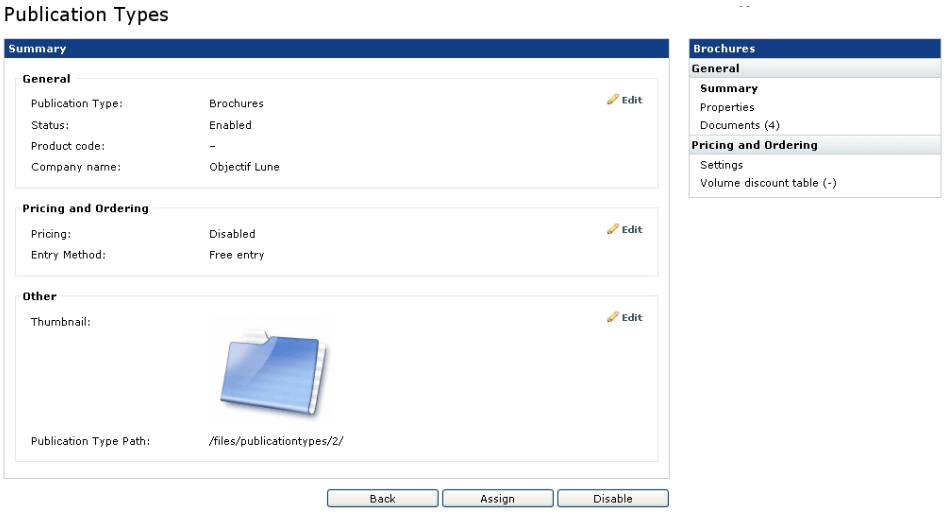


In this dialog publication types can be assigned to a department

6. Select a publication type in the *Unassigned* window and click the *Assign* button to move the selected publication type to the *Assigned* window. Double clicking the selected name will also assign or unassign the selected publication type.
7. Click *Save* to store the changes and return to the *Publication Types overview*.

To assign a publication type to a department via the *Publication Type* section:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name. The *Publication Types Summary* page appears:



On the Publication Types Summary page publication types can be assigned to a department

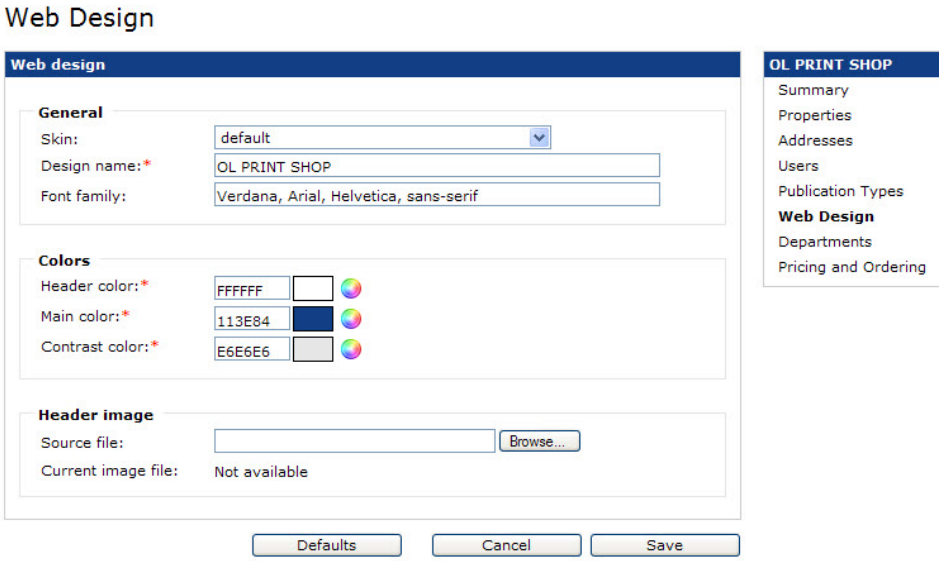
3. Click *Assign* and select a department in the *Unassigned* window and click the *Assign* button to move the selected department to the *Assigned* window. Double clicking the selected name will also assign or unassign the selected department.
4. Click *Save* to store the changes and to return to the *Summary* page of the selected publication type.

2.2.9 Change web design settings

PrintShop Mail Web can use different *skins* for each company, allowing your customers to use the system in their own house style or a style that closely matches their house style. Users of that company can access the PrintShop Mail Web web site via a personalized URL which will invoke their skin. The web design settings of a company control the skin, global style settings and the personalized URL variable of the company. For example: http:/www.yourprintshopweb.com/yourclientscompanyname.

To change the web design settings of a company:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company from the overview.
3. Click *Web Design* in the side menu.
4. Click *Edit*. The following screen appears:



Upload a company logo and change the colors in this window

5. The *Web Design* page contains the following fields:
   - **Skin:** This pop-up menu lets you select one of the available skins. For more information about creating skins refer to the Skinning Guide.
   - **Design Name:** The *Design Name* defines the URL suffix to invoke the selected skin and web design settings.
   - **Font Family:** The font-family property is a prioritized list of font family names and/or generic font family names. The browser will use the first value it recognizes. Separate each value with a comma, and always offer a generic-family name as the last alternative.
   - **Colors:** These color pickers are used to select colors for various parts of the web site.
   - **Header Image:** Use the *Browse* button to select an image file on your local machine (jpg or gif). In the *Default* skin this image is used in the area above the *Menu* bar.
6. Click *Save* to store the changes and to upload the company logo (if applicable).

To *Restore* the default PrintShop Mail Web skin click the *Defaults* button. A warning dialog is shown. After clicking *OK* the default PrintShop Mail Web skin is restored. Click *Save* to store the changes.

Note: If the selected skin does not make use of the custom font family, colors and header image, changes to these fields will have no effect. The Skinning Guide explains how a skin can be made dependent on these parameters.

Note: You might need to refresh the cache of your browser in order to see the changes.

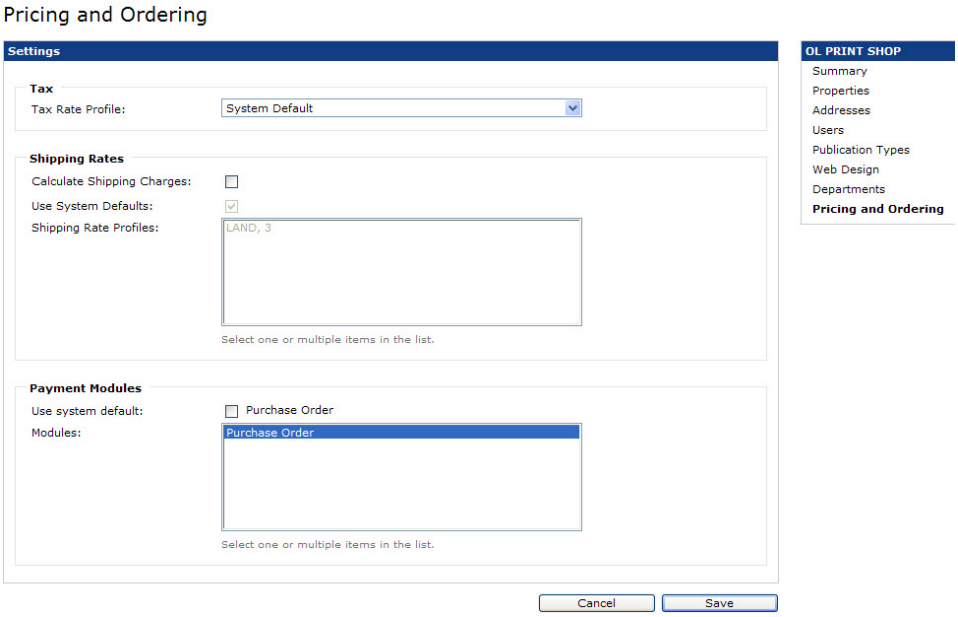
2.2.10 Modify Pricing and Ordering parameters

In the *Pricing and Ordering* section of a company or department a tax rate profile can be selected. The calculation of shipping rates can be enabled and a payment module can be selected. In addition to this it defines the shipping rate profiles visible in the order working. If multiple profiles are available the end user can select the preferred method. The calculation of shipping rates has the following prerequisites:

- The administrator should create one or multiple shipping rate profiles in the *Shipping Rates* page of the *Settings* section. For more information see the Settings section.
- The *Calculate Shipping Charges* option of the company should be enabled (described below).
- Pricing should be enabled for the company's publication types and documents.

To set the pricing and ordering settings for a company:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Click *Pricing and Ordering* in the side menu, the *Pricing and Ordering Settings* page appears.
3. Click *Edit.* The following screen appears:



Edit the pricing and ordering settings and manage the company shipping rate profiles and payment modules in this window.

4. This page contains the following sections and lets you set the following items:
   - **Tax:** Defines the *Tax Rate Profile* that applies to this company (or department).
   - **Shipping Rates:** This section defines the following shipping charge options:
     - **Calculate Shipping Charges:** Check the *Calculate Shipping Charges* checkbox to enable the calculation of shipping rates for this company (or department). This enables the options below.
     - **Use System Defaults:** If selected the system default rates are used in the ordering workflow. If this option is selected the *Shipping Rate Profile* area is enabled.
     - **Shipping Rate Profiles:** The shipping rate profiles become available when the *Use System Default* checkbox is unchecked. To select one or multiple contiguous profiles use shift click. Non contiguous items can be selected with alt click.
       When multiple shipping rate profiles are assigned, the customer is able to select the preferred shipping method in the ordering workflow.

Shipping charges can be defined for the company and/or departments. These are managed independently; the profile list of a department can be completely different from the list for the company (e.g. when located in a different country or region).

- **Payment Modules:** This section controls the settings used for the payment modules.
  - **Use System Defaults:** If selected the system default module is used. If this option is deselected the *Module* area becomes available.
  - **Modules**: The modules become available when the *Use System Default* checkbox is unchecked. To select one or multiple contiguous modules use shift click. Non contiguous items can be selected with alt click.
    When multiple modules are assigned, the customer is able to select the preferred payment method in the ordering workflow.
    Modules can be defined for the company and/or departments. These are managed independently; the module list of a department can be different from the list for the company (e.g. when located in a different country or region).

5. Click *Save* to store the changes.

2.2.11 Delete company

On the *Companies overview* page it is possible to delete a company. When a company is deleted the company and the linked departments, orders, publication types and collections are removed from the system. In the database these items will be marked as deleted. When performing the delete companies process on the *Maintenance* page in the *Settings* section the company and all linked items will be deleted from the database and the file system.

To delete a company from the *Companies overview* page:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select the checkbox next to the company name:

The Companies overview page

3. Click *Delete*. First after click *OK* in the warning dialog the company is removed from the overview.

2.3 Publication Type and Document Tasks

This chapter describes tasks related to publication types and docments. Typically these tasks are performed by the designer, operator or the production manager. Read the Designer Guide and PrintShop Mail User Guide for detailed information on PrintShop Mail related tasks and how to publish a PrintShop Mail document to PrintShop Mail Web.

2.3.1 Add publication types

There are two ways to create publication types:

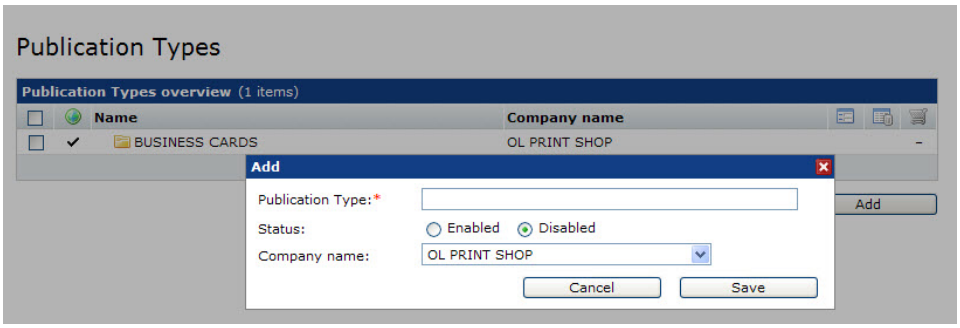
- Using the PrintShop Mail Web website
- Using the PrintShop Mail application

For more information on how to create publication types via PrintShop Mail please refer to the PSM User Guide.

Create a publication type in PrintShop Mail Web

To create a new publication type in PrintShop Mail Web:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Click *Add*. The following dialog appears:



Give the publication type's folder a name

3. Complete the following fields:
   - **Publication Type:** Enter the name for the new publication type.
   - **Status:** The selected status defines if end users can view this folder in the *New Document* section and start creating new documents based on the contained templates. Typically administrators and designers can view these publications types in the *New Document* section allowing them to test the preview and job generation. Disabled folders are marked with a red background in the *New Document* section and have a stop-symbol next to their name.
   - **Company Name:** Select a company in this pull-down-menu to assign the publication type folder to that company. A publication type folder is always assigned to a company.
4. Click *Save* to add the folder.

Create a publication type in the Companies section

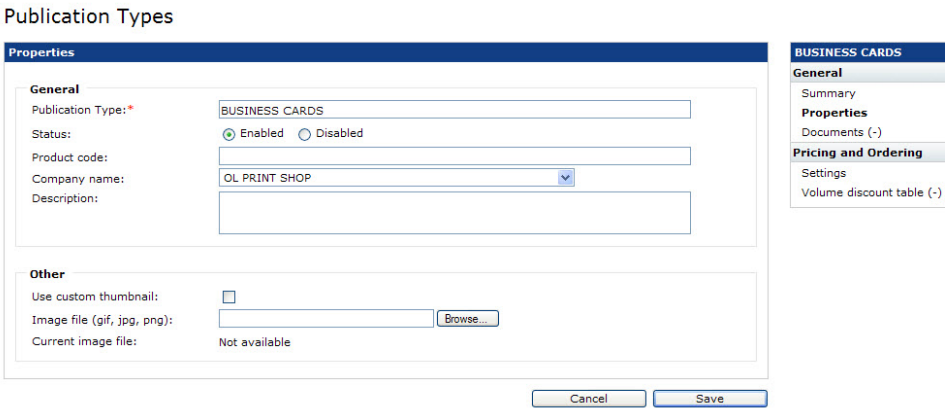
To create a publication type folder in the *Companies* section:

1. Click *Companies* in the *Menu* bar. The *Companies overview* page is shown.
2. Select a company by clicking its name.
3. Click *Publication Types* in the side menu.
4. Click *Add* to display the *Add* dialog.

2.3.2 Modify the publication type properties

After a publication type folder is created the folders properties can be changed and additional information can be added. To modify the publication type properties:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking on the publication type name. The *Publication Type Summary* page is shown and on the right hand side a menu is displayed. This side menu allows management of the following items of the selected publication type folder:
   - Summary
   - Properties
   - Documents
   - Settings
   - Volume Discount Table.
3. On the *Publication Type Summary* page the most relevant publication type information is displayed. To modify the *Publication Type Properties* click the *Edit link* or click *Properties* in the side menu
4. Click *Edit*. The following screen appears:



Change the publication type properties and add a custom thumbnail on the properties page

5. It is possible to complete the following fields:
   - **Product Code:** This value is a unique code which can be used to link to an administration or ordering system.
   - **Description:** A text describing the publication type folder and/or additional information.
   - **Company Name**: Select the company to be associated with the publication type.
   - **Use Custom Thumbnail:** Check the *Use custom thumbnail* checkbox to display a custom logo, icon or image for the publication type.
   - **Browse:** Click *Browse* to locate the image file to be used as the thumbnail on your local hard drive.
6. Click *Save* to store the changes. The *Publication Type Properties* page is shown.

2.3.3 Delete a publication type folder

It is possible to delete one or multiple publication type folders on the *Publication Types overview* page. To delete a publication type folder:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select the checkbox next to the publication type name
3. Click *Delete*. First after click *OK* in the warning dialog the publication type(s) is removed from the overview.

Note: A publication type can only be deleted when there are no orders using one of the containing documents.

2.3.4 Adding documents to a publication type

A publication type folder can contain various document types. There are three documents types:

- Database file upload documents
- User input file documents
- Static documents (PDF and PrintShop Mail documents without variables)
- File Upload documents (job submission)

Adding a file upload document

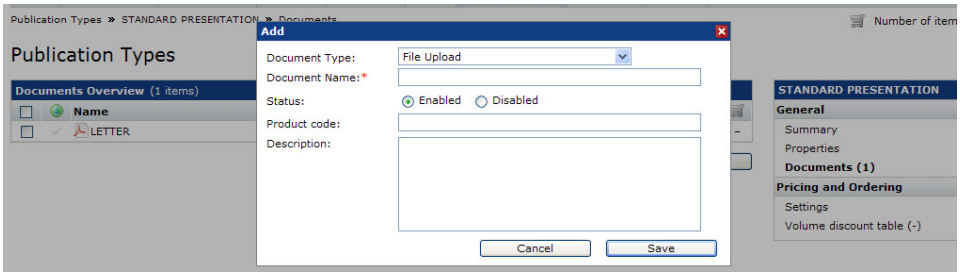
The *File Upload* option lets the end user upload a document from the local hard drive to PrintShop Mail Web. This often referred to as 'One-Off-Jobs' or Job Submission (non repetitive jobs). The file upload documents are assigned to publication types just like PrintShop Mail and Static PDF documents and are recognized by a *File upload icon* in the publication types and documents overview. A publication type can contain multiple template documents of different types.

The administrator/designer can setup multiple file upload documents in the *Publication Type* section. The document name and description can be used to distinguish document types and their production method (e.g. color mode, folding method and finishing options). The administrator/designer can configure parameters for the actual file upload. These parameters include the maximum file size and the permitted file types.

Typically the file upload documents will be quote orders but normal pricing options can be applied.

To add a file upload document to a publication type folder:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name
3. Click *Documents* in the side menu.
4. Click *Add*.
5. Select in the *Document Type* pull-down-menu the *File Upload* document type. The following screen appears:



The document add dialog to define file upload documents templates

On this page the following fields are found:

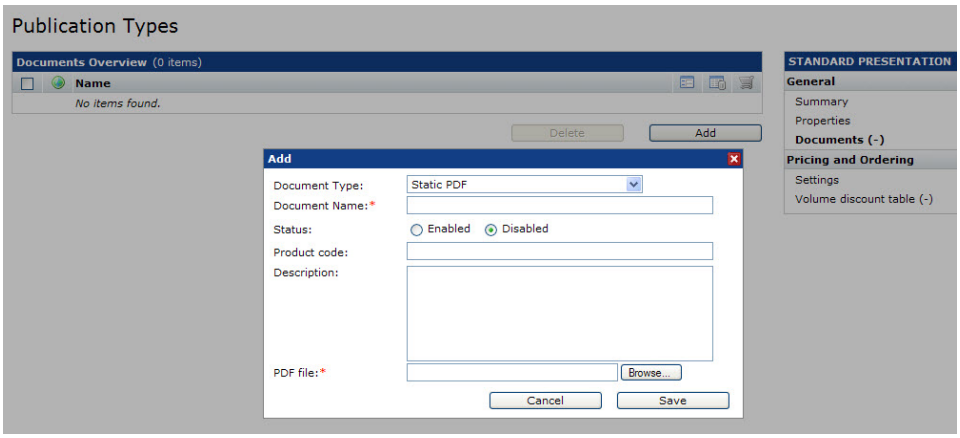
- **Document Type:** In the *Document Type* it is possible to select the document type in the pull-down-menu (*Static PDF* or *File upload*).
- **Document Name:** Enter a *Name* for the document. The name for the document should be unique. To create a multilingual document name (a document name that switches with the language of the PrintShop Mail Web user interface), add a document name according to the internal PrintShop Mail Web language string format. Language strings start with the percentage character %, followed by the document name in which the words are joined without spaces and are capitalized within the compound. The string should end with the percentage character % (e.g. %ServiceManual%). Subsequently you should add this string to the various languages via the *Languages* section of the *Settings* section.
- **Status:** The selected status defines if end users can see the document in the *New Document* section and start creating new documents based on it. Typically administrators and designers can view these documents allowing them to test the preview and job generation. Disabled documents are marked with a red background in the *New Document* section and have a stop-symbol next to their name.
- **Product Code:** This value is a unique code which can be used to link to an administration or ordering system.
- **Description:** Enter a descriptive text for the document in the *Description* field, this is optional. The description field can be used now to add additional information for end users according to the file upload document template. Use the *<!--break-->* breakpoint to split the information. Text before the breakpoint is shown in the *New Document overview* and document pages. The text after the breakpoint is shown on the *File Upload* page in the ordering process.

6. Click *Save* to add the document to the publication type's folder. The *Document's overview* page will be shown.

Adding a static PDF

To add a static PDF document to a publication type folder:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name
3. Click *Documents* in the side menu.
4. Click *Add*. The following dialog appears:



The document Add dialog to import PDF documents

5. Select the *Static PDF* type in the Document Types pull-down-menu.
   On this page the following fields are found:
   - **Document Type:** In the *Document Type* section it is possible to select the document type (*Static PDF* or *File upload*).
   - **Document Name:** Enter a name for the document.

- **Status:** The selected status defines if end users can see the document in the *New Document* section and start creating new documents based on it. Typically administrators and designers can view these documents allowing them to test the preview and job generation. Disabled documents are marked with a red background in the *New Document* section and have a stop-symbol next to their name.
- **Product Code:** This value is a unique code which can be used to link to an administration or ordering system.
- **Description:** A text describing the document or additional document information.
- **PDF files:** Click *Browse* to navigate to a PDF document on your local hard drive. This will be the *High Resolution* version for this document. Afterwards an optional Low Resolution can be uploaded via the properties page of the document.

6. Enter a name for the document.
7. Click *Save* to add the document to the publication type's folder. The *Document's overview* page will be shown.

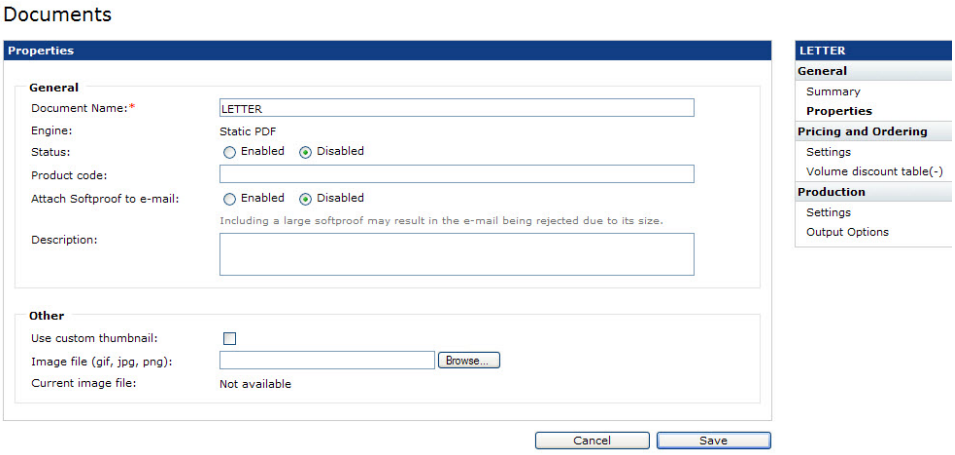
Adding a variable data document

The PrintShop Mail application lets design variable data documents. From within PrintShop Mail these documents can be published to PrintShop Mail Web. Please refer to the PrintShop Mail User Guide for detailed information on these subjects.

2.3.5 Delete documents from a publication type

To delete documents from a publication type folder:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type by clicking its name.
3. Click *Documents* in the side menu. The following screen appears:



The Documents overview window

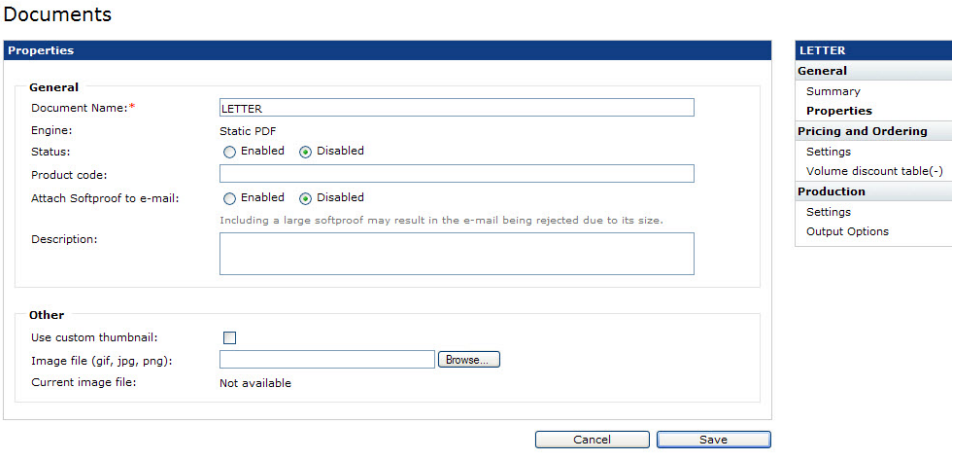
4. Select the checkbox in front of the document's name.
5. Click *Delete* to remove the document from the overview.

Note: A document can not be deleted while there are orders in the *Order Manager* that are based on this document. The number of print jobs referring to this document is displayed in the column with the -symbol.

2.3.6 Edit document properties

To modify the properties of a document:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type by clicking its name
3. Click *Documents* in the side menu.
4. Select a document from the overview, the *Documents Summary* page is shown.
5. Click *Properties* in the side menu.
6. Click *Edit*. The following screen appears:



In the properties window from a document the documents' properties can be modified

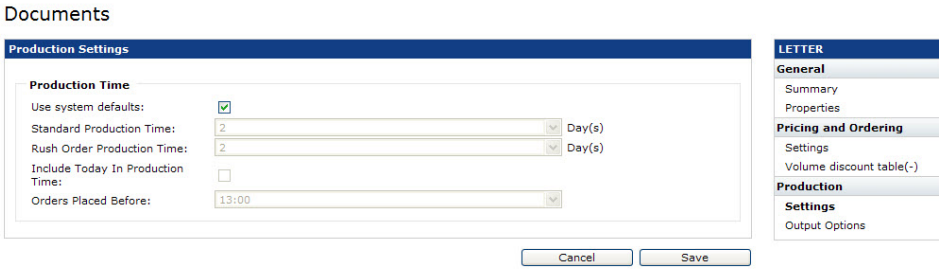
7. The document properties page contains the following sections:
   - **General:** In this section you can change the name of the document, the status, and the product code.
     Check the *Attach Softproof to e-mail* checkbox to make it possible to send a softproof with the e-mail sent on status change (*Ordered* and *Approved*). Attach softproof is only available for static PDF and PrintShop Mail documents.
     On the *Softproof* page (*New document)* customers can choose to check the *Attach softproof to e-mail* checkbox and receive the softproof as an e-mail attachment than. This check box will only be shown for templates where the softproof attachment option is enabled. If the attach softproof option is enabled and the softproof is too large to send the e-mail is not send.
   - **Other:** In this section it is possible to select *Use custom thumbnail* to display a custom logo, icon or image for the document. Click *Browse* to locate the image file to be used as the thumbnail on your local hard drive.
8. Click *Save* to store the changes and upload the image file (if applicable).

Note: For the user to receive the e-mail with attachment the attachment size must not exceed the SMTP server or the user's e-mail box capacity.

2.3.7 Manage production settings

The *Production Settings* lets you change default values for production specific parameters on document level. The document production settings are related to the *Shipping date* calendar in the ordering process. To modify the *Settings* in the *Production* section:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type by clicking its name
3. Click *Documents* in the side menu.
4. Select a PDF document from the overview, the *Documents Summary* page is shown.
5. Click *Settings* in the *Production* section from the side menu.
6. Click *Edit*. The following screen appears:



On the production settings page from a document the documents' production parameters can be modified

7. The document production settings page contains the following sections:
   - **Use System Defaults:** The *Use system default* checkbox is on by default, which causes the remaining options of this section to be disabled. If selected the system default values are used.
   - **Standard Production Time:** In the *Standard production time* pull-down-menu the number of days to produce documents can be defined. The values ranges from 0 to 15. The standard production time is used to calculate the first possible shipping date during the ordering process. The end user has the option to select a different date (via a calendar) but cannot select any of the data marked as standard production time. The values specified in this section are automatically applied to new templates.
   - **Rush Order Production Time:** The *Rush order production time* pull-down-menu represents the time frame to produce the document measured in days for rush orders. The end user will be able to select a date between the *Standard Production Time* and *Rush Order Production Time*. If such a date is selected as the shipping date the rush rate of the document is added to the price calculation (surcharge) and the order is marked as a rush order.
     If the value is set to same value as the *Standard Production Time*, customers cannot request a rush order.
   - **Include Today In Production Time:** When checked, this option determines if the current date is counted as a production day for orders placed before the time specified in the orders placed before pull-down-menu.
   - **Orders Placed Before:** The *Orders placed before* option defines the time slot for the *Include today for production* option. If an order is placed before the stated time and the *Include Today In Production Time* option is selected, the current day is counted as production day. The default value of the *Orders placed before* pull-down-menu is 13:00 hours.

   When no *Standard production time* is specified and the *Include today in production time* checkbox is cheked it is possible for customers to order print jobs for the same day (when ordered before the specified *Orders placed before* time).
8. Click *Save* to store the changes.

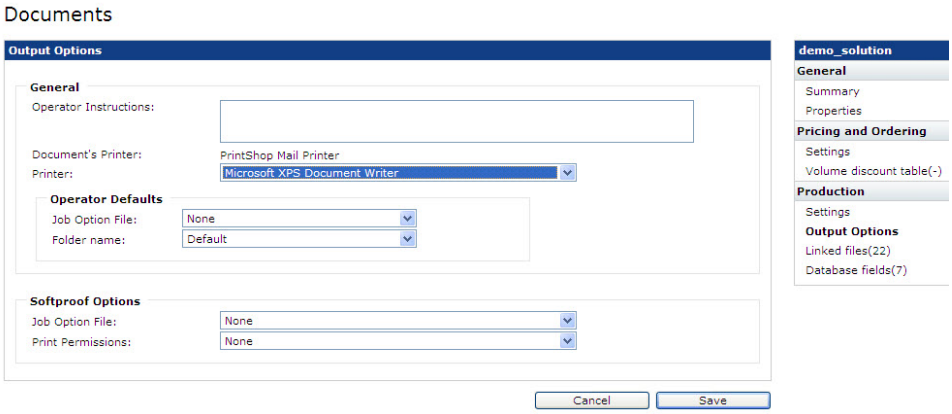
2.3.8 Output options

The *Output Options* of a document depend on the document type. The output options of a static PDF document differ from the output options of an PrintShop Mail document. The following sections explain the output options of both document types.

Output options for a PrintShop Mail document

To modify the document *Output Options*:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking its name.
3. Click *Documents* in the side menu.
4. Select a PrintShop Mail document from the overview, the *Document Summary* page is shown.
5. Click *Output Options* in the side menu.
6. Click *Edit*. The following screen appears:



In the output options window from a PrintShop Mail document the documents' output settings can be modified

7. The document output options page contains the following sections:
   - **General:**
     - **Operator Instructions:** Enter a note or reminder for the operator regarding, duplex settings, paper type, paper weight etc. This information is visible when the operator views a job in the *Order Manager* section.
     - **Document's Printer:** This static field states the printer that was saved with the document upon publishing.
     - **Output Printer:** The selected driver defines the default item for the *Printer* list in the *Print* page (*Order Manager* section). Defines the printer driver that is used to create PDF softproofs.
   - **Operator Defaults:**
     - **Job Option File:** Defines the default item for the *Job Options* list in the *Create PDF* page (*Order Manager* section). Via this page the operator can output the page to PDF. By default the *Job Option File* field is set to *None*, in this case the job options file installed with PrintShop Server is applied.
       A *Job Options* file defines the characteristics of the resulting PDF document. The administrator can add and remove *Job Options* in the *Settings* section.
     - **Folder Name:** This option defines the default *Output folder* when the operator creates PDF documents in the *Order Manager* section (*In-Plant* status). The operator can override the value in the *Create PDF* page. For more information see Output Folders.

- **Softproof Options:**
  - **Job Options File:** Select a *Job Options* file from the list a *Job Options* files define the characteristics of the resulting PDF document. The administrator can add and remove *Job Options* in the *Settings* section. By default this is set to *None*, in this case the *Job Options* file installed with PrintShop Server is applied.
  - **Print Permissions:** The *Print permissions* option controls the print permission for the PDF softproof. There are three options: *None, Low resolution* and *High resolution*. Selecting *None* will prevent printing the softproof; the print icon in the softproof window is disabled. Selecting the *Low resolution* option allows customers to print the softproof with a resolution of 150 dpi.

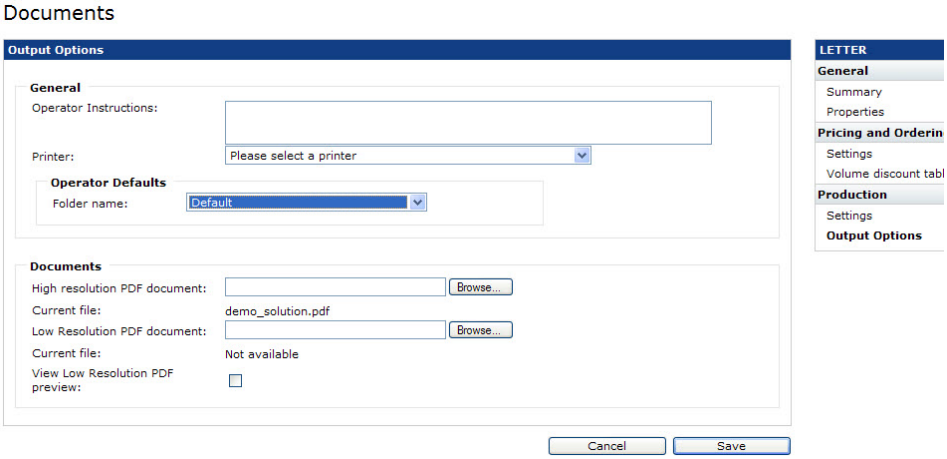
8. Click *Save* to store the changes and upload the image file (if applicable).

Important: If a non-PostScript printer is selected in the *Printer* section, users may experience rendering engine errors when a softproof is created!

Output options for a static document (PDF)

To modify the document *Output Options*:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking its name.
3. Click *Documents* in the side menu.
4. Select a static document (PDF) from the overview, the *Document Summary* page is shown.
5. Click *Output Options* in the side menu.
6. Click *Edit*. The following screen appears:



In the output options window from a static document the documents' output settings can be modified

7. The document output options page contains the following sections:
   - **General:**
     - **Operator Instructions:** Enter a note or reminder for the operator regarding, duplex settings, paper type, paper weight etc. This information is visible when the operator views a job in the *Order Manager* section.
     - **Printer:** The selected *Printer* defines the selected printer item for the *Printer* list in the *Print* page (*Order Manager* section.
   - **Operator Defaults:**
     - **Folder Name:** This option defines the default *Output folder* when the operator creates PDF documents in the *Order Manager* section (*In-Plant* status).

- **Documents:** The *Document* section lets you replace the *High Resolution* version of the PDF and optionally add a *Low Resolution* version. If the *View Low Resolution PDF preview* is enabled the end user will see this document in the ordering process.
  Especially for large PDF documents this options should be enabled and a Low Resolution PDF should be uploaded. Using a Low Resolution PDF will reduce network bandwith and will reduce the respons time of the system.

8. Click *Save* to store the changes.

2.3.9 Manage linked files

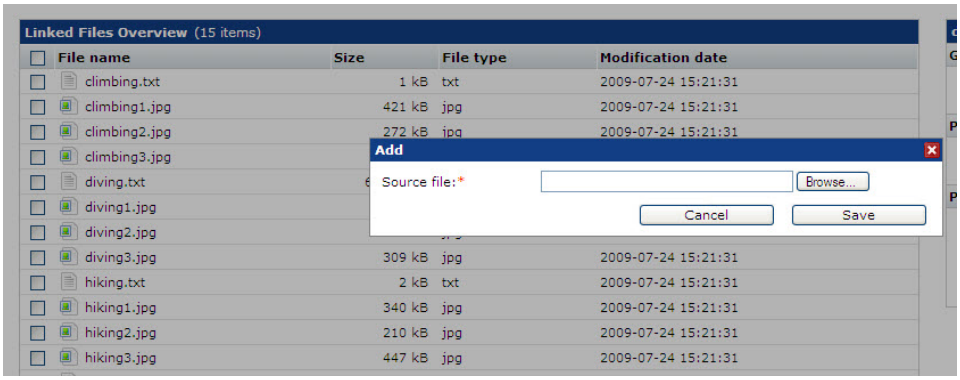
When a document is published the designer has the option to include the variable images required to print the document. Examples of variable images are: logo's, stock photos, signatures etc. The PrintShop Mail Web interface allows the designer to manage these files online once the document is published. New files can be added by the designer, he can add this via PrintShop Mail Web instead of re-publishing the document using PrintShop Mail.

To add a new file:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking its name.
3. Click *Documents* in the side menu.
4. Select a document from the overview.
5. Click *Linked Files* in the side menu. The following screen appears:

The Linked Files overview showing all files related to the document

6. Click *Add* the *Add* dialog appears:



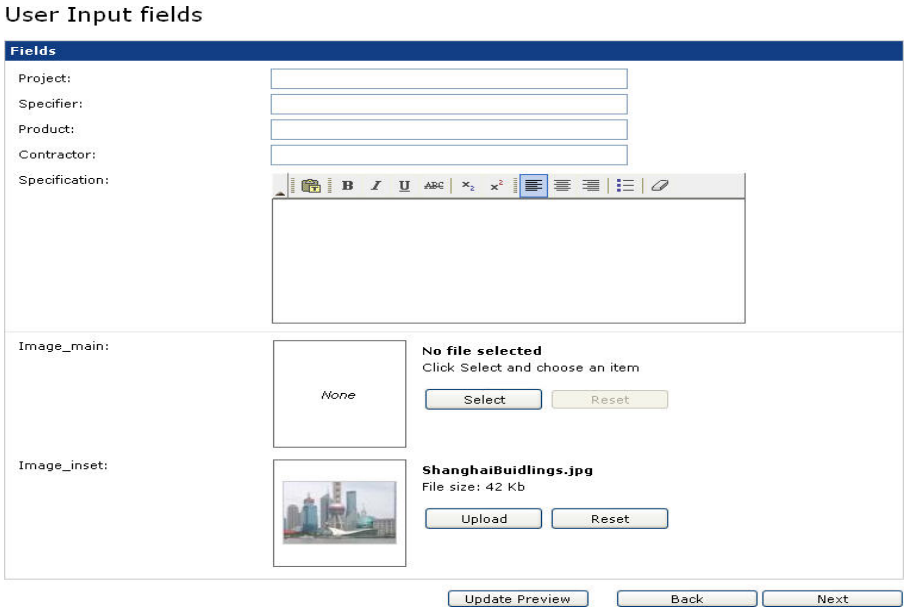
The Add dialog to upload new files

7. Click *Browse* and select a file on your local hard drive.
8. Click *Save* to upload the new file. The new file is added to the *Linked Files Overview*.

Important: When a new linked file is added with the same name a warning is shown. It is possible than to replace the existing file by clicking the *Replace* button.

2.3.10 Setting up web forms

Documents that require user input use a web form to collect information entered by the customer. Such a form contains of one or multiple modifiable elements called input fields (e.g. text fields, checkboxes, radio buttons, etc.). This section describes how to set the entry method and appearance of these fields.



A sample web form

User Input Fields

To make modifications to a user input field:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Click the + symbol next to the publication type to view a list of its documents. Documents containing user input fields have a value in the *User Input Fields* column ( ).

The Publication Type overview showing a document that requires user input

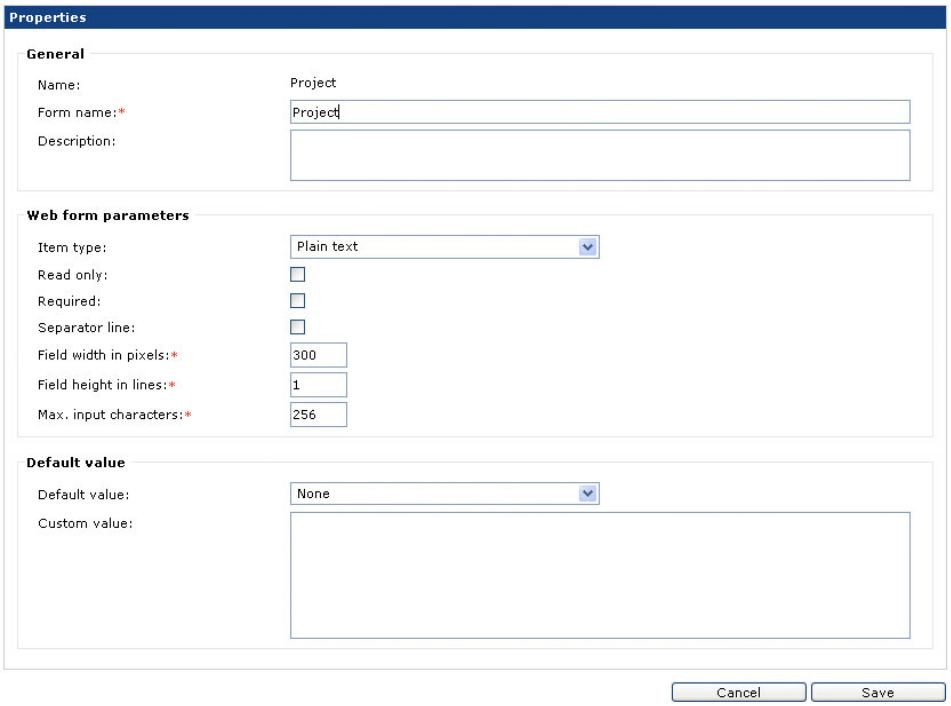
3. Select a document that requires user input from the overview. The *Document's Properties* page is shown.
4. Select *User Input Fields* in the side menu. The *User Input Fields* page is shown, this overview displays information about the input fields (e.g. name, default value, input type):

Documents

In the User Input fields overview information about input fields is shown

5. Select an input field from the overview. The following screen appears:

Item



The options in the Item page define the appearance of the input field

6. The *Item Properties* page consists of following sections:
   - **General:** The *Name* of the entry field can be modified and it is possible to add an informative text which appears below the data entry field.
   - **Web Form Parameters:** The options found in the *Web form parameter* section are used to define the appearance of the field. They depend on the selected field type. PrintShop Mail Web supports the following field types (described separately):
     - Plain text
     - Pull-down
     - Phone
     - Image upload
     - Collection
     - Checkbox
     - Rich text editor
     - Regular expression.

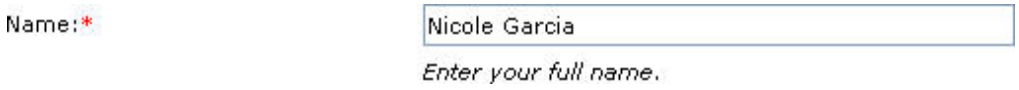
- **Default Value:** The options in this section define the initial value of the field. The value can be overwritten by the end user.

7. Click *Save* to store your changes.

When *User Input Field Default* items are specified in the *Settings* section it is not necessary to define the settings of a specific item. With the *Apply Default* button it is possible to select a user input field default item which setting should be applied to the current user input field. Clicking *Save* will replace the current user input field settings.

Plain Text field

Plain text fields are the most commonly used input type and are used when you want the user to type letters, numbers, etc. in a form. The height is measured in lines, by default the field allows a single line of input.



A required plain text field showing a description

Web Form Parameters

A plain text field has the following properties:

- **Required:** Defines the plain text option as a required field.
- **Read Only:** Customers can not edit the information, the value is static.
- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.
- **Field Width:** The width of the data entry field can be modified. The minimum width of the data entry field is 1 pixel, the maximum width is 2048 pixels. By default the value is set to 300 pixels.
- **Field Height:** The height of the data entry field can be modified. The minimum height of the input field is 1 line and the maximum height is 255 lines. By default the value is set to 1 line.
- **Max. Input Characters:** Defines the maximum number of characters that the user may enter. The number of characters is unlimited. By default the value is set to 256 characters.

Default Value

This field type has the following *Default Value* options:

- **Default Value:** This pop-up menu contains a list of items referring to company information and account details. The selected value defines the initial value for the field and it's retrieved automatically when creating new jobs. This is very useful for business cards, letterheads and other versioned documents as it will automatically populate the field with user specific information.
- **Custom Value:** Enter an initial value for the field. If a value is entered this will overwrite the selected *Default Value*.

Checkbox field

Checkboxes are used to allow the user to select one or more options of a limited number of choices. Based on the status of the checkbox a 0 (zero) or 1 (checked) is set as the value of the user input field. This value can be used in an expression in the PSM document to implement a specific condition (e.g. print or skip layouts). A data field can have only one checkbox, if a range of checkboxes is required one data field should be created per option.

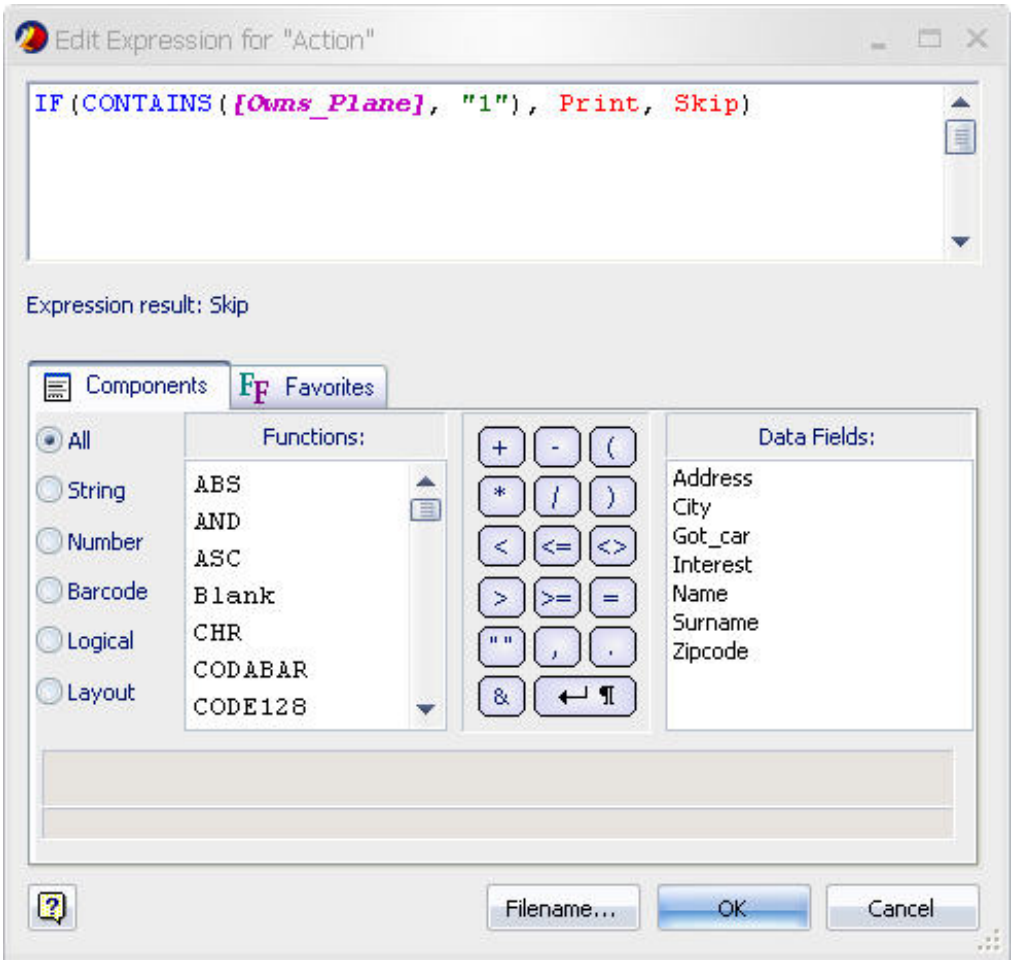
A range of checkboxes.

Web Form Parameters

- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.

Default Value

- **Custom Value:** Defines the initial status of the checkbox (checked or unchecked).

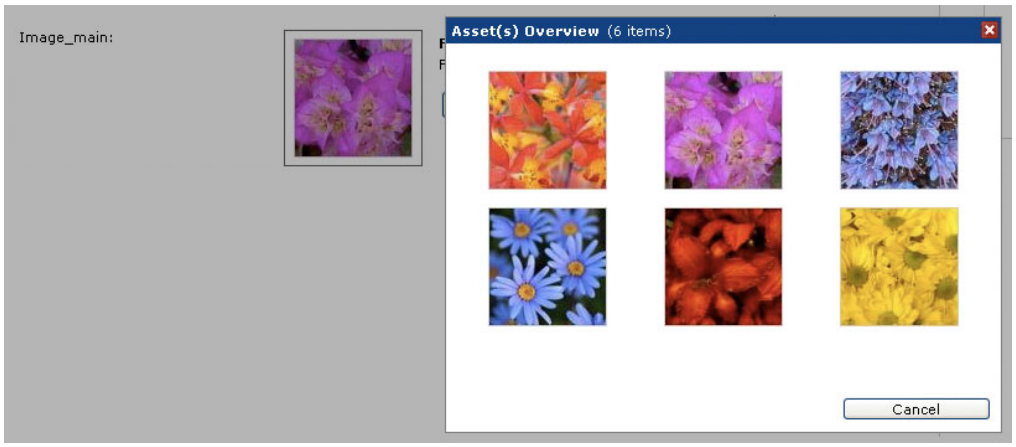


A layout condition to skip or print a layout

Collection field

Image Collections allows the end user to select an image by browsing a collection of predefined images. The PrintShop Mail document should contain a variable image box, with an expression that refers to a (user input) data field. The *Scale* property of this box defines how the image is resized relative to the box. Make sure that

the *Source* of the data field is set to *User Input*. Collections can be assigned to data fields across multiple documents and are managed in the *Collection* section. Collections examples are: a set of stock images used for backgrounds or a group of company logo variants.



An image collection

Web Form Parameters

When the *Field Type* is set to *Collection* the following options are shown:

- **Required:** Defines the collection field as a required field, requiring customers to select an image then.
- **Separator line:** A separator line between two data entry fields. With this option it is possible to arrange web forms that have more complex variable data more logically.
- **Collection:** Select one of the available collections.

Image Upload field

The *Image Upload* field type enables the end user to upload an image file for the job. The PrintShop Mail document should contain a variable image box, with an expression that refers to a (user input) data field. The *Scale* property of this box defines how the image is resized relative to the box. Make sure that the *Source* of the data field is set to *User Input*. For more information about variable images refer to the Designer Guide.

The supported image formats are: JPEG, GIF, PDF.

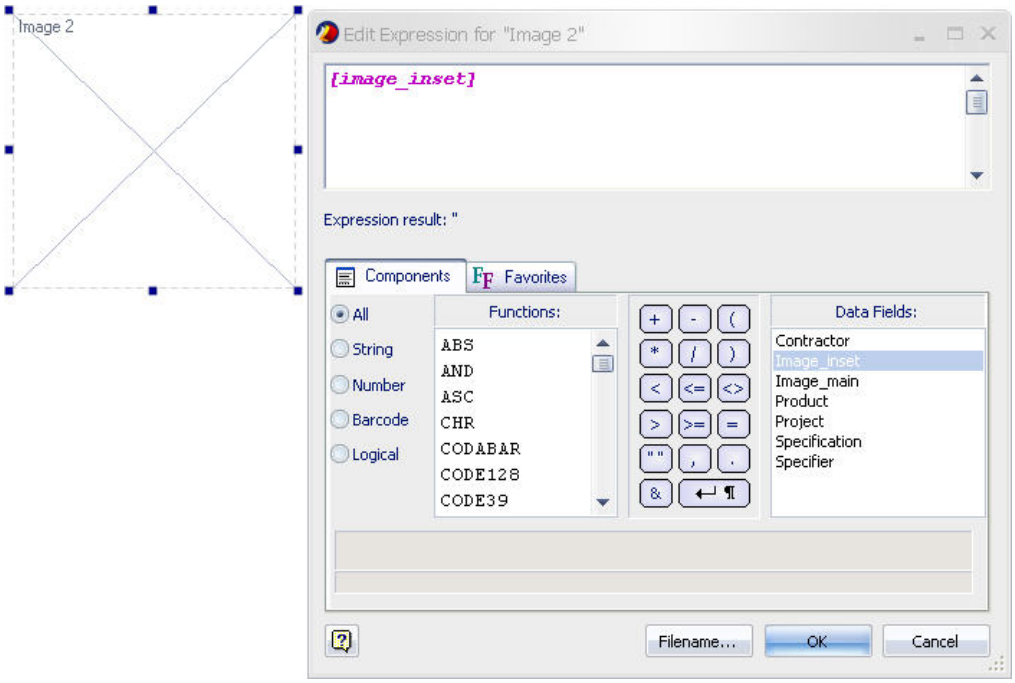
An image upload field

Web Form Parameters

The *Image Upload* field has the following parameters:

- **Required:** Defines the image upload option as a required field requireing upload an image.

- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.



The image box in PrintShop Mail, the expression of this box is referring to a data field

Phone field

This field type is used to restrict the user supplied data to a pattern for a phone number.

Web Form Parameters

This field type has the following parameters:

- **Required:** Defines the phone option as a required field.
- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.
- **Phone Template:** This field defines the pattern for the phone number. Use a #-symbol for each digit. The number of # -symbol defines the maximum numbers of digits a telephone number can consist of.

Regular Expression field

Regular expressions allow text strings such as names, addresses, phone numbers, and other user information to be validated. Regular Expressions can be used to constrain input and check lengths. PrintShop Mail Web allows the designer to enter a custom expression or to pick one from the expression library. For more information about this subject refer to the *Regular Expressions* chapter.

Web Form Parameters

This field type has the following parameters:

- **Required:** Marks the field as a required, the user needs to enter data in order to proceed.

- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.
- **Field Width:** The width of the field in the web form. The minimum width of the data entry field is 1 pixel, the maximum width is 2048 pixels. By default the value is set to 300 pixels.
- **Field Height:** The height of the field in the web form. The minimum height of the input field is 1 line and the maximum height is 255 lines. By default the value is set to 1 line.
- **Max. Input Characters:** Defines the maximum number of characters that the user may enter. The number of characters is unlimited. By default the value is set to 256 characters.
- **Regular Expression:** Type or paste the expression in this field. Click the -icon to display the *Regular Expression Library*. This dialog shows a list of predefined expressions. Double click an expression to copy it to the *Item Properties* page. This action will also copy the description to the *Description* field.
- **Test Data:** Enter a sample string in this field and hit the -icon to test the expression.

Default Value

This field type has the following *Default Value* options:

- **Default Value:** This pop-up-menu contains a list of items referring to company information and account details. The selected value defines the initial value for the field and it's retrieved automatically when creating new jobs. This is very useful for business cards, letterheads and other versioned documents as it will automatically populate the field with user specific information.
- **Custom Value:** Enter an initial value for the field. If a value is entered this will overwrite the selected *Default Value* is ignored.

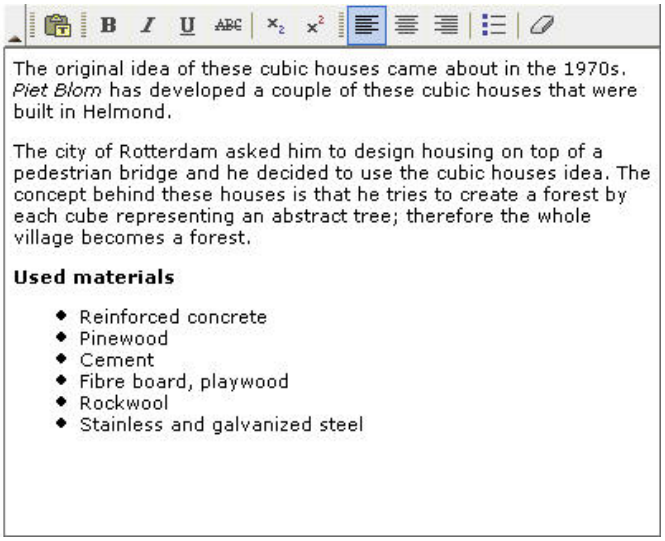
```
Enter three digits (0 through 9)
[0-9]{3}

Dutch postal code (e.g. 2718RP or 2718 RP)
Four digits where the first cannot be a 0.
An optional space
And two uppercase characters
[1-9]{1}[0-9]{3}\s?[A-Z]{2}
```

Rich Text Editor field

The Rich Text Editor input field allows the end user to apply basic formatting to the entered text. Such as: bold, italic, underline, alignment options and lists.

The entered data is converted into a RTF file. The user input field will contain the path to the RTF file. The PrintShop Mail document should have a variable with the TEXT_FILE() expression. The value parameter of this expression should state the name of the user input data field, e.g. TEXT_FILE([Specification]). For more information about the TEXT_FILE() expression refer to the PrintShop Mail User Guide.

Specification:



A rich text field

Web Form Parameters

- **Required:** Defines the *Rich Text Editor* field as a required field.
- **Separator Line:** Controls whether a separator line will be shown before this field. With this option web forms that have more complex variable data can be arranged more logically.
- **Max. Input Characters:** Defines the maximum number of characters that the user may enter. The number of characters is unlimited. By default the value is set to 256 characters.
- **Field Width:** The width of the field in the web form. The minimum width of the data entry field is 1 pixel, the maximum width is 2048 pixels. By default the value is set to 300 pixels.
- **Field Height:** The height of the field in the web form. The minimum height of the input field is 1 line and the maximum height is 255 lines. By default the value is set to 1 line.

Rich Text Defaults

When the field type is set to *Rich Text* an additional group of options becomes available. These options are used to set basic formatting of the content or to specify additional parameters of the online editor. The *Rich Text Defaults* section contains the following properties:

- **Font:** Enter the name of the font for text. All text will have the same font applied. Note that this font should be installed and activated on the PrintShop Mail Web server.
- **Font Size:** The fonts size applied to the text in the RTF file.
- **Line Spacing:** Space between lines of text measured fom baseline to baseline. The value is measured in points.
- **Default Color:** Enter the base color for the text (hexadecimal value, e.g. 0099FF).
- **Color Palette:** This field defines the contrast colors that can be used to mark ranges of text in the online editor. Colors should be entered using hexadecimal values. The values are comma separated, the #-symbol is not required (e.g. 0099FF, FF0000, 00CC00).
- **Background Color:** Enter the background color for the text editor (hexadecimal value, e.g. 0099FF). Change this value when the *Default Color* is set to white (#FFFFFF) or a light color, to enable the end user to see the entered text clearly.

Default Value

This field type has the following *Default Value* option:

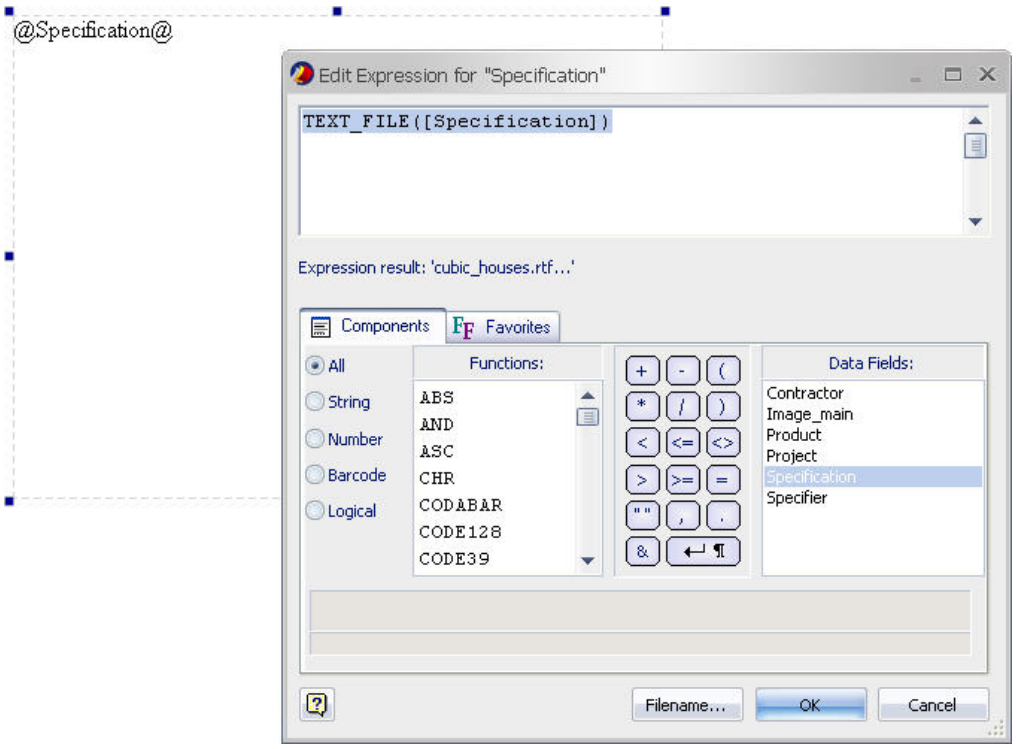
- **Custom Value:** Enter the initial value for the field.

Data conversion

The entered data is converted into a RTF file, which is achieved using a XSLT style sheet. If a document requires specific RTF output an experienced user could change this XSLT style sheet. The *xhtml2rtf.xsl* is located in the *include* folder of the PrintShop Mail Web web site.

To create a document specific conversion one should copy this file to the folder of the PrintShop Mail document. The preview process will automatically detect and apply this file. The path to the document folder is stated in the property page of that document.

Note: Before editing the XSLT style sheet create a backup of the file first.



A variable in PrintShop Mail with the TEXT_FILE expression

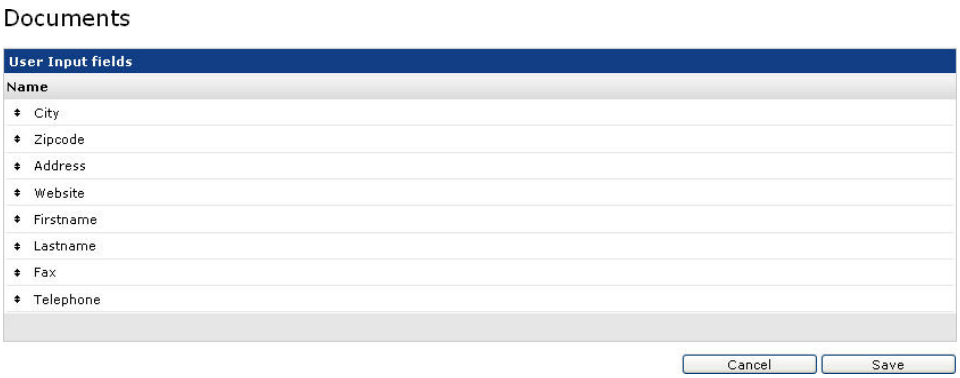
Arrange Fields

The order of the fields shown when a user creates a new job can be changed using the PrintShop Mail Web interface. This is applicable for user input fields and database input fields.

User Input Fields

To change the order of the user input fields:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name.
3. Click *Documents* in the side menu.
4. Select a document containing user input fields from the overview.
5. Click *User Input Fields* in the side menu. This will show an overview of the available input fields.
6. Click *Arrange*. The following page appears:



Drag and drop an item to change its position

7. The order of the items can be changed by dragging and dropping an item name.
8. Click *Save* to store the changes.

Database Input Fields

To change the order of the database input fields:

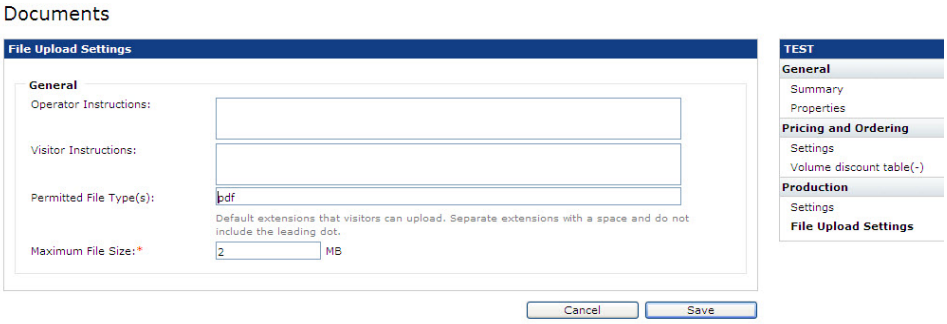
1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name.
3. Click *Documents* in the side menu.
4. Select a document containing database input fields from the overview.
5. Click *Database Fields* in the side menu. An overview with the database input fields appears.
6. The order of the items can be changed by dragging and dropping an item name.
7. Click *Save* to store the changes.

2.3.11 Define file upload settings

When a **file upload template** is added to PrintShop Mail Web the administrator and the designer can configure parameters for the actual file upload. These parameters include the maximum file size and the permitted file types.

To define the file upload settings:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type **that contains a file upload template** from the overview by clicking its name.
3. Click *Documents* in the side menu.
4. Select a document from the overview by clicking its name.
5. Click *Files Upload Setting* in the side menu.
6. Click *Edit.* The following screen appears:



The File upload settings page

7. The items found in this section controls the following options:
   - **Operator Instructions:** Enter a note or reminder for the operator. This information is visible on the *Job Properties* page in the *Order Manager*.
   - **Visitor Instructions:** Enter instructions for the file upload procedure if necessary. This information becomes visible on the *File Upload* page from the ordering process.
   - **Permitted File Type(s):** In the *Permitted File Type* entry field can be defined which default extensions can be uploaded. Separate the extensions with a space and do not include the leading dot. The following file types are supported:
     - jpg/jpeg
     - gif
     - png
     - psd
     - tiff
     - pdf
     - zip
     - rar
     - txt
     - rtf
     - doc

     All other file types are only checked by the file extension. The default value of the permitted file type field is *PDF.*
   - **Max File Size Per Upload:** The *Max File Size Per Upload* option state the max file size of the uploaded files measured in megabytes (Mb). The default max file size per upload is 2 Mb.

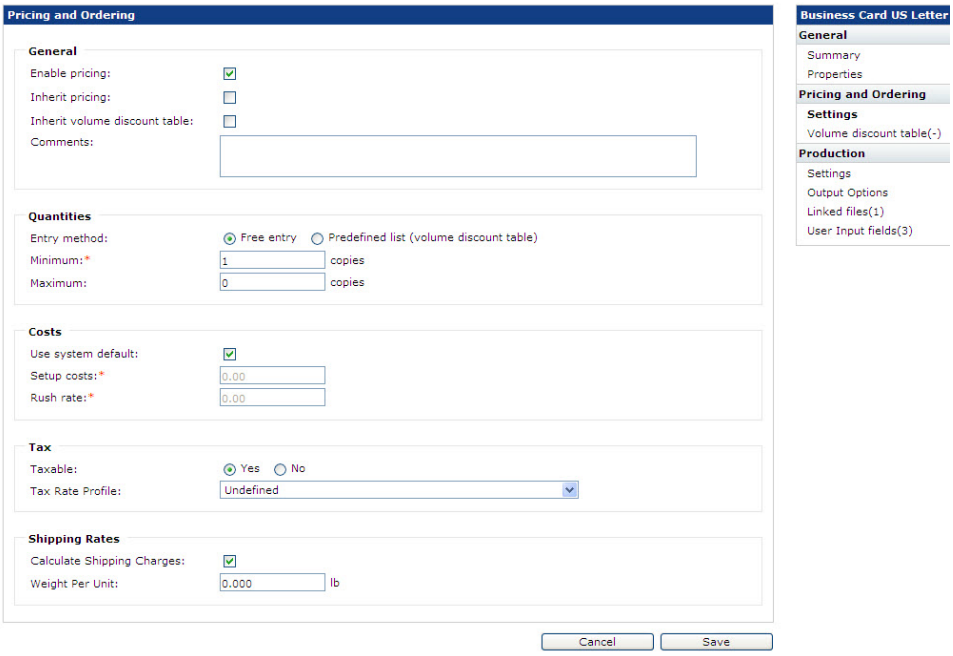
2.3.12 Setting up pricing

In order to calculate the cost of a document the price calculation option of that document should be enabled and a volume discount table should be available.

Pricing options

To enable pricing for a document:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name.
3. Click *Documents* in the side menu.
4. Select a document from the overview, the *Documents' Summary* page is shown. The *Pricing* field on this page states the current calculation method.
5. Click *Settings* in the *Pricing and Ordering* section from the side menu.
6. Click *Edit*. By default the document pricing is disabled.
7. Click *Enable Pricing* to display the pricing options:



The documents' pricing options

8. The items found in this section control the following options:
   - **General:** The items in this section let you enter a pricing comment and inherit pricing information from the publication type.
     - **Inherit Pricing:** If selected the pricing settings of the publication type are used.
     - **Inherit Volume Discount Table:** Check this field to inherit the volume discount table of the publication type.
     - **Comment:** The comment text is shown in the checkout overview (shopping cart) and can be used to point out pricing information to the end user.
   - **Quantities:** The *Quantity* section defines the entry method of quanties. Quantities for documents that require a database upload are determined by the number of records in the database file.
     - **Entry Method:** The selected option defines the quantity entry method in the shopping cart.
     - **Free entry:** If selected customers can enter a custom quantity. The *Minimum* and *Maximum* fields specify a minimum and maximum quantity.
     - **Predefined list:** Customers can select a quantity from a predefined list (pull-down-menu). The quantities in the list are defined by the volume discount table.
     - **Minimum:** The smallest quantity a customer is allowed to order. By default this value is 1.
     - **Maximum:** The maximum quantity a customer is allowed to order. If set to 0 or a value smaller than the *Minimum* than there is no limit to the number of copies. By default this value is 0.
   - **Costs:** These options control various surcharges:
     - **Use System Default:** Check this option to use the system default settings for the items in the *Costs* section. The administrator can setup these default values in the *Settings* section (*Pricing and Ordering*).
     - **Setup Costs:** A surcharge incurred each time a document is produced.
     - **Rush Rate:** The *Rush Rate* is a surcharge for rush orders.
   - **Tax:** This section controls document specific tax settings.
     - **Taxable:** If checked the document is subject to taxation.
     - **Tax Rate Profile:** Defines the tax profile applicable to this document. This is used when specific document types have a special tax rate.
       By default this field set to *Default*. In this case the rate is defined by the tax profile assigned to the department or company of the logged on user.

- **Shipping Rates:** *Shipping Rates* are calculated based on the total weight of the shopping cart and the shipping rate profiles assigned to the company or the department of the logged on user. The options found in this section control the document specific properties regarding the calculation of shipping charges.
  - **Calculate Shipping Charges:** Selects whether shipping charges should be calculated for the print job related to this document.
  - **Weight Per Unit:** Enter the weight per unit for the document. In the checkout cart this unit is multiplied with the quantity of the job to calculate its total weight.

9. Click *Save* to store the changes.

Volume Discount Tables

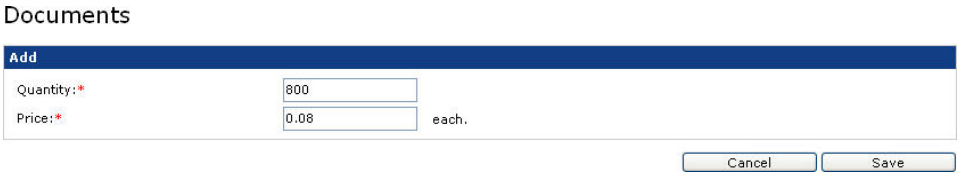
In order to calculate pricing a volume discount table is required. The entries in this table define the reduction in price based on the ordered quantity. In PrintShop Mail Web this table is managed in the *Volume Discount Tables* page of a document or publication type. When pricing is enabled and no volume discount table is defined, the system will not be able to calculate a price and price quote will be requested for the document.

The *Volume Discount Table* defines the volume range and the *price per record* what applies. Please note that for database upload jobs the number of pages printed may differ from record to record due to conditional layouts. The pricing should be adjusted accordingly.

Add an entry

To add an entry to the volume discount table:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type containing a document from the overview.
3. Click *Documents* in the side menu.
4. Select a document from the overview by clicking the document's name.
5. Click *Volume Discount Table* in the side menu.
6. Click *Add* to show the *Add* dialog:



Enter a Quantity and Price for the new entry

7. Enter a *Quantity* and *Price*.
8. Click *Save* to store the changes and to return to the *Volume Discount Table overview*.

Delete an entry

To delete entries from the *Volume Discount Table*:

1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type containing a document from the overview.
3. Click *Documents* in the side menu.
4. Select a document from the overview.
5. Click *Volume Discount Table* in the side menu, the *Volume Disount Table overview* is shown.
6. Select one or multiple checkboxes in the first column.
7. Click *Delete*.

Import

The *Volume Price Table* is easy to create from a spreadsheet. The spreadsheet is easy to maintain offline, and when the *Volume Discount Table* needs to be updated, a simple upload will replace the data.

To import a price table:

1. Create a tab delimited file containing two columns in the application of your choice. Column 1 needs to state the quantity, the second column the price per piece.
2. Logon to PrintShop Mail Web.
3. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
4. Select a publication type containing a document from the overview.
5. Click *Documents* in the side menu.
6. Select a document from the overview.
7. Click *Volume Discount Table* in the side menu.
8. Click *Import* to import a volume discount table. With the *Browse* button you can locate the file.
9. Click *Save* to process the tab delimited file.

2.4 Image Collection Tasks

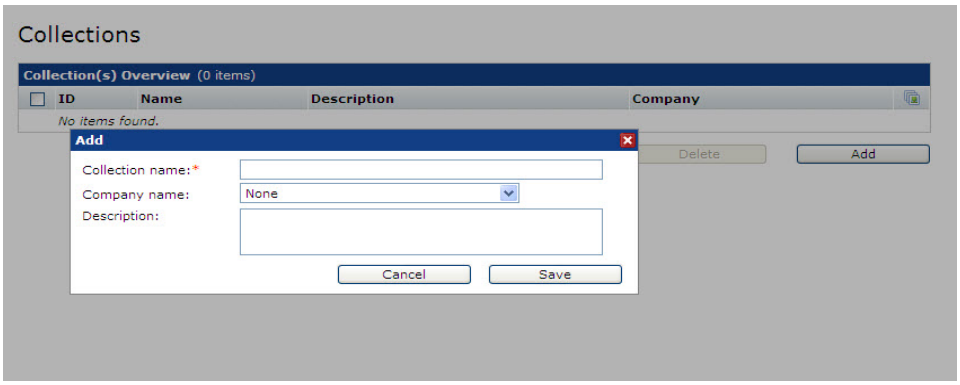
This chapter describes tasks related to image collections. Typically these tasks are performed by the designer, operator or the production manager.

2.4.1 Create an image collection

Image Collections allows the end user to select an image for a user input field by browsing a collection of predefined images. The PrintShop Mail document should contain a variable image box, with an expression that refers to a (user input) data field.

To create an image collection:

1. Click *Collections* in the *Menu* bar. The *Collections overview* page is shown.
2. Click the *Add* button to display the *Add* dialog:



The Add collection dialog

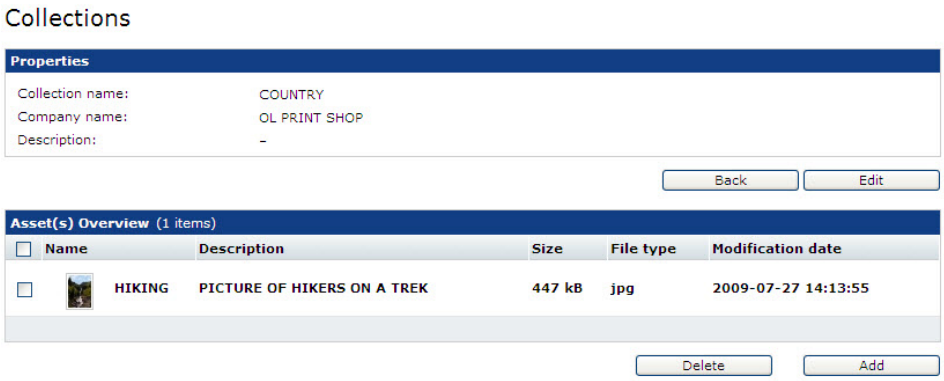
3. The input fields of this dialog control the following items:
   - **Collection Name:** The name of the collection. This name is visible in the *Collection* pop-up-menu in the *Edit Item* page of data fields (*Publication Typ*e section).
   - **Company Name:** The name of the company to which this collection belongs. The collection can be used across all PrintShop Mail templates of that company.
   - **Description:** A text describing the images in the collection.
4. Click *Save* to create the collection and close the dialog

The collections overview

2.4.2 Add images to a collection

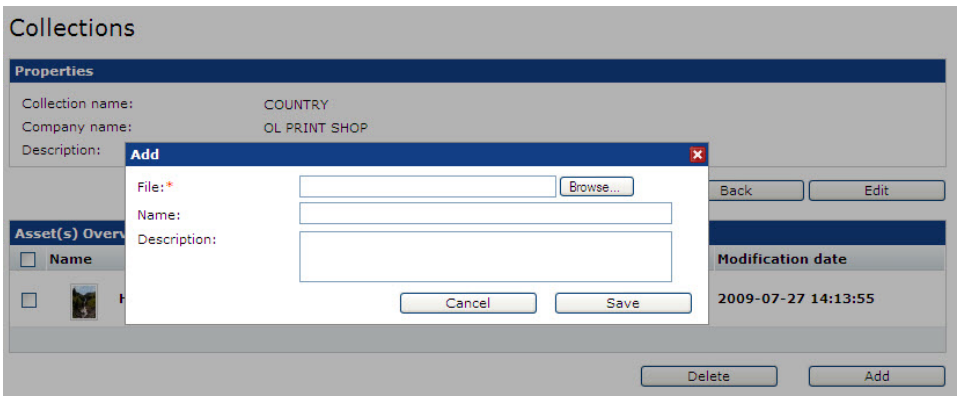
To add an image to a collection:

1. Click *Collections* in the *Menu* bar.
2. Select a collection from the *Collections overview*. The *Collections Properties* page is shown. This page displays the properties of the collection and a list of the images belonging to this collection.



The Collection Properties page

3. Click the *Add* button, the *Add asset* dialog appears.



The Add asset dialog

4. Click the Browse button to locate an image file on your local hard drive (jpg, gif, pdf).
5. Click Save to process the selected file.

2.4.3 Delete image from a collaction

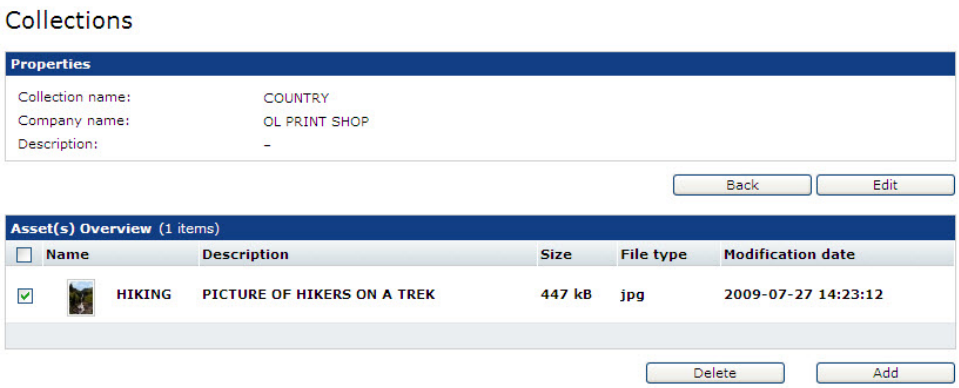
To remove an image from a collection:

1. Click *Collections* in the *Menu* bar.
2. Select a collection from the *Collections overview* by clicking the collection name. The *Collections Properties* page is shown. This page displays the properties of the collection and a list of the images belonging to this collection.
3. Select a checkbox next to one of the images in the *Assets overview.*
4. Click *Delete* to remove the image. First after click *OK* in the warning dialog the image is removed.

To remove all images from a collection at once:

1. Select the checkbox in the header from the *Assets overview.*
2. Click *Delete.* First after click *OK* in the warning dialog all images are removed.

Note: Collections and/or images that are used in active print jobs can not removed from the system. The checkbox is greyed out than.



The Collection Properties page

2.5 Order Manager Tasks

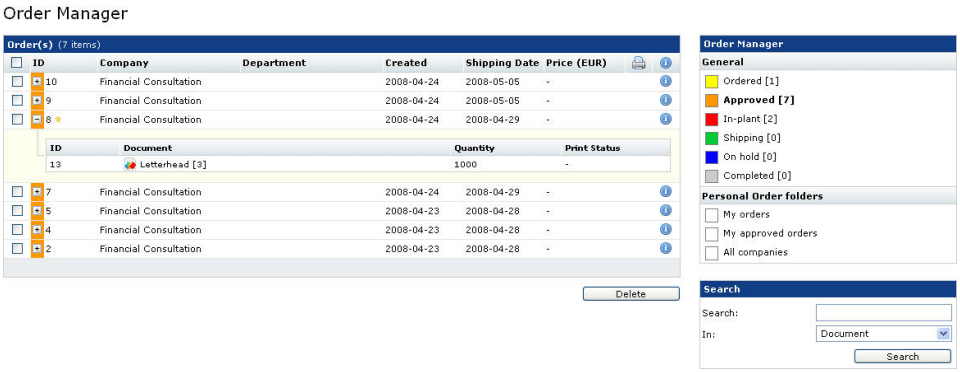
This chapter explains tasks performed by the operator or production manager.

2.5.1 Select an order status overview

PrintShop Mail Web can generate detailed order overviews, allowing a user to view all orders at each stage of the production process. Orders with the *Approved* status are ready for production. Those orders have been approved by the customer and are released for print production.

To view the orders of a specific status:

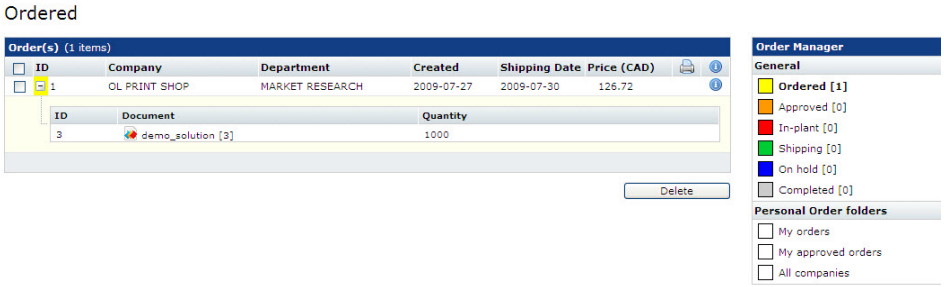
1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown:



By clicking on an order in the Order Manager overview, details of the order can be viewed

2. Click an item in the *General* section of the *Order Manager* side menu to view the orders of that production status. The orders of this status are shown in the orders overview table. The colored cubes at the beginning of each row indicate the status of the order and refer to the status folder.
   The *Approved* item in the *Order Manager* side menu, shows the orders that are released for print. If you're logged on using an operator role this folder is the initial view of the *Order Manager*.

   Orders with the status *Rush* have a mark ( ) behind the order ID. Overdue orders are colored red.
3. Click the + symbol next to the order ID to view the jobs belonging to that order. The job overview shows the name of the document, the ordered quantity and the current print status.



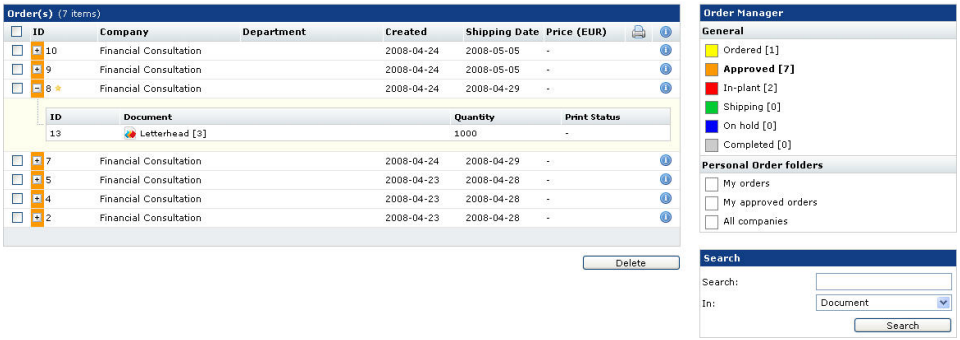
Job overview page

2.5.2 Change the status of an order

To change the status of an order in the *Order Manager*:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown:

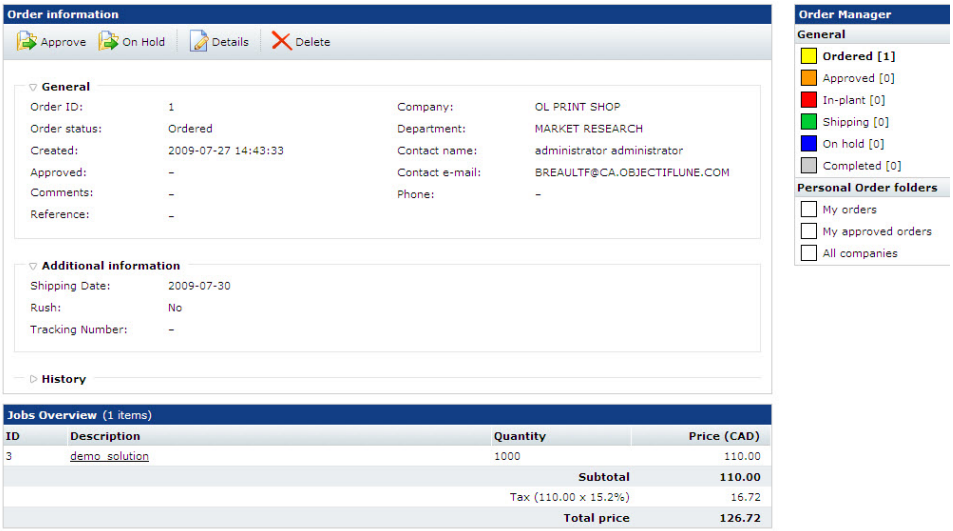
   Order Manager

   The Order Manager overview

2. Click the ID of an order. The *Order Information* page is shown:

   Order ID: 1

   The Order Information page

3. Click on the status option under Order Information section tiltle bar.

   The status available will depend on the user who is log - in.The *Order Information* page consists of an order information section and a jobs overview of the jobs belonging to this order. The *Action* bar along the top contains a range of buttons to change the status of the order, edit the order details and delete the order. The set of status change icons that are visible depends on the current status of the order.

4. Click a status item in the *Action* bar to change the status of the order.
   An order with the status *Ordered* can be set to the *On hold*-status by the customer and will be placed in the *On hold*-folder. Orders with the quote request status are also placed in the *On hold* folder, waiting for a price to be set. If a price is added the customer can accept the print job by ordering or approving the order or reject the print job by deleting the order. For more information see Add a price to a quote request.

Orders residing in the *Ordered* or *On Hold* status folders are typically orders created by other users. Users with the appropriate privilege can approve orders with the ordered status. It is assumed that the person that is approving orders (created by different users) wants to verify the quantities, the contents of the job and the shipping details of the order. For this the order is restored to the *Checkout* for approving.
As soon as an order is placed in the *Approved* folder, your customers can no longer change the status of the order. It is possible for your customers to track their personal orders via the *My orders* folder, or (if they have the necessary access rights) via the *My departments* or *My company* folder.

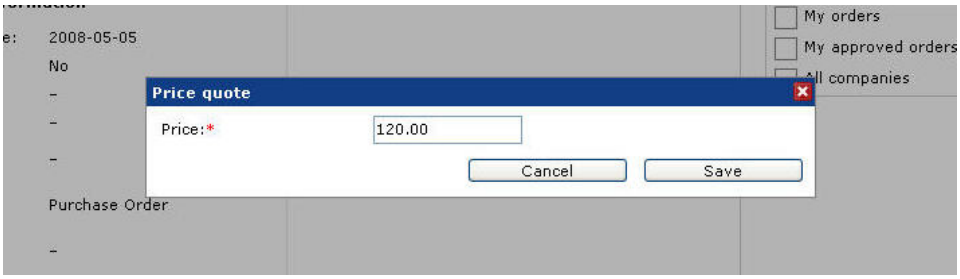
Important: When the order reaches the *Shipping* state the customer can set the status of the order to *Completed*. When an order is not delivered to your customer, the job status should be changed to *Completed* by the operator or production manager when the order is dispatched.

2.5.3 Add a price to a quote request

A print job with a quote request is automatically placed in the *On hold* folder. The production manager will receive an e-mail message when a price quote is requested.

To add a price to a quote request:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Select the *On hold* folder in the *Order Manager* side menu. This will show the orders contained in this folder. Orders with the quote request status show *Price Quote* in the *Price* column.
3. Select the order to show its properties page. The *Jobs Overview* section shows a list of the jobs belonging to this order. The jobs that require a price quote are marked in yellow and state *Price Quote* in the *Price* column.
4. Click the pencil icon next to the *Price Quote* text to display the *Edit Price Quote* dialog.



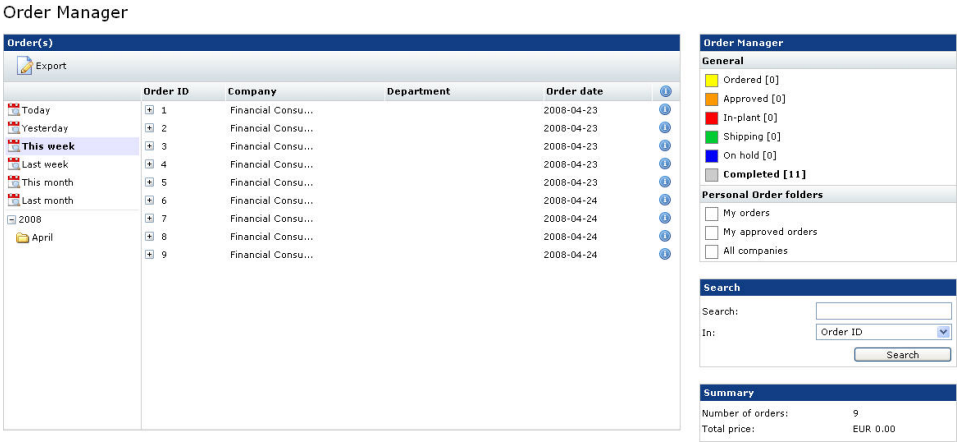
The Price Quote dialog

5. Enter a price and click *Save*. The dialog is closed.
   Repeat the steps 4 and 5 for every job that requires a price quote.
6. Click the *Send Quote* button in the *Action* bar once all prices are set. This will notify the customer.

2.5.4 Export order data

To export order data of completed print jobs:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Select the *Completed* folder in the *Order Manager* side menu. This will show the orders contained by this folder.



The completed orders overview

3. Select one of the predefined queries on the left side of the Order overview. The available options are:
   - Today
   - Yesterday
   - This week
   - Last week
   - This month
   - Last month
   - Year overview with sub selections per month
4. Click the *Export* button in the *Action* bar to instruct your browser to download and save the Excel file containing the requested order date.
5. Open Excel to view the downloaded document.

2.5.5 Print a document

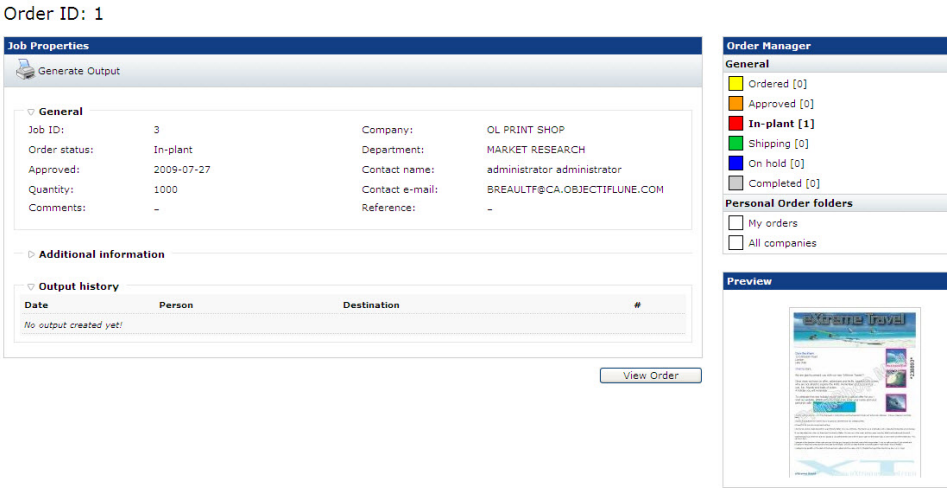
PrintShop Mail Web introduces various output options. The *Output* options are:

- Print
- Print to file
- Create PDF
- Preflight
- Send to Planet Press Watch.

In PrintShop Mail Web it is possible to print PrintShop Mail documents, static PDF files and File upload documents (only PDF documents) to a selected printer.

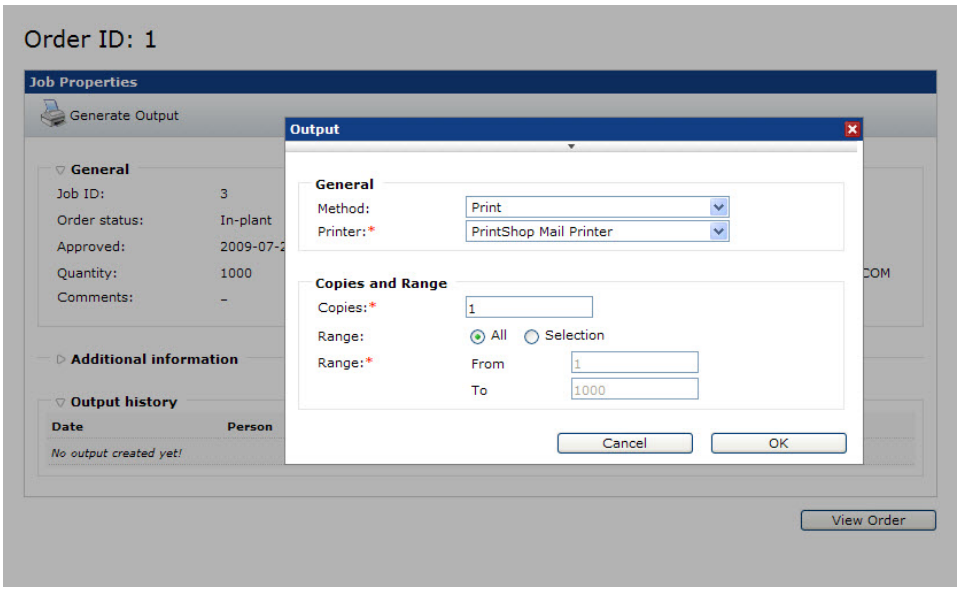
In order to create output the status of the order should be changed to *In-plant*. To print a document in the *In-plant* folder:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed and shows job details.



The Job Properties page

5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown:



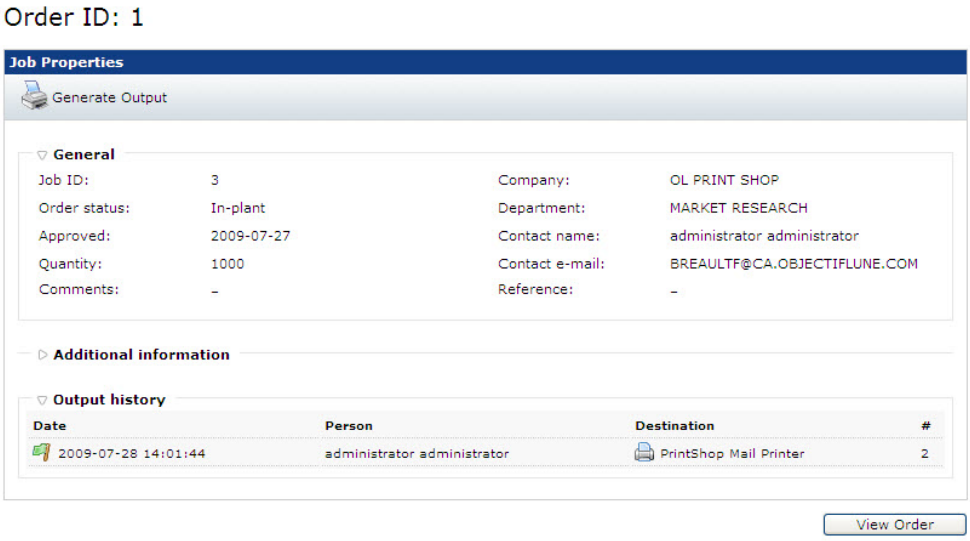
The Output options dialog with information sheet

6. Select *Print* in the *Method* pull-down-menu. In the *Output dialog* the following sections becomes visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information (e.g. the version of the PrintShop Mail application which is used to create the document, used technology, document's printer and operator instructions). The information is shown by clicking the handle of the sheet. Default the information sheet is hidden.
   - **General:**
     - **Method:** Select the *Output Method* here.
     - **Printer:** Select the *Output Printer* in the pull-down-menu. The printers shown in the pull-down-menu are set by PrintShop Server. Stopping and starting PrintShop Server will refresh the actual printer list. An overview of available printers is also visible in the *Settings* section. Blacklisted printers are not shown. Printers can be blacklisted/disabled in the *Printers* section of the *Settings* section.
   - **Copies and Range:**
     - **Copies:** Define the number of *Copies* to be printed.
     - **Range method:** The *Range method* determines the range of records that should be printed. Default *All* is selected. In case of a document with user input the *Selection* option can be used to provide extra records for the repetition option (*Preference* dialog in PrintShop Mail). For example: enter 1 to 10 to populate a single sheet of business cards with 10 cards.
     - **Range:** Specify the *Range* if needed.
7. Click *OK* to start printing.

Output History

For each print request an entry is added to the output history of the job. The *Output History* overview is shown on the *Job Properties* page. Every successfully outputted document shows a green flag symbol in the *Print Status* column. If problems are encountered during the output process a warning icon is shown.

The *Destination* column states the name of the printer. The #-column states the number of records outputted (not the number of copies).



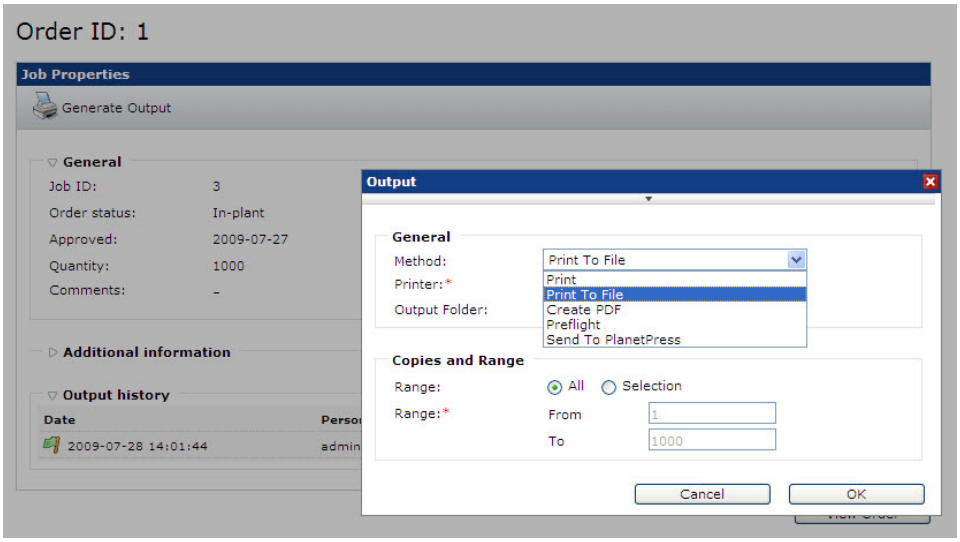
The Output history overview

2.5.6 Print to file

The *Print to File* option generates an optimized output file according to the print technology set in the PrintShop Mail template document. The operator can download the resulting output file on the *Job Properties* page and sent the document to the printer on the local network of the print shop. The print to file method prints the job to a printer file in a seleted *Output folder* and is only available for PrintShop Mail Documents.

In order to print to file the status of the order should be changed to *In-plant*. To print to file in the *In-plant* folder:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed showing job details and an *Output history* overview.
5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown.



The Output options dialog with information sheet

6. Select *Print to File* in the *Method* pull-down-menu. In the *Output dialog* the following sections become visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information. The information is shown by clicking the handle of the sheet. Default the information sheet is hidden.
   - **General:**
     - **Method:** Select the *Output Method* here.
     - **Printer:** Select the *Output Printer* in the pull-down-menu. The printers shown in the pull-down-menu are set by PrintShop Server. Stopping and starting PrintShop Server will refresh the actual printer list. An overview of available printers is also visible in the *Settings* section. Blacklisted printers are not shown. Printers can be blacklisted/disabled in the *Printers* section of the *Settings* section.
     - **Output folder:** Select a target folder in the *Output Folder* pull-down-menu. The *Output folder* pull-down-menu shows a list of the available output folders. The file will be stored in the selected folder. Output folders are managed in the *Settings* section of the system.
   - **Copies and Range:**
     - **Range method:** The *Range method* determines the range of records that should be printed. Default the *All* option is selected.
     - **Range:** Specify the *Range* if needed.
7. Click *OK* to start printing to file.

Output History

For each print request an entry is added to the output history of the job. The *Output History* overview is shown on the *Job Properties* page. Every successfully outputted document shows a green flag symbol in the *Print Status* column. If problems are encountered during the output process a warning icon is shown.

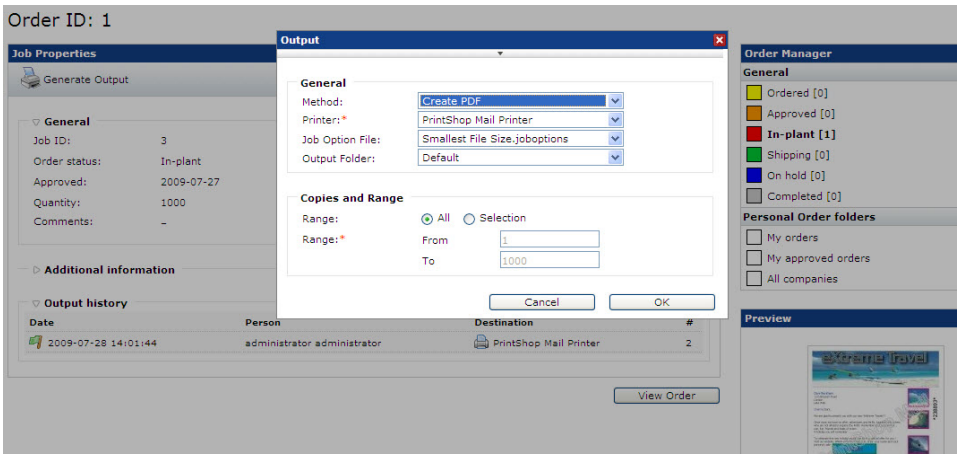
The *Output history* overview shows the 5 most recent output tasks. The *Destination* column states the path to the outputted file. The most recent outputted file shows a download icon and has a hyperlink allowing the operator to download the file. The #-column states the number of records outputted (not the number of copies).

Note: By default the download link will only work on the localhost, this is due to the tight security settings of printShop Mail Web. For more information see the *Output Folders* information in the *Settings* section.

2.5.7 Create PDF output

The new print option for static PDF documents allows the operator to print the High Resolution PDF document via one of the printers on the PrintShop Mail Web server. In order to create PDF output the status of the order should be changed to *In-plant*. PDF output can be created for PrintShop Mail jobs, static PDF jobs and File upload documents (PDF documents only):

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed showing job details and an *Output history* overview.
5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown.
6. Select *Create PDF* in the *Method* pull-down-menu:



The Output dialog with Create PDF options

7. In the *Output dialog* the following sections becomes visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information. The information is shown by clicking the handle of the sheet. Default the information sheet is hidden.
   - **General:**
     - **Method:** Select the *Output Method* here.
     - **Printer:** Select the *Output Printer* in the pull-down-menu. The printers shown in the pull-down-menu are set by PrintShop Server. Stopping and starting PrintShop Server will refresh the actual printer list. An overview of available printers is also visible in the *Settings* section. Blacklisted printers are not shown. Printers can be blacklisted/disabled in the *Printers* section of the *Settings* section. The output printer is used to generate the PostScript that will be converted into PDF.
     - **Job Option File:** Select a *Job Option File*. The selected file is used in the conversion from PostScript to PDF.
     - **Output folder:** Select a target folder in the *Output Folder* pull-down-menu. The file will be stored on this location. Output folders are managed in the *Settings* section of the system.
   - **Copies and Range:**
     - **Range methode:** The *Range methode* determines the range of records that should be printed. Default *All* is selected.
     - **Range:** Specify the *Range* if needed.
8. Click *OK* to create PDF output. Once completed the PDF will be created in the selected output folder and a new entry is added to the *Output History* overview of the job.

Output History

For each print request an entry is added to the output history of the job. The *Output History* overview is shown on the *Job Properties* page. Every successfully outputted document shows a green flag symbol in the *Print Status* column. If problems are encountered during the output process a warning icon is shown.

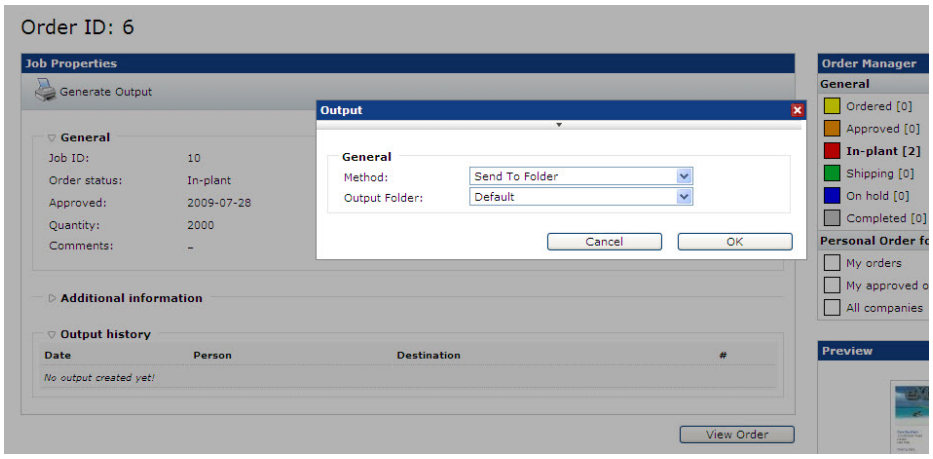
The *Output history* overview shows the 5 most recent output tasks. The *Destination* column states the path to the outputted file. The most recent outputted file shows a download icon and has a hyperlink allowing the operator to download the file. The #-column states the number of records outputted (not the number of copies).

Note: By default the download link will only work on the localhost, this is due to the tight security settings of printShop Mail Web. For more information see the *Output Folders* informatin in the *Settings* section.

2.5.8 Send to folder

The *Send to Folder* option is only available for static PDF documents and file upload documents. This method creates a copy of the High Resolution version of the PDF document in the selected *Output folder*. In order to send a PDF to folder the status of the order should be changed to *In-plant*. To send a document to folder:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed showing job details and an *Output history* overview.
5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown.
6. Select *Send to Folder* in the *Method* pull-down-menu:



The Output dialog with Send to Folder options

7. In the *Output dialog* the following sections becomes visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information (e.g. document name, file name and operator instructions). The information is shown by clicking the handle of the sheet.
   - **General:**
     - **Method:** Select the *Output Method* here.
     - **Output folder:** Select a target folder in the *Output Folder* pull-down-menu. The file will be stored on this location. Output folders are managed in the *Settings* section of the system.
8. Click *OK*. Once completed the PDF will be created in the selected output folder and a new entry is added to the *Output History* overview of the job.

Output History

For each request an entry is added to the output history of the job. The *Output History* overview is shown on the *Job Properties* page. Every successfully outputted document shows a green flag symbol in the *Print Status* column. If problems are encountered during the output process a warning icon is shown.

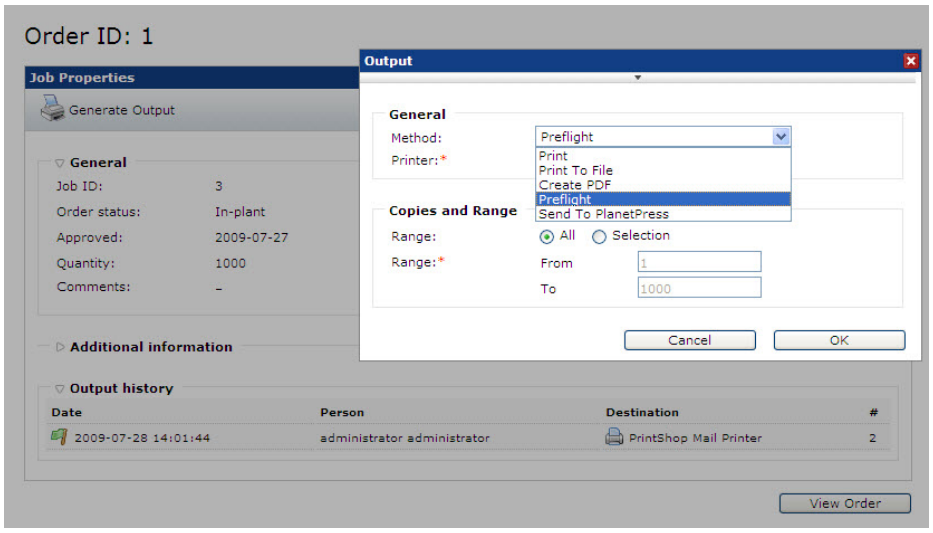
The *Output history* overview shows the 5 most recent output tasks. The *Destination* column states the path to the outputted file. The most recent outputted file shows a download icon and has a hyperlink allowing the operator to download the file. The #-column states the number of records outputted. When PrintShop Mail Web doesn't have information regarding the number of pages in the docment a dash is shown in this column.

Note: By default the download link will only work on the localhost, this is due to the tight security settings of printShop Mail Web. For more information see the *Output Folders* informatin in the *Settings* section.

2.5.9 Preflight a PrintShop Mail document

The *Preflight* method is only available for PrintShop Mail documents and will verify the database and the PrintShop Mail document. This process checks for possible errors on the layouts (e.g. text that doesn't fit its bounding box). To preflight a print job before printing the jobs:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed showing job details and an *Output history* overview.
5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown.
6. Select *Preflight* in the *Method* pull-down-menu.



Preflight dialog

7. In the *Output dialog* the following sections becomes visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information. The information is shown by clicking the handle of the sheet.
   - **General:**
     - **Method:** Select the *Output Method* here.
     - **Printer:** Select the *Output Printer* in the pull-down-menu. The printers shown in the pull-down-menu are set by PrintShop Server. Stopping and starting PrintShop Server will refresh the actual printer list. An overview of available printers is also visible in the *Settings* section. Blacklisted printers are not shown. Printers can be blacklisted/disabled in the *Printers* section of the *Settings* section.
   - **Copies and Range:**
     - **Range method:** The *Range method* determines the range of records that should be checked. Default *All* is selected.
     - **Range:** Specify the *Range* if needed.
8. Click *OK* to start preflighting the file. Once the process is completed the *Preflight Result* dialog is shown. Any problems with the print job will be shown here.

Important: If images are used in PrintShop Mail based upon conditions, and these conditions determine that the image should not be displayed (empty file name as a result), a notification will be included in the preflighting data for each empty image. The notification displayed is "*No image specified*". In order to avoid this notification you may want to use in PrintShop Mail a transparent image as an alternative for the empty file name.

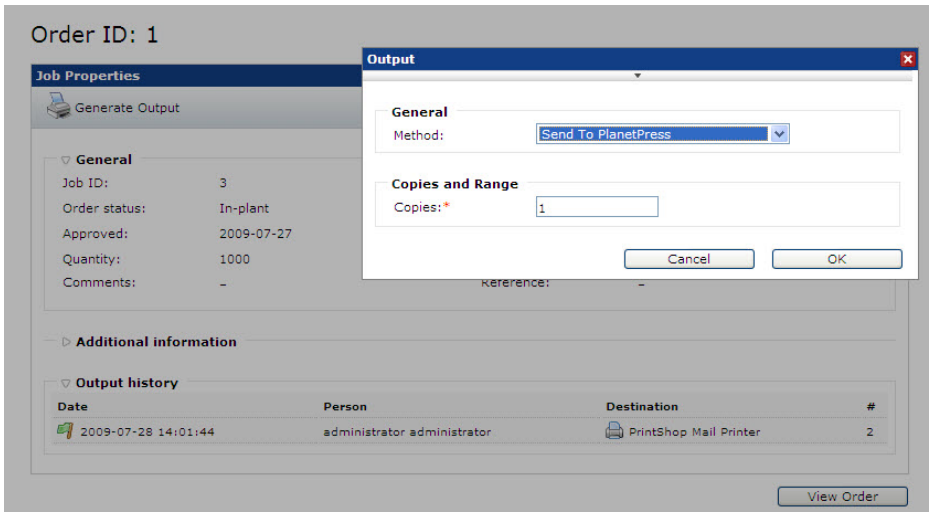
2.5.10 Send a document to PlanetPres Watch

The new *Send to PlanetPress Watch* option allows the operator to send a PrintShop Mail job to PlanetPress Watch and let PlantetPress Watch handle the printing of PrintShop Mail documents. PlanetPress Watch will have a new helper service that will query PrintShop Mail Web to know if there are jobs for it. PrintShop Mail Web provides the paths to the PrintShop Mail template and the database file to PlanetPress Watch using an XML message.

In the PlanetPress Watch process the user can then either use the PrintShop Mail plug-in, send the job to another sub process upon conditions to spread the load or even concatenate the data file per unique document to later do batch printing at scheduled item. To concatenate the data a user can use the XSLT plug-in.

The *Send to PlanetPress Wacht* option is only available for PrintShop Mail documents. In order to sent a job to PlanetPress Watch and prepare an output request for PlanetPress Watch:

1. Click *Order Manager* in the *Menu* bar. The *Order Manager* page is shown.
2. Click *In-plant* in the side menu.
3. Click the plus-symbol next to the order ID to view the jobs of this order.
4. Select a job by clicking its ID or document name. The *Job Properties* page is displayed showing job details.
5. Click *Generate Output* in the *Action* bar. The *Output dialog* is shown.
6. Select *Sent to PlanetPress* in the *Method* pull-down menu:



The Output options dialog with Sent to PlanetPress Watch options

7. In the *Output dialog* the following sections becomes visible:
   - **Information Sheet:** Along the top of the dialog a *Sheet* is added. The sheet contains additional information. The informations is shown by clicking the handle of the sheet.
   - **General:** Select the *Output Methode* here.
   - **Copies and Range:** Define the number of *Copies* to be sent to PlanetPress Watch.
8. Click *OK* to sent the job to PlanetPress Watch.

Output History

For each PlanetPress Watch request an entry is added to the output history of the job. The *Output History overview* is shown on the *Job Properties* page. The *Destination* column states *PlanetPress Watch.*

2.5.11 Context menus

A *Context menu* (also called shortcut) is a menu in a graphical user interface (GUI) that appears upon user interaction, such as a right mouse click. A context menu offers a limited set of items that are available in the current state, or context, of the application. A context menu can help you save time while working with documents, because it requires less mouse movement and menu searching. This chapter explains how to ascess context menus and what types of options are available in different context menus. Context menus drop-down when users right-click on an object that supports a context menu.

To display a context menu right click the object you want to affect.

Order Manager Overview

Richt click an order to invoke the *Order Context* menu. The available links in the context menu depend on the users' role and the current status of the order. The *Order context* menu contains the following items:

- **Send To:** The *Send to...* context menu item status the name of the next order status in the workflow (e.g. *Send to Shipping* for orders in the *In-plant* folder).
- **Edit:** Click the *Edit* context menu item to display the *Order Edit* page of the selected order. By default all roles have this right for the *Ordered* status.
- **Delete:** Click the *Delete* context menu item to display the *Delete confirmation dialog*. By default all roles have this access right.

Click the plus-symbol next to an order. The jobs of this order are shown. Right click a job to invoke the *Job Context* menu. The available links in the context menu depend on the users' role and the current status of the order. The *Job context* menu contains the following items:

- **Generate Output:** The *Generate output* context menu item will display the *Generate Output* dialog. The *Generate Output* dialog lets the operator output/print the selected job. The *Generate Output* context menu by-passes various pages in order to invoke the *Generate Output dialog*.
- **View Softproof:** Click the *Softproof* context menu item to display the low resolution PDF or softproof in a new window. This context menu is only applicable for PrintShop Mail and static PDF documents and is not available for File upload documents as this document type doesn't have a softproof document.

Order Properties page

Click an order. The *Order properties* page appears. Right click a job on the *Order Properties* page in the *Job overview* to invoke the *Job Context* menu. The available links in the context menu depend on the users' role and the current status of the order. The *Job context* menu contains the following items:

- **Generate Output:** The *Generate output* context menu item will display the *Generate Output* dialog. The *Generate Output* dialog lets the operator output/print the selected job. The *Generate Output* context menu by-passes various pages in order to invoke the *Generate Output dialog*.
- **View Softproof:** Click the *Softproof* context menu item to display the low resolution PDF or softproof in a new window. This context menu is only applicable for PrintShop Mail and static PDF documents and is notavailable for File upload documents as this document type doesn't have a softproof document.

Order Manager Completed Overview

Right click an order in the *Order Manager Completed overview* to invoke the *Order Context* menu. The *Order context* menu contains the following items:

- **Delete:** Click the *Delete* context menu item to display the *Delete confirmation dialog*. By default all roles have this access right.

Right click a job in the *Order Manager Completed overview*to invoke the *Job Context* menu. The *Job context* menu contains the following items:

- **View Softproof:** Click the *Softproof* context menu item to display the low resolution PDF or softproof in a new window. This context menu is only applicable for PrintShop Mail and static PDF documents and is notavailable for File upload documents as this document type doesn't have a softproof document.
- **Re-order:** Click the *Re-order* link to place a copy of the order in the current checkout. In the checkout the user can choose to edit the job content. The re-order context menu item is available to all document types.

3 Ordering workflow

This chapter explains the various ordering workflows and price calculation methods of PrintShop Mail Web. The ordering workflow incorporates a shopping cart as seen in common ecommerce Internet sites.

The ordering process step by step:

1. **Document Creation:** The *New Document* section is a store front listing the documents available to the customer. Based on the selected document the system invokes a wizard like interface guiding the customer through the steps of the document creation process. At the end of this process the customer is shown a PDF softproof. If the customer is satisfied with this document it can be added to the shopping cart. The customer can continue creating more documents and add those documents to the cart.
2. **Shopping Cart:** The shopping cart (or basket) allows customers to collect documents created via or selected from the *New Document* section. The pricing configuration controls whether the customer may enter a user definable quantity, pick a quantity from a predefined list or whether the uploaded database determines the quantity.
   The orders that are approved from the *Ordered* folder in the *Order Manager* section, are also placed in the *Shopping Cart*. Users can verify the quantities, the content of the job and the shipping details of the order.
3. **Shipping Options:** This step allows the customer to select one of the available shipping methods (if applicable), select a preferred shipping date, verify the shipping address information and add comments.
4. **Payment Options:** The *Payment Options* page requires the customer to select a payment method (if applicable), add a order reference number and verify the billing address.
5. **Order Summary:** This page summarizes the order. The documents in the cart, the address the order will be shipped to, and the payment information are shown.
6. **Order Confirmation:** If the order has been processed successfully, the order confirmation page is shown. This page includes the PrintShop Mail Web order number and transaction information if applicable.

Pricing parameters are set per document or publication type. These parameters define the quantity entry method the customer sees and whether automatic price calculation is performed. In order to calculate prices a volume discount table needs to be specified per document or publication type.

Tax Rate profiles can be setup per tax rate system and are created in the *Settings* section. These profiles can be assigned to documents, companies and departments. Profiles assigned to a document have the highest priority. If no tax rate is specified for a document, the system will use the tax rate assigned to the company or department. If no tax rate is specified at all the system will use the system default tax rate profile.

Price calculation can also include the following items:

- Shipping charges
- Rush rate charges

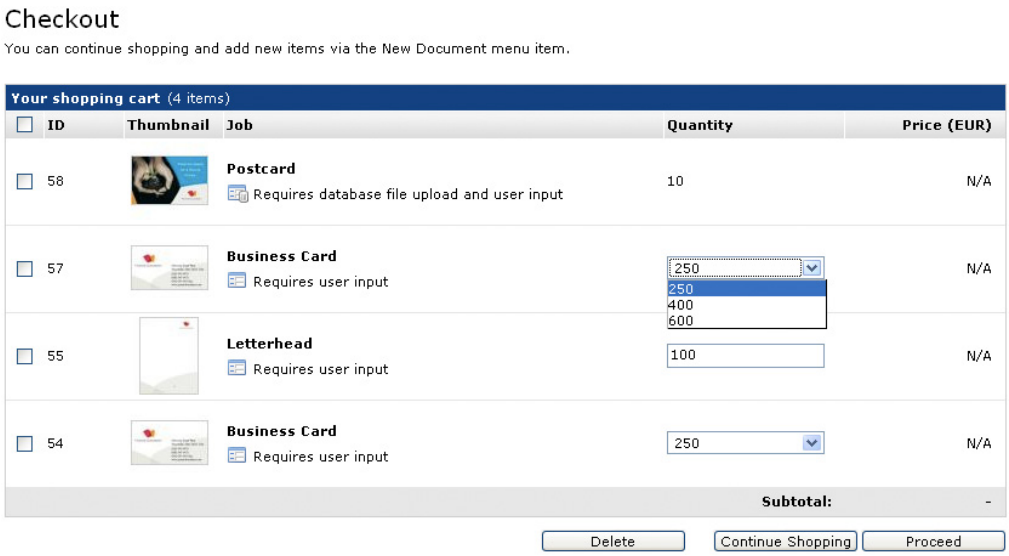
Note: Changes to the pricing parameters of a document (or publication type) do not effect the items stored in the shopping cart of logged on customers.

3.1 The shopping cart

The shopping cart allows customers to collect multiple documents in the cart before placing an order. Documents created by a customer stay in the shopping cart even if the customer leaves the web site. There is no need for the customer to complete the ordering process. The next time the customer logs on the shoppping cart will list the documents created in a previous session. The contents of the documents can be changed (*Edit job content*), the documents can be removed from the cart and new documents can added.

In PrintShop Mail Web it is possible to edit the content of PrintShop Mail documents in the *Checkout* or *Shopping cart*. These PrintShop Mail documents must contain data fields and/or variables. In the shopping cart, next to the documents name a pencil icon is shown. Customers can click the pencil icon to edit the content of the job. It is possible now to change the data entered for user input fields, change the field mapping of an uploaded databae file or replace the database file.

Each item in the cart can have a different pricing setup and quantity entry method. The appearance of the quantity field depends on the entry method set for the document or is defined by the document type. Documents that require a database file upload have quantity, which is determined by the number of records in the database file. Documents that require a file upload are placed in the shopping cart as a quote order.



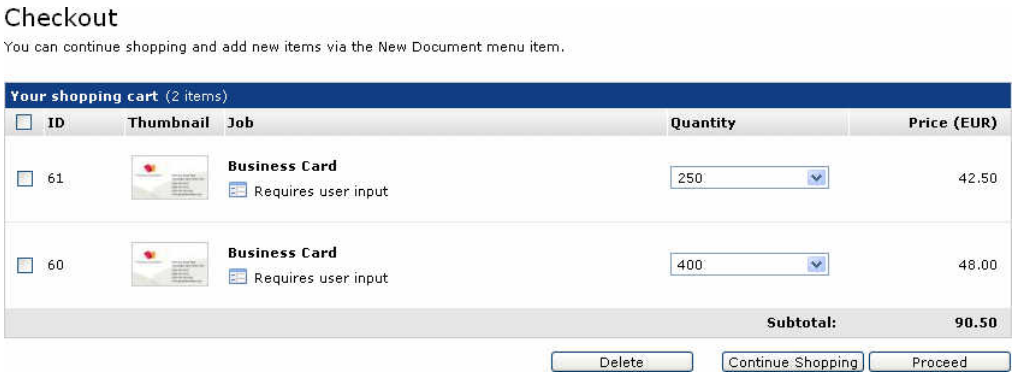
The shopping cart containing multiple documents with different quantity entry methods

The quantity entry method could be one of the following:

- **Free entry field:** The customer can enter a custom quantity within the minimum and maximum quantity range (*Pricing Options* page).
- **Predefined list:** The customer can select a quantity from a predefined list. This list is derived from the volume discount table.

3.1.1 Automatic price calculation

In order to automatically calculate the price of a job a volume discount table should be available and the pricing calculation option must be enabled (*Edit Pricing* page).



The shopping cart with documents that have price calculation enabled

The prices shown in the shopping cart include setup costs (optional), these costs are defined separately.

When the quantity entry is set to *Free Entry*, a custom quantity can be entered. The entered value should be between the minimum and maximum quantity range. Whenever the user changes the quantity in the shopping basket the price of that document and the subtotal will be updated automatically. If the entered quantity does not meet the minimum and maximum requirements a warning will be shown.

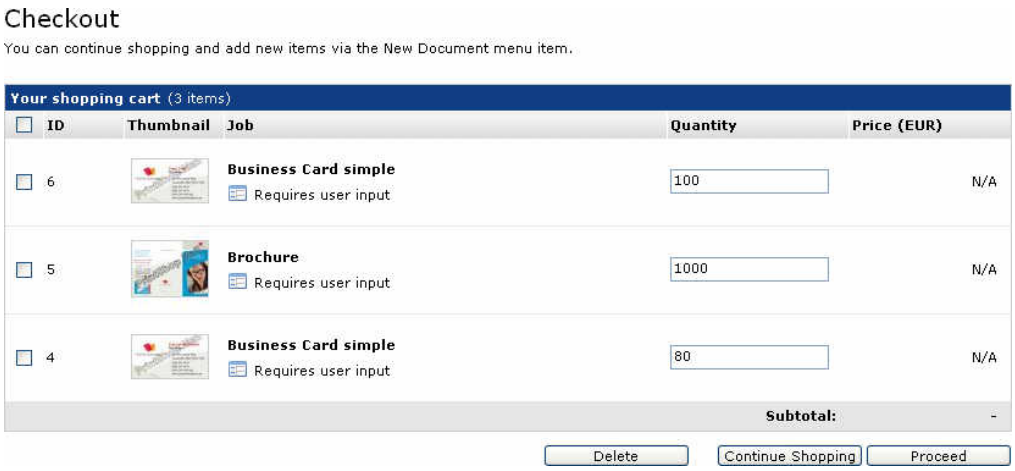
Prerequisites

Prerequisites for automatic price calculation:

- Enable pricing for the document
- Create a volume discount table for the document

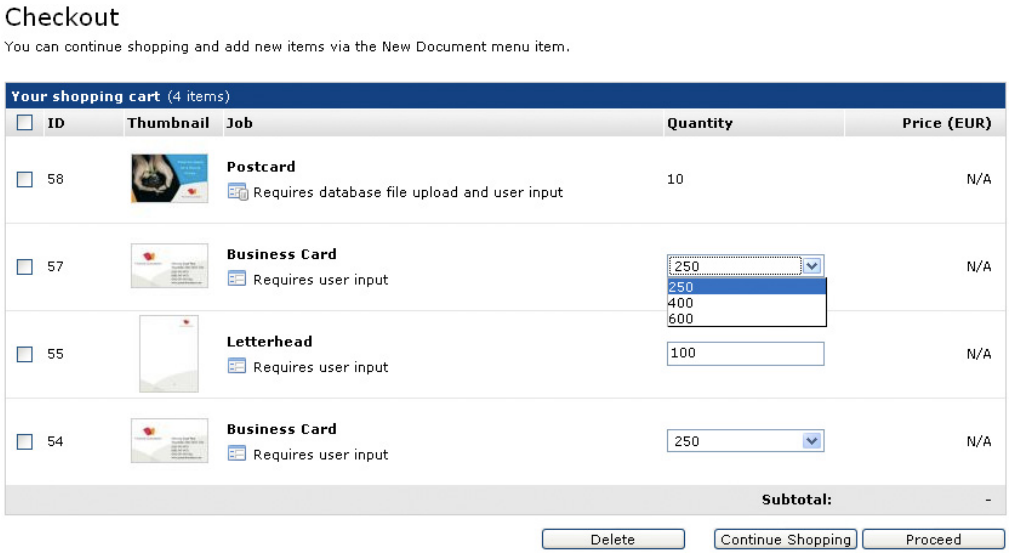
3.1.2 No price calculation

Automatic price calculation is defined per document and is disabled by default. The initial entry method for these document is *Free Entry* and no quantity restrictions are set. In this case the pricing column shows the *Not Applicable* (N/A) message. The *Quantities* options on the *Edit Pricing* page control the entry method and quantity restrictions of the document.



The shopping cart containing multiple documents without pricing

When the quantity entry method is set to *Predefined List* the customer will choose the quantity from a pop-up-menu. The available quantities are retrieved from the volume discount table of that document. If there is only one entry in the discount table this value is used as the quantity for the document, the customer will not be able to change this value. If automatic price calculation is disabled the prices in the volume discount table are ignored but still define the quantities the user will be able to choose from.



The shopping cart containing multiple documents with different quantity entry methods

Prerequisites

To disable automatic price calculation:

- Disable pricing for the template

3.1.3 Price Quotes

A document will require a price quote when pricing is enabled for the document but no entries are found in the volume discount table. In this case no subtotals and totals will be shown in the shopping basket. After placing the order the production manager needs to enter a price quote. The customer will not be able to approve the order until a price quote is given.

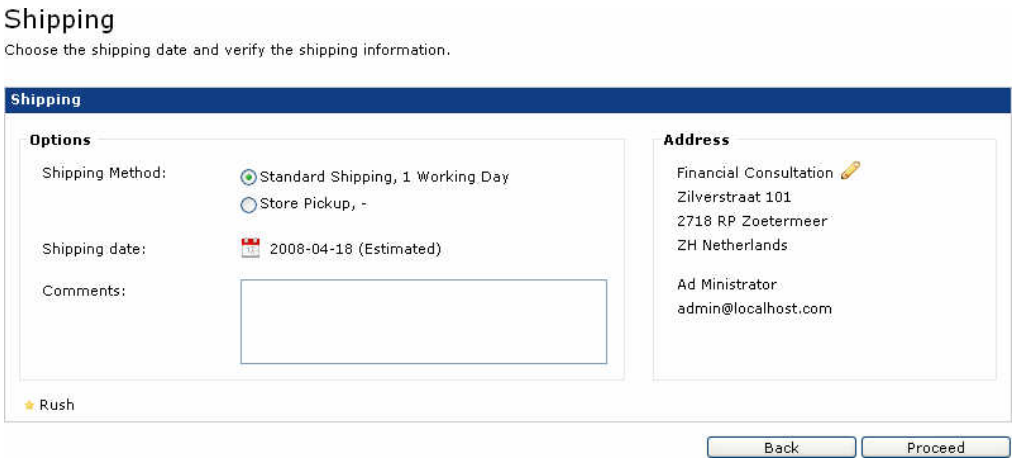
Prerequisites

Prerequisites to enable price quotes:

- Enable pricing for the document
- Do not create a volume discount table

3.2 Shipping Options

The *Shipping* page lets the customer edit the shipping address and specify shipping related items like the shipping method (if applicable) and the preferred shipping date. Shipping methods are managed in the *Settings* section of the system. The calculation of shipping charges can be enabled and disabled per company. Profiles need to be assigned to companies and departments to enable the customer to select a shipping method in the ordering workflow.



The Shipping Options page

The *Shipping* page contains the following sections:

- **Address:** The *Address* the order will be shipped to. This information is automatically retrieved from the company or department the customer belongs to. In case the customer belongs to multiple departments or companies the information is based on the company/department of the first document in the cart. The selected country in the pull-down-menu defines the checks of the zip code and defines the presentation and values of the state field.
- **Options:**
  - **Shipping Methode:** The preferred shipping method.
  - **Shipping Date:** The preferred or estimated shipping date.
  - **Comment Field:** In this field the customer can enter a descriptive text or note.
  - **Reference Field:** The *Reference* field can be used by end users to enter a company reference. This reference can be used than in correspondence with the print supplier.
- **Terms and Conditions:** The ordering workflow requires the customer to view and accept the *Terms and Conditions* of the print shop. The text for the terms and conditions can changed by the print shop. The terms and conditions are required. First after checking the terms and conditions checkbox the *Proceed* button is enabled.
  Click the *Terms and Conditions* link to open the *Terms and Conditions* dialog. For more information see Managing the Terms and Conditions.

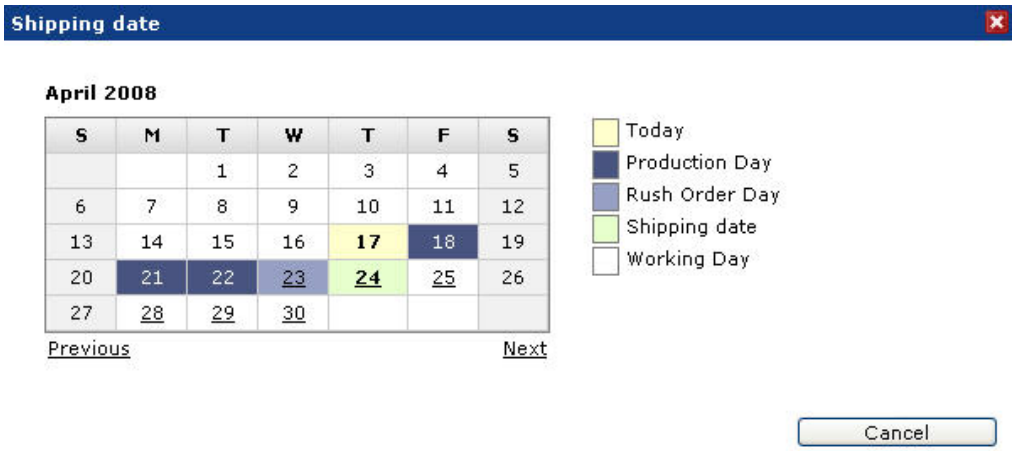
3.2.1 Restore address

Click the *Restore address* button if the address information was modified on the *Shipping* page. The address information is restored from the address information section from the company/department.

3.2.2 Shipping Date and Rush Rate handling

PrintShop Mail Web automatically calculates an estimated shipping date based on the longest *Standard Production Time* set for the documents in the cart. The customer can select a different date by clicking the calendar icon. The calendar marks the current date, production dates and non working days. None of the dates marked as production day or non working day can be selected.

The system will check if *Rush Order Production Time* is applicable. Shipping dates that require a rush order are marked behind the calendar icon. The rush rate charges for those documents that require a rush order are added to the final price calculation.



The Shipping Date calendar

The *Standard Production Time*, *Rush Order Production Time* and *Rush Rate* are set in the *Settings* page from the *Production* section of a document.

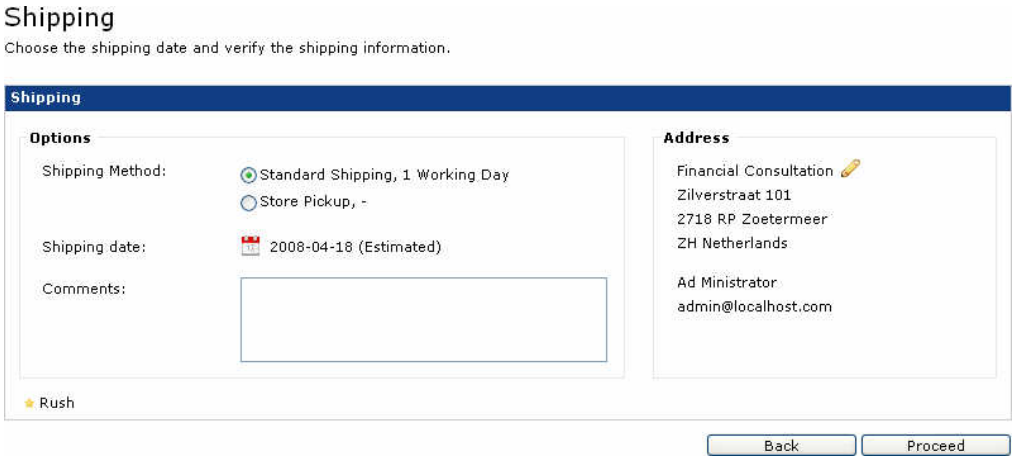
Prerequisites

Prerequisites for automatic rush rate calculation:

- Setup working days and restricted order dates in the *Settings* section.
- Set the *Standard Production Time* and *Rush Production Time* of the templates. To accept rush orders the *Rush Production Time* should be set to a lower value than the *Standard Production Time.*
- Enter a *Rush Rate* on the *Settings* page from the *Pricing and Ordering* section of the document.

3.2.3 Shipping Methods

To allow a customer to select a shipping method the administrator should enable the calculation of shipping charges for the company (or department). When the customer has access to multiple companies or departments the entries of the shipping method list is defined by the selected company or department on the *Shipping* page.



The Shipping Options page

When a shipping rates table is available, the shipping rate is calculated based on the total weight of the items in the cart. If no rates table is specified the base fee of the shipping rate profile is used as a flat fee for all items in the cart. In case both a base rate and a rates table are available, the base rate will be added to the price that is calculated based on the total weight.

The actual shipping rate is shown on the *Order Summary* page.

Prerequisites

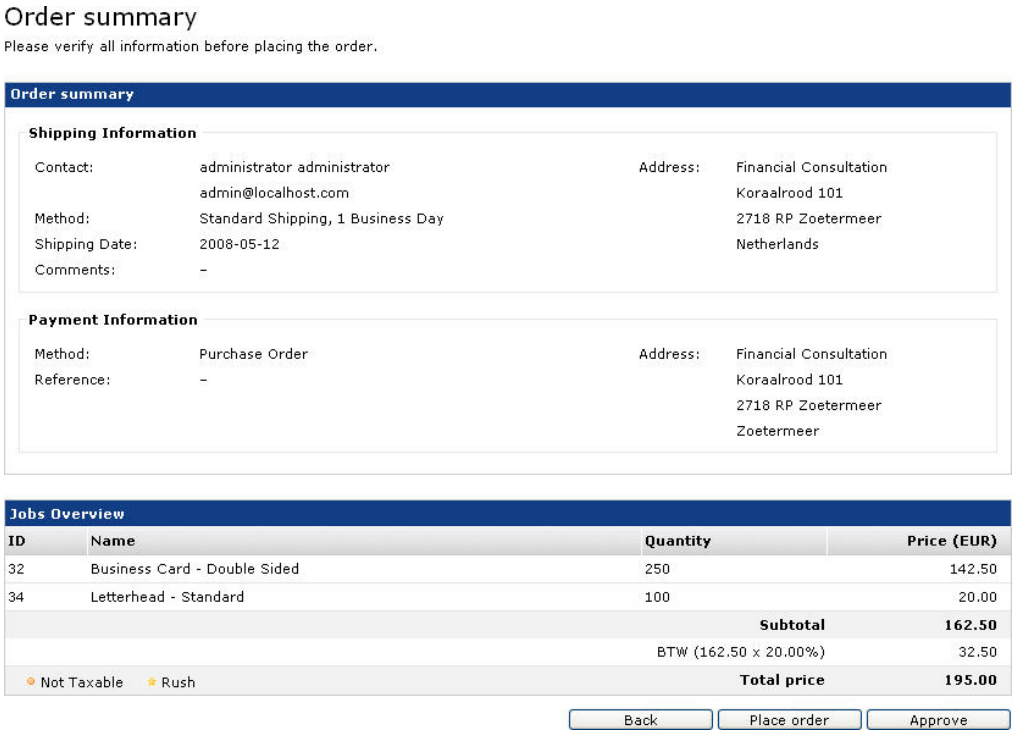
Prerequisites for charging shipping rates:

- Create one or multiple shipping rate profiles.
  - Set a base rate and/or create a rates table for the profile.
- Enable the *Calculate Shipping Charges* option in the *Pricing and Ordering* page of companies or departments.
- Enable the *Calculate Shipping Charges* option in the *Pricing and Ordering* page of templates.
  - To use a rates table a value needs to be entered in the *Weight Per Unit* field of the template.

3.3 Order summary

Once all order information is collected the summary page is shown. This page summarizes the order information and shows the final pricing including shipping charges, rush rates and tax. Based on the customers role the *Place Order* and *Approve* buttons are shown.

PrintShop Mail Web invokes a workflow specific to the selected payment connector. The default payment connector (*Purchase Order*), pops up a processing dialog and no user interaction is required to place the order. Once the order is placed a confirmation page is shown and a e-mail notification message is sent.



Order summary

Please verify all information before placing the order.

Order summary

Shipping Information

Contact:	administrator administrator	Address:	Financial Consultation
	admin@localhost.com		Koraalrood 101
Method:	Standard Shipping, 1 Business Day		2718 RP Zoetermeer
Shipping Date:	2008-05-12		Netherlands
Comments:	-		

Payment Information

Method:	Purchase Order	Address:	Financial Consultation
Reference:	-		Koraalrood 101
			2718 RP Zoetermeer
			Zoetermeer

Jobs Overview

ID	Name	Quantity	Price (EUR)
32	Business Card - Double Sided	250	142.50
34	Letterhead - Standard	100	20.00
		Subtotal	**162.50**
		BTW (162.50 x 20.00%)	32.50
Not Taxable Rush		**Total price**	**195.00**

Back | Place order | Approve

The Order Summary page

3.4 Manage the Terms and Conditions

The *Terms and Conditions* template is a HTML document and is stored on the file system of the PrintShop Mail Web web server. The terms and conditions document can be altered using a plain text editor (e.g. Note Pad++). The terms and conditions document can be add per language and/or per skin allowing the look and feel of the message to be changed according to that skin.
In order to create language specific terms and condition documents (in the termsandconditions folder) the name of these language specific terms and conditions documents should match the iso code as specified in the *Language* section of the *Settings* section.

The document is read from the following location, sorted by priority and language of the current logged in user:

- C:\Program Files\PrintShop Web\Website\templates\<skinname>\misc\termsandconditions\<languageiso>\termsandconditions.php
- C:\Program Files\PrintShop Web\Website\templates\<skinname>\misc\termsandconditions\termsandconditions.php
- C:\Program Files\PrintShop Web\Website\misc\termsandconditions\<languageiso>\termsandconditions.php
- C:\Program Files\PrintShop Web\Website\misc\termsandconditions\termsandconditions.php

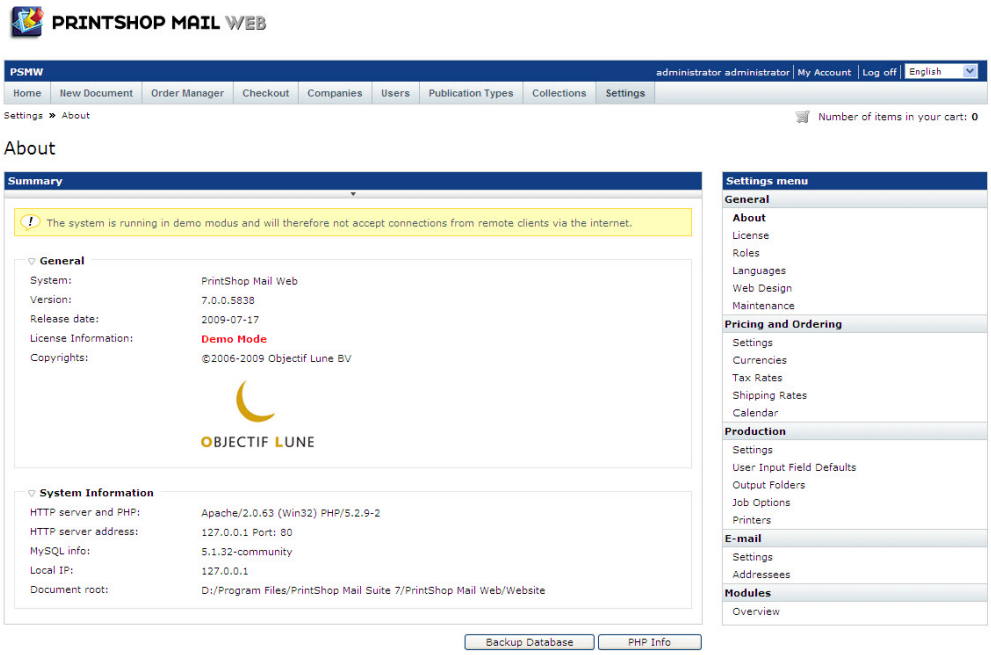
The administrator can simply place a copy of the terms and conditions document in the folder of the skin and start customizing the file. The isocode used in the folder path is in lowercase.

To edit the default *Terms and Conditions* document:

1. Select the *Terms and Conditions* document on the following location:
   C:\Program Files\PrintShop Web\Website\misc\termsandconditions\termsandconditions.php and open the document in a plain text editor.
2. Add your terms and conditions to the document.
   It is possible to use PHP statements in the terms and conditions document. The builtin function *getString* is available and returns the given string from the language strings in the *Language* section from the *Settings* section.
3. Click *Save* to store the changes.

4 Settings

The administrator is the only user that can modify the system settings. The *Settings* section can be accessed from the *Menu* bar. Click *Settings* in the *Menu* bar. The following screen appears:



By selecting Settings in the Menu bar the Setting Summary page appears

5 General Settings

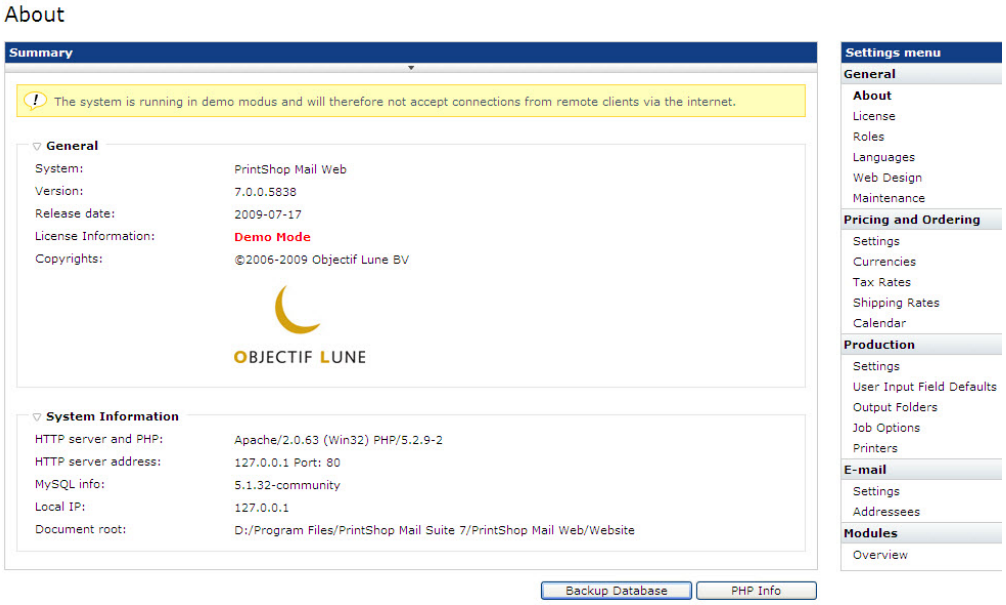
In the *General* section of the *Settings* menu general system settings can be defined. This section covers the following topics:

5.1 About

The *About* window is the window that opens when the *Settings* tab in the *Menu* bar is selected. The *Summary* window shows the following information:

- **General:** The *General* section shows information regarding the version of the software.
- **System Information:** The *System Information* section shows information about the technical components of the system (e.g. the IP-address of the PrintShop Mail Web-server, version information of the web server software and information about the database server software.
- **PHP Info:** The *PHP-info* button shows all PHP-settings which are important in case technical support is required.
- **Backup Database:** The Backup Database button allows an administrator to get a backup of the database used by PSM Web over the internet.

Clicking on the small grey bar a sliding sheet shows the statistic information about the number of logged on users, user accounts, companies, templates, orders and printers. If no printers are found a warning is shown telling you to restart the PrintShop Server.



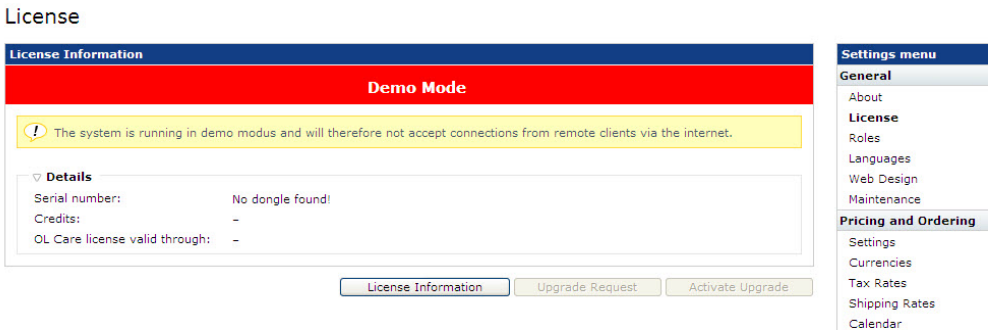
The About page with slide sheet

5.2 License

PrintShop Mail Web includes options to invoke a PrintShop Mail Web specific upgrade request page and a dialog to activate an upgrade code.

Furthermore PrintShop Mail Web works in demo mode when no dongle /invalid dongle is found. With the demo version of the PrintShop Mail Web software, only **two** records per print job can be printed. Each print will have a watermark printed. IN demo mode access to the system is limited to the local network. For an unlimited/ production version of the PrintShop Mail Web software, a software license with a hardware key (dongle) is required.

The *License information* page shows an overview of the dongle/license information. When no dongle or an invalid is found a warning is shown on the *License Information* page:



A warning is shown on the License information page when no dongle is found.

5.2.1 Activate Upgrade

The *License information* page shows an overview of the active dongle/license information. To activate an upgrade:

1. Click *Settings* in the *Menu* bar.
2. Click *License* in the side menu.
3. Click the *Activate Upgrade* button. The *Activate Upgrade* dialog appears.
4. The *Activate Upgrade* dialog allows the administrator to upgrade the PrintShop Mail Web dongle using the upgrade code provided by OL. Enter (or copy and paste) the *Activation code* in the *Activation code* entry field.
5. Click *Activate.* Once the upgrade process is completed the dialog is closed and the license page is refreshed to reflect the new dongle information.

5.2.2 License information

The *License information* page shows an overview of the dongle/license information (Serial number, Credits, OL Care license, etc.) including the licensed plug-ins. The *License Information* page includes options to invoke the online update request page allowing the administrator to renew the OL care maintenance agreement and/or acquire additional PrintShop Mail Web modules/plug-ins. To show the *License information* page:

1. Attach the hardware key to an USB-port.
2. Click *Settings* in the *Menu* bar.
3. Click *License* in the side menu. The following screen appears.
4. When the *License information* page is shown the license information from the memory is read. The *License information* is read every hour (automitically). To manually refresh the dongle information click the *License Information* button. When no dongle/invalid dongle is found the system is falling back to the demo modus.

5.2.3 Redeem Voucher

The *License information* page shows an overview of the active dongle/license information. To redeem your voucher:

1. Click *Settings* in the *Menu* bar.
2. Click *License* in the side menu.
3. Click the *Voucher* button. The *Voucher* dialog appears.
4. Select "I would like to redeem my voucher"
5. Enter the Voucher Code provided and click on **Redeem my voucher** and follow the instructions to receive the activation code.

5.2.4 Upgrade Request

The *License information* page shows an overview of the active dongle/license information. When no dongle/ invalid dongle is found the *Upgrade Request* button is disabled. To do an upgrade request:

1. Attach the hardware key to an USP-port.
2. Click *Settings* in the *Menu* bar.
3. Click *License* in the side menu.
4. Click the *Upgrade Request* button. The *Upgrade Request* dialog appears.
5. The PrintShop Mail Web upgrade request pages resides on the Objectif Lune web server and allows the PrintShop Web owner to renew the OL Care license and obtain licenses for commercial modules. Enter name and address information before submitting the form. A *Thank you page* is shown and it is possible to print the confirmation of the upgrade request.

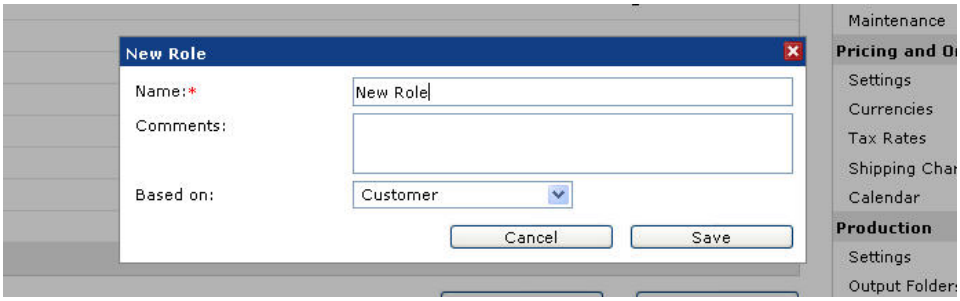
5.3 Roles

Roles are assigned to user accounts and define which sections and resources users in PrintShop Mail Web are allowed to access. PrintShop Mail Web has nine predefined roles which can be modified by the administrator (not deleted). The administrator may add and delete custom roles. The administrator role itself can not be modified or deleted.

5.3.1 Create a new role

To add a new role:

1. Click *Settings* in the *Menu* bar and click *Roles* in the side menu. The *Roles overview* page appears.
2. Click the *Add* button. This will show the *Add* dialog:

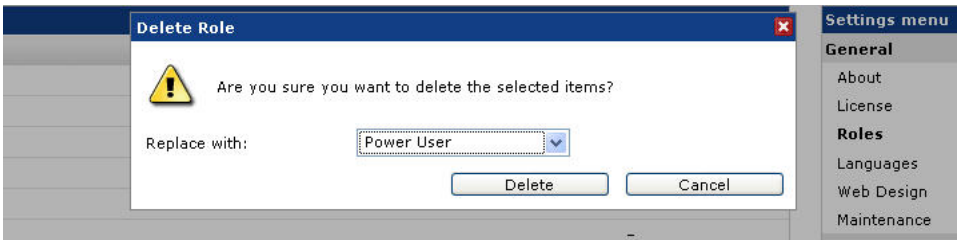


The Add role dialog

3. Enter a *Name* for the new role. Select on which role the new role will be based. The new role will receive all settings of the selected role.
4. Click *Save* to create the new role and close the dialog. The new role is added to the *Roles overview*.

5.3.2 Delete a role

1. Click *Settings* in the *Menu* bar and click *Roles* in the side menu.
2. Select one or multiple user defined roles by clicking the checkbox in front of a role.
3. Click the *Delete* button. The *Delete* dialog appears:



The Delete role dialog

4. The application will ask you to select a replacement role for the user accounts that have one of the selected roles.
5. Click the *Delete* button to remove the roles and assign the replacement role to the affected user accounts.

Note: The system defined roles cannot be deleted.

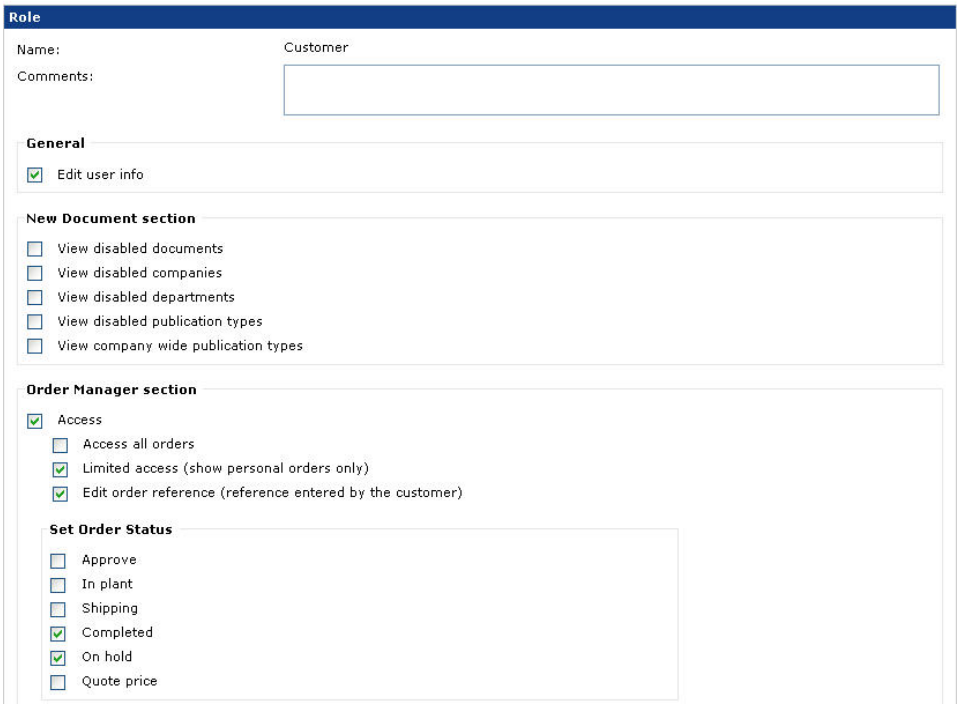
5.3.3 Modifying a role

Modifying a role

To modify a role:

1. Click *Settings* in the *Menu* bar.
2. Click *Roles* in the side menu. An overview of the available roles is shown.
   The users column of each row represents the numbers of users with that particular role.
3. Select a role from the overview. The *Properties* of that role are shown:

   Roles



The Role properties page with collapsible sections

In the *Role Properties* screen you see the collapsible sections for which you can define user rights. In each section you can specify whether a user with the selected role may perform a given function or not. The settings for the following sections can be modified:

- General
- New Document section
- Order Manager section
- Companies section
- Users section
- Assign Roles section
- Publication Types section
- Collections section
- PrintShop Mail section.

If one or all sections are collapsed it is possible to close all sections at once with the *Collapse all* button. The role properties screen with the collapsible sections is visible than.

General

In the *General* section you can specify if a user may see the option *My Account* in the *Menu* bar.

- **Edit My Account:** The *My Account* option is, by default, enabled for each role. This function allows users to change their own user settings. The *My Account* option appears in the *Menu* bar.

New document

The *New document* section controles whether users are allowed to see disabled companies, departments, publication types and documents in the *New document* section of PrintShop Mail Web.

New Document section

- **View disabled...:** These checkboxes are normally switched off for almost al roles. These options allows users to see disabled companies, departments, publication types and documents. These options are useful for testing documents before making them available for ordering.
- **View company wide publication types:** The *View company wide publication types* option allows users to view all publication types of a company which contains departments. Normaly both, the user and publication type, need to be assigned to a department. This option is typically used for the administrator, product manager, operator, designer and company manager.

Order Manager

In the *Order Manager* section each option group is related to a part of the side menu in the *Order Manager*. When the *Access* checkbox is checked the other options are available.

Order Manager section

- [x] Access
  - [ ] Access all orders
  - [x] Limited access (show personal orders only)
  - [x] Edit order reference (reference entered by the customer)

Set Order Status

- [ ] Approve
- [ ] In plant
- [ ] Shipping
- [x] Completed
- [x] On hold
- [ ] Quote price

View Status folders

- [x] Order folder
  - [x] Edit order details
  - [x] Edit quantity
  - [x] Delete orders with Order status
- [ ] Approved folder
  - [ ] Edit order details
  - [ ] Edit quantity
  - [ ] Delete orders with Approved status
- [x] On hold folder
  - [x] Edit order details
  - [x] Edit quantity
  - [x] Delete orders with On hold status
  - [ ] Delete quote request orders
  - [ ] Delete quote price orders
- [ ] In plant folder
  - [ ] Edit order details
  - [ ] Edit quantity
  - [ ] Delete orders with In-plant status
  - [ ] Print orders
- [x] Shipping folder
  - [ ] Edit order details
- [x] Completed folder
  - [ ] Export report
  - [x] Re-order
  - [x] Delete completed orders

View Personal Order folders

- [x] My orders folder
- [ ] My approved orders folder
- [ ] My departments folder
- [ ] My companies folder

Order Manager section

- **Access:** The *Access* checkbox in this section is normally on for all user roles and controls whether users see the *Order Manager* tab in the *Menu* bar or not. The *Access all orders* option allows users to view and edit all orders (within all statuses and companies) in the Order Manager. The *Limited access* checkbox limits users access to their own print orders. If this checkbox is not selected, users can see all print jobs from the departments and/or companies that the user belongs to.
- **Edit Order Reference:** The *Edit order reference* option allows users to edit the reference field in the order information window of the new document section. The customer roles have this checkbox switched on.
- The *Order Manager* section has the following sub sections:
  - Set Order Status
  - View Status Folders
  - View Personal Order Folder

Set Order Status

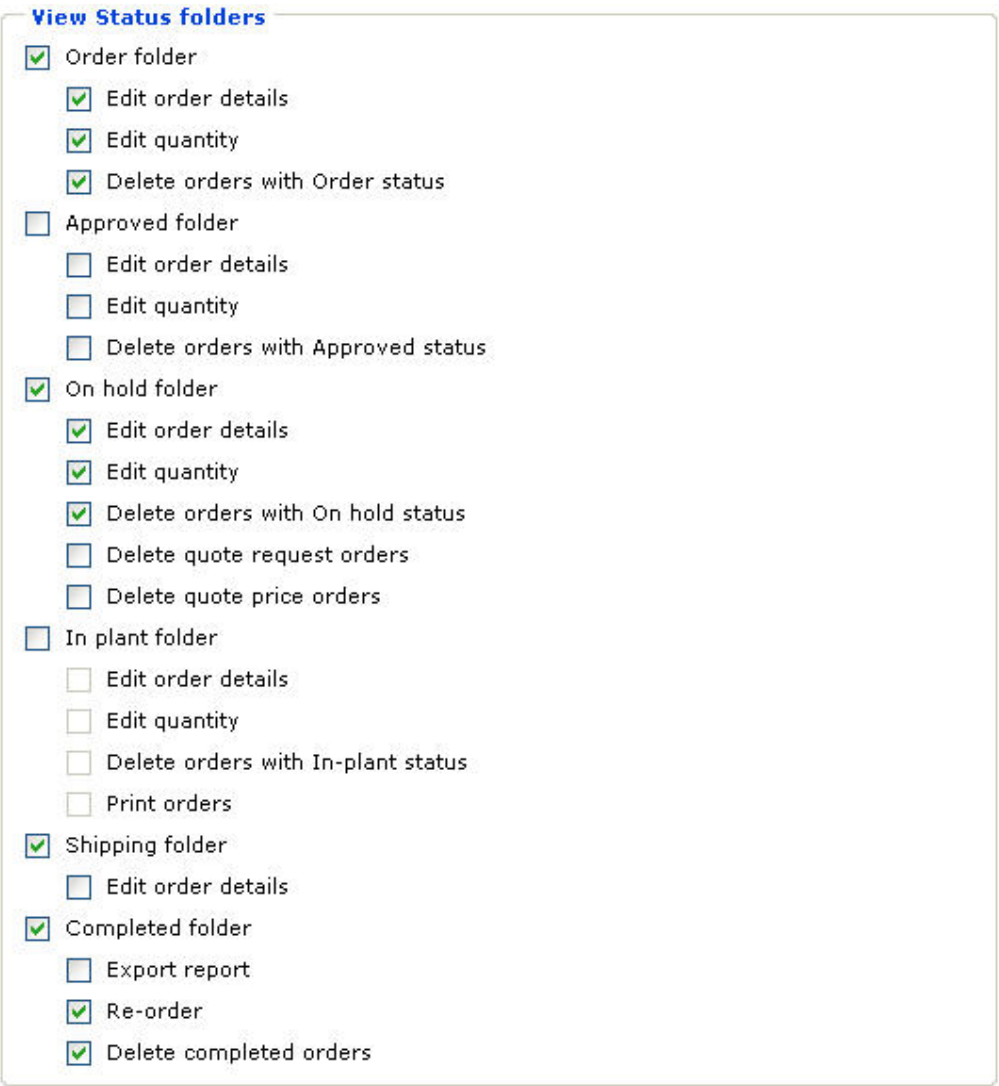
The *Set Order Status* section defines whether users have access to a folder to adjust a print job to the selected statuses.

The *Set Order Status* checkboxes enables a user to set the status of a print job to the statuses with a checked checkbox. The *Quote price* checkbox controls the right to add a price to an order with a quote request.

Set order status section

View status folders

The checkboxes in this section controls a users right to view print jobs in a given status.

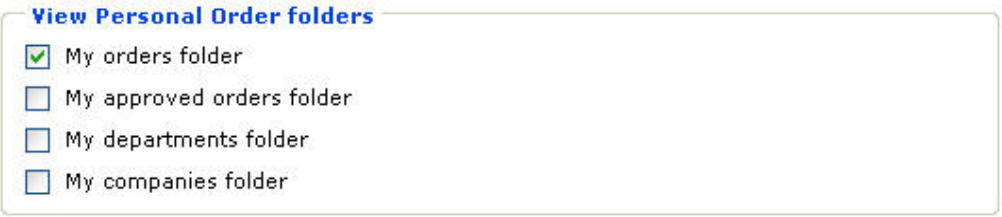


View status folders section

- **Status folders:** The *…folders* checkboxes controls a users right to view print jobs in a given status.
- **Edit options:** The *Edit*... checkboxes controls the users right to edit print jobs or the print job's quantity in a specific folder.
- **Delete options:** The *Delete*… checkboxes controls the users right to delete print jobs in a specific folder.
- **Print Orders:** The *Print orders* checkbox controls the users right to print jobs in the *In-plant* folder. By default the designer, operator and administrator roles have this option checked.
- **Export Report:** If the *Export report* function in the *Completed* folder is enabled, the user can sort and export a file with all order information from a specific year and/or month.
- **Re-Order:** This checkbox controls the users right to re-order existing print jobs from the *Completed* folder.

View Personal Order Folder

This section controls whether users have right to see specific order folders and the jobs in these folders.

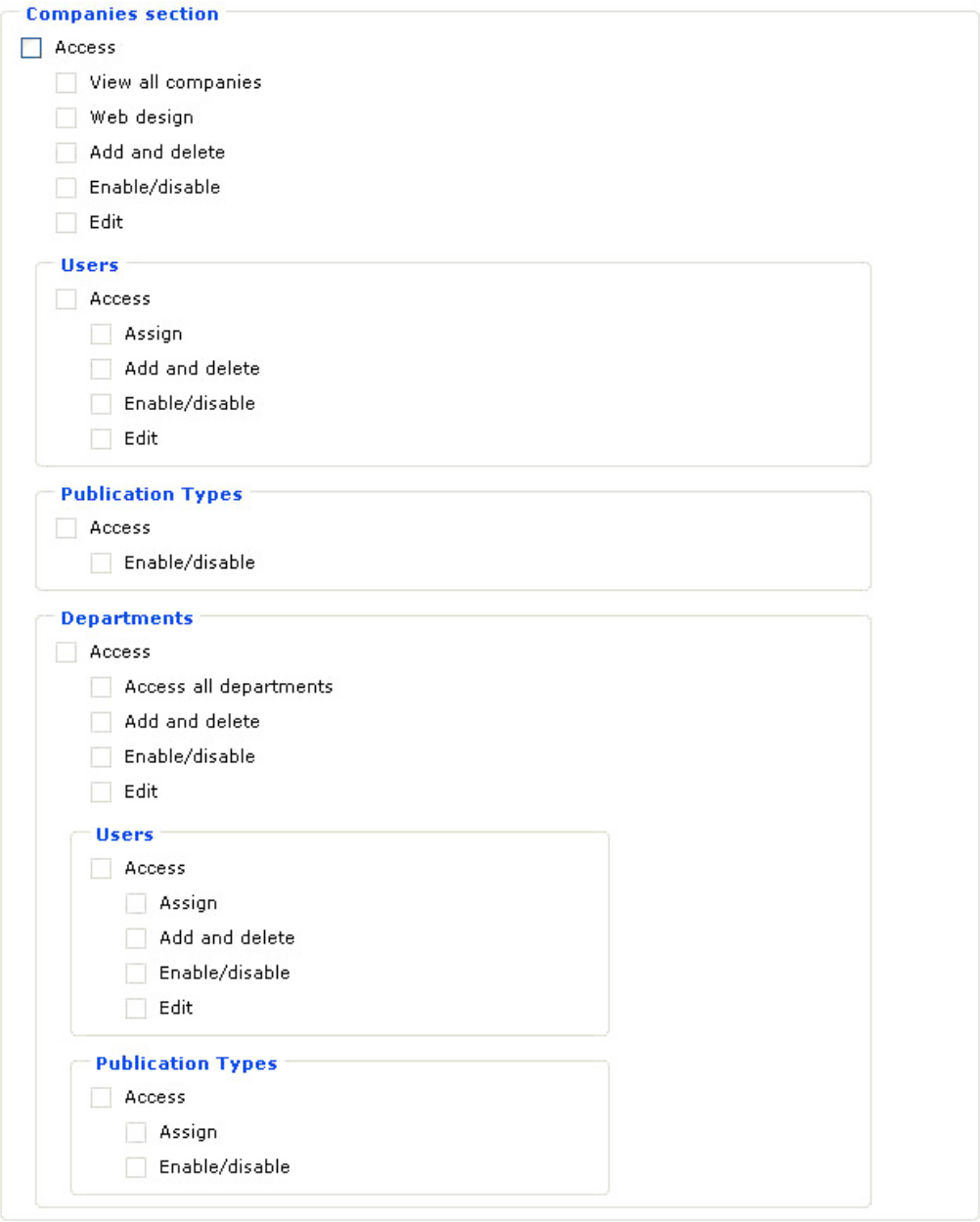


View personal order folders section

- **My Orders Folder:** This option controls whether users can get an overview of all their orders that have not yet been completed. The *My Orders Folder* is by default enabled for every user allowing the user to see his own orders.
- **My Approved Order Folder:** This option enables users to view the print jobs they have approved, included the print jobs that they approved of other users. By default this folder is visible for power users, because they can approve orders from other users. All approved orders can be viewed in the *Approved* folder.
- **My Departments Folder:** This option controls whether users can view all print jobs from the departments they have access rights to. In the default setup this folder is visible for the department manager.
- **My Companies Folder:** This option enables users to view all print jobs from the company or companies they have access rights to. In the default setup company managers and production managers can see this folder.

Companies

In the *Companies* section each block is related to an item of the side menu. When the *Access* checkbox is checked the other options are available.



Companies section

- **Access:** The *Access* checkbox in the *Companies* section controls whether users see the *Companies* tab in the *Menu* bar or not and is off by default for all user roles, except the department manager, company manager, production manager and administrator.
- **View All Companies:** The *View all companies* checkbox allows users to view all company and company related items (users and publication types). When deselected you'll need to assign the user to a company first.
- **Web Design:** The *Web Design* checkbox give users the right to change the Web design for a company. This option allows a user to change the color settings, upload another custom logo or select another skin for the company the user belongs to.
- **Add and Delete:** The *Add and delete* option allows users to add and delete companies. The options *Enable/disable* and *Edit* are directly related to the *Add and delete* option.

- **Enable/disable:** When the *Enable/disable* option is selected a user can control whether a company is visible (enabled) for other users or not (disabled). A disabled company is normally not visible for other users (except when the *View disabled companies* is selected in the *New document section* above) from this list.
- **Edit:** The *Edit* option allows users to modify the properties of a company.

The *Companies* section has four sub sections:

1. Users
2. Publication Types
3. Pricing and Ordering
4. Departments

Users

The *Users* section defines whether users see the *Users* item in the side menu of the companies section. A user can only control those users who have one of the roles that the user may assign to another user.

Companies section - Users

- **Access:** The *Access* checkbox controls whether users see the *Users* item in the side menu of the companies section. When the *Access* checkbox is unchecked all other options are not available.
- **Assign:** The *Assign* option allows users to assign users to a company.
- **Add and Delete:** The *Add and delete* option allows users to add and delete users. The options *Enable/disable* and *Edit* are directly related to the *Add and delete* option.
- **Enable/disable:** The *Enable/disable* option allows users to control other users access to the system.
- **Edit:** The *Edit* function controls whether a user can edit the user information of other users.

Publication Types

In this *Publication Types* section is defined whether users see the *Publication Types* item in the side menu of the companies section.

Companies section - Publication types

- **Access:** The *Access* checkbox determines whether users see the *Publication Types* item in the side menu of the companies section. When the *Access* checkbox is unchecked the *Enable/disable* option is not available.
- **Enable/disable:** When the *Enable/disable* option is selected users can enable/disable documents. Disabled documents can only be viewed by users whose role have the *View disabled documents* option enabled.

Pricing and Ordering

In this *Pricing and Ordering* section is defined whether users see the *Pricing and Ordering* item in the side menu of the companies section.

Companies section - Pricing and Ordering

- **Edit Tax:** The *Edit Tax* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the companies section. When the *Access* checkbox is unchecked the *Tax* option is not available. By default only the production manager and administrator have access right.
- **Edit Shipping Rates:** The *Edit Shipping Rates* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the companies section. When the *Access* checkbox is unchecked the *Shipping Rates* option is not available. By default only production managers and administrators have access right.
- **Edit Payment Modules:** The *Edit Payment Modules* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the companies section. When the *Access* checkbox is unchecked the *Payment modules* option is not available. By default only production managers and administrators have access right.

Departments

The *Department* section defines whether users see the *Departments* item in the side menu of the companies section.

Companies section - Departments

- **Access:** The *Access* checkbox controls whether users see the *Departments* item in the side menu of the companies section. Only when the *Access* checkbox is checked are the other options available.
- **Access all Departments:** The *Access all departments* option gives users the right to view all departments.
- **Add and Delete:** The *Add and delete* option allows users to add and delete a department. The options *Enable/disable* and *Edit* are directly related to the *Add and delete* option. A disabled company is visible in the departments overview, but users have no access to the disabled departments except when their role has the option *View disabled departments* checked.
- **Users:** The *Users* subsection lets the administrator set privileges regarding user accounts within the *Department* section of PrintShop Mail Web:
  - **Access:** The *Access* checkbox in this user section determines whether users see the *Users* item in the side menu of the department section. When the *Access* checkbox is unchecked all other options are not available.
  - **Assign:** The *Assign* option allows users to assign users to a department.
  - **Add and Delete:** The *Add and delete* option allows users to add and delete users. The options *Enable/disable* and *Edit* are direct related to the *Add and delete* option.
  - **Enable/disable:** When the *Enable/disable* option is selected users can control other users access to the system.
  - **Edit:** The *Edit* option controls whether the user information of users in the department can be edited.
- **Publication Types:** The *Publication Types* subsection is used to set privileges regarding the publication types of a department:
  - **Access:** The *Access* checkbox determines whether users see the *Publication Types* item in the side menu of the department section. When the *Access* checkbox is unchecked all other options are not available.
  - **Assign:** The *Assign* option allows users to assign publication types to a department.
  - **Enable/Disable:** When the *Enable/disable* option is selected users can enable/disable documents. Disabled documents are not visible for users except when the *View disabled documents* option is selected in their role.
- **Pricing and Ordering:** The *Pricing and Ordering* subsection is used to set privileges regarding the *Pricing and Ordering* section of a department. By example when the *Edit Shipping Rates* checkbox in the department section is checked for the company manager, the company manager has access rights on department level to the *Pricing and Ordering* section and can select the Shipping rate profiles for each of his departments.
  - **Edit Tax:** The *Edit Tax* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the department section. When the *Access* checkbox is unchecked the *Tax* option is not available. By default only the production manager and administrator have access right.
  - **Edit Shipping Rates:** The *Edit Shipping Rates* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the department section. When the *Access* checkbox is unchecked the *Shipping Rates* option is not available. By default only production managers and administrators have access right.
  - **Edit Payment Modules:** The *Edit Payment Modules* checkbox determines whether users see the *Pricing and Ordering* item in the side menu of the department section. When the *Access* checkbox is unchecked the *Payment modules* option is not available. By default only production managers and administrators have access right.
  - **Access:** The *Access* checkbox in the *Users* section controls whether users see the *Users* tab in the *Menu* bar and is by default disabled for all user roles.
  - **Add and Delete:** The *Add and delete* option allows users to add and delete users. The options *Enable/disable* and *Edit* are directly related to the *Add and delete* options.
  - **Enable/Disable:** The *Enable/disable* option allows users to enable other users access to the system. Disabled users remain visible in the users overview.
  - **Edit:** The *Edit* option allows users to modify other users' information.
  - **Roles:** To select multiple contiguous items press the *Shift* key and select the first and last entry for your selection. To select multiple non contiguous items press the *Alt* key and select the appropriate roles.

- **Access:** The *Access* checkbox enables users to see the *Publication Types* tab in the *Menu* bar and is not by default enabled for all user roles.
- **Add and Delete:** The *Add and Delete* checkbox allows users to add and delete publication types.
- **Enable/Disable:** When the *Enable/disable* checkbox is selected users can enable publication type folders. Disabled publication type folders are not visible for users (except when the *View disabled publication types* option is selected in the *New document* section). It is useful to disable a publication type folder while documents and pricing information are being added. When all information is added you can easily enable the publication type folder allowing users to see the publication type folder.
- **Edit:** The *Edit* option allows users to modify the properties of publication type folders. When the *Edit* checkbox is unchecked the other options are not available.
- **Edit Production Code:** The *Edit Production Code* option allows users to change product codes for publication type folders.
- **Change Company:** The *Change company* option allows users to change the company to which a publication type is assigned. Publication types can be reassigned from the properties page of that publication type folder.
- **Edit Pricing:** The *Edit Pricing* checkbox determines whether users have access to the pricing information in the publication types section. If the checkbox is checked it is possible to add and delete all pricing information.
- **Add and Delete:** The *Add and delete* checkbox allows users to add and delete documents to a publication type folder.
- **Enable/Disable:** The *Enable/disable* checkbox controls whether users can enable or disable documents in the publication type folders. Disabled documents are not visible for users (except when the *View disabled documents* option is selected in the *New document* section). It is useful to disable a document while pricing information is added. Once all information is added you can easily enable the document and the publication type folder so users can see the publication type folder and enclosed documents.
- **Edit:** The *Edit* option allows users to modify the properties of documents in publication type folders. When the *Edit* checkbox is unchecked other options are not available.
- **Edit Production Code:** The *Edit Production Code* option allows users to change product codes for documents.
- **Edit Operator Instructions:** The *Edit operator instructions* option allows users to modify the operator instructions (which may have been set for a PrintShop Mail document).
- **Edit Printer:** The *Edit printer* checkbox enables users to select an other printer than the document printer. Every PrintShop Mail document has a document printer by default.
- **Change Publication Type:** The *Change Publication Type* option allows users to change the publication type to which a document is assigned.
- **Edit Pricing:** The *Edit Pricing* checkbox controls access to the pricing information in the publication types section on a document level. If the checkbox is checked it is possible to add and delete all pricing information.
- **Access:** If checked the user with this role is granted access to the *Collection* section. A user that has access to the *Collection* section can create, edit and delete collections.
- **Publish Document:** Users with the *Publish document* checkbox checked have rights to publish PrintShop Mail documents to PrintShop Mail Web.

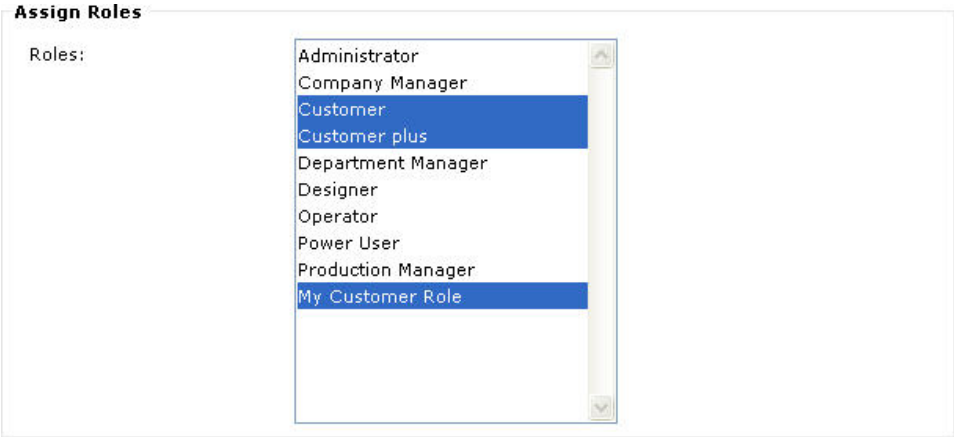
Users

- The *Users* section defines whether users see the *Users* tab in the *Menu* bar. When the *Access* checkbox is unchecked the other options are not available.

- ***Users section***

Assign Roles

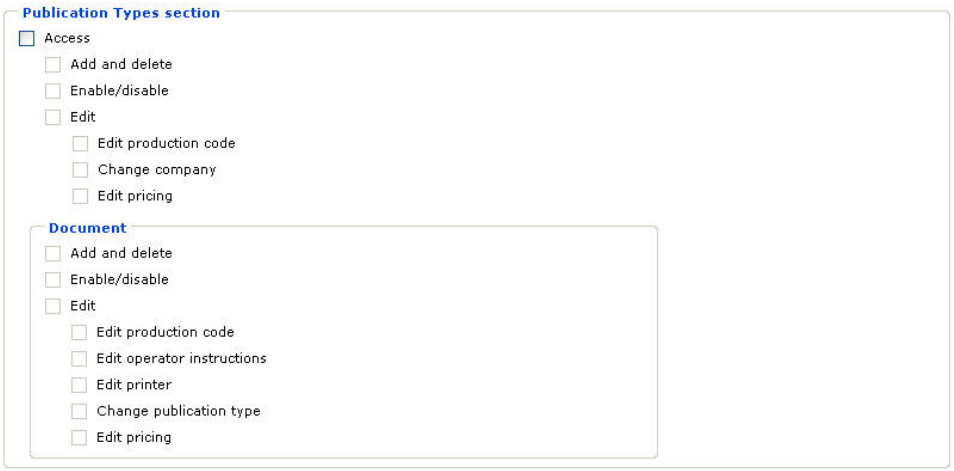
- Some roles allow the end user to manage user accounts (company and department manager). When creating a new account an username and password for that account needs to be specified as wel as a role. The *Assign Roles* section lets the administrator define which roles the manager can assign when creating and editing accounts. The manager will be able to manage users that have these roles.



- ***Assign Roles section***

Publication Types

- In the *Publication Types* section several blocks can be checked. When the *Access* checkbox is unchecked all other options are not available.



- ***Publication Types section***

Document

- The options found in the *Document* subsection are used to define template/document related privileges:

Collections

- The Collection options lets the administrator grant access to the *Collection* sections and its underlaying features.

PrintShop Mail

- In the *Printshop Mail* section the right to publish documents to PrintShop Mail Web can be defined.

5.4 Languages

PrintShop Mail Web is delivered with various languages. In the *Language overview* page you can:

- Select the system language
- Add a new language
- Change the default language
- Delete a language.

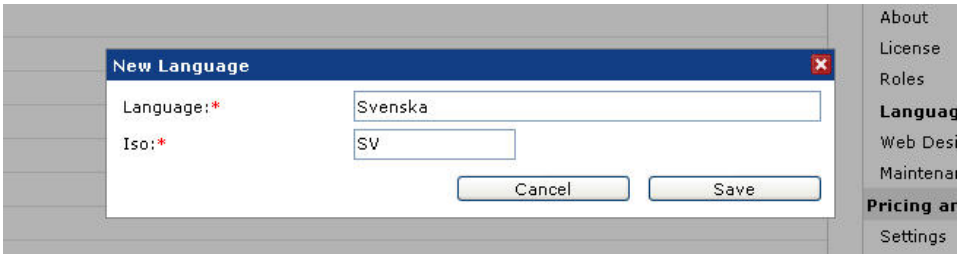
The administrator can set the system language. The system language is the default language for each company and all users. Each user can select the language they want to use. When a user selects a different language it is stored in the database. Users can change their own language preference by clicking *My Account* in the *Menu* bar. The system will use the system language or English if this language is not available.

5.4.1 Create a new language

The administrator can add new languages to the language list. If a string is missing the English content for that string is shown.

To add a language:

1. Click *Settings* in the *Menu* bar and click *Language* in the side menu.
2. Click *Add* in the Language overview window. The *Add* dialog appears:



The Add new language dialog

3. Fill in the following parameters:
   - **Language:** The full name of the language (preferably localized, Nederlands, Deutsch, Svenska).
   - **Iso:** The language ISO-code (two characters, NL, DE, SV, etc.).
4. Click *Save* to close the dialog and add the new language to the *Language overview*.

5.4.2 Delete a language

The languages delivered with the PrintShop Mail Web system cannot be deleted!

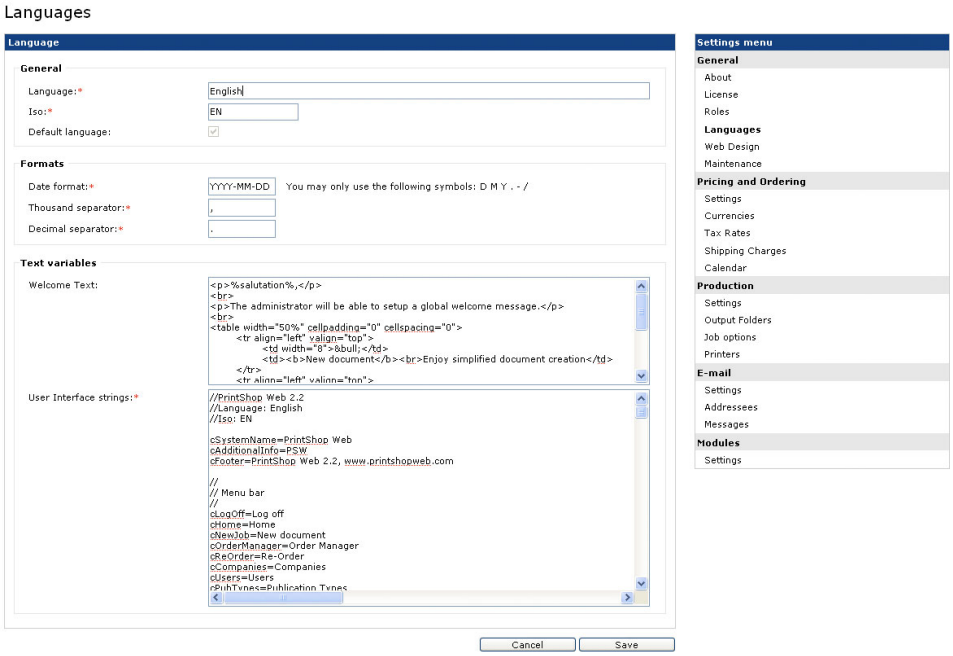
To delete a language:

1. Click *Settings* in the *Menu* bar and click *Languages* from the side menu.
2. Select one or multiple languages by selecting the checkboxes in the first column.
3. Click *Delete*, a warning message will be shown.
4. Click OK to delete the selected items.

5.4.3 Edit a language

It is possible to edit every language in the overview. If, by example, a new language is added it is poissible to edit the settings or to add a translation to the new added language. To edit a language:

1. Click *Settings* in the *Menu* bar and click the *Language* item from the side menu.
2. Select a language from the overview by clicking on the name of the language. The next screen appears:



In the language window you can define language, date format, separators and the systems welcome text

3. The language window contains the following sections:
   - **General:** Enter the *language name* and *Iso code*. Select if the language is the *default language* or not.
   - **Formats:** The em>Date format is the way dates are presented to your customers throughout the PrintShop Mail Web system, for example 2007-12-23 or 23-12-2007. To define the date format only use:
     - D or DD for day
     - M or MM for month
     - Y, YY or YYYY for year
     - -
     - /
     - .

     The *Thousand* and *Decimal separator* defines how numbers are formatted, for example 2,599.13 or 2.599,13.
     Select in the *First day of week* pull-down-menu on which day of the week the calendar should start. By default the first day of the week is set on Sunday. The calender is shown on the *Shipping* page (New document), after selecting the *Shipping date* icon.
   - **Text variables:** it is possible to change the *Welcome text* here. The *Welcome text* is shown after logging in to the system.
     In the *User interface strings* window you find all strings used in the PrintShop Mail Web system. You can edit and/or translate all buttons, text items and strings to any language. The variables and the text are separated by = symbols. See the examples below:

```
cWelcome=Welcome
cEditUserInfo=Edit user info
fbPersonInfoEdit=Edit user info

cWelcome=Welcome
cEditUserInfo,fbPersonInfoEdit=Edit user info

cWelcome=Welcome
cEditUserInfo,fbPersonInfoEdit=My Profile
```

4. Click *Save* to store the changes.

It is also possible tot change the default language direct from the *Language overview.* The default language is indicated by a black check mark. Click one of the greyed out check marks to make the selected language the default system language.

Note: Changing the user interface strings must be done with caution. If you are not sure whether you are editing the right string, please add some text behind the string, click *Save* and check the result in the software. You can search for the added text to find the changed string easily after having verified the results.

5.5 Web Design

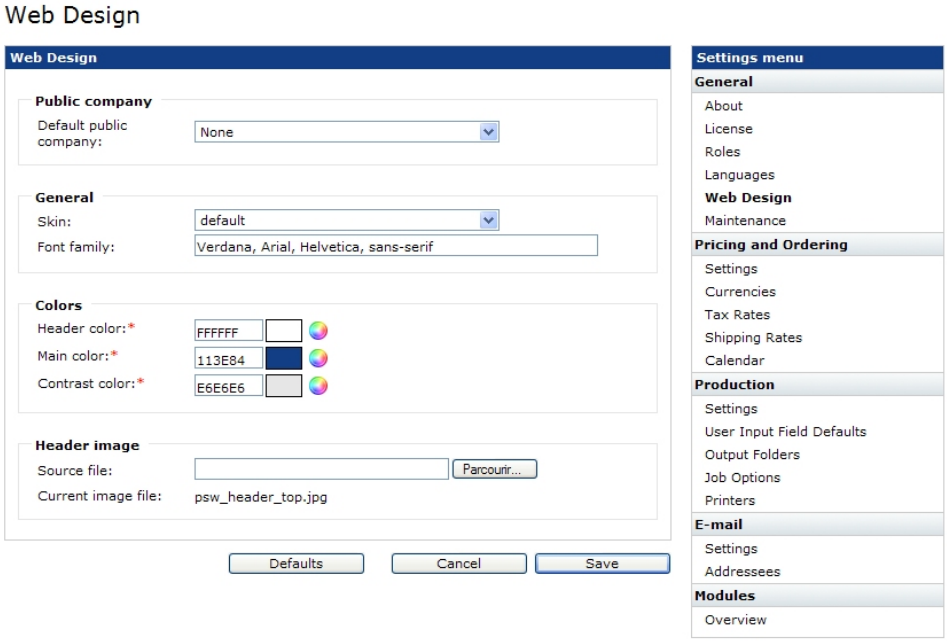
The Web Design page lets you define the color scheme and other style attributes of the web site. These settings are used for those users that have access to multiple companies (if these companies have different skins).

Important: In the *Companies* section there is also a *Web Design* section. In this part of the software you can select a custom skin for each company.

5.5.1 Changing the Web Design parameters

To change the Web Design:

1. Click *Settings* in the *Menu* bar and click *Web Design* in the side menu.
2. Click *Edit.* The following screen appears:



In the web design section you can change the look of the PrintShop Mail Web system

3. In the Web Design-window you can edit the web design for your own organization:
   - **Default Public Company:** Select the public company that will be shown to unregistered users when they visit the PrintShop Mail website. When a public company is selected as default, the web design options (General, Colors, Header) become those of the selected company.
   - **Skin:** Select a skin in the pull-down-menu.
   - **Font Family:** The *Font family* is skin independent. The fonts specified in the font entry field are used for the selected skin. Multiple fonts should be specified in case a font is missing. The first defined font is leading and used if present. When the first defined font is missing the second font is used, etc.
   - **Colors:** Controls the header background color, menu color and contrast colors. Please note that the selected skin should support these colors in order to see the changes. For more information see the *Skinning guide*.
   - **Header Image:** If your company has a logo, please locate the JPEG-image by clicking the *Browse* button. For more information see the *Skinning guide*.

- **Default:** Click the *Default* button to reset the values to the values that came with the system.

4. Click *Save* to store the changes and to upload the header image (if applicable).

5.6 Maintenance

In the *Maintenance* window the administrator can delete items marked for deletion by users. Deleted items are not visible but are stille stored in the database.

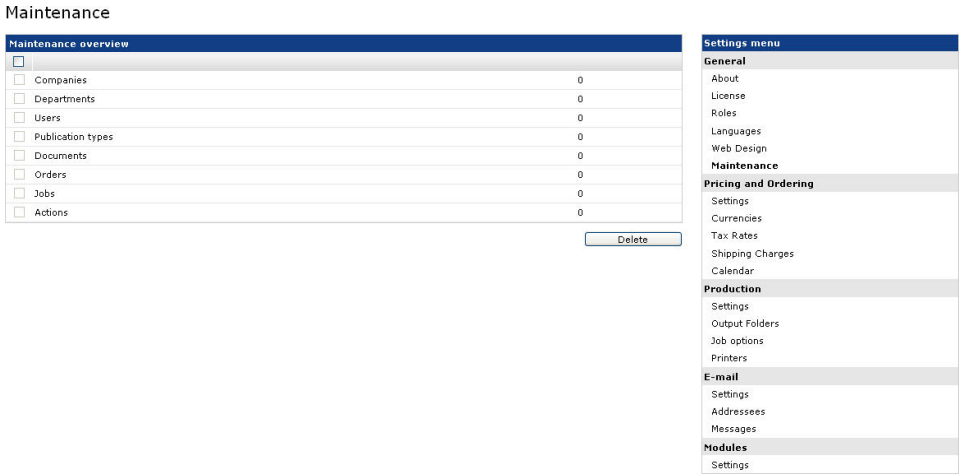
- **Documents:** These are deleted templates/documents from the *Publication Type* section.
- **Orders:** Orders deleted from the *Order Manager* section.
- **Jobs:** Jobs that where not added to checkout and are no part of an order.
- **Actions:** These are database records of preview failures, print failures, etc.

Note: The user interface currently has no options to undelete items. Undeleting can be done using direct queries on the database.

5.6.1 Remove unused items

To remove unused items from the PrintShop Mail Web database:

1. Click *Settings* in the *Menu* bar and click the *Maintenance* item from the side menu. The following screen appears:



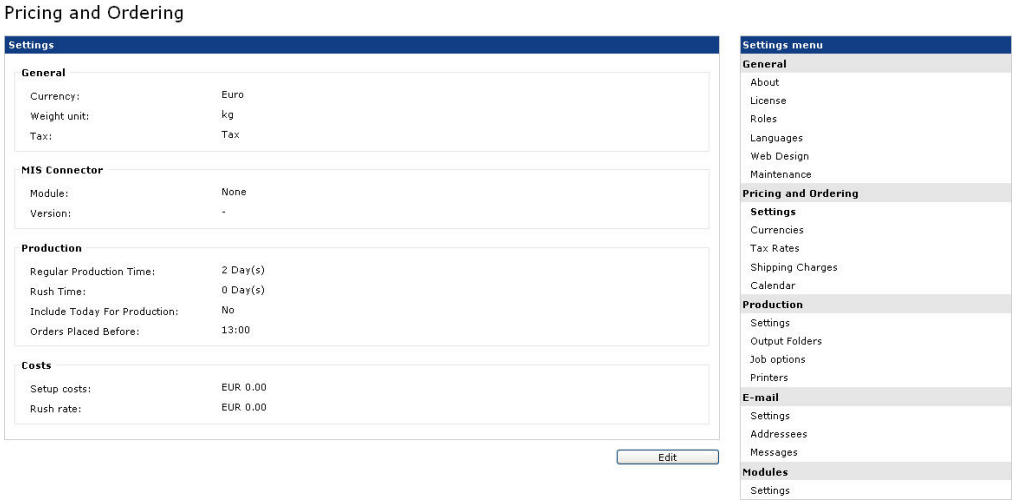
The maintenance window

2. Select which items to delete and click *Delete*, a warning message is shown, after clicking *OK* the selected items are deleted from the database.

Note: This action cannot be undone, therefore we strongly advice to create a backup of the *psw* database and *Files* folder (located in the PrintShop Mail Web website folder).

6 Pricing and Ordering

In the *Pricing and Ordering* section of the *Settings* menu various pricing and ordering releated settings can be defined.



The Pricing and Ordering Settings page

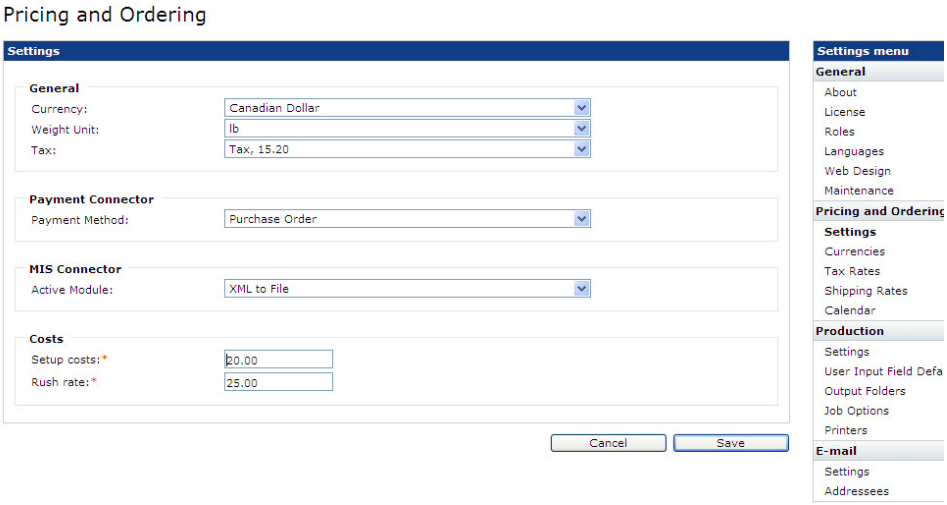
6.1 Settings

In the *Settings* window from the *Pricing and Ordering* section you can define several general system settings. The *Pricing and Ordering Settings* pages contains the following sections:

- General
- Payment connector
- MIS connector
- Costs

To change the general *Pricing and Ordering Settings*:

1. Click *Settings* in the *Menu* bar.
2. Click *Settings* in the *Pricing and Ordering* section from the side menu.
3. Click the *Edit* button. The following screen appears:



The general Pricing and Ordering page

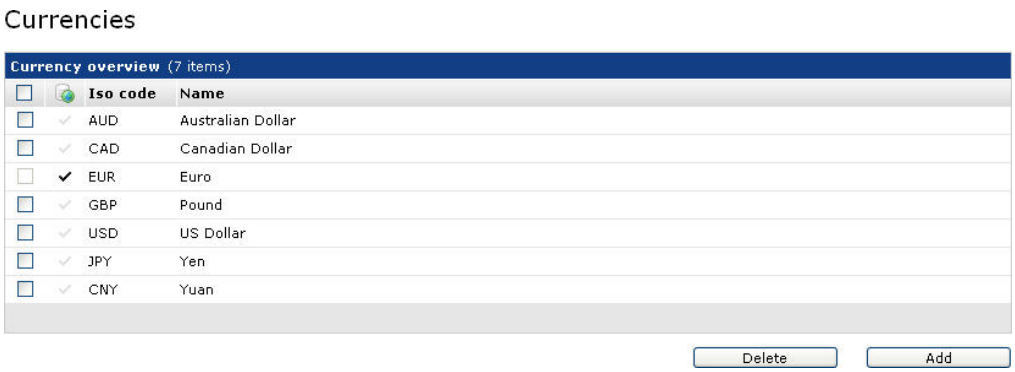
4. The *Pricing and Ordering* window contains the following options:
   - **General:**
     - **Currency**: The selected currency will be presented in *Checkout* and *Order Manager* sections of the system.
     - **Weight Unit**: The weight unit is used to define the total weight of the documents/jobs in the checkout. PrintShop Mail Web supports *kg* and *lb*.
     - **Tax**: The standard Taxation system. The exact parameters of the selected Taxation system can be modified in the *Tax Rates* section. A Tax Rate system can be specified per company/ department or template. If no Tax Rate system is defined at these levels, PrintShop Mail Web system will use the one specified in this section (the system default).
   - **Payment Connector:**
   - **MIS Connector:** The *MIS Connector* section lets the administrator activate a *MIS Connector*. MIS Connectors are used to send order information to external MIS systems on order creation or order status changes. The communication method and the type of data used to exchange information depends on the selected MIS connector and is often determined by the developer of the MIS system.
   - **Costs:** In the *Costs* section defaults can be defined for:
     - **Setup Costs**: A surcharge for setting up your production environment and workstations.
     - **Rush Rate**: A surcharge for urgency printing (if applicable).

     When no costs are specified at template level (*Edit Pricing* page) the system default costs are used. To specify the *Setup costs* and *Rush Rate* on a per template basis see the information in the chapter Add publication types.

5. Click *Save* to store the changes.

6.2 Currencies

In the *Currency* window you can change the systems default currency. The system default currency is set to *Euro*. To change the currency settings click on the *currency name* and click *Save* to store the changes. The default currency can also be changed by clicking one of the grey check marks in the overview. The system default currency is indicated by a black check mark.

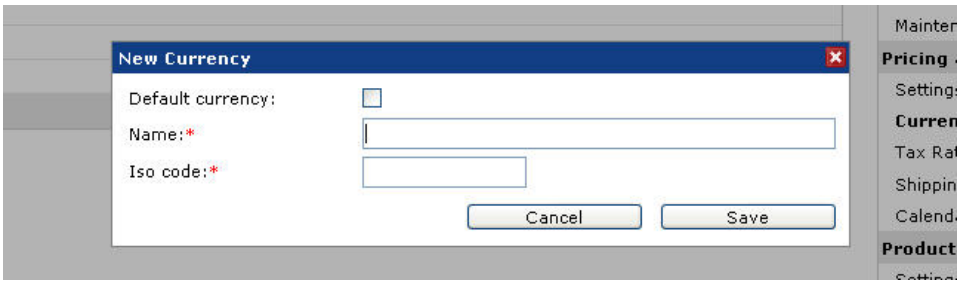


The Currency overview page

6.2.1 Add a new currency

To add a new currency:

1. Click *Settings* in the *Menu* bar.
2. Click *Currency* in the *Pricing and Ordering* section of the side menu.
3. Click *Add*. The following dialog appears:



Enter the name and ISO code of the currency

4. Enter the parameters for the new currency:
   - **Default Currency:** Select the *Default currency* checkbox to specify that PrintShop Mail Web should use this currency across the system.
   - **Name:** Enter the *Name* of the currency.
   - **Iso Code:** The value entered in the *Iso Code* field will be shown in the pages of the ordering process and *Order Manager* section. It is possible to enter a symbol, such as the euro-symbol (€) in this field. In this case this symbol is used in the mentioned pages.
5. Click *Save* to close the dialog and to the return to the *Currencies overview* page.

6.2.2 Delete a currency

To delete a currency:

1. Click *Settings* in the *Menu* bar.
2. Click *Currency* in the *Pricing and Ordering* section of the side menu.
3. Select the checkbox in front of the currency's name.
4. Click the *Delete* button, a warning dialog appears. Currencies are directly removed from the system.

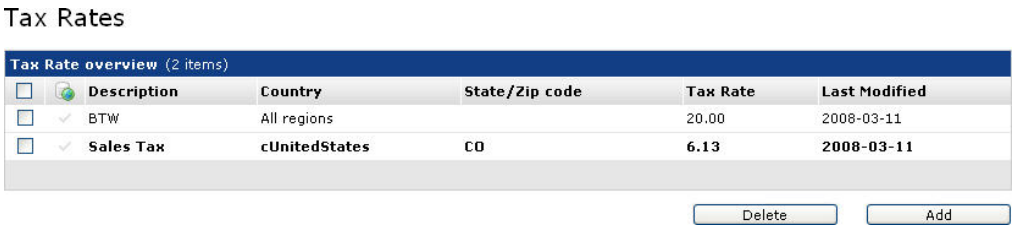
6.3 Tax Rates

PrintShop Mail Web is working with a sales tax mechanism (also called value-added tax or VAT). This mechanism covers tax rates for different countries and states/zipcodes/zipcode ranges. Tax is applied in the price calculation process at the end of the checkout process (shopping cart) based on the company or department.

The Tax Rates section found in the *Settings* side menu lets the administrator manage Tax Rate profiles. Tax Rates profiles can be assigned to:

- Company
- Department
- Template

The tax rate assigned to a template has the highest priority. If no tax rate is specified for the template, the system will use the tax rate assigned to the company or department. If no tax rate is specified at company/ department level the system will use the system default tax rate.



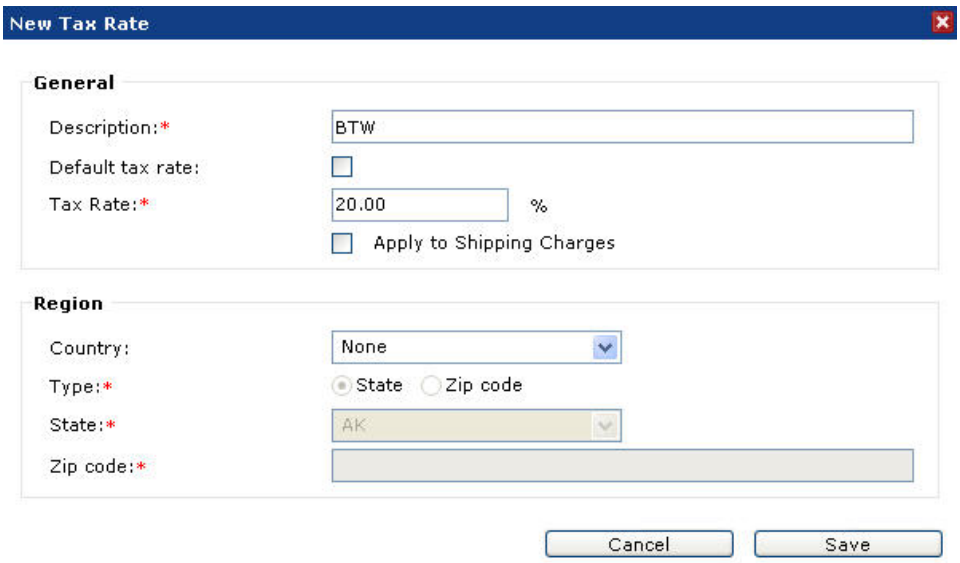
The Tax rates overview shows all available tax rates

To define a tax rate as the system default tax rate click the grey check mark in front of the tax rate description (name). The default tax rate has a black check mark in front of the tax rate description.

6.3.1 Add a new tax rate

To add a new tax rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Tax Rate* in the *Pricing and Ordering* section of the side menu. The *Tax Rates overview* page is shown.
3. Click *Add*. The following dialog appears:



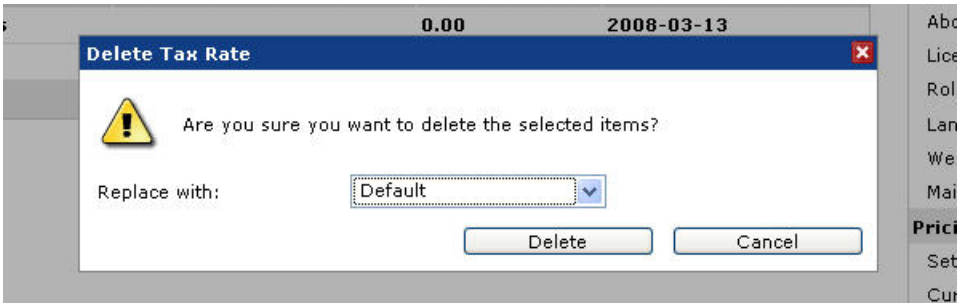
The Add new tax rate dialog

4. The *Add* dialog contains the following sections:
   - **General:** Enter the *Name* of the tax rate and specify the *Tax Rate Percentage*. Check the *Default* checkbox if the tax rate is the system default tax rate. The *Apply to Shipping Charges* checkbox can be used to indicate of the tax rate should be applied to the shipping charges if applicable.
   - **Region:** Select a *Country* in the pull-down-menu and select the region specific information (*State* or *Zip code*) if applicable.
5. Click *Save* to store the tax rate profile and close the dialog.

6.3.2 Delete a tax rate

Tax rate profiles can be removed from the overview except for the system default tax rate profile. To delete a tax rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Tax Rate* in the *Pricing and Ordering* section of the side menu. The *Tax Rate overview* page is shown.
3. Select the checkbox in front of the tax rate description (name).
4. Click *Delete*, a warning dialog is shown. Select a tax rate profile to replace the deleted profiles in the *Replace with* pull-down-menu.



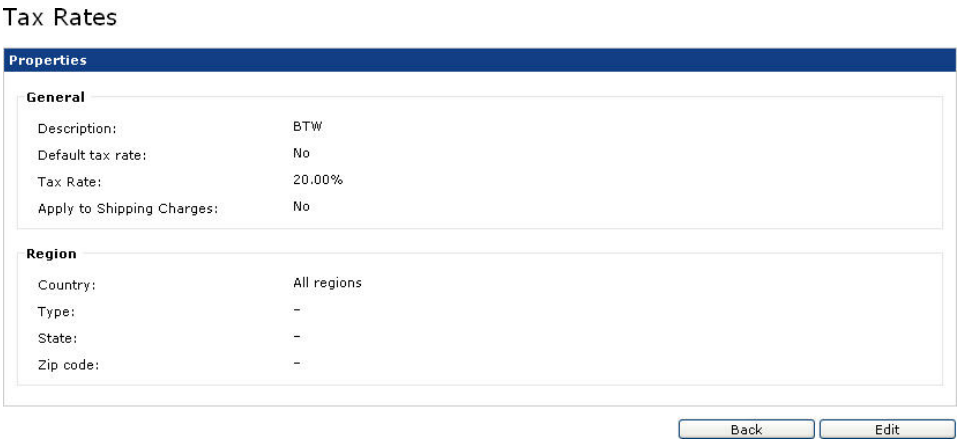
The Delete tax rate dialog

5. Click *Delete* to remove the tax rate profile(s). All companies, departments and/or templates that used the removed tax rate profile(s) are assigned to the replacement tax rate profile.

6.3.3 Edit a tax rate

To edit a tax rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Tax Rate* in the *Pricing and Ordering* section of the side menu. The *Tax Rate overview page* is shown.
3. Select a tax rate profile from the overview by clicking the tax rate name. The following screen appears:



The tax rate properties page

4. Click *Edit* to open the *Edit* dialog, in this dialog you can change the properties of the tax rate profile.
5. Click *Save* to store the changes and close the dialog.

Important: Modification of a tax rate profile has no affect on the calculation of existing print jobs, the rate applicable when the order was created is stored with the order. When re-ordering a completed job the current tax rate will be applied.

6.4 Shipping Rates

Shipping costs are calculated based on the total weight of the items in the *Checkout*. For this the administrator can define a unit weight per template and needs to setup *Shipping Rate Profiles*. Shipping charge calculation can be enabled per company and multiple shipping rate profiles can be assigned to that company.

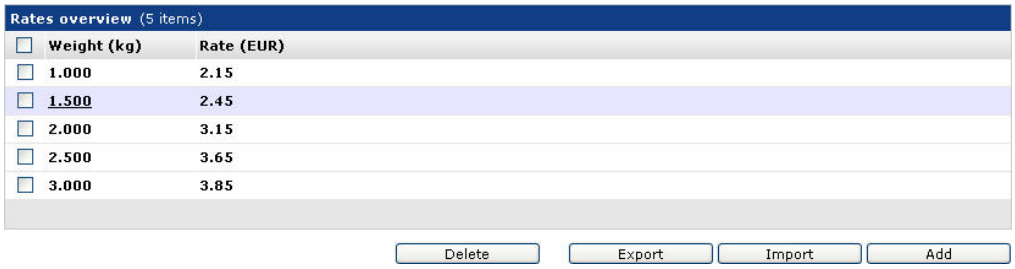
In PrintShop Mail Web customers can add one or multiple documents to a shipping basket or checkout. The documents in the checkout will be part of the same order. In previous versions of PrintShop Mail Web each order had one document. By grouping documents into a single order, the ordering process is shortened as the customer has to state shipping and billing only once. Shipping charges are calculated based on the total weight of the orders in the checkout, resulting in a more accurate price calculation. In the ordering process the customer will be able to select the desired shipping method (if available).

Shipping Rate Profiles

Shipping Rate Profiles can be defined for specific shipping methods/carriers and for different levels of shipping services. *Shipping rate profiles* are assigned to companies allowing the end user to select one of the profiles available for that customer in the ordering process (Checkout).

The Shipping Rate Profiles overview

Shipping rate profiles allow the administrator to define an initial parcel weight cost and a weights rate table. If no rates table is defined the initial parcel weight cost will be charged as the shipping costs (flat fee) otherwise the costs are calculated based on the approximate weight of the ordered document(s) and the initial parcel weight cost is added (if defined). When using the rates table a weight per unit needs to be defined per template.



The Rates overview table

6.4.1 Add a Rate to a Shipping Rate Profile

To manually add a rate to the rates table of a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click the name of the profile, the *Shipping Rate Profile Properties* page is shown. This page shows the properties of the profile and a list of the rates if applicable.
4. Click the *Add* button below the *Rates overview* table to display the *Add* dialog:

The Add new rate dialog

5. Enter a *Weight* and *Rate*.
6. Click *Save* to create the new rate.

6.4.2 Add a new Shipping Rate Profile

To add a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click *Add* to display the *Add* dialog.

The Add new shipping rate dialog

4. The *New Shipping Rate Profile* window lets you specify the following information:
   - **Shipping Method:** Enter a name in the *Shipping method* field. This identifier is shown on the *Shipping information* page of the ordering process together with the *Delivery time* property.
   - **Default Shipping Rate Profile:** Check the *Default Shipping Rate Profile* checkbox to specify the profile as a system default. Companies that have the *Calculate Shipping Rates* option enabled but do not have any profiles assigned will use the system default profiles. If there are multiple profiles the customer will be able to select one in the ordering process.
   - **Delivery Time:** An additional identifier to state the delivery time.
   - **Service Region:** Select the applicable *Service Region* identifier. If the *Specific region* option is selected the region edit field becomes available.
   - **Shipping Base Rate:** Enter a value in the *Shipping base rate* field to specify the initial parcel costs. This is an optional value and uses the system default currency.
5. Click *Save* to store the changes and close the dialog.

6.4.3 Delete a Rate

To delete a rate of the rates table of a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click the name of the profile. The *Shipping Rate Profile Properties* page is shown. This page shows the properties of the profile and a list of the rates if applicable.
4. Check the checkboxes in the first column.
5. Click *Delete* to remove the rates. A warning dialog is shown before deleting the rate(s).

6.4.4 Delete a Shipping Rate Profile

To delete a shipping rate profile from the *Shipping Rate Profiles overview*:

1. Click *Settings* in the *Menu* bar.

2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Check one or multiple checkboxes in the first column.
4. Click *Delete* to remove the profile. A warning dialog is shown before deleting the profile(s).
   Deleted profiles are removed from the system, companies that had these profiles assigned will no longer have this option in the ordering process. Existing orders are not effected.

6.4.5 Edit a Rate

To edit a rate of the rates table of a shipping rate profile perform the following steps:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click the name of the profile, the *Shipping Rate Profile Properties* page is shown. This page shows the properties of the profile and a list of the rates if applicable.
4. Click the weight or rate to display the *Edit* dialog.
5. Edit the *Weight* and/or *Rate*.
6. Click *Save* to save the changes.

6.4.6 Edit a Shipping Rate Profile

To change the properties of a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click the name of the profile. The *Shipping Rate Profile Properties* page is shown. This page shows the properties of the profile and a list of the rates if applicable.
4. Click the *Edit* button to show the *Edit* dialog.
5. Edit the properties of the profile and click *Save* to store the changes. Click *Cancel* to close the dialog withouth saving changes.

6.4.7 Import and Export a Rates table

The import and export options allows the rates table to be updated without the need to re-enter the entries via the PrintShop Mail Web interface. The current rate table will be available for download by clicking the *Export* button below the *Rates* table. The easiest way to start working with these options is to manually create a tax rate and create an export file. Open the file in Microsoft Excel and add additional rates. Once completed the Excel file can be imported.

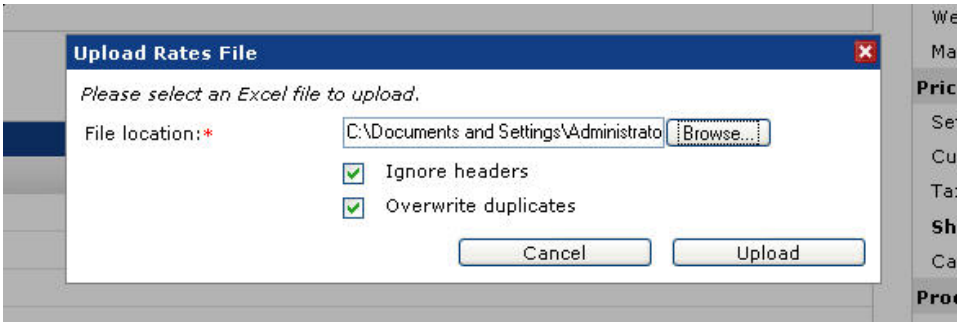
To export the rates table of a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.
3. Click the name of the profile. The *Shipping Rate Profile Properties* page is shown. This page shows the properties of the profile and a list of the rates if applicable.
4. Click the *Export* button below the *Rates overview* table, the *Opening* window of your web browser appears.
5. Choose to save the file to disk and open the resulting file (Excel format) in Microsoft Excel.

To import a rates table file to a shipping rate profile:

1. Click *Settings* in the *Menu* bar.
2. Click *Shipping Rates* in the *Pricing and Ordering* section of the side menu. The *Shipping Rate Profiles overview* page is shown.

3. Click the name of the profile. The *Shipping Rate Profile Properties* page is shown.
4. Click the *Import* button below the *Rates overview* table. The *Import* dialog is shown:

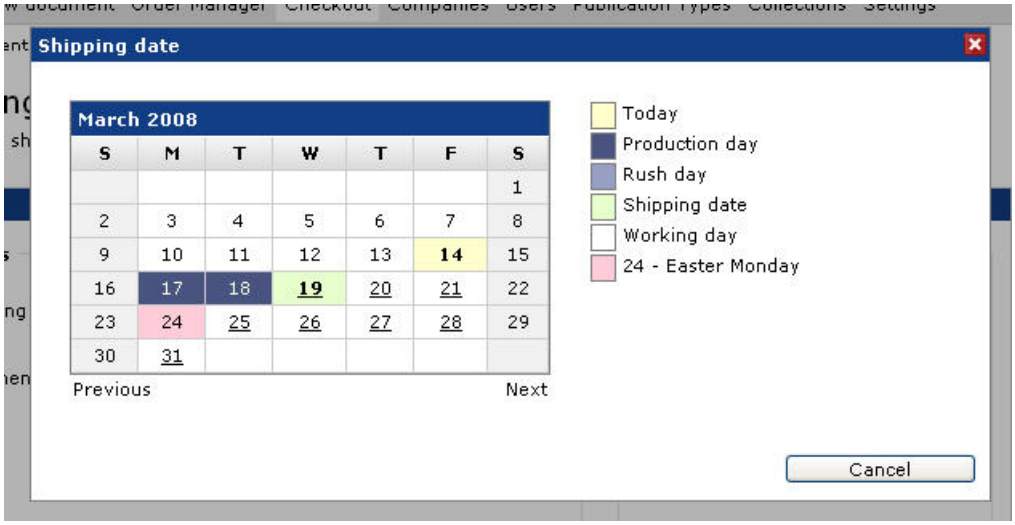


The Upload rates file dialog

5. Click *Browse* and navigate to the file on your local hard drive.
   Check the *Ignore headers* option to ignore the information stored in the first row of the Excel document. The import procedure will start reading at the second row of the document.
   Select the *Overwrite duplicates* checkbox to overwrite duplicate weight values.
6. Click *Save* to start uploading the file. Once the upload process is completed the dialog will close and the rates overview table will be updated. New entries are shown in bold.

6.5 Calendar

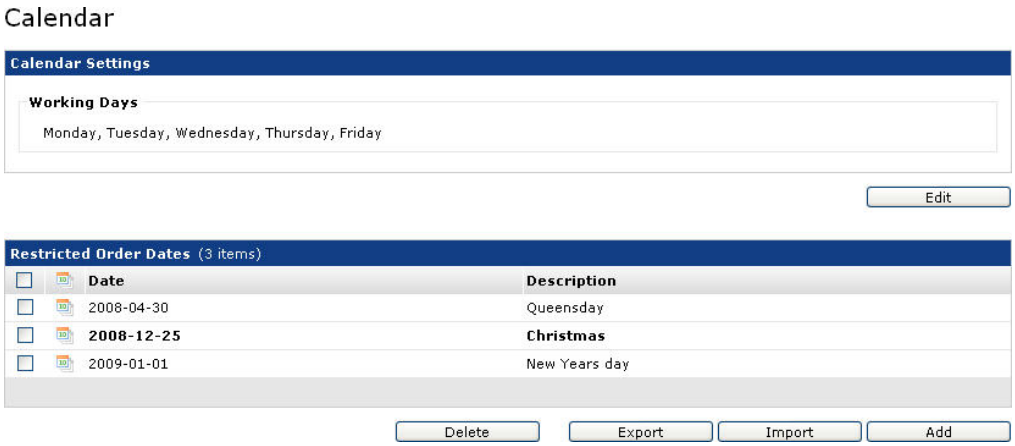
The *Calendar Settings* section lets the administrator define the working days of the print provider and setup a list with restricted order dates. These items are reflected in the shipping date calendar in the ordering process.



The calendar dialog in the ordering process

The *Restricted Order Date* option lets the administrator mark specific dates as a holiday or day off. Customers will not be able to select these days/dates as the preferred shipping date. These dates can be a specific day of the week (e.g. Saturdays and Sundays), a specific date (October 24, 2009) or a repeating date (January 1st or December 25th).

The specified restricted order days are clearly marked in the calendar and can not be selected. The calendar reflects the first day of the week, current date, the selected shipping date, working days, restricted order dates, the standard production time of the items in the checkout and optionally the allowed dates for rush orders.

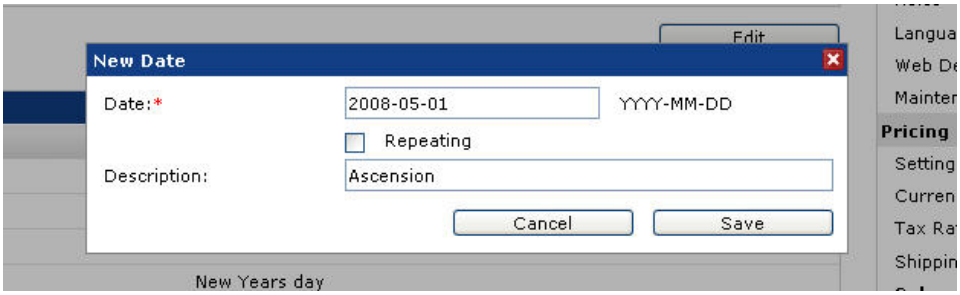


The Calendar settings page

6.5.1 Add a Restricted Order Date

To *Add* restricted order dates:

1. Click *Settings* in the *Menu* bar.
2. Click *Calendar* in the *Pricing and Ordering* section of the side menu. The *Calendar* page is shown.
3. Click *Add* below the *Restricted Order Dates* overview. The following dialog appears:



Enter a date and description for the new Restricted Order Date.

4. The dialog contains the following fields to complete:
   - **Date:** Enter the *Date*. The date entered should follow the date format set for the system.
   - **Recurring Date:** Check the *Recurring Date* checkbox to repeat the date yearly. The *Restricted Order Date overview* shows a single entry for first occurrence of this date and the repeating date icon is shown in the second column. Once the date is reached it will automatically be rescheduled for the next occurrence.
   - **Description:** Enter a descriptive text for this date in the *Description* field, this is optional. To create a multilingual description (a description that switches with the language of the PrintShop Mail Web user interface), add a description according to the internal PrintShop Mail Web language string format. Language strings start with the percentage character %, followed by the description in which the words are joined without spaces and are capitalized within the compound. The string should end with the percentage character % (e.g. %Queensday%, %NewYearsDay%). Subsequently you should add this string to the various languages via the *Languages* section of the Settings section.

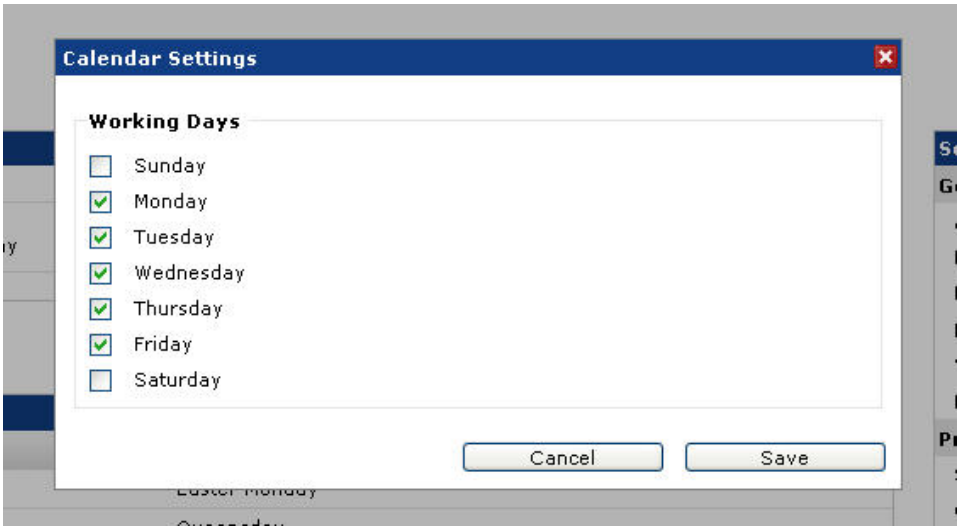
```
English
cQueensday=Queen's Day
cNewYearsDay=New Year's Day

Dutch
cQueensday=Koninginnedag
cNewYearsDay=Nieuwjaarsdag
```

5. Click *Save* to add the new restricted order date and to return to the *Restricted order dates overview.*

6.5.2 Change the Working Days

To change the working days:

1. Click *Settings* in the *Menu* bar.
2. Click *Calendar* in the *Pricing and Ordering* section of the side menu. The *Calendar* page is shown.
3. Click the *Edit* button below the *Calendar Settings* section. The *Edit* dialog appears:



The Edit calendar settings dialog

4. Check the checkboxes of your regular working days.
5. Click *Save* to store the changes and close the dialog.

6.5.3 Delete Restricted Order Dates

To *Delete* a restricted order date:

1. Click *Settings* in the *Menu* bar.
2. Click *Calendar* in the *Pricing and Ordering* section of the side menu. The *Calendar* page is shown.
3. Select one or multiple checkboxes in the first column.
4. Click *Delete*. A warning dialog is shown.
5. Click *OK* to remove the restricted order dates.

6.5.4 Import and Export Restricted Order Dates

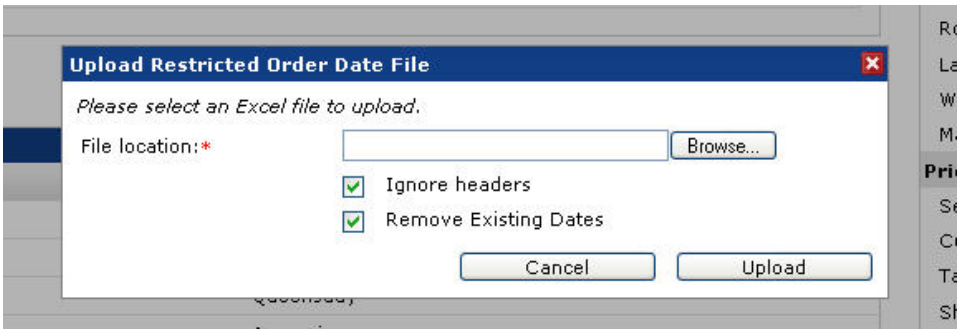
The import and export options allows the restricted order dates table to be updated as needed without the need to re-enter the entries via the PrintShop Mail Web interface. The current table will be available for download by clicking the *Export* button below the *Restricted Order Dates* table. The easiest way to start working with these options is to manually create a date and create an export file. Open the file in Microsoft Excel and add or modify the dates. Once completed the Excel file can be imported.

To export the restricted order dates table:

1. Click *Settings* in the *Menu* bar.
2. Click *Calendar* in the *Pricing and Ordering* section of the side menu. The *Calendar* page is shown.
3. Click the *Export* button below the *Restricted Order Dates* table, the *Opening* window of your web browser appears.
4. Choose to save the file to disk and open the resulting file (Excel format) in Microsoft Excel.

To import a restricted order dates table file:

1. Click *Settings* in the *Menu* bar.
2. Click *Calendar* in the *Pricing and Ordering* section of the side menu. The *Calendar* page is shown.
3. Click the *Import* button below the *Restricted Order Dates* table. The *Import* dialog is shown:



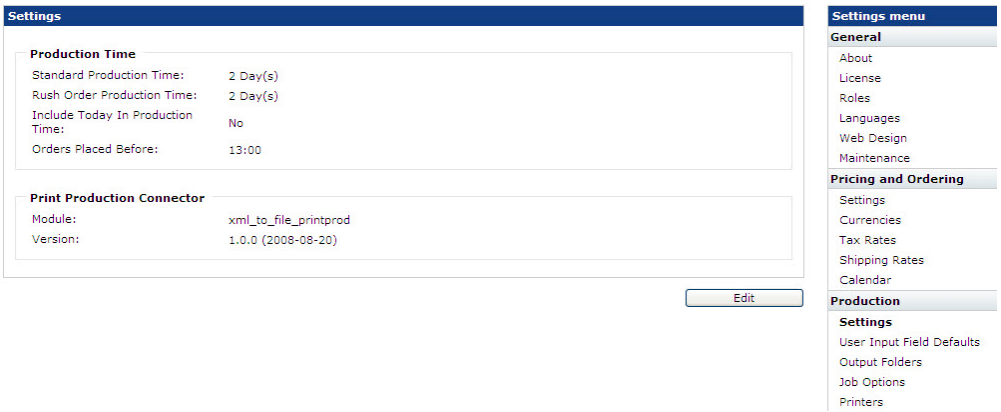
The Upload restricted order date file dialog

4. Click *Browse* and navigate to the file on your local hard drive.
   Ignore headers: Select this option to ignore the information stored in the first row of the Excel document. The import procedure will start reading at the second row of the document.
   Removes Existing Dates: Select the *Remove Existing Dates* checkbox to delete all existing entries before insert the dates.
5. Click *Save* to start uploading the file. Once the upload process is completed the dialog will close and the dates table will be updated. New entries are styled in bold.

7 Production

In the *Production* section of the *Settings* menu several production related topics can defined.

Production



The Production Settings page

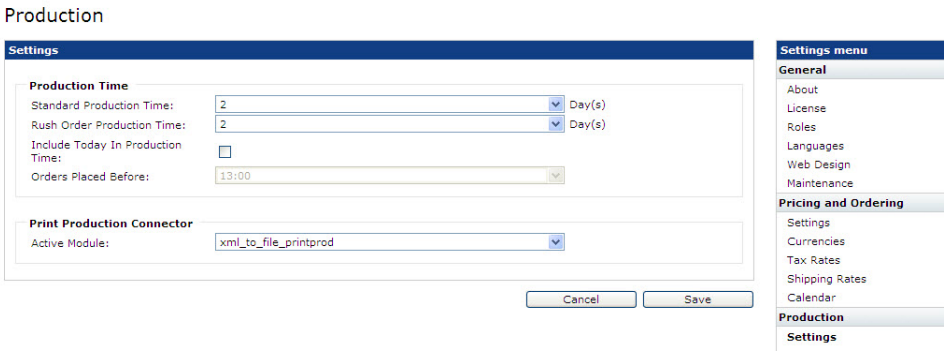
7.1 Production Settings

In the *Settings* window from the *Production* section you can define several production specific settings. The *Production Settings* page contains the following sections:

- Production Time
- Print Production Connector

To change the *Production Settings* :

1. Click *Settings* in the *Menu* bar.
2. Click *Settings* in the *Production* section from the side menu.
3. Click the *Edit* button. The following screen appears:



The Production Settings page

4. The *Production Settings* window contains the following sections:
   - **Production Time:** The *Production* section lets you change default values for production specific parameters. These settings are system wide and can be overridden at template level.
     - **Standard Production Time:** In the *Standard Production Time* pull-down-menu the number of days to produce documents can be defined. The values ranges from 0 to 15. The standard production time is used to calculate the first possible shipping date during the ordering process. The end user has the option to select a different date (via a calendar) but cannot select any of the dates marked as standard production time. The values specified in this section are automatically applied to new templates.
     - **Rush Order Production Time:** The *Rush Order Production Time* pull-down-menu defines the number of production days for rush orders. When the end user selects a date that implies a rush order the rush surcharge is added to the price of the document. If the rush order production time is set to 0 no rush orders are accepted.
     - **Include Today In Production Time:** When checked, this option determines if the current date is counted as a production day for orders placed before the time specified in the *Orders Placed Before* pull-down-menu.
     - **Orders Placed Before:** Defines the time for the *Include today in production time* option.

     When no *Standard Production Time* is specified and the *Include Today In Production Time* checkbox is checked, it is possible for customers to order print jobs for the same day (when ordered before the specified *Orders placed before* time).
     The default value of the *Orders placed before* pull-down-menu is 13:00 hours. The settings defined in the *Production* section are system default settings and are used for all templates. It is also possible to specify production settings for a template in the *Publication Types* section. See for more information the chapter Add publication types.
   - **Print Production Connector:** The *Print Production Connector Framework* is build on top of the module framework and is called when creating PDF and printing an order. The *Production Settings* page defines the active *Print Production Connector*.
     For more information see the *Print Production integrationguide*. This document describes the *Print Production Framework* and the options of the *XML to File* connector.
5. Click *Save* to store the changes.

7.2 User Input Field Defaults

The *User Input Field Defaults* option is introduced to streamline the web form configuration during the PrintShop Mail Publishing process. The designer of a PrintShop Mail document can use the Printshop Mail Web interface to change the presentation and behavior of user input fields. The designer can set various aspects like the input type (plain text, image upload, checkbox, etc.) and make a field required. Setting up these fields can be a time consuming task, especially when publishing documents share common elements.

A good example is a business card, because business cards typically include fields for the first name, last name, job title and e-mail address. The first and last name fields are typically required fields and you might want to use a regular expression field to validate the entry for the e-mail address. Besides this you might want to link these fields to the account information of the visitor.

In order to prevent the designer to configure these fields for each business card template the administrator can create default settings for user input fields. These settings are applied to the user input fields when publishing a PrintShop Mail document to PrintShop Mail Web. In this process the system tries to find a mapping between the data field name in the template document and the user input field defaults item.

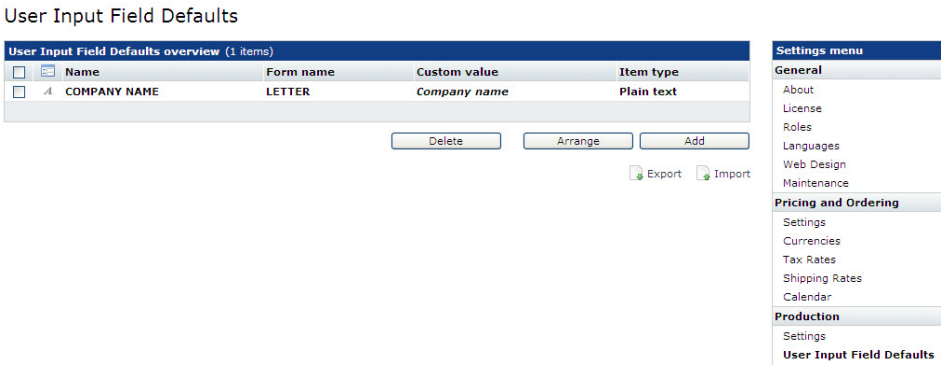
To invoke this process the designer needs to specifify the name of the "default item" in the *Remarks property* in PrintShop Mail. The name of the "Default item" should be surrounded by square brackets.

If a match is found all web form parameters are retrieved from the default item and stored with the input field.

7.2.1 Add a new User Input Field Default item

To add a new user input field default item:

1. Click *Settings* in the *Menu* bar.
2. Click *User Input Field Defaults* in the side menu. The *User Input Field Defaults overview* page is shown:



The User input field default overview

3. Click the *Add* button below the *User Input Field Default overview* to show the *Item Properties* page.
4. The *Item Properties* page contains the following sections:
   - **General:** Enter a name for the user input field default item and it is possible to add an informative text which appears below the data entry field.
   - **Web Form Parameters:** The *Web form parameters* in this section are used to define the appearance of the field. They depend on the selected field type. PrintShop Mail Web supports the following field types:
     - Plain text
     - Pull-down
     - Phone
     - Image upload

- Collection
- Checkbox
- Rich text editor
- Regular expression.

- **Default Value:** The options in the *Default value* section define the initial value of the field. The value can be overwritten by the end user.

See for more information about *Item Properties* the Setting up Web Forms chapter.

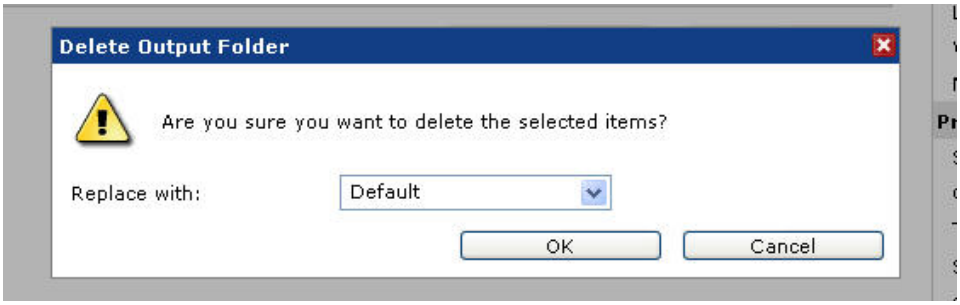
5. Click *Save* to creat a new user input field default item.

Note: When an existing user input field default is edited the changes are only applied on new user input fields. A designer can change the web form properties for each user input field of each template separately, because when a new user input field is made using a set of defaults the properties of the defaults are copied to the new input field, there is no further link.

7.2.2 Arrange User Input Field Defaults items

On the *User Input Field Defaults overview* it is possible to arrange the items. The administrator set the most likely arrangement of the input fields. The order of the fields is shown when a user creates a new job. To arrange the user input field default items in the overview:

1. Click *Settings* in the *Menu* bar.
2. Click *User Input Field Defaults* in the side menu. The *User Input Field Defaults overview* appears.
3. Click *Arrange*. The following screen appears:



The User input field defaults overview with the possibility to arrange the items

4. The order of the items in the overview can be changed by dragging and dropping an item name.
5. Click *Save* to store the changes.

7.2.3 Delete an User Input Field Default item

To delete one or multiple user input field default items:

1. Click *Settings* in the *Menu* bar.
2. Click *User Input Field Default* in the side menu. The *User Input Field Default overview* page appears.
3. Select the checkbox in front of the user input field default item that should be deleted
4. Click *Delete.* First after clicking *OK* in the warning dialog the user input field item is deleted.

7.2.4 Import and Export an User Input Field Default list

The *Export* user input field defaults option lets you export a XML file with the user input field defaults from PrintShop Mail Web. To export the user input field default items:

1. Click *Settings* in the *Menu* bar.
2. Click *User Input Field Default* in the side menu. The *User Input Field Default overview* page appears.

---

3. Click the *Export* button below the *User Input Field Defaults overview.* The *Opening* window of the web browser appears.
4. Choose to save the file to disk and open the resulting file (*XML format*) to read of edit the data with an XML editor.

The *Import* user input field defaults option lets you import a XML file with user input field defaults on the *User Input Field Defaults overview* page. To import the XML file:

1. Click *Settings* in the *Menu* bar.
2. Click *User Input Field Default* in the side menu. The *User Input Field Default overview* page appears.
3. Click the *Import* button below the *User Input Field Defaults overview.* The *Import* dialog appears.
4. Click *Browse* and navigate to the file on your local hard drive.
   Check the *Remove Existing User Input Field Defaults* checkbox to remove the existing user input field defaults from the overview. If the *Remove Existing User Input Field Defaults* checkbox is not checked existing defaults are maintained. If duplicate user input field defaults are found the user input field defaults are updated based on the data found in the uploaded file.
5. Click *Save* to close the dialog and upload the selected file.

7.3 Output Folders

Output folders are folders used to store static PDF-files, these can be PDF output generated for PrintShop Mail documents or the high resolution file of static PDF documents. Due to their nature output folders are not connected to a particular company.

The operator will not be able to send PDF documents directly to the printer or spooler. Instead the system will place a copy of the PDF document in a predefined output folder. This folder is located in the *Output* folder of *Files* folder (located in the PrintShop Mail Web web site folder). This central location contains a sub folder called *Default*. In order to move the file to the printer additional applications or scripts are required (f.e. PlanetPress Watch). These tools should monitor the folders located in the *Output folder* and remove the files once they are processed. The name of the resulting pdf file is: <order-id>_<job-id>.pdf.

When the operator wants to output the document, he can use the *Generate output* button on the *Job Properties* page (*In-plant* orders). Once the operator clicks the *Generate output* button and the *Send to folder* option and *Output folder* are selected, a copy of the high resolution version of the PDF will be copied to the select output folder located in the *output* folder. In this process the document will be renamed to the ID of the job. To ensure that the documents name will be unique and refer to the order it belongs to.

The administrator can create additional output folders. These user defined output folders can be assigned to a document.

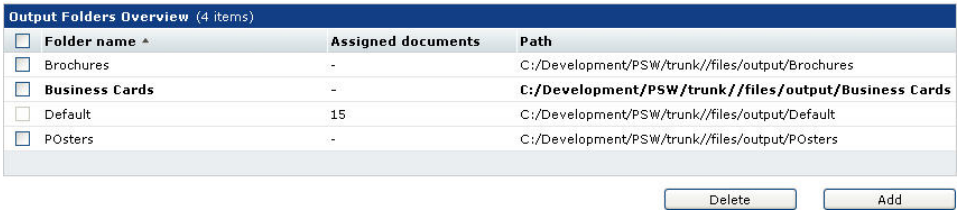
If print jobs are not automatically removed from this folder, the print jobs must be removed manually from this folder by an operator. The number of output folders that can be added is unlimited. An output folder can be set for each document via the *Publication Types* section.

7.3.1 Add a new output folder

To add a new output folder:

1. Click *Settings* in the *Menu* bar.
2. Click *Output folders* in the side menu. The *Output Folders overview* appears:

Output Folders



Output Folders Overview (4 items)

Folder name	Assigned documents	Path
Brochures	-	C:/Development/PSW/trunk//files/output/Brochures
Business Cards	-	**C:/Development/PSW/trunk//files/output/Business Cards**
Default	15	C:/Development/PSW/trunk//files/output/Default
POsters	-	C:/Development/PSW/trunk//files/output/POsters

Delete Add

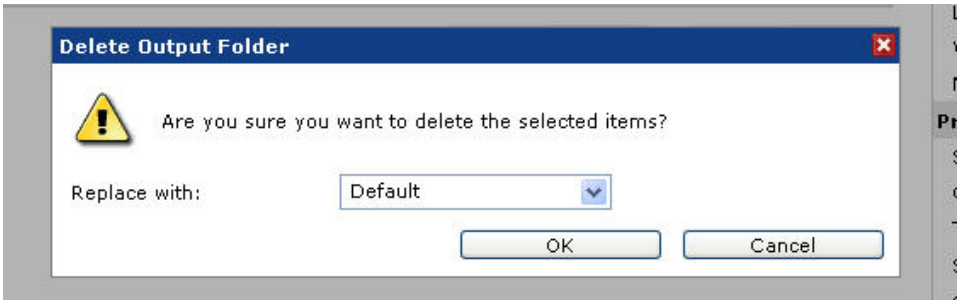
The Output folders overview

3. Click the *Add* button below the *Output Folders overview* to show the *Add* dialog.
4. Enter a *Name* for the output folder. The name of the output folder may only contain the following characters: uppercase and lowercase characters, dash and underscore, numbers and whitespace.
5. Click *Save* to create the new folder.

7.3.2 Delete an output folder

To delete an output folder:

1. Click *Settings* in the *Menu* bar.
2. Click *Output folders* in the side menu. The *Output Folders overview* appears.
3. Select an output folder by clicking the checkbox in front of the folder name and click *Delete*. The following dialog appears:



The Delete output folder dialog

4. Select a new output folder in the *Replace With* pull-down-menu. This will assign a new default output folder to these documents that are attached to the selected folder(s).
5. Click *Delete*. The selected output folder(s) and the documents contained in it are removed.

7.3.3 Enable the download link

Download links are added to the most recent items in the *Output History overview*. By default the download link will only work on the localhost, this is due to the tight security settings of printShop Mail Web. In order to enable the download link:

1. Create a text file in the *output* folder and name this file .htaccess: */files/output/.htaccess*.
   The purpose of .htaccess files is to provide a means to configure Apace for users who cannot modify the main configuration file. More information about .htaccess files can be found at the following web site: http://httpd.apache.org/docs/2.0/howto/htaccess.html.
2. Add the following code to the .htaccess file to allow access to all files in the *output* folder and its sub folders. Replace the <youripaddress> with the IP address of your domain.
   <FilesMatch ".*">
   Order Allow, Deny
   Allow from <youripaddress>
   </Filesmatch>
3. Use the following code to provide access to .pdf files:
   <FilesMatch ".(pdf)$">
   Order Allow, Deny
   Allow from <youripaddress>
   </Filesmatch>
4. Use the following code to provide access to .pdf and .zip files:
   <FilesMatch ".(pdf|zip)$">
   Order Allow, Deny
   Allow from <youripaddress>
   </Filesmatch>

7.4 Job options

With *Job Options* it is possible to change the characteristics of generated PDF files. PrintShop Mail Web uses job options files when creating softproofs and when creating PDF output of PrintShop Mail documents. By default Print Shop Mail Web has 2 pre installed job option files. It is possible to upload additional job options files. Job option files can be created using Acrobat Distiller, by editing the settings and saving the settings to a file. It is not possible to delete the pre installed job options files.

Job options files are plain text files, a common text editor, like NotePad++, can be used to change the settings in the file. PrintShop Mail Web does not have an option to preflight job options files and cannot determine if a job options file is valid. Manually edited job options files and even job option files created using Acrobat Distiller may not work properly and could cause rendering errors. Make sure that you have tested your job options file and template using PrintShop Mail Web before making the template document available to your customers.

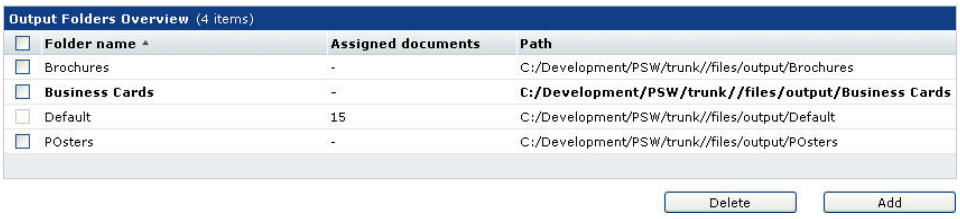
Note: Please note that image compression settings in the job options files only affect bitmap data in the PDF document. When a document contains vector data you won't see any difference.

7.4.1 Add a new job options file

To add a new job options file:

1. Click *Settings* in the *Menu* bar.
2. Click *Job Options* in the side menu. The following screen appears:

   Output Folders



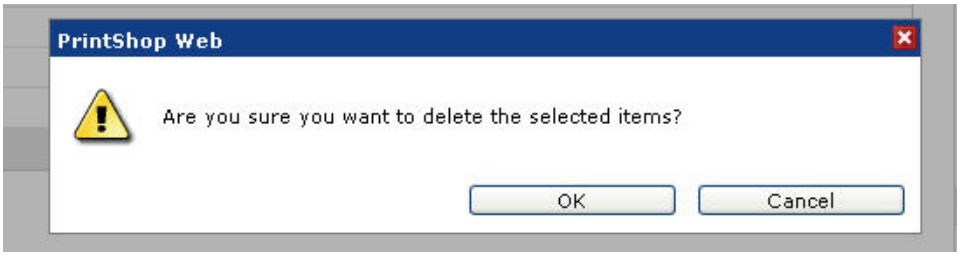
The Job options overview

3. Click *Add*. The *Add* dialog is shown.
4. Click *Browse* and locate the job option file.
5. Click *Save.* The job file is stored and the new job option is added to the *Job Options* overview.

7.4.2 Delete job options files

To delete a job options file:

1. Click *Settings* in the *Menu* bar.
2. Click *Job Options* in the side menu. The *Job Options overview* appears.
3. Select one or multiple job options files by clicking the checkbox in the first column.
4. Click *Delete*. The following dialog appears:



The Delete job options dialog

5. Click *OK* to delete the selected job options files. Documents reffering to a deleted job options file will use the standard job options file included with PrintShop Mail Web.

7.5 Printers

In the *Printers overview* from the *Settings* section all the available printers are displayed. This list is provided by PrintShop Server. Stopping and starting PrintShop Server will refresh this printer list.

Printers that are marked with a red icon in the first column will not show up in the printer list in the *Output* dialog. Printers that are marked with a green icon will show up in the printer list.

7.5.1 Change the status of a printer

To disable a printer perform the following steps:

1. Click *Settings* in the *Menu* bar.
2. Click *Printers* in the side menu. The *Printers overview* page shows a list of the available printers.

   Printers

   Printers (6 items)

Printer Name	Driver
Acrobat Distiller	AdobePS Acrobat Distiller
Microsoft Office Document Image Writer	Microsoft Office Document Image Writer Driver
Microsoft XPS Document Writer	Microsoft XPS Document Writer
PDFCreator	PDFCreator
PlanetPress Printer	Objectif Lune Printer Driver (PS)
PrintShop Mail Printer	PrintShop Mail Printer Driver (PS)

   The list of printers is refreshed when PrintShop Server is started

3. Click the icon in front of a printer name to change its status.

8 E-mail

The E-mail settings section is used to set up e-mail notifications that will be send e-mail messages when orders are created or when the status of an order is changed

8.1 E-mail Settings

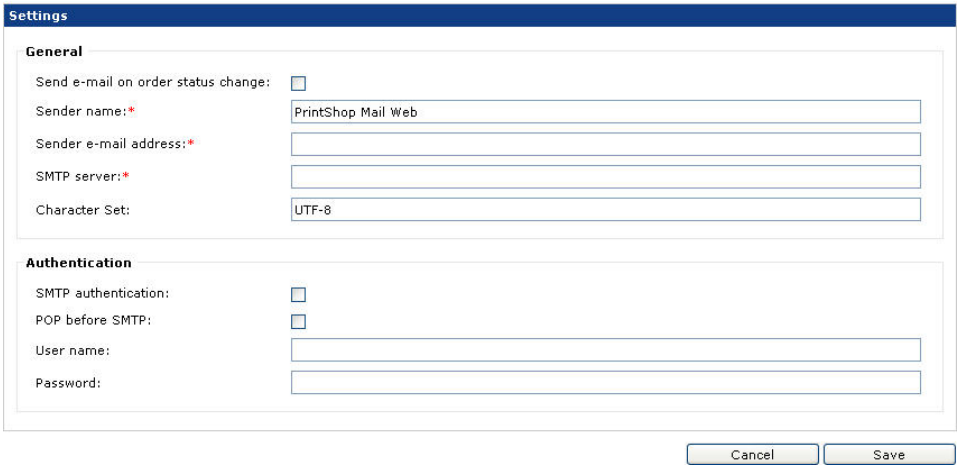
When PrintShop Mail Web sends e-mail messages the system default e-mail settings are used. The *E-mail Settings* page shows information about the current e-mail settings. The *E-mail Settings* page allows the administrator to enable the send e-mail message option and setup e-mail server related parameters.

8.1.1 Configure the E-mail settings

To change the *E-mail Settings* perform the following tasks:

1. Click *Settings* in the *Menu* bar.
2. Click *Settings* in the *E-mail* section from the side menu. The *E-mail Settings* page appears.
3. Click *Edit*. The following page appears:

   E-mail



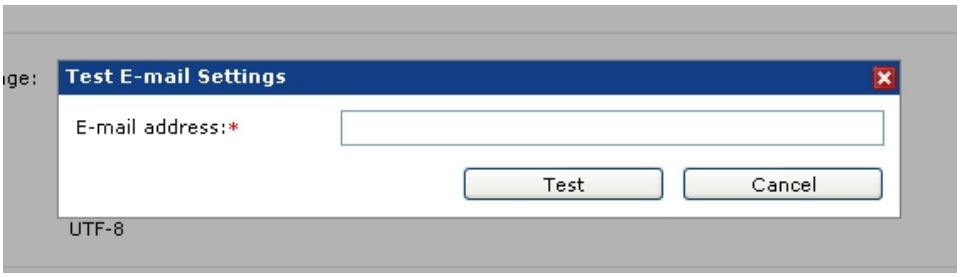
The E-mail Settings page

4. Change the settings to meet the requirements of your environment:
   - **Send E-mail on Order Status Change:** Select this option to send an e-mail message on every status change of the customers print jobs to your customer.
   - **Sender Name:** Enter the name of your company or web server.
   - **Sender E-mail Address:** Enter the company's e-mail address, this address is visible to the customer.
   - **SMTP Server:** Enter the name of your outgoing mail-server.
   - **Character Set:** Enter the characters set used for the e-mail message (e.g. UTF-8 or iso-8859-1). By default this field is set to UTF-8.
   - **SMTP Authentication:** Select the checkboxes for *SMTP authentication* and/or *POP before SMTP* if your ISP (Internet Service Provider) blocks outgoing e-mail until e-mail has been read. Try this option if you experience problems connecting to your mail server.
   - **User Name** and **Password:** Sets the STMP user name and password.
5. Click *Save* to store the changes and to return to the *E-mail Settings* page.

8.1.2 Test the E-mail settings

Test the E-mail settings to make sure users receive their e-mail messages. To test the *E-mail Settings* perform the following steps:

1. Click *Settings* in the *Menu* bar.
2. Click *Settings* in the *E-mail* section from the side menu. The *E-mail Settings* page appears.
3. Click the *Test* button. The following dialog appears:



The Test E-mail Settings dialog

4. Enter an e-mail address and click the *Test* button to send a test message to the entered address. If the e-mail message was send successfully the message "S*uccesfully sent the test e-mail*" is shown.

8.2 E-mail Addressees

The *E-mail Addressees* section lets the administrator define who receives e-mail notification messages. This can be defined per order status.

Configure the addressees

To setup who receives status change messages:

1. Click *Settings* in the *Menu* bar.
2. Click *Addressees* in the side menu. The *E-mail Addressees overview* appears:

   E-mail Addressees

Order status
Name
Ordered
Approved
In-plant
Shipping
On hold
Completed
Quote request
Quote price

   Status Overview of the E-mail addressees section

3. Select an order status from the overview. The following screen appears:

   E-mail Addressees

   Status: Ordered

Customer:	☑
Additional order form contact:	☑
Company contact:	☐
Department contact:	☐
Queue responsible:	☑
Custom e-mail:	

   Cancel Save

   Select the person(s) who must receive an e-mail messages in the selected order status

4. Select the person(s) who must receive an e-mail message in the selected status:
   - **Customer:** The person who ordered or approved the print job.
   - **Additional order form contact:** If the contact for the print job differs from the user placing the print job, the *Contact name* and *Contact e-mail* can be entered in the order information window.
   - **Company contact:** The person who is selected in the companies properties page, in the *Contact person* field.
   - **Department contact:** The person who is selected in the department properties page, in the *Contact person* field.
   - **Queue responsible:**
     - **Ordered queue:** Persons in the customers organization that have the privilege to *Approve* the order.
     - **Approved queue:** Persons in the printshop that have the privilege to set the order status to *In-plant.*
     - **In-plant queue:**
       - Persons in the printshop that have the privilege to print orders.
       - Persons in the printshop that have the privilege to set the order status to *Shipping.*
     - **Shipping queue:** Persons that have the privilege to set the order status to *Completed.*

    - **Completed queue:** Persons that have the privilege to view the orders with status *Completed.*
    - **Quote request:** Persons in the printshop that can enter a price quote.
    - **Quote price:** Persons in the customers organization that have the privilege to *Approve* the order.
  - **Custom e-mail:** In the *Custom e-mail* field you can enter an extra e-mail address. Please note that this custom e-mail address is used for all orders in the system. For example, each print job that is ordered can be send an e-mail message to the person responsible for tracking orders.
    If one or more addressees checkboxes represent the same person, this person will only receive one e-mail.

5. Click *Save* to store the changes.

8.3 Managing E-mail Templates

The introduction of *E-mail templates* simplifies the management and customization of e-mail messages send by PrintShop Maill Web. E-mail templates are HTML documents and are stored on the file system of the PrintShop Mail Web web server. The e-mail templates can be altered using a plain text editor (e.g. Note Pad++).

An e-mail template combines HTML and PHP allowing the administrator to add and remove information from the message. As the templates are using the PHP scripting language custom content conditions can be added by adding local functions that use variables supplied by PrintShop Mail Web.

Templates can be overwritten per skin allowing the look and feel of the message to be changed according to that skin.

A range of e-mail template functions can be added to perform specific tasks like adding cc and bcc addressees as well as adding e-mail attachments.
The options covered by this document are:

- The organization of e-mail templates.
- E-mail settings.
- E-mail template attributes per message type (order notification, forgot password).
- E-mail template functions.

In order to create language specific exceptions, sub folders can be created for each language (in the emailtemplates folder). The name of these sub folders should match the Iso code as specified in the *Language* section of the *Settings* section.

The system will check for the existence of an e-mail template in the folder structure of the current skin. E-mail templates in a skin folder have a higher priority and if found this message is used. The organization inside a skin folder is similar to the default e-mail templates location. The administrator can simply place a copy of the emailtemplates folder in the folder of the skin and start customizing the templates. The iso code used in the folder path is in lowercase.

Below an overview of the possible e-mail template locations, sorted by priority:

1. C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website\templates\<skinname>\misc\emailtemplates\<isocode>
2. C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website\templates\<skinname>\misc\emailtemplates
3. C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website\misc\emailtemplates\<isocode>
4. C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website\misc\emailtemplates

8.3.1 Edit a default e-mail template

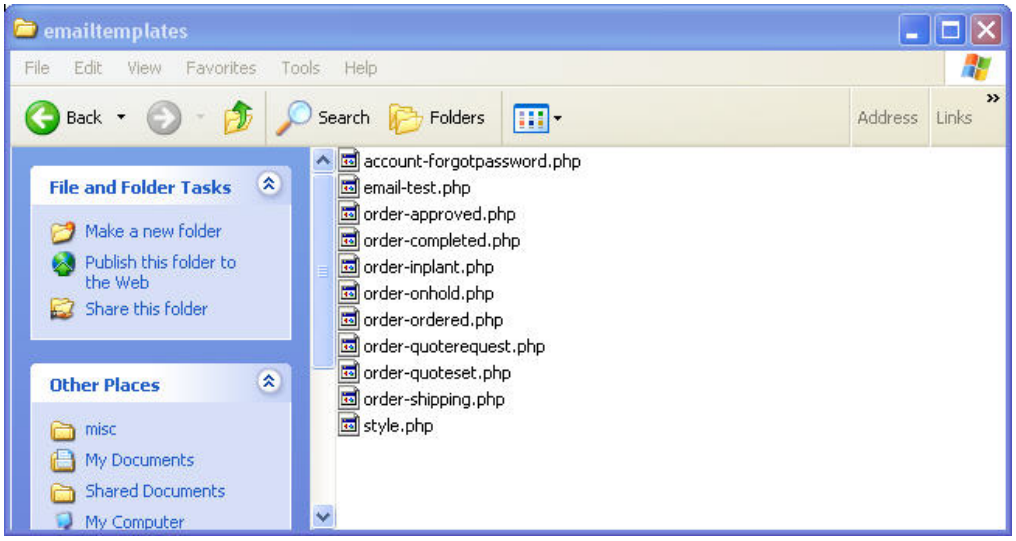
To edit a default e-mail template:

1. Select an e-mail template document on the following location: *C:\Program Files\PrintShop Web\Website\misc\emailtemplates* and open the file in a plain text editor.
2. Edit the text in the document.
3. Click *Save* to store the changes.

To add e-mail templates to a skin simply place a copy of the *emailtemplates folder* in the folder of the skin and start customizing the templates.

8.3.2 Template names

The name of the template consists of two parts. The first indicator refers to PrintShop Mail Web objects (e.g. order and account). The second part defines the action that invokes the sending of the message.



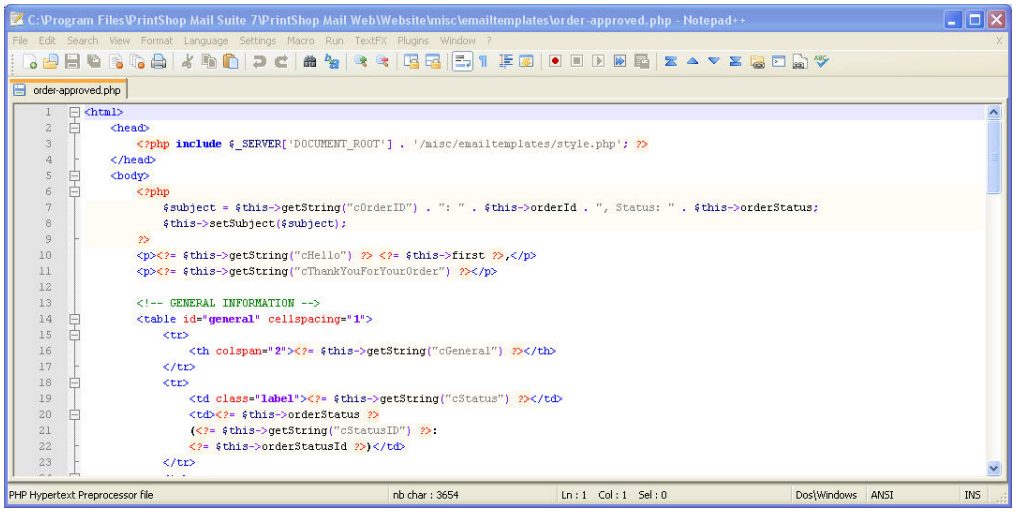
E-mail templates folder

By default PrintShop Mail Web has a set of language independent e-mail templates stored in emailtemplates folder. So the setup doesn't create language exceptions or exceptions for a skin. The list of the default available e-mail templates/messages:

- **email-test:** The *E-mail test* message is sent when the administrator clicks the *Test* button on the *E-mail Settings* page.
- **account-forgotpassword:** The *Account forgot password* template is used when the customer requests the retrieval of a lost password.
- **order-ordered:** The *Ordered* message is send when the status of an order is set to ordered.
- **order-approved:** The *Approved* message is send when the status of an order is set to approved.
- **order-inplant:** The *In-plant* message is send when the status of an order is set to in plant.
- **order-shipping:** The *Shipping* message is send when the status of an order is set to shipping.
- **order-completed:** The *Completed* message is send when the status of an order is set to completed.
- **order-quoterequest:** The *Quote request* message is send when the customer ordered a document without price information.
- **order-quoteset:** The *Quote price* message is send when the production manager has set the price for the quote request.

8.3.3 Using functions in e-mail templates

The template system includes options to override the subject, add/remove addressees, create file attachements and to apply formatting using html tags and cascading style sheets (CSS). The e-mail template system includes options to call functions that perform specific tasks.



An e-mail template in Notepad++

The following functions are available for all e-mail templates:

- **setSubject:** This function sets the subject for the e-mail message. If no subject is specified the subject is set to: *No Subject.*
  $this->setSubject("Password Assistance")
- **setFrom:** This function overrides the *Sender e-mail address* set in the *E-mail Settings.*
  $this->setFrom("info@printshopweb.com")
- **setFromName:** This function overrides the *Sender e-mail address* set in the *E-mail Settings.*
  $this->setFromName("MyCards.com")
- **setTo:** By default PrintShop Mail Web will determine the recipients of the message based on the *E-mail Addressees* settings in the *Settings* section. The *setTo* function overrides the "To" header defined by the system.
  The first parameter is the e-mail address, the function accepts a second optional parameter that is used as a human-readable name of the recipient for the header.
  $this->setTo("psw-beta@eu.objectiflune.com","PSW Beta")
- **addTo:** Adds a recipient to the mail with a "To" header.
  The first parameter is the e-mail address, the function accepts a second optional parameter that is used as a human-readable name of the recipient for the header.
  $this->addTo("psw-beta@eu.objectiflune.com","PSW Beta")
- **addCc:** Adds a recipient to the "Cc" header of the message.
  The first parameter is the e-mail address, the function accepts a second optional parameter that is used as a human-readable name of the recipient for the header.
  $this->addCc("psw-beta@eu.objectiflune.com","PSW Beta")
- **addBcc:** Adds a recipient to the "BCc" header of the message.
  The first parameter is the e-mail address, the function accepts a second optional parameter that is used as a human-readable name of the recipient for the header.
  $this->addBcc("logger@eu.objectiflune.com","Logger")
- **setHtmlContent:** Sets the content type of the message body to text/html (default).
  $this->setHtmlContent()
- **setPlainTextContent:** Sets the content type of the message body to text/plain.
  $this->setPlainTextContent()
- **setCharset:** This functions sets the charset of the message body.
  $this->setCharset("UTF-8"); (default)
  $this->setCharset("iso-8859-1")
- **addAttachment:** Adds an attachment from a path on the filesystem.
  $this->addAttachment("application/pdf","sample1.pdf");
  $this->addAttachment("application/pdf","/files/jobs/1/8/8_lr.pdf");
  $this->addAttachment("application/pdf","/files/jobs/$this->companyid/$this->jobs[0]/$this-> jobs [0] _lr.pdf");

```
//Attach the softproof pdf of each document/job to the message:
foreach ($this->jobs as $key => $job) {
$id = $job[id];
$this->addAttachment("application/pdf","/files/jobs/$this->companyid/" . $id . "/" . $id . "_lr.pdf");
}
```

- **getString:** Returns the given string from the language strings.
  ```
  $this->getString(cNo);
  $this->setSubject("$this->getString(cYourAccountDetails)")
  ```
- **replaceString:** Replaces the value of a string based on a match in the second parameter (array). The result is returned.
  ```
  $this->replaceString($this->rush, array(0=>$this->getString(cNo), 1=>$this->getString(cYes))
  ```
- **skipEmpty:** Use this function to skip a specific value in case it is empty. The second parameter is optional and defines the string that will be inserted when the input string is not empty. If this parameter is omitted the input string will be returned.
  ```
  <?php echo $this->skipEmpty($this->shippingaddress2,$this->shippingaddress2 . "<br />"); ?>
  <?php echo $this->skipEmpty($this->shippingaddress2); ?>.
  ```

9 Modules

PrintShop Mail Web includes a framework for managing and describing modules. Modules are used to add or customize functionality in specific areas of the application.

The *Overview* option in the *Modules* section from the *Settings* side menu shows an overview of the installed modules. The modules are grouped by their module type. Click the plus-icon in front of a module type to view the available modules for that type. For more information see the guides of the respective module type.

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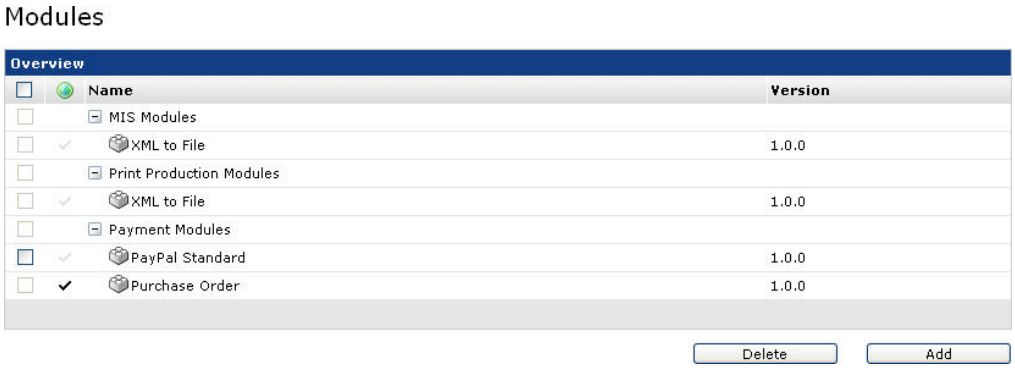


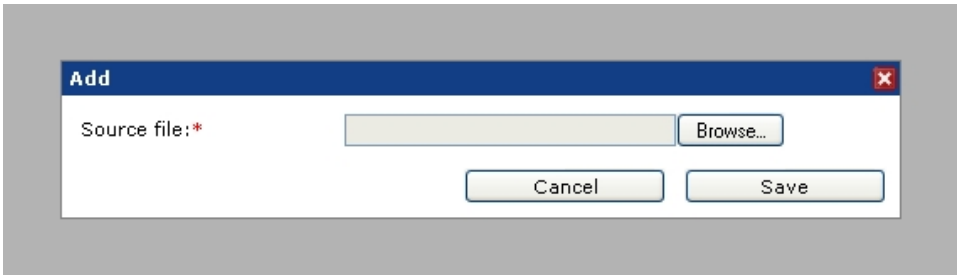
The Modules overview

9.1 Add a new Module

PrintShop Mail Web modules are distributed as zip files. They are installed by uploading the .zip file via the *Modules Overview* page (*Settings* section).

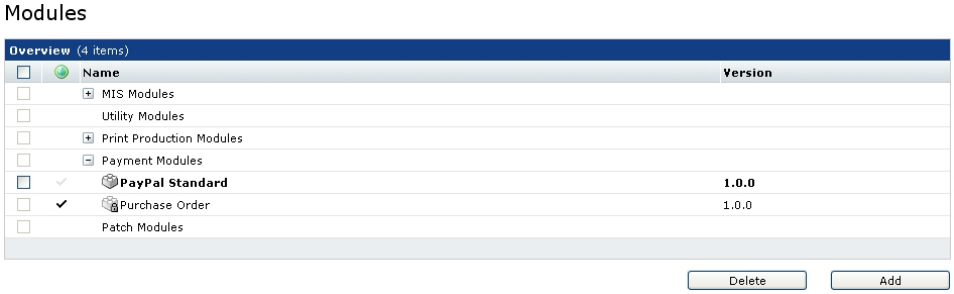
To upload a new module:

1. Log on to the PSM Web website using the credentials of an administrator account.
2. Click *Settings* in the menu bar.
3. Click *Overview* in the *Modules* section of the *Settings* side menu. The *Modules Overview* page appears.
4. Click *Add*, the *Add module* dialog appears.



The Add module dialog

5. Click *Browse* and locate the .zip file on your local hard drive.
6. Click *Save* to add the module to PSM Web.



The PayPal connector is added to the Modules overview

Once the connector is uploaded you can proceed with configuring the module.

Note: Before you can add a module to PSM Web you must have completed the first run successfully.

9.2 Configure a module

To change the settings of a module:

1. Click *Settings* in the *Menu* bar.
2. Click *Overview* in the *Modules* section from the side menu. The *Modules Overview* page appears.
3. Click the plus-symbol in front of a module type to view its contents.
4. Select a module by clicking the module name to view its *Properties* page.
5. Click the *Edit* button to edit the *Properties* page:

Modules

Properties

Module Type:	MIS Module
Status:	Inactive
Version:	1.0.0
Date:	2007-06-11
Name:	XML to File
Copyright:	© 2007 Objectif Lune BV
Creator:	Objectif Lune BV
Comments:	This connector creates a XML file at each status change. The XML file is stored in the orders folder located in the files folder of the PrintShop Web website. The file name is based on the order id. During the XML creation process a XSLT style sheet can be applied to modify the XML structure. In addition to this the connector can post the XML data to a user definable URL.

Push method

Method: Write to folder

XML options

Apply XSLT style sheet: ☐

Style sheet:

```
<?xml version="1.0" encoding="UTF-8"?>
<!--This is an sample stylesheet-->
<xsl:stylesheet version="1.0" xmlns:xsl="http://www.w3.org/1999/XSL/Transform">
<xsl:output method="xml" indent="yes"/>
 <xsl:template match="/">
  <PrintShopCommunication>
   <Order>
    <xsl:attribute name="id"><xsl:value-of select="//fnOrderID"/></xsl:attribute>
    <xsl:attribute name="statusid"><xsl:value-of select="//fnOrderStatusID"/></xsl:attribute>
```

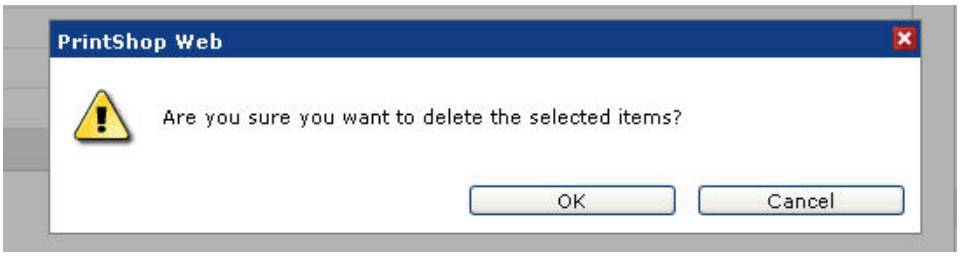
The Properites page of the XML to File MIS Connector.

6. Change the settings of the module and click *Save* to store the changes.

9.3 Delete a Module

To delete module from the *Modules overview*:

1. Click *Settings* in the *Menu* bar.
2. Click *Overview* in the side menu. The *Modules overview* appears.
3. Select one or multiple *Modules* by clicking the checkbox in the first column.
4. Click *Delete*. The following dialog appears:



The Delete modules dialog

5. Click *OK* to delete the selected *Modules*.
   When a module is marked as system module in the database, the checkbox is disbled. It is not possible to delete the system marked modules.

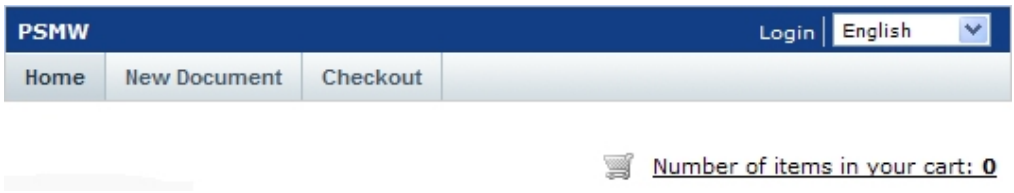
10 Enabling B2C (Business to Customer)

PrintShop Mail Web not only enables B2B (Business to Business) transactions, but also B2C (Business to Customer) transactions.

URL of a Public Company

To allow any visitor from the web to view and order selected documents, without having to create an account first, the documents and publication types must be defined in a public company, that is a company whose type is **Public**. Like any company, a public company can be accessed by typing the PrintShop Mail Web URL with the company name as the path. For example, if the URL of PrintShop Mail Web is *www.psmw.com* and a public company is named 'shop', then the URL of the public company is *http://www.acmeprinting.com/shop*.

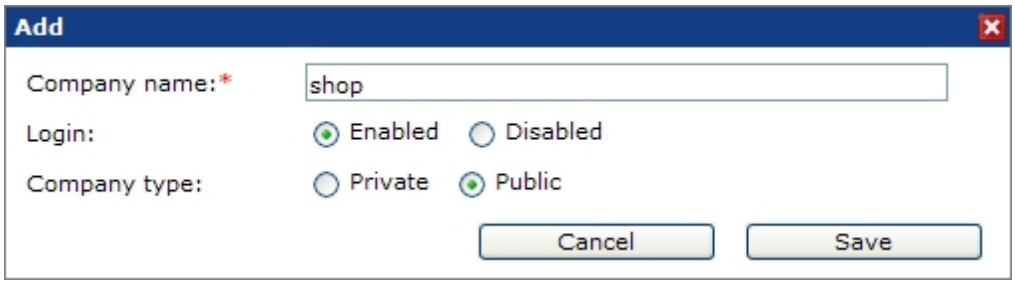
Instead of the login page, the home page of a public company displays basic actions that any customer can do: add item(s) to a shopping cart and checkout.



PrintShop Mail default tab for a new customer visiting a public company.

How to Create a Public Company

To create a public company, a PrintShop Mail adminstrator (or user with appropriate rights) simply needs to add a new company and specify its type to be **Public**.



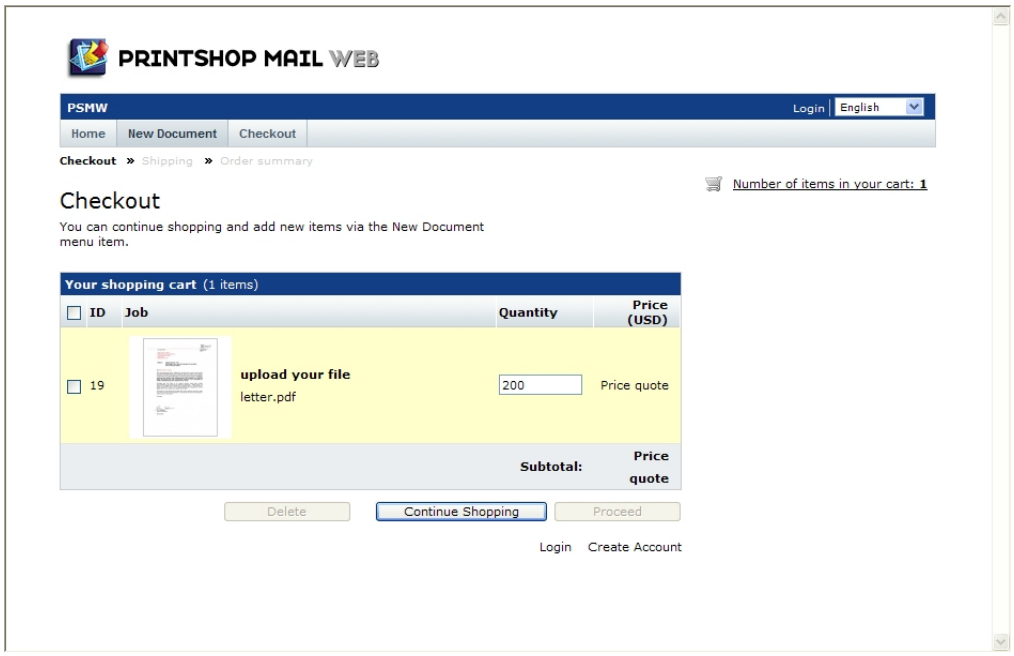
Dialog window for adding a new company of type public.

A company defined in PrintShop Mail Web as **Public** can be accessed by any visitor from the web without having to log in. It is therefore like a public online shop where any visitor can view document(s) and create order(s). Only when proceeding to checkout is the vistor invited to create an account.

The same types of documents can be published either in a public or private company (PDF, user upload, user input, database).

How to Place an Order

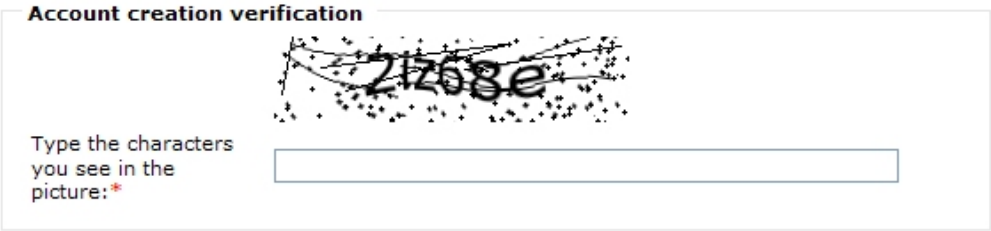
Placing orders in a public company is achieved the same way as with a private company, except that in order to proceed to checkout, the user is invited to create an account. As illustrated below, the *Proceed* button is grayed out until the user creates an account by clicking ont the *create account* link.



A* Create Account *link allows new visitors to create an account in order to proceed with checkout when shopping on a public company.

Account Creation

New users can create an account by filling a web form asking for standard information (user name, password, billing/shipping address). A CAPTCHA is used to validate the account was created by a human. Once the account is created, the new user is brought back to the checkout page, where the *Proceed* button is now enabled.



CAPTCHA as part of the account creation form.

Public Customer Capabilities

A user account created with creation form available when checking out of a public company is defined in PrintShop Mail Web as a user of type *Publc Customer*. Such users have limited capabilites in the sense that they can only place, approve, or view the status of their own order(s).

By default, the account manager of a public customer will only let him see his current order(s). It will not show the different statuses of an order (Approved, Shipping, etc.). Of course, like with other roles, this can be changed by the administrator.

11 Introduction to Regular Expressions

This chapter is an introduction to regular expressions, explaining basic regular expression syntax. Regular expressions for user input fields use the perl regular expression notation. Note that the user input regular expressions must match all of the input.

Additional information can be found at the following web sites:

- http://regexlib.com
- http://www.regular-expressions.info
- http://en.wikipedia.org/wiki/Regular_expression

11.1 Syntax

The following sections describe the basic regular expression syntax.

Character selection

Regular expressions can contain both special and ordinary characters. Most ordinary characters, like "A", "a", or "0", are the simplest regular expressions; they simply match themselves. You can concatenate ordinary characters, so *last* matches the string 'last'.

- **[]** Matches a single character that is contained within the brackets. For example, [abc] matches "a", "b", or "c". [a-z] matches any lowercase letter. These can be mixed: [abcq-z] matches a, b, c, q, r, s, t, u, v, w, x, y, z, and so does [a-cq-z]. The '-' character should be literal only if it is the last or the first character within the brackets: [abc-] or [-abc]. To match an '[' or ']' character, the easiest way is to make sure the closing bracket is first in the enclosing square brackets: [][ab] matches ']', '[', 'a' or 'b'.
- **[^]** Matches a single character that is not contained within the brackets. For example, [^abc] matches any character other than "a", "b", or "c". [^a-z] matches any single character that is not a lowercase letter. As above, these can be mixed.
- **( )** Defines a "subexpression".
- **.** Matches any single character. Within [ ] this character has its normal (literal) meaning. For example, "a.cd" matches "abcd", "a..d" matches "abcd" but [a.cd] matches "a" or "." or "c" or "d".
- **\d** Any digit 0-9
- **\D** Any non-digit
- **\s** Any whitespace character (this is equivalent to the set [\t\n\r\f\v])
- **\S** Any single non-whitespace
- **\w** Any letter, number or underscore (this is equivalent to the set [a-zA-Z0-9_])
- **\W** Any char except letter, number or underscore
- **\t** ASCII Horizontal Tab (TAB)
- **\n** ASCII Linefeed (LF)
- **\r** ASCII Carriage Return (CR)
- **\f** ASCII Formfeed (FF)
- **\v** ASCII Vertical Tab (VT)

Alternation

A vertical bar separates alternatives. For example, "gray|grey" can match "gray" or "grey".

Grouping

Parentheses are used to define the scope and precedence of the operators. For example, "gray|grey" and "gr(a|e)y" are different patterns, but they both describe the set containing gray and grey.

Quantification

A quantifier after a character or group specifies how often that preceding expression is allowed to occur. The most common quantifiers are ?, *, and +:

- **?** The question mark indicates there is zero or one of the preceding element. For example, colou?r" matches both color and colour.
- ***** The asterisk indicates there are zero or more of the preceding element. For example, ab*c matches "ac", "abc", "abbc", "abbbc", and so on.
- **+** The plus sign indicates that there is one or more of the preceding element. For example, ab+c matches "abc", "abbc", "abbbc", and so on, but not "ac".

- **{n}** Exactly n occurrences.
- **{n,}** At least n occurrences.
- **{n,m}** Between n and m occurrences.

There are 12 characters with special meanings:

- the opening square bracket [
- the backslash \
- the forward slash /
- the caret ^
- the dollar sign $
- the period or dot .
- the vertical bar or pipe symbol |
- the question mark ?
- the asterisk or star *
- the plus sign +
- the opening round bracket (
- the closing round bracket)

Special characters can be escaped by placing a backslash \ before the special character. A backslash can be matched using \\.

11.2 Examples

The following examples may be useful.

Only numbers

The following regular expression accepts only numbers as input.

```
[0-9]+
```

The expression step by step:

- **[0-9]** Numbers 0 through 9
- **+** one or multiple

Dutch zip code

The Dutch zip code consists of four numbers, one space and two uppercase letters (eg 1234 AB).

```
[0-9]{4}\s[A-Z]{2}
```

The expression step by step:

- **[0-9]{4}** Four numbers
- **\s** a single space ("" or [] or \s)
- **[A-Z]{2}** Two uppercase characters

Canadian zip codes

Canadian postal codes alternate between letter and number such as L0S 1E0. Some choose not to put in the space. And not every letter is used as the first letter which designates region. The regions are (from east to west, then north): A,B,C,E,G,H,J,K,L,M,N,P,R,S,T,V,X,Y.

```
\s*[a-ceghj-npr-tvxyA-CEGHJ-NPR-TVXY]\d[a-zA-Z](\s)?\d[a-zA-Z]\d\s*
```

The expression step by step:

- **\s*** Zero or more whitespaces
- **[a-ceghj-npr-tvxyA-CEGHJ-NPR-TVXY]** The regions letters
- **\d** One digit
- **[a-zA-Z]** One letter
- **(\s)?** Zero or one whitespace
- **\d** One digit
- **[a-zA-Z]** One letter
- **\d** One digit
- **\s*** Zero or more whitespaces