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Enabling business communications

PRINTSHOP MAIL SUITE

Administration Guide

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Table of Content

Overview

This PDF documentation covers **version 7.1**. To view the documentation of previous versions please refer to the PDF files available in the *Downloads* section of our website:
http://www.objectiflune.com/OL/Download/DownloadCenter.

Icons used in this guide

Some icons are used throughout this guide in order to catch your attention to certain particular information.

Notes: This icon shows you something that complements the information around it. Understanding notes is not critical but may be helpful when using PrintShop Mail Web.

Warnings: This icon shows information that may be critical when using PrintShop Mail Web. It is important to pay attention to these warnings.

Technical: This icon shows technical information that may require some technical knowledge to understand.

Other Documentation

For other related documentation , please see the drop-down menu at the top-right corner of this page.

Understanding PrintShop Mail Web

This chapter will introduce PrintShop Mail Web as well as establish its terminology in a glossary.

What is PrintShop Mail Web?

PrintShop Mail Web is a companion extension to the PrintShop Mail Design module. It supports multi-user printing from PrintShop Mail Design with the added benefit of a web interface for automating and managing document templates. PrintShop Mail Web is the perfect module for organizations where multiple users can create and/or manage document templates and facilitates their publication enterprise-wide to a web interface. Its web capability allows real-time, 24/7 online modification, ordering and production of repetitive, promotional and personalized documents created with PrintShop Mail Design as well as static PDF files. It's the ideal solution for any business that has remote workers or offices – typically retail outlets, franchises and dealerships.

Users can upload an image for local personalization and modify the text based on pre-defined variable fields. Once the document is ready, users validate and pre-flight their print run and initiate the ordering process. With permissions and access rights that can be set per user, PrintShop Mail Web allows companies to adapt the verification process of submitted documents based on their business rules.

PrintShop Mail Web is also a fully functional web front for print shops that want to give their clients the ability to order documents, whether these clients are part of a known company or are one-time users from the web. With the B2C functionality, anyone can create and pay for their orders directly from the web interface (*requires separate B2C license*).

About Companies

In PrintShop Mail Web, a Company is an entity that contains departments users, publication types and documents. A company can have more one or more departments, in which each user can have specific roles such as Operator, Manager, Designer, etc (see "About Users" (page 14)).

Each company also has their own individual publication types (see "About Publication Types" (page 14)) in which users with the appropriate role can upload documents (see "About Documents" (page 15)).

Companies are access via sub-folders from the main website. For example, a company may be called "Oasis Health & Beauty Spa" and its URL will be http://www.mywebsite.com/

For more information, see the chapter on "Companies" (page 77).

Public Companies

A public company is a special type of company in which users can create accounts themselves (normally an administrator or manager has to create each user account). Public companies are used by print shops that want to have a storefront where anyone can order specific document types. For example, a print shop wants to offer its clients the ability to create their own business cards or postcards from pre-existing templates can do this with PrintShop Mail Web.

> Public Companies require a B2C license to be installed on the server. See "B2C (Business to Customer)" (page 52).

About Users

A user is an entity within PrintShop Mail Web that has a specific role and is generally part of a company (see "About Companies" (page 13)). However, a user can be assigned to multiple companies if it is necessary. This is useful if one of the companies is the print shop itself and one of its operators is assigned to a certain number of companies and is responsible for generating output for them. What a user can do on PrintShop Mail Web depends on their role.

To create users, please see the chapter on "Users" (page 83).

Public Users

Public users are users that are part of a public company. These users are so-called "basic" users and cannot do anything other than create new orders, view the status of their order and edit their user preferences. Public users can create themselves as long as their do so within a public company.

User Roles

A user role is a set of permission that is applied to one or more users in PrintShop Mail Web. Users in specific roles will be able to execute certain specific actions such as uploading documents, approving and modifying orders, providing quotes or generating outputs. A list of pre-built user roles, as well as the ability to create new custom user roles, is described in the "Roles" (page 113) section of the PrintShop Mail Web "Settings" (page 111) tab.

> Roles are site-wide, meaning they are applied to all users across all companies, whether this company is private or public. Only administrator can edit roles, but managers can assign roles to users.

About Publication Types

A publication type is a folder in which template documents of your customers are grouped (see "About Documents" (page 15)). 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 company has his own publication types.Publication types are set within the "Publication Types" (page 85) tab in PrintShop Mail Web.

About Documents

A document is a file present within PrintShop Mail that is used to generate outputs. There are multiple types of documents including Static PDFs, PrintShop Mail Design documents and Mail Merge documents.

Documents are always part of a publication type (see "About Publication Types" (page 14)) so they are always specific to a company (see "About Companies" (page 13)). Documents are what clients and users are selecting to build an order and its output.

Getting Started

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!

Installing the software

This section will show you how to install PrintShop Mail Web and its components, as well as configure it through the First Run Wizard.

The steps to install PrintShop Mail Web are:

- Make sure your system conforms to the "System requirements" (page 19).
- Run the PrintShop Mail Web installer (see "Running the installer" (page 20))
- Access the website and use the First Run Wizard (see "Configuring the database and web site" (page 24))
- Check your "Settings" (page 111)
- Check your activation (see "USB Hardware Key" (page 51))
- Follow the "Quick start guide" (page 53) to get started.

System requirements

PrintShop Mail Web is a server software and is delivered as an executable installer with predefined configuration settings. We strongly recommend to install the software on a clean installed Windows computer.

Pre-requisites

Please ensure that the following requirements have been met before you run the PrintShop Mail Suite installer:

- Login user must have administrator privileges
- An Internet connection is required.
- The PrintShop Mail Suite installer will install the following system components:
- Microsoft .Net Framework
    - Version 2.0 SP2 (on Windows 2000, XP and 2003 Server)
    - Version 3.5 SP1 (on Windows Vista, Windows 7 and 2008 Server)
- MSXML 4.0 SP3 Parser
- Visual C++ 2008 runtime libraries (vanilla, not SP1)
- Access Database Engine

Missing third party software packages will be downloaded from the Internet and installed during the course of the installation. The mentioned components can also be downloaded and installed manually. Installers for these packages can be downloaded from the Microsoft web site.

The software components are installed in the *Program Files* folder of the system drive. Normally this is drive C.

Minimum Hardware Requirements

- Pentium 4, 3 GHz 32-bit (x86)
- 2 GB of system memory
- 80 GB hard disk with at least 1 GB of available space

Supported Operating Systems

- Microsoft Windows 2000 (32-bit)
- Microsoft Windows XP Professional (32-bit and 64 bit)
- Microsoft Windows Vista (32-bit and 64 bit)
- Microsoft Windows 2003 Server (32-bit and 64 bit)
- Microsoft Windows 2008 Server (32-bit and 64 bit)

Suggested Requirements

For production servers, it's recommended to invest in specific server hardware, such as large RAID hard disks, UPS (uninterrupted power supply) and enough RAM memory.

- Intel or AMD dual-core processor
- 4 GB of system memory
- 300 GB hard drive with as much available space as possible

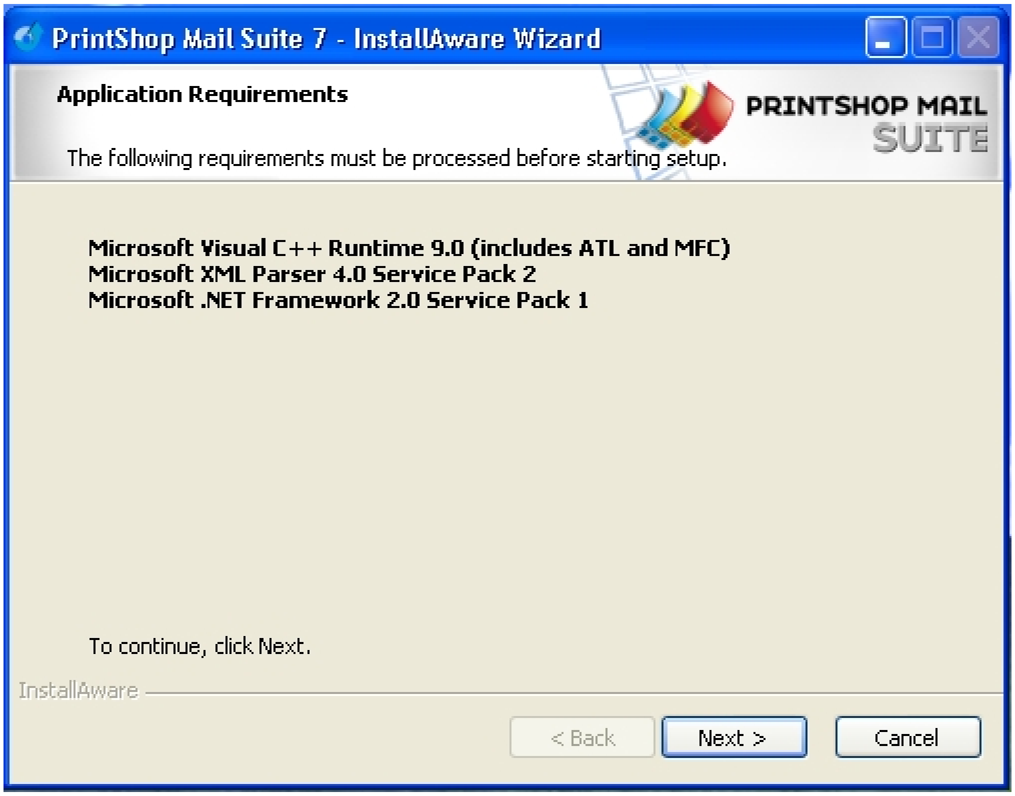
Notes

- Make sure that port 80 and/or port 443 are available for the Apache web server that comes with PrintShop Mail Web.
- USB slot (not required for testing). Your server musts have a USB port to which the hardware key ('dongle') can be attached. See "USB Hardware Key" (page 51).
- Your network should be an Ethernet (TCP/IP) network, which is by far the most commonly used network today.
- You should have a high speed Internet connection, and a fixed outgoing IP address, which implies that you can run a web server.
- The PrintShop Mail Web server should be directly connected to the RIP or Printer. This means that the PrintShop Mail Web server should be located on your local network (same subnet), on your premises, and preferably not at your ISP's (Internet Service Provider, the company that provides your Internet connection).
- Your router should be configured to allow incoming HTTP connections over port 80. Your network administrator or your ISP should know how to enable this.
- The PrintShop Mail Web server has a built-in email server. This email server will send email notifications to you and your customers when the order status changes. You'll need to know your ISP's SMTP server address (usually something like smtp.yourprovider.com)

Running the installer

1. Navigate to the *PrintShop Mail Suite.exe* file you downloaded from the Internet or locate the file on the PrintShop Mail Suite product CD. Once located double click its icon to launch the installation program. The *Select Setup Language* dialog appears.
2. Select your preferred language and click *OK*.

   In case the prerequisites are not met, the following dialog is shown stating the missing items.



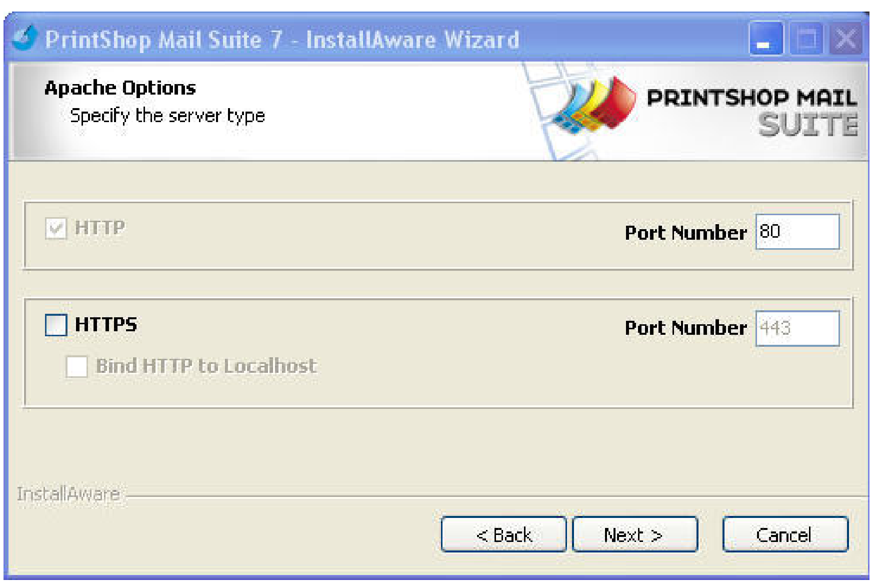
The stated components/libraries are missing

3. Click *Next* to download and install the required components. Once the installation of the components is completed the installer *Welcome* screen displays.
4. Click *Next*. The *License Agreement* page is shown.
5. Read the license agrement. If the terms of the agreement are acceptable, click on *I accept the terms of the license agreement.*
   Note: You must accept the terms of the license agreement to continue.
6. Click *Next* to continue the installation process. The *Features* page displays.
7. Select the *PrintShop Mail Web* option to install the web server, database server and PrintShop Mail Server components required for PrintShop Mail Web. The PrintShop Mail application is a required by PrintShop Mail Web and cannot be deselected. Unless you have specific setup requirements, we recommend using the default options for the PrintShop Mail application.

The features dialog

8. Click *Next*. The *Apache Options* screen appears.

   PrintShop Mail Web uses the Apache web server, the software can be configures to support regular (HTTP) and secured (HTTPS) types of connections. HTTP is required for the communication between PrintShop Mail Server and PrintShop Mail Web. HTTPS enabls the secured transmission of web pages. Please refer to the HTTP over SSL (HTTPS) chapter for more information on this subject. When selecting Bind HTTP to localhost, PrintShop Mail Web only accpets HTTP connections from the local machine, from all other systems PrintShop Mail Web accepts only HTTPS connections.



The Apache Options dialog

9. Select the protocol(s) you wish to use.

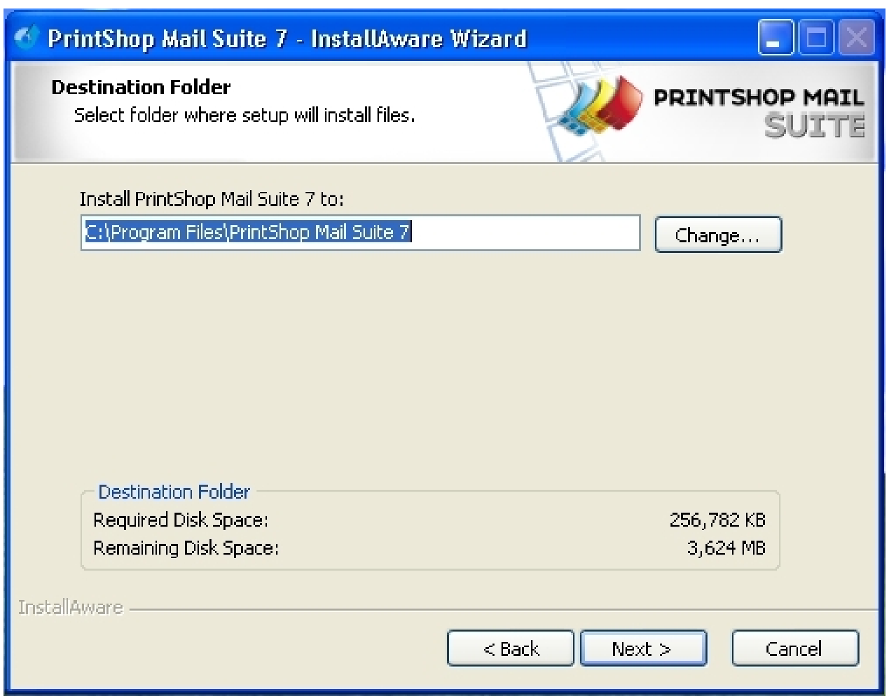
   Note: If the ports for these protocols are in use a warning appears. This may occur when an existing web server like Apache, Internet Information Server (IIS) or applications like Skype is already running on the same machine. The application or service that uses port 80 or 443 (https) must be closed in order to use PrintShop Mail Web. If you proceed without closing the conflicting application, the installer application will not be able to start the Apache web server. Apache can be started manually using the PrintShop Server Managerapplication.

10. Click *Next*. The *PriintShop Server Services* screen appears.

    PrintShop Mail Server is a Windows Service that runs in the background. Windows services by default run as a virtual user: *Localsystem*. As the *Local System*-account has some limitations the PrintShop Mail Suite installer assigns the currently logged on account to the PrintShop Mail Server service. For more information on this subject please refer to the PrintShop Mail Server service chapter.

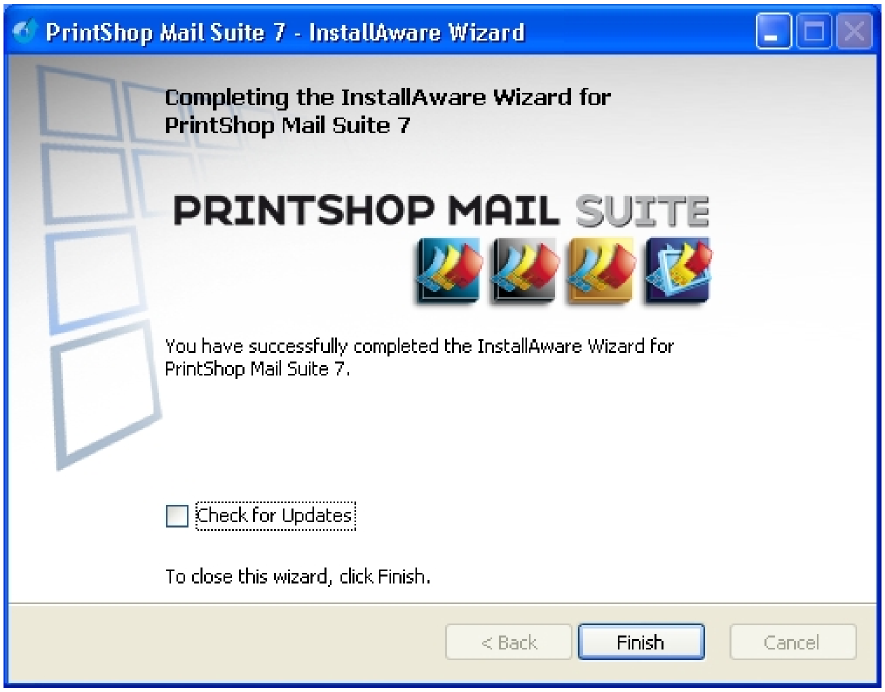
    Note: In order to start a Windows Service your account must have a password (not empty).

11. Type the password of the displayed user.
12. Click *Next*. The *Destination Folder* screen displays the drive and folder where PrintShop Mail Web will be installed. To install the software elsewhere, click *Change...* and navigate to the desired folder.



Select the destination folder

13. Click *Next*. The *Program Folder* page is shown.
14. Enter a name for the shortcuts folder in the Start menu.
15. Click *Next.* The *Ready to install* screen appears.
16. Click *Next* to install the program files.
    When the installation has been successful, the following dialog appears:



Setup completed dialog

17. Click *Finish* to complete the installation of PrintShop Mail Web. Further configuration is still needed and is explained in the following sections.
    - Select the *Check for Updates* option to launch the Objectif Lune Update Manager service. It contains a list of updates (if available) for the PSM Suite components that are installed on your system. Click the *Install* icon to downloaded and install the new versions.

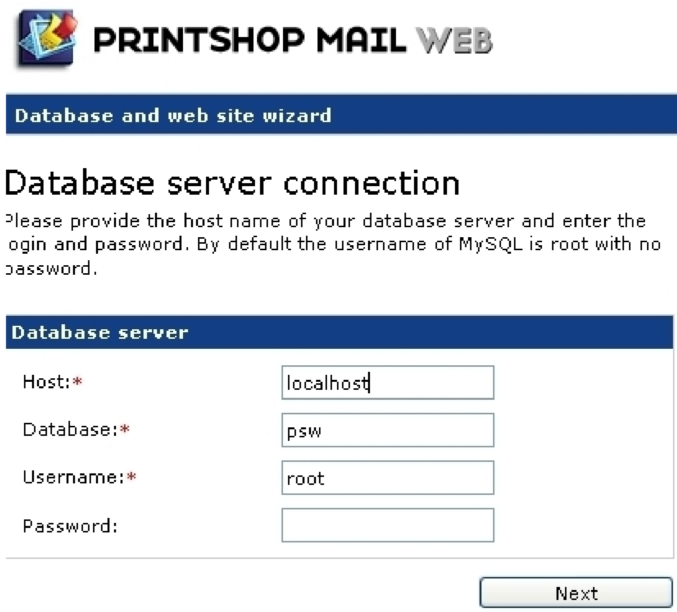
Configuring the database and web site

After the installation you will need to launch your web browser and navigate to the PrintShop Mail Web web site. You can reach the web site using localhost in your web browser's address bar. The first time you visit the web site the First Run page will be shown. This web page will initialize the PrintShop Mail Web web site and database and guides you through this process step by step.

1. Open your web browser and enter *localhost* in the address bar. The First Run wizard appears.

Choose your language: The wizard will first allow you to select a language to use.

2. Select a language and click *Next* to proceed to the *Database server connection* page.



Specify your MySQL host, user name and password

Provide the host name of your database server and enter the login and password. If both the web server and database server (typical installation) are running on the same machine, you can use *localhost* as the host and use *root* as the user name.

During the installation of the MySQL database software a user is created with the name *root*, with no password. To modify the password you can use an application like MySQL Administrator afterwards. The MySQL Administrator is part of the MySQL GUI Tools suite which you can download for free from the MySQL website: http://dev.mysql.com/downloads/gui-tools/

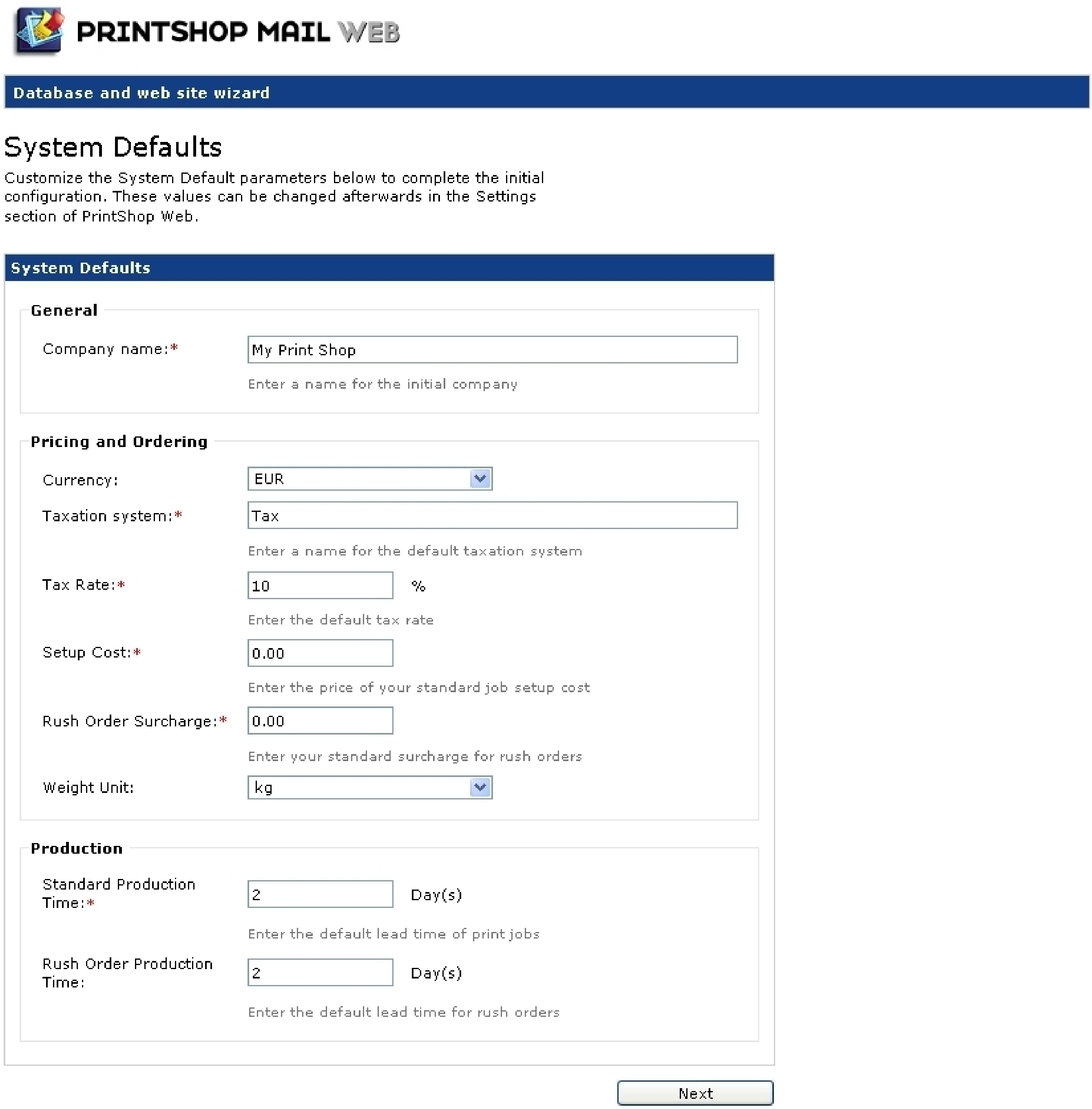
Note: The *incDBLink.php* file (located in the *Functions* folder of the PSW *Website* folder) should be changed accordingly.

3. Leave all the server connections options set to the default value unless you need to make a specific change. Click *Next* to proceed.

   When PrintShop Web find a database wich the name *psw*, the *Database Exists* page may appear:
   This page allows you to use the existing database or to overwrite it. If an older version of the system is found you will be able to update the database keeping the existing orders, templates, etc. Once the installation procedure is finished you should check that the companies, templates and other information in the system has default values set for items like the pricing settings.

   Note: When upgrading PrintShop Web we strongly advise to read the "Important update notes" (page n) chapter and create backups of your current PrintShop Web installation. You can use the MySQL Administrator tool described before to create a backup of your *psw* database.

4. Once the database is created several system defaults need to be set. These settings can be modified and expanded in PrintShop Web once the first run wizard is completed.



Specify the name for the initial company and set system defaults

The system default settings page requires input for the following system defaults:

- **Company Name:** The name of the initial company. This field is not visible when upgrading a previous version of PSW.
- **Currency:** The selected currency will be presented in Checkout and Order Manager sections of the system.
- **Taxation System:** The standard Taxation system.
- **Tax Rate:** The percentage of the standard taxation system.
- **Setup Cost:** The surcharge for setting up your production environment and workstations.
- **Rush Order Surcharge:** The surcharge for urgency printing (if applicable).
- **Weight Unit:** The weight unit used to define the total weight of the documents/jobs in the checkout. PSW

supports *kg* and *lb*.

- **Standard Production Time:** The number of days to produce documents.
- **Rush Order Production Time:** The number of production days for rush orders.

Enter a name for the initial company and verify the remaining parameters. Refer to the Administrative Guide for more information about these parameters. Click *Next* to proceed to the *Registration* page.

5. We encourage you to register your PrintShop Web product in order to have the benefit of free product information, new release information, and security updates.

Register your version of Printshop Web in order to take advantage of free product information
Enter your details and click *Send registration* or *Register later* to continue.

6. The website and database initialization process is now completed and you are ready to use the system. Click *Go* to enter the login page of PrintShop Mail Web

   For both the login name and password use *administrator* to enter the system and you are ready to setup the system for your clients.

Upgrading PrintShop Mail Web 2.X to Version 7

When upgrading PrintShop Mail Web we strongly advise to create backups of your current installation.

Upgrading to PrintShop Mail Web 7 is a one way street and be undone since the PrintShop Mail Web 7 database is not backwards compatible with older versions.

Orders and Documents

- In PrintShop Mail Web the relationship between orders and documents (print jobs) is changed. Orders now can contain multiple documents which is visualized using a tree view. To avoid misunderstanding by customers it is advised to change the status of orders in the *Ordered* and *Approved* status folders to *In-plant*. Price related items remain intact although the presentation is different due to changes in the PrintShop Web user interface.
- PrintShop Mail documents (templates and print jobs) in the system are automatically converted to the PrintShop Mail 7 format the first time they are used for previews or print actions. This action is performed only once.

Skin changes

- As PrintShop Mail Web 7 includes various user interface enhancements and new interface elements (e.g. modular dialogs) custom skins should be checked and updated to support these new items. To test your existing skin(s) with PrintShop Mail Web 7:
  - Install PrintShop Mail Web 7 on a stand-alone machine.
  - Copy your skin(s) to the templates folder of the PrintShop Mail Web 7 installation.
  - Test and modify your skin
  - Once completed create a backup of the modified skin and copy it to your production server.
- The 'Default' skin of PrintShop Mail Web 7 uses a gradient image as background image in the menu bar and table headers. Although this looks very nice it prevents the web browser from showing the contrast color set in the *Edit Web Design* page. If the contrast color is preferred the style-element-menu.php of the default skin should be changed. The original code is still there but commented out. Simply remove these comments and comment the lines that render the gradient image.

Create backups

Backup all files and databases prior to the migration. In case of problems during the update installation this will enable the contents of PrintShop Mail Web to be restored.

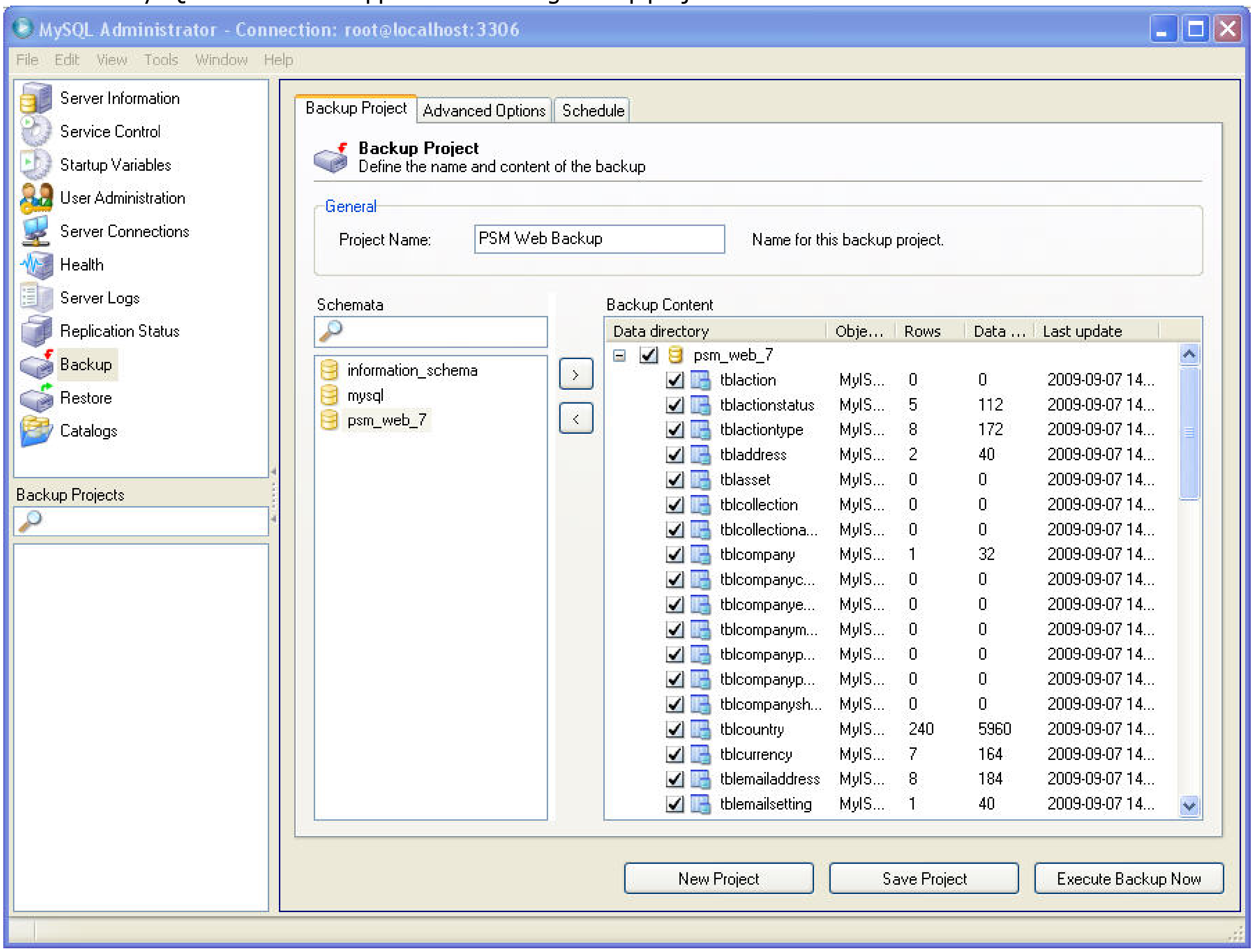
- "Backup configuration files" (page 31)
- "Backup production files" (page 29)
- "Backup skin files" (page 30)
- "Backup your database" (page 28)

Backup your database

To create a backup of the database:

1. Download and install the MySQL GUI tools. These tools can be downloaded for free at: http://dev.mysql.com/downloads/gui-tools/

2. Launch the MySQL Administrator application. Existing backup projects are listed in the lower left area of the sidebar.



The MySQL Administrator window.

3. If you are not working from a previously saved backup project, click the New Project button to create a new backup project. You cannot begin configuring a backup operation without either loading an existing project or creating a new project.
4. Once you have configured your backup project, you can click the Save Project button to save your project for future use. To start your backup, click the Execute Backup Now button. You will be prompted for a path and filename for the backup file, after which the backup operation will begin.

MySQL Administrator can be used to restore the database backup files created using MySQL Administrator. The backup files created by MySQL Administrator are similar but not identical to those created by ***mysqldump***. A consequence of the differences is that MySQL Administrator cannot read dump files created by ***mysqldump***.

Backup production files

PrintShop Mail Web stores the production files in a central location located in the web site folder of the PrintShop Mail Web system. This folder includes: template documents, job created by the visitors, image collections, job option files etc. Most of these items are referred to by the PrintShop Mail Web database. It is very important to create a backup of the database that goes with the current state of your *files* folder.

To create a backup of the *files* folder:

1. Stop the PrintShop Mail Server service. This can be done via the Windows *Services* dialog (Administrative tools) or by launching the PrintShop Server - Service Manager application. The latter can be found in the following locations:

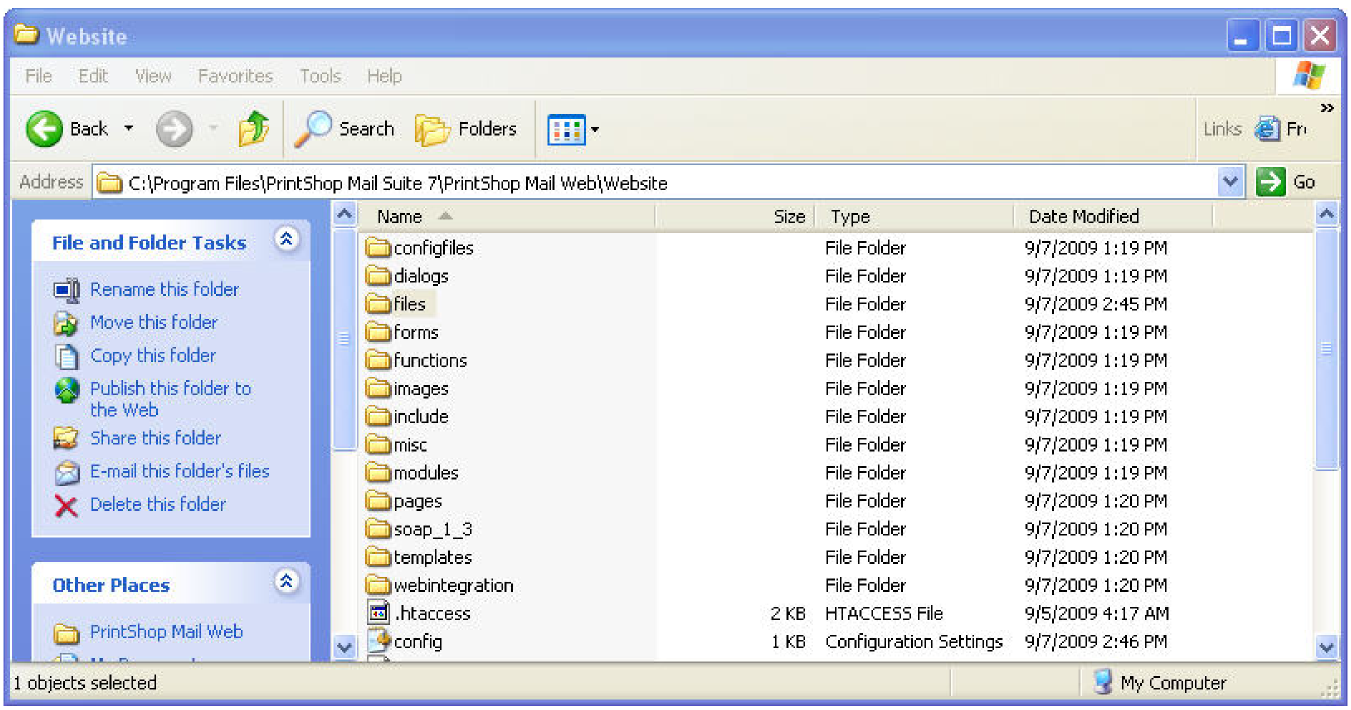
    - For PSW 2.x this is:
      C:\Program Files\PrintShop Web\PrintShop Server
    - For PrintShop Mail Web 7 this is:
      C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\PrintShop Server

    Note: If you do not stop the PSM Server service files might be in use (busy) due to the template cache of PrintShop Server.

2. Locate the web site folder of your PrintShop Mail Web installation.

    - For PSWeb 2.x this is:
      C:\Program Files\PrintShop Wev\Website
    - For PrintShop Mail Web 7 this is:
      C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website

3. Copy the *files* folder to an external hard drive or share on your network.



The files folder of a PrintShop Mail Web 7 installation.

Backup skin files

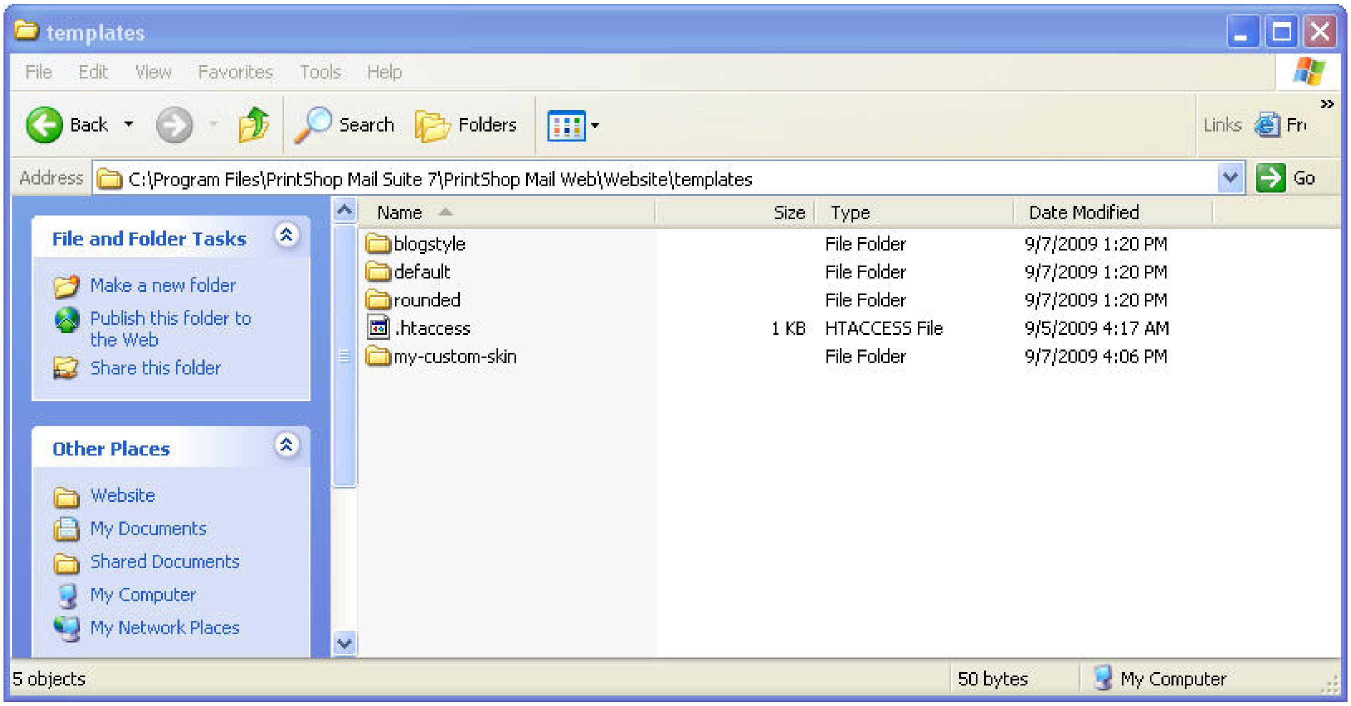
Skin files should be backupped when you created customs skins or altered the default skins supplied with PrintShop Mail Web.

To create a backup of your skins:

1. Locate the web site folder of your PrintShop Mail Web installation.

    - For PSWeb 2.x this is:
      C:\Program Files\PrintShop Wev\Website
    - For PrintShop Mail Web 7 this is:
      C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website

2. Copy the *templates* folder to an external hard drive or share on your network.



The templates folder of a PrintShop Mail Web 7 installation.

Note: Custom skins or skins from older/newer versions of PrintShop Mail Web might not work properly in newer or older versions of PrintShop Mail Web.

Backup configuration files

If you modified the httpd.conf and ssl.conf files (f.e. changed the VirtualHost(s)) these should be backupped too.

To create backups of your configuration files:

1. Locate the *conf* folder of the Apache folder which resides in the PrintShop Mail Web folder.

    - For PSW 2.x this is:
      C:\Program Files\PrintShop Web\PrintShop Server\Apache\conf
    - For PrintShop Mail Web 7 this is:
      C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Apache\conf

2. Copy the httpd.conf and ssl.conf files to an external hard drive or share on your network.

PrintShop Server service

This section describes the configuration of a distinct local user-account for the PrintShop Server service.

> This description focuses on procedures on Windows XP; on other platforms this procedure may be slightly different.

PrintShop Server (PSS) is a Windows Service that runs in the background. Windows Services mostly run under a different Windows User Account than the one any end-user has used to log on to their system called Local System. Because the Local System-account has some limitations the PrintShop Server service will run by default under the administrator end-user account that was logged on to the system during the installation of PrintShop Web.

In order to properly serve PrintShop Web, it is vital that the account that PrintShop Server runs under has enough security privileges on the local machine, and perhaps on the network, to access (network-)printers or other resources it needs.

First and foremost, as the name Local System implies, the account is only valid for the local machine. Network printers will therefore not available for use in PrintShop Server. The second limitation is printer management. PrintShop server will only have access to printers installed for the user account under which PrintShop Surver runs. This means that if Administrator has logged on and manages his printers, this might not propagate to the Local System account's printers, which PrintShop Server would use!

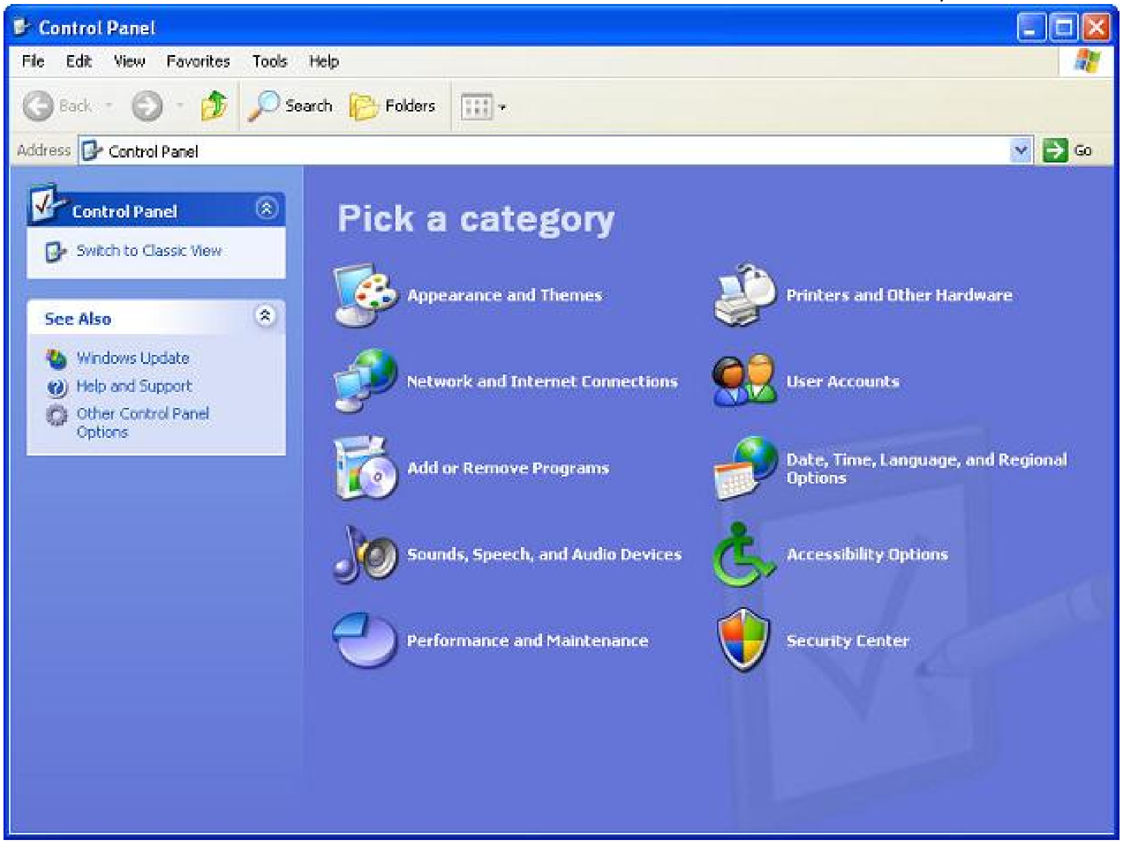
To avoid these issues with Printer Management, we strongly advise to make sure that the PrintShop Server service runs under a user-account with administrative privileges. It is necessary to install and configure your printer(s) explicitly for this user-account, - for the PrintShop Server service.

What follows is a description of how to create a new (local) user-account with sufficient administrative privileges on the system where the PrintShop Server service is running.

> In case your network-configuration requires this user-account to be a Domain User to be able to access network resources, like network-printers, please contact your Domain Administrator to set up a proper configuration.

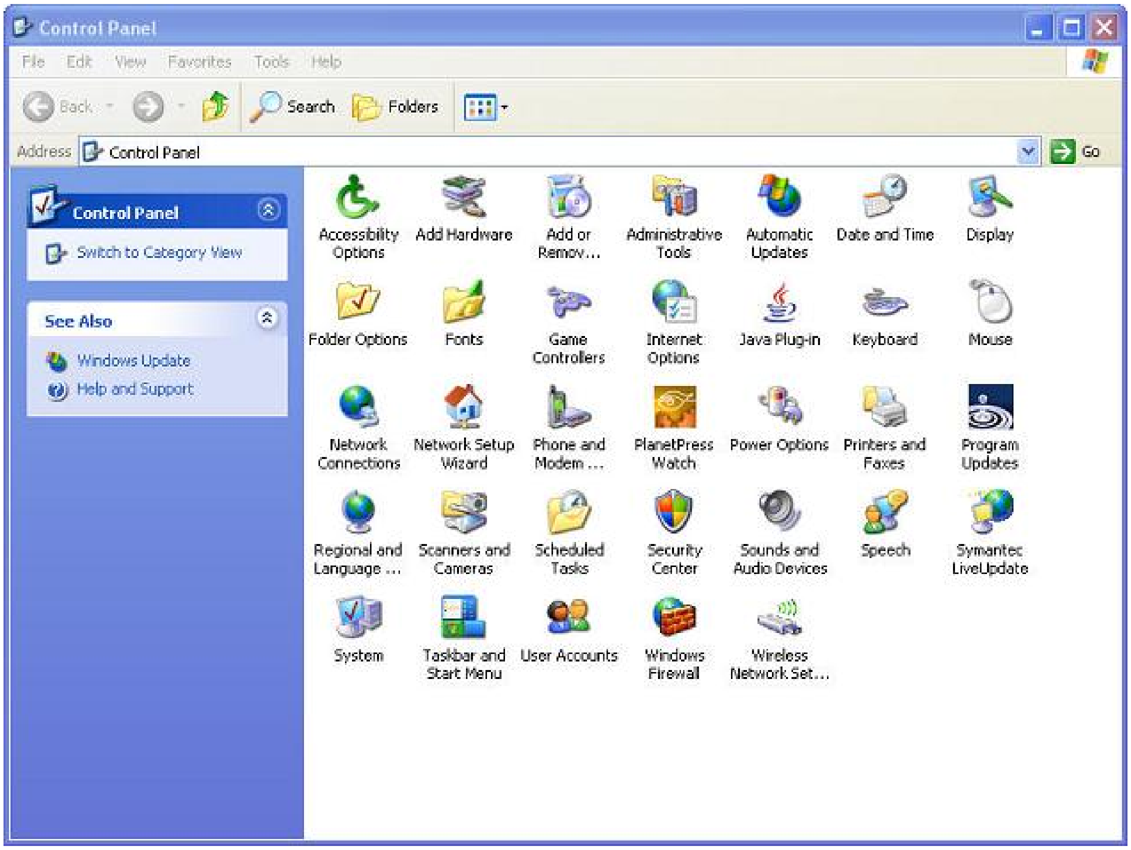
Creating a User Account for the PSS service

1. Click *Control Panel* in the *Start* menu in windows. If the Control Panel looks like this, click on *Switch to Classic View*:



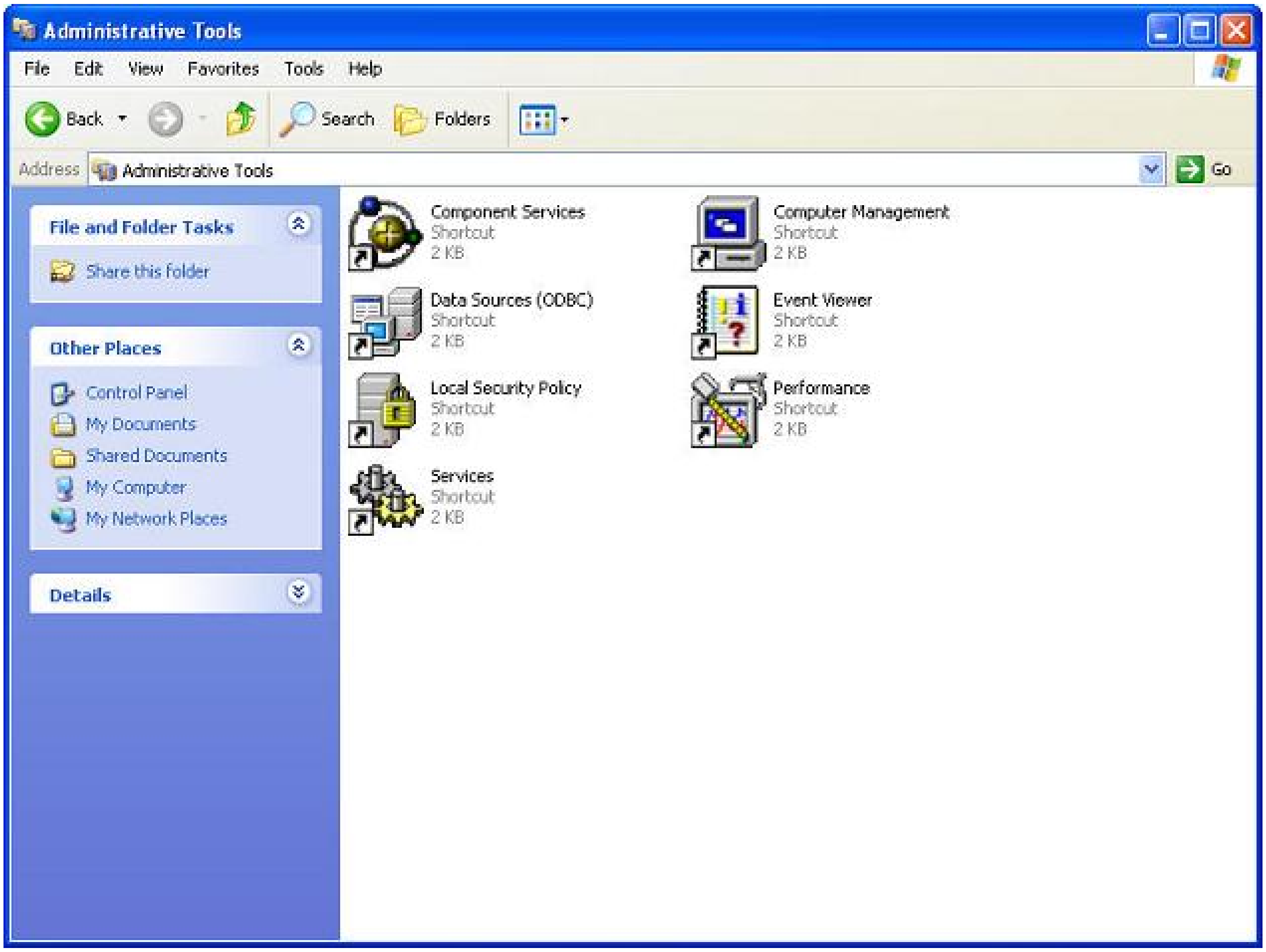
The Control Panel window

It should look like this now:



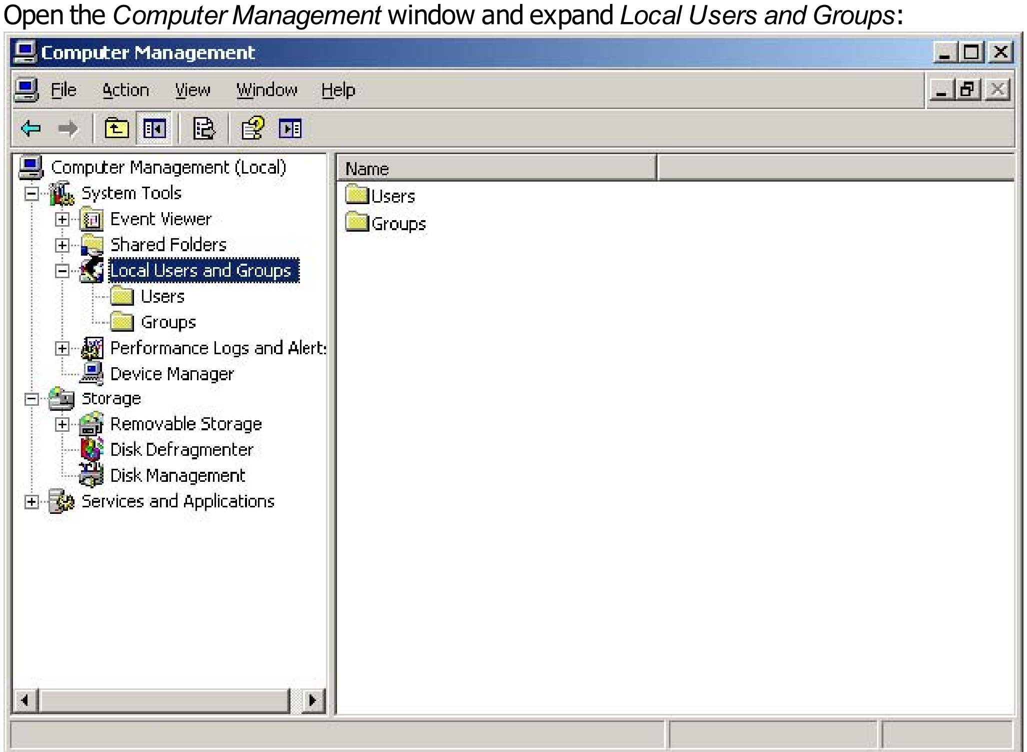
The Control Panel window

2. Open *Administrative Tools*:



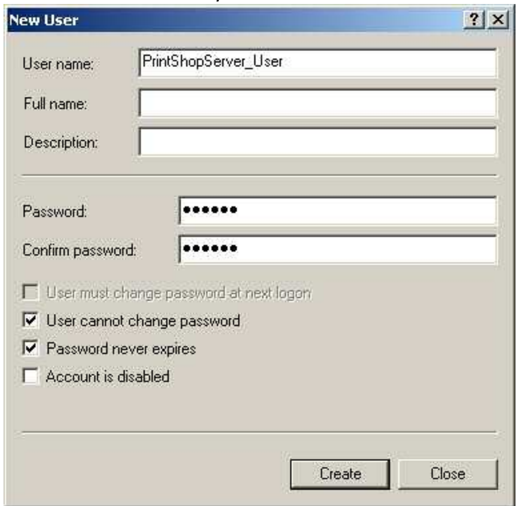
The Administrative Tools window

3. Open the *Computer Management* window and expand *Local Users and Groups*:



The Computer Management window

4. Right-click *Users* and select *New User…* the *New User* window appears
5. Enter a *User name*, a *Password* and select the check boxes as shown below:



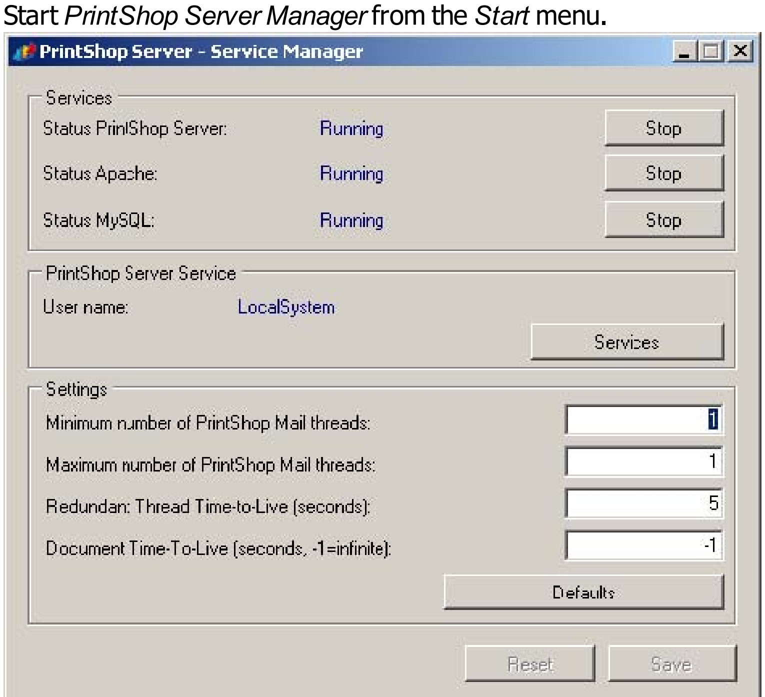
The New User window

6. Click *Create* and after that click *Close*. The account is created; now the security privilege need to be set.

Setting the PrintShop Server Service account

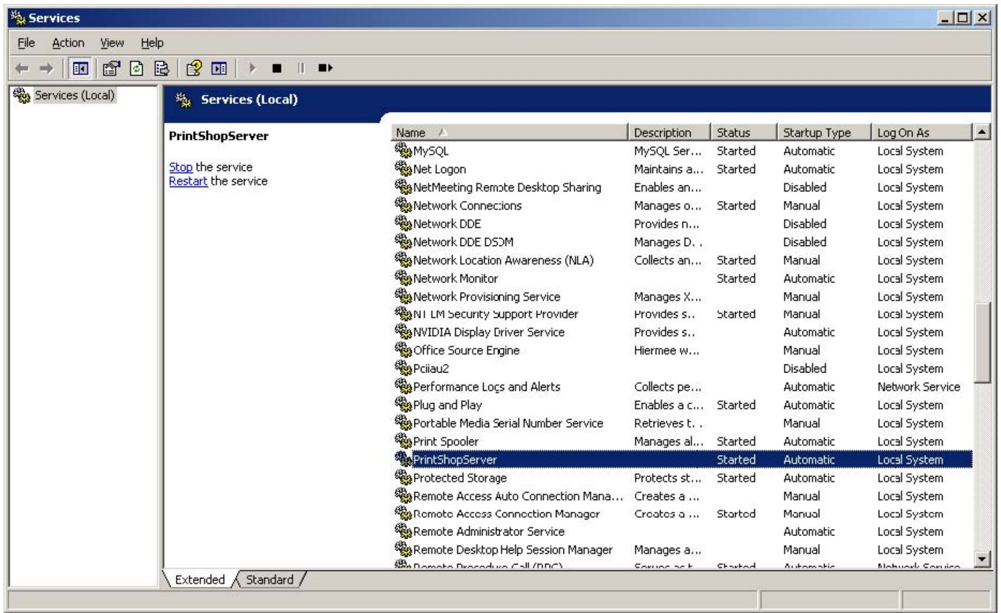
Now that we have set-up an account for PrintShop Server, PrintShop Server must be configured to use it.

1. Start *PrintShop Server Manager* from the *Start* menu.



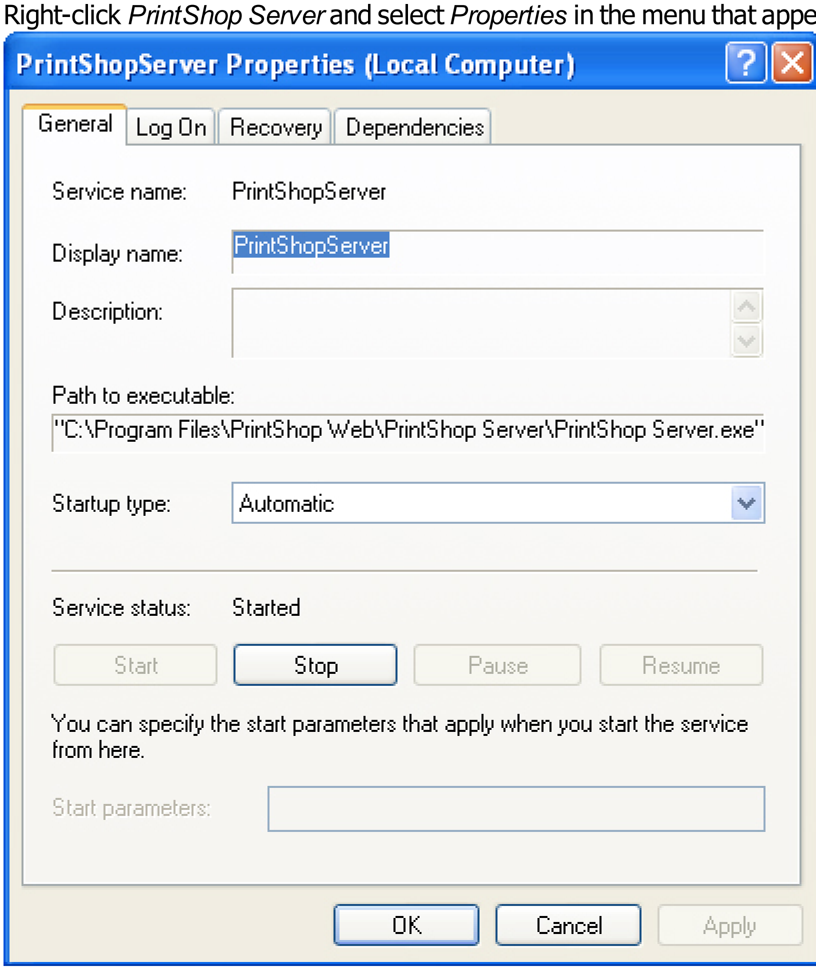
The PrintShop Server Manager main window

2. Click *Services*, which will lead to the *Service* window and locate *PrintShop Server* in the list:



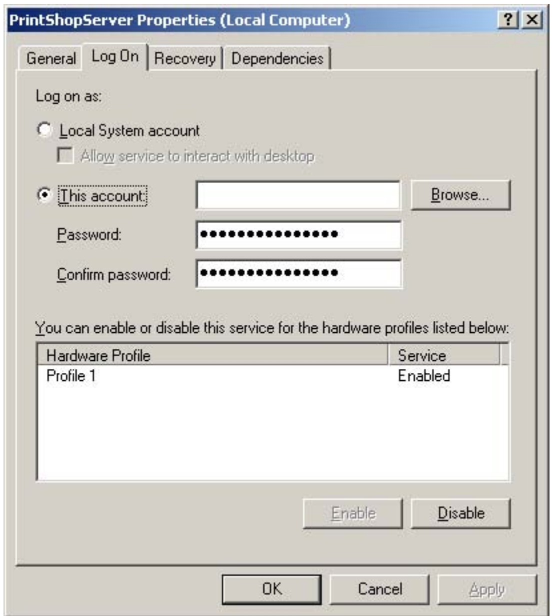
Locate PrintShop Server

3. Right-click *PrintShop Server* and select *Properties* in the menu that appears, which will lead to the following window:



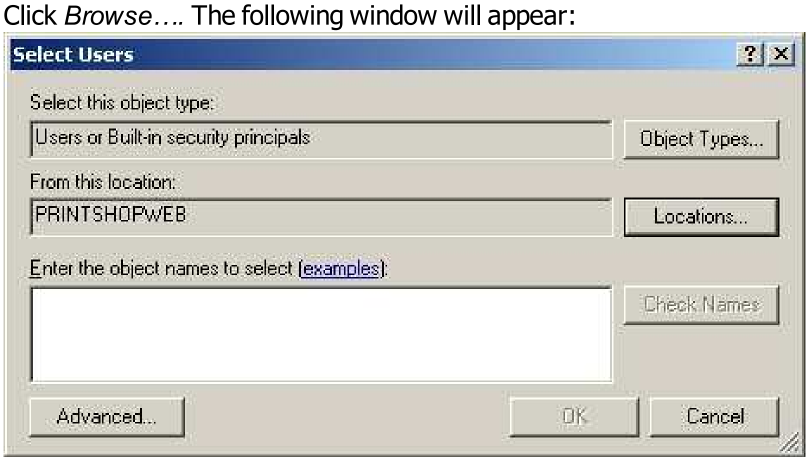
PrintShop Server service properties

4. Select the *Log On* tab, and select the *This account*:-option



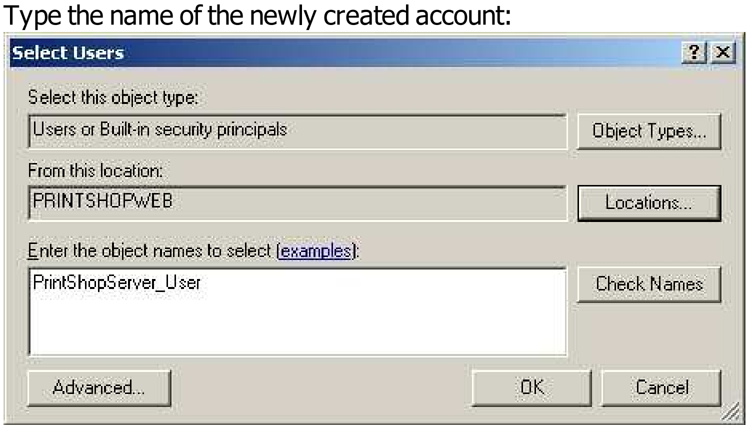
PrintShop Server service properties log on

5. Click *Browse….* The following window will appear:



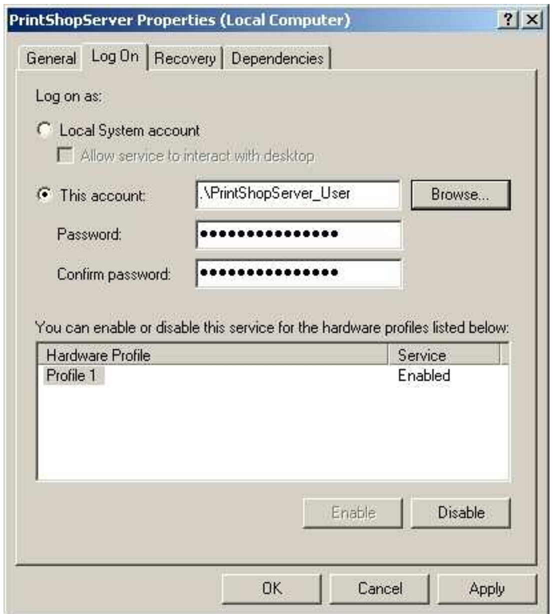
Select a user

6. Type the name of the newly created account:



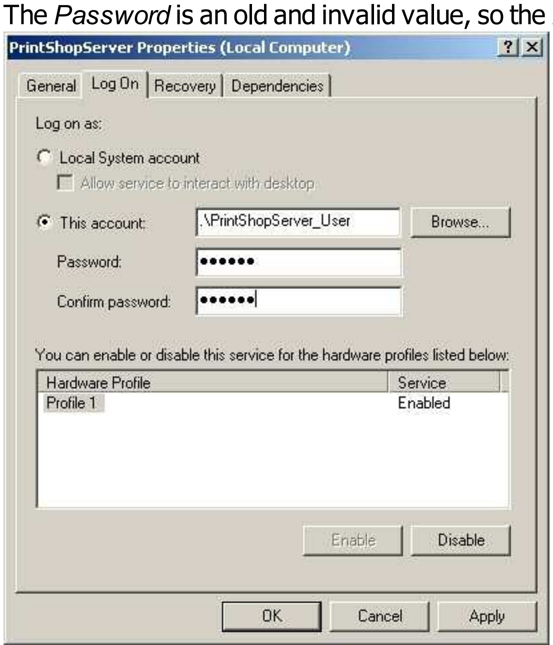
The Select Users window

7. Click *Check Names* to be sure we entered it correctly, clicking *OK* after will lead to the following window:



PrintShop Server service properties log on as PrintshopServer_User

8. The *Password* is an old and invalid value, so the *Password field must be set* to the password for the new account:

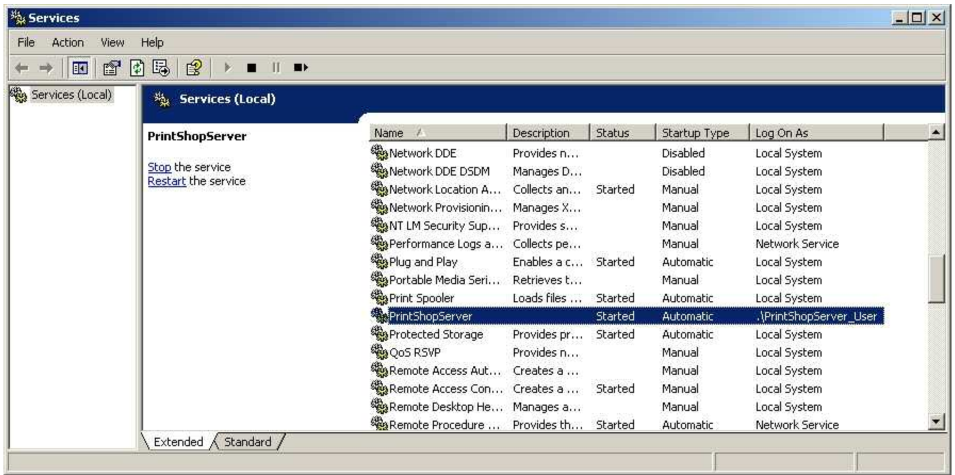


The Locate PrintShop Server window

9. Click *OK to proceed*

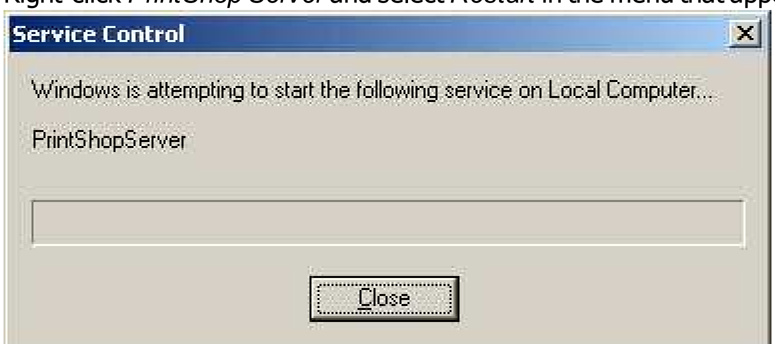
Log on as service rights granted

10. Clicking *OK* will return you to the following window:



Log on as PrintShopServer_User

11. Right-click *PrintShop Server* and select *Restart* in the menu that appears.

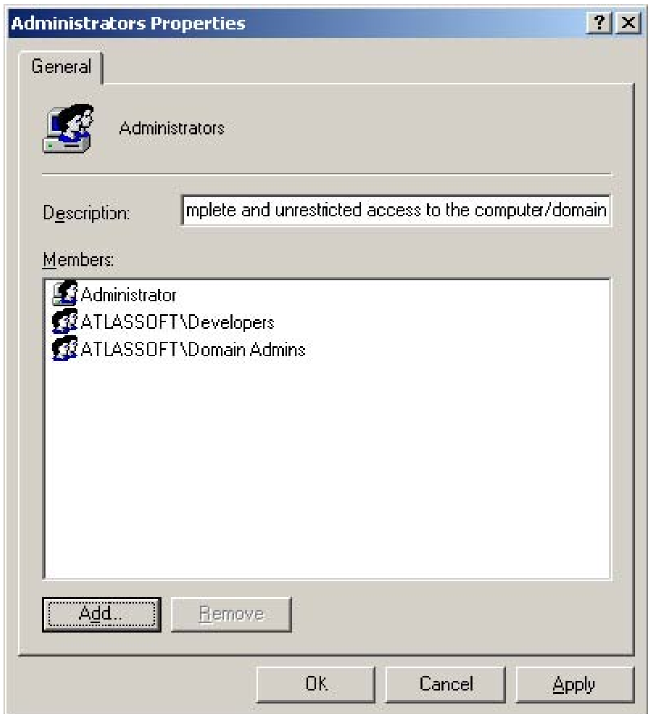


Restart service

Note: Wait for the restart to finish: (do not click *Close*, this dialog will disappear automatically).

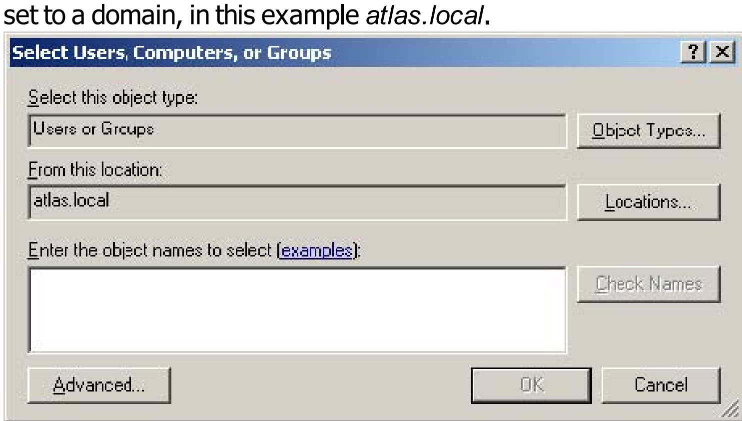
Set the security privileges (local account)

1. Select the *Groups* in the Computer Management pane on the left side of the window.
2. Right-click *Administrators* in the right pane and select *Properties* in the menu that appears. The following window will be shown:



The Administrators Properties window

3. Click *Add*... The *Select Users, Computers, or Groups* window appears. In this window the *From this location* option is set to a domain, in this example *atlas.local*.

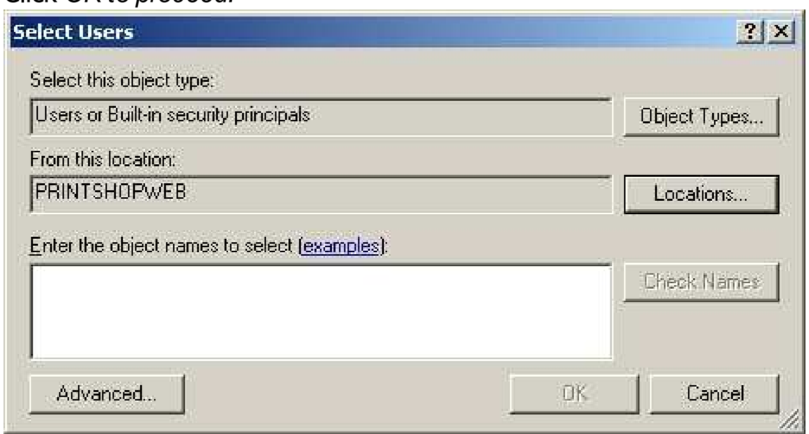


The Select Users, Computers, or Groups window

In case you would want to select another domain, or use a local account, click *Locations…*, which will lead to the following window:

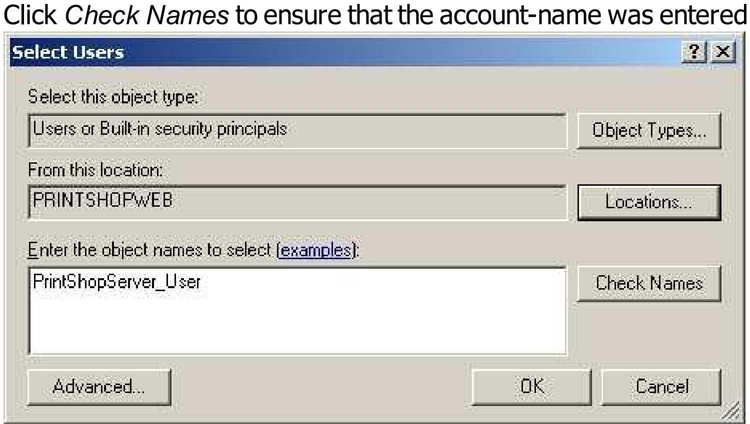
Select the location you want to serch for users.
In this example the local computer (*PRINTSHOPWEB*) must be selected, because we want to set the security settings for the just created local account.

4. Click *OK to proceed.*



The Select Users window

5. Type the name of the local account to set the security settings.
6. Click *Check Names* to ensure that the account-name was entered correctly:



The Select Users window

7. Click *OK* twice. The *Administrators Properties* window appears showing the new user.

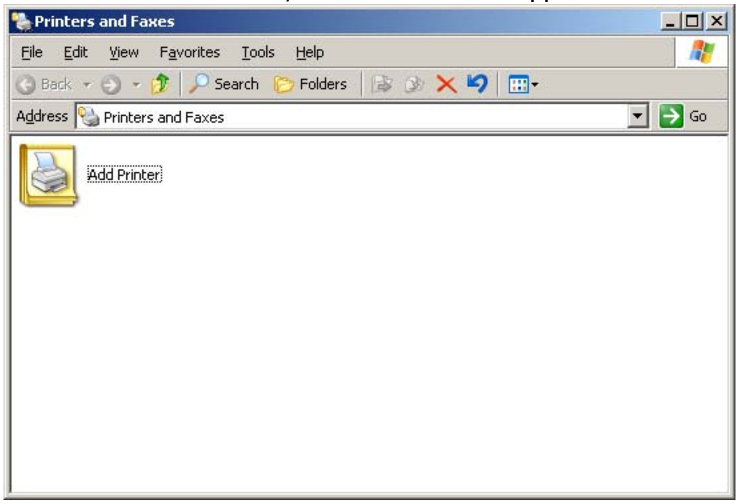
The Administrator Properties window

Managing printers for PrintShop Server

Installed printers differ per user in Windows, so we need to *Log Off* from Windows via the *Start* menu and *Log On* with the account that will be used for PrintShop Server.

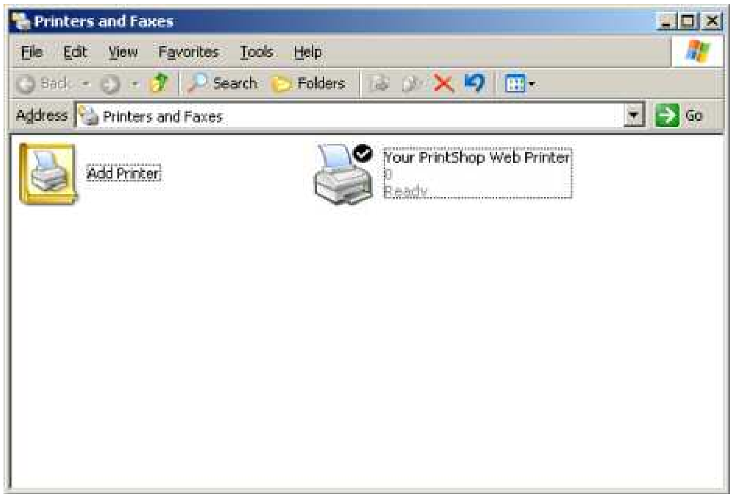
Note: PrintShop Server needs at least one PostScript printer to operate.

1. Open the *Printers and Faxes settings* from the *Windows Control Panel* (use the Windows *Start* menu)
2. Click the *Add Printer* icon, *Add Printer* wizard appears



The Printers and Faxes window

3. Add any PostScript printer you like through the Add Printer wizard.
4. Once created the printer is added to the *Printers and Faxes* overview.



The new printer is added to the Printers and Faxes window

Note: The PrintShop Server service must be restarted after changing printer settings (or when printers have been added) to be able to use these new settings (or printers).

PrintShop Mail Web and HTTPS

The PrintShop Mail Web installer gives you the option to support both HTTP and HTTPS connections. If you do not install HTTPS during the installation you can enable it afterwards.

What is HTTPS?

HTTPS (Hypertext Transfer Protocol over Secure Socket Layer, or HTTP over SSL) is a Web protocol used to encrypt and decrypt user page requests as well as the pages that are returned by the Web server.

SSL is an open, non proprietary protocol that Netscape has proposed as a standard to the World Wide Consortium (W3C). HTTPS is not to be confused with S-HTTP, a security-enhanced version of HTTP developed and proposed as a standard by EIT.

When you visit a web site with a Uniform Resource Locator (URL) that starts with https:// your browser's HTTPS layer will encrypt information send from the client to the server. The acknowledgment you receive from the server will also travel in encrypted form, arrive with an https:// URL, and be decrypted for you by your browser's HTTPS sublayer.

HTTPS and SSL support the use of X.509 digital certificates from the server so that a user can authenticate the sender.

SSL certificates

When you enable HTTPS you have to obtain a ssl certificate from a certificate authority like Verisign (http://www.verisign.com), this certificate and the private key must be placed in */apache/certificate*. PSW comes with a sample certificate, which will work on PrintShop Mail Web servers that can be reached through the URL https://localhost. For any other URL the supplied certificate will generate security warnings when an user connects to the PrintShop Mail Web server.

Most certificate authorities have detailled information on their web site on how to obtain, create and install certificates. The following steps will help you generating a Certificate Signing Request (CSR) and need to be performed on the PrintShop Mail Web server.

1. Download and install Openssl. Openssl can be found at the following location: http://www.slproweb.com/
2. Navigate to the OpenSSL folder and launch the OpenSSL.exe located in the bin folder
3. Enter the following command to generate a private key:

   ```
   openssl genrsa -out yourdomainname.key 1024
   ```

   The example above generates a *genrsa* encrypted key. These settings may differ between certificate providers.
4. Enter the following to create the CSR:

   ```
   openssl req -new -key yourdomainname.key -out yourdomainname.xsr
   ```

5. Read the instructions and completed the information on screen (use YOUR details).

   ```
   You are about to be asked to enter information that will be
   incorporated into your certificate request.
   What you are about to enter is what is called a Distinguished Name
   or a DN. There are quite a few fields but you can leave some blank
   For some fields there will be a default value,
   If you enter '.', the field will be left blank.
   -----
   Country Name (2 letter code) [AU]:NL
   State or Province Name (full name) [Some-State]:Zuid Holland
   ```

```
Locality Name (eg, city) []:Zoetermeer
Organization Name (eg, company) [Internet Widgits Pty Ltd]:Objectif Lune BV
Organizational Unit Name (eg, section) []:R and D
Common Name (eg, YOUR name) []:www.yourdomainname.com
Email Address []:info@yourdomainname.com

Please enter the following 'extra' attributes
to be sent with your certificate request
A challenge password []:
An optional company name []:
```

Enter your host address at "Common Name", if you enter "yourdomainname.com",the certificate is limited to the https://yourdomainname.com and cannot be used for https://www.yourdomainname.com.

You can leave the "challenge password" and "optional company name" empty. This completes to steps to create a private key and the csr, both files are created inside the folder of OpenSSL.exe. You will need the csr when obtaining a SSL certificate.

Place the key file generated in step 3 in Apache/certificate/psw.key in your PrintShop Mail Web installation folder. The .crt file provided by your certificate authority must be installed in Apache/certificate/psw.crt in your PrintShop Mail Web installation folder.

Server installation

During the installation of PrintShop Mail Web all components to run HTTPS are installed but will be disabled if you did not choose to select the HTTPS protocol. To enable and configure HTTPS:

1. Open the *httpd.conf* file located in the *conf* folder of the *Apache* folder (inside the PrintShop Web folder).
2. Add the following module rule:

   ```
   LoadModule ssl_module modules/mod_ssl.so
   ```

3. Open the *ssl* file located in the *conf* folder of the *Apache* folder (inside the PrintShop Web folder).
4. Make sure that the following entries refer to the location of your certificate files:
   - SSLCertificateFile (.crt)
   - SSLCertificateKeyFile (.key)
5. Restart the Apache service using the PrintShop Server Manager.

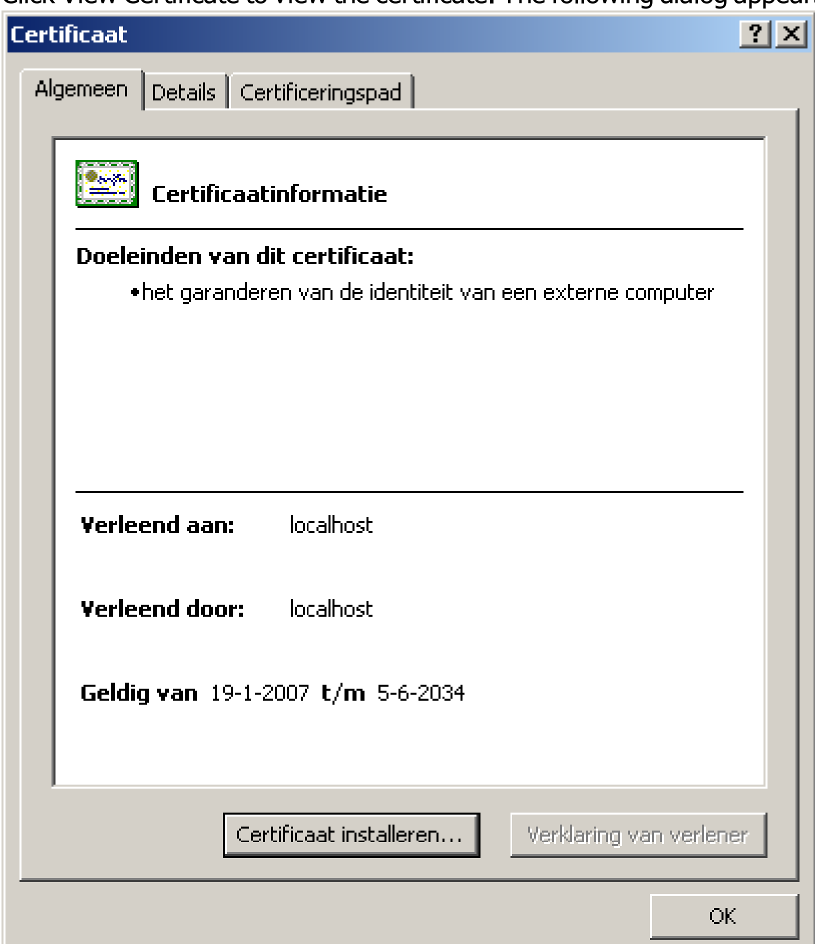
Client installation

Important: The supplied certificate only works on PrintShop Mail Web servers that can be reached through the URL http://localhost. For any other URL the supplied certificate will generate security warnings when an user connects to the PrintShop Mail Web server.

1. Close all opened web browser windows.
2. Open the an Internet Explorer web browser and go to https://localhost (notice that this is https, not http!).
3. If you don't see the following dialog and PrintShop Mail Web loads normally, all settings are correct and you may stop reading this section:

This certificate is not accepted yet

4. Click View Certificate to view the certificate. The following dialog appears:



View the certificate

5. Click on *Install Certificate*, progress through the wizard and click *Yes*.

Test Certificate by Web Browser

1. Open an internet browser and add the following URL to test the non-secure version: http://localhost
2. Open an internet browser and add the following URL to test the secure version: https://localhost
   Important: If you see the following window while visiting the secure version, the certificate isn't properly installed on your system (See Install Certificate). Please do not close the windows and repeat Install Certificate.
   

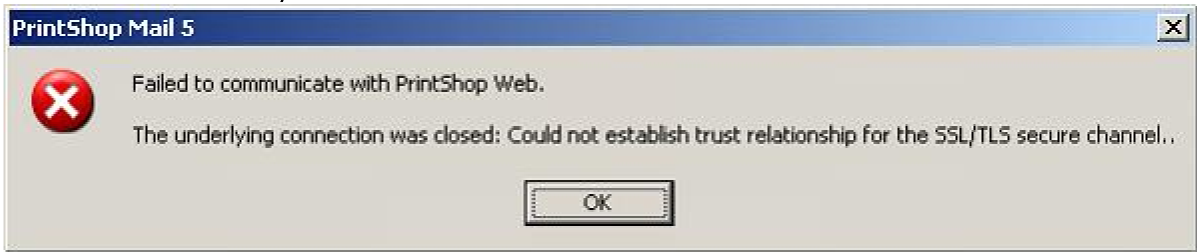
   This certificate is not accepted yet
   Important: If you see the following window while visiting the secure version, the URL you are using is not https:/-/localhost but some other one!
   

   The URL you used doesn't mach the URL in the certificate

Test Certificate in PrintShop Mail

1. Open PrintShop Mail. In the PrintShop Mail Web publishing preferences, please set the URL property to: https:/-/localhost

2. Click on *Test Connection...*button. If you the following message, please re-check the URL and re-test by webbrowser if the URL was set correctly.



There is no certificate installed yet for this server

USB Hardware Key

Without a hardware key, also known as a "dongle", PrintShop Mail Web will run in limited mode. In this mode, PrintShop Mail Web will run with the following limitations:

- It will not accept requests from the web and only be accessible from computers on the same local network.
- All softproof and output will be produced with a watermark
- Only 2 records per print job will be printed.

In order to enjoy PrintShop Mail Web's full set of functionality, a hardware key needs to be attached to the system. This hardware key also needs to be activated with an activation code provided by Objectif Lune.

> Because the hardware key is USB and needs to be connected directly to the server, PrintShop Mail Web cannot be used in a virtual machine or virtual environment such as VMWare or ESX servers. It must be on a physical machine with direct access to a USB port.

The Hardware Key generally looks like, though it may differ slightly in appearance:

To activate the hardware key:

1. Attach the hardware key to the computer.
2. Open PrintShop Mail Web.
3. Click the Settings button.
4. Click on License in the General section.
5. Click on License Information to refresh the dongle status.
6. If the license is not activated, click Activate Upgrade and paste your activation code before clicking OK.
7. If you have a voucher number instead of an activation code, click Voucher and follow the instructions on the screen to redeem the voucher for an activation code.
8. If you do not have either a voucher or activation code, please contact the Objectif Lune customer service department.

> If your hardware key worked in PrintShop Mail Design but does not work when plugging it into PrintShop Mail Web, it

may be because it is not licensed to work with PrintShop Mail Web. Contact customer service for more information.

B2C (Business to Customer)

While by default PrintShop Mail Web is a B2B (Business to Business) software that simplifies transactions between print shops and their clients, it can also be easily used as a B2C (Business to Consumer) interface for direct client sales. To do this, you must purchase the optional B2C license on your hardware key, and you must create a public company in which the clients will be able to register.

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.

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**.

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.

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.

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 *Public Customer*. Such users have limited capabilities 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.

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.

Skins can be applied to the default website as well as to each individual companies in PrintShop Mail Web but they cannot be chosen directly by the user.

To install a skin:

1. Extract the skin's ZIP file into a temporary folder
2. Copy the skin's folder
3. Paste the skin's folder into the following location: C:\Program Files\Printshop Mail Suite 7\PrintShop Mail Web\Website\templates

> The location of the PrintShop Mail Suite installation being customizable, it may be different on your system.

To learn how to create your own skin, please refer to "Skinning Guide" (page 209).

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" (page 111).
2. Add a company to the system. For more information see "Add companies" (page 77).
3. Add departments to a company if necessary. For more information see "Add departments" (page 78).
4. Add users to a company and assign them to a department. For more information see "Add users" (page 83) and "Assign users to a department" (page 84).
5. Add publication types and assign them to a company and/or department. For more information see Add publication types and "Adding documents to a Publication Type" (page 87).
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" (page 83).
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 Design User 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" (page 92).
9. Setup e-mail messaging to communicate with your customers. For more information see "Settings" (page 111).
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.

The PrintShop Mail Web Interface

The PrintShop Mail Web Interface is composed of a top menu, a tab-menu for each of the sections, as well as breadcrumbs. Some sections of the website also include a sidebar on the right (with the default skin) that offer sub-sections to each tab.

PrintShop Mail Web navigates just like any other website and offers the same type of interface tools such as links, buttons, radio buttons and checkboxes.

Accessing PrintShop Mail Web

To access the PrintShop Mail Web Interface, you must do so from a browser that has access to the location where it is installed.

To access the website from the server where it is installed use any of the following methods:

- Double-click on PrintShop Mail Web on your desktop
- Go to Start, (All) Programs, PrintShop Mail Suite 7 and click on PrintShop Mail Web
- Open your browser and go to http://localhost/
- Open your browser and go to http://127.0.0.1/

To access the website from a computer on the same local network as the server:

- Open your web browser on the client computer
- Type in the IP of the server within a URL. For example if the server's IP is 192.168.100.123 , type in http://192.168.100.123/

To access the website from a computer on the internet (for anyone to access the website):

- Make sure your server is accessible from the internet. To do this, make sure the port used by PrintShop Mail Web is redirected from by the router to the PrintShop Mail Web server IP address. Your network administrator can do this for you.
- If you want your website to be accessible using a domain name such as http://www.myprintshopname.com/ , you will need to create a redirection or DNS setup on the domain name. Your network administrator can do this for you.
- Once this is done, you can access your website from anywhere in the world by typing the IP or domain name of your server, such as http://12.34.56.78/ or http://www.myprintshopname.com/

If, during installation, you specified an HTTP port that is different than port 80 (The default HTTP port), you will need to always type in the port when accessing your website, even when using a domain name. For example if you put port 8080, any URL will need to contain :8080 at the end, like this: http://www.myprintshopname.com:8080/ . If PrintShop Mail Web is to be accessed publicly through the web, it is not recommended to use a port other than 80, as regular Internet users will not expect to have to type in a port, thus may not be able to understand how to access your website.

The PrintShop Mail Web Menu Tabs

To navigate PrintShop Mail Web, you must use the menu tab at the top (with the default skin, this is a blue bar with white links within it). This menu can let you access all the parts of PrintShop Mail Web, except for the User Account menu which is accessed at the top-right of the menu next to the language selection.

- **Home**: Displays a welcome message once a user is logged on. This message can be modified by the administrator in the Web Design section of the "Settings" (page 111) tab.
- "New Document" (page 65): This tab is used to create new orders. It will display existing and active publication types as well as their containing documents.
- Order Manager: This tab is used to manage existing orders that are in the system.
- Checkout: This tab is used to complete your order once you have added all the documents you want to order to your shopping cart.
- "Companies" (page 77): This tab is used to manage, add or delete companies on the system.
- "Users" (page 83): This tab is used to manage, add or delete users on the system. This can be used to create a user in any company in the system, but you can also add users through the company itself in the Companies tab.
- "Publication Types" (page 85): This tab is used to manage, add or delete publication types and their documents. This can be used to create publication types for any company in the system, but you can also add publication types through the company itself in the Companies tab.
- "Collections" (page 107): This tab is used to manage, add or delete image collections for your system. Collection can be global to all the companies or be assigned to a specific company.
- "Settings" (page 111): This tab is used by administrators to change system settings, pricing, production, etc. Only administrators can access this tab.

Common Tasks

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

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.

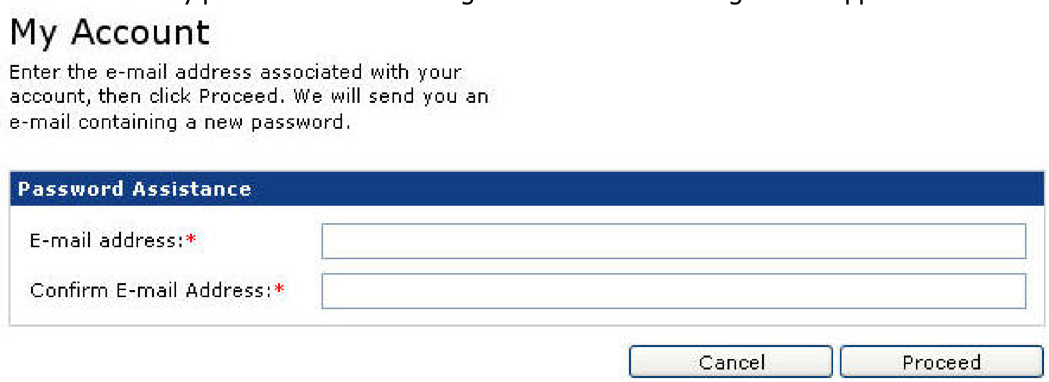
When the *Remember me* checkbox is checked a cookie is created. This cookie stores the user name and password of the user. The next time the PrintShop Mail Web web site is visited by the user the system will check for the cookie and automatically log in the user in order to show the appropriate content.

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.

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:



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.

Modify user info

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

1. Click *My Account* in the *Menu* bar.
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.

Set New Password

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

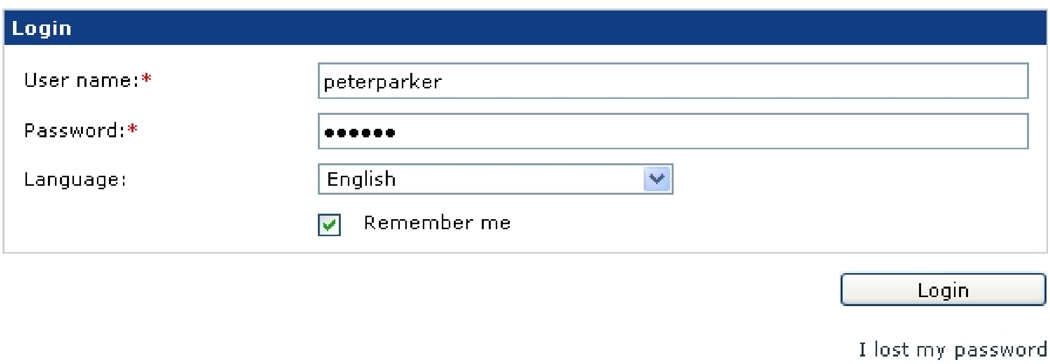
1. Click *My Account* in the *Menu* bar.
2. Enter a new password.
3. Confirm the new added password.
4. Click *Save* to store the changes.

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*.

Publishing Workflow

The Publishing Workflow describes each step necessary in the publication of documents through PrintShop Mail Web. Depending on the document to be used in PrintShop Mail Web, the methods may differ.

Publishing a PrintShop Mail Design Document

Publishing of a PrintShop Mail Design document is fairly simple and follows these simple steps:

1. Making sure the Company and Publication Type have already been created (optional; this can be done from PrintShop Mail Design). See "Companies" (page 77) and "Publication Types" (page 85).
2. Creating the PrintShop Mail Design document meant for publishing. See "Interaction With PrintShop Mail Design" (page 187).
3. Sending the document from PrintShop Mail Design to PrintShop Mail Web. See the PrintShop Mail Design User Guide.
4. Setup the document's fields in PrintShop Mail Design. See "Interaction With PrintShop Mail Design" (page 187).
5. Enable the document for use with PrintShop Mail Web. See "Modify the publication type properties" (page 86).

Publishing a Word Mail Merge Document

Publishing a Word document with Mail Merge in PrintShop Mail Web is very simple and follows these simple steps:

1. Create a Word document that contains one or more MergeFields corresponding to a database entry.
2. Create a new Document in a new or an existing Publication Type of the Mail Merge type. See "Word Mail Merge Document" (page 87).
3. Enable the document for use with PrintShop Mail Web. See "Modify the publication type properties" (page 86).

Publishing a Static PDF Document

Publishing Static PDF files in PrintShop Mail Web is pretty trivial as it consists only of 2 steps:

1. Create a new Document in a new or an existing Publication Type of the Static PDF type. See "Adding documents to a Publication Type" (page 87).
2. Enable the document for use with PrintShop Mail Web. See "Modify the publication type properties" (page 86).

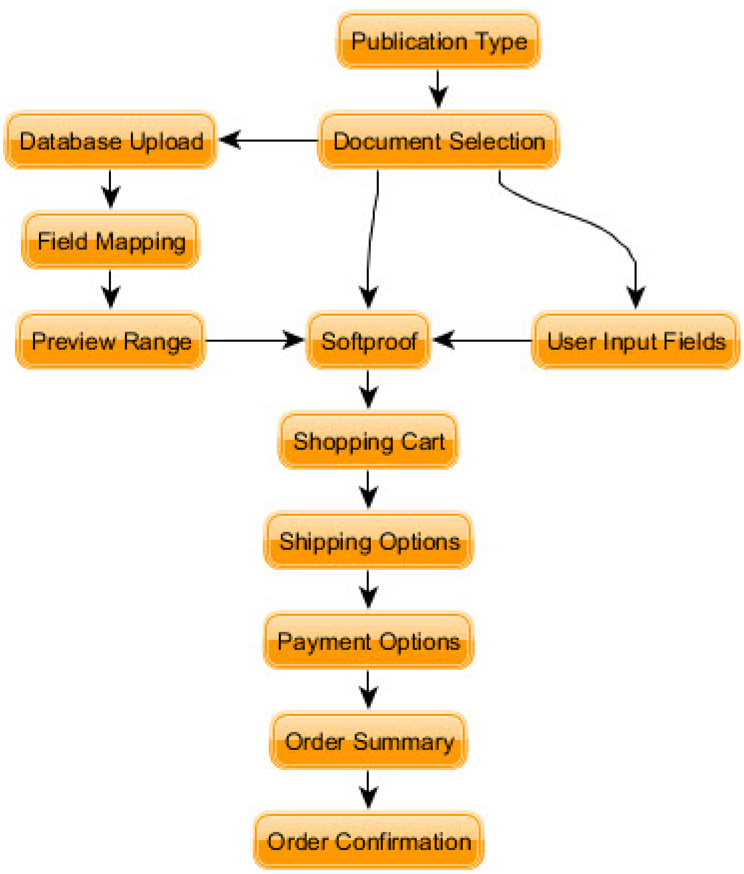
Ordering Workflow

This chapter explains each individual step that is involved in the ordering, processing and output generating of an order in PrintShop Mail Web. This includes the definition of each user that is involved in this workflow and the steps they each need to take to get the job done.

This workflow assumes that PrintShop Mail Web has already been setup with the appropriate companies, departments, publication types, documents and users. It consists of two different parts - the first part is the Customer Workflow where a customer selects a document to order, adds it to a shopping cart and completes an order and the Processing Workflow where managers and operators can approve orders, generate output and mark it as complete.

Customer Workflow

This diagram details the possible paths a customer may take in the workflow. Note that the first branches are all about the different types of document and are automatically chosen by the software, they are not a user choice:



The Customer Workflow consists of these basic steps:

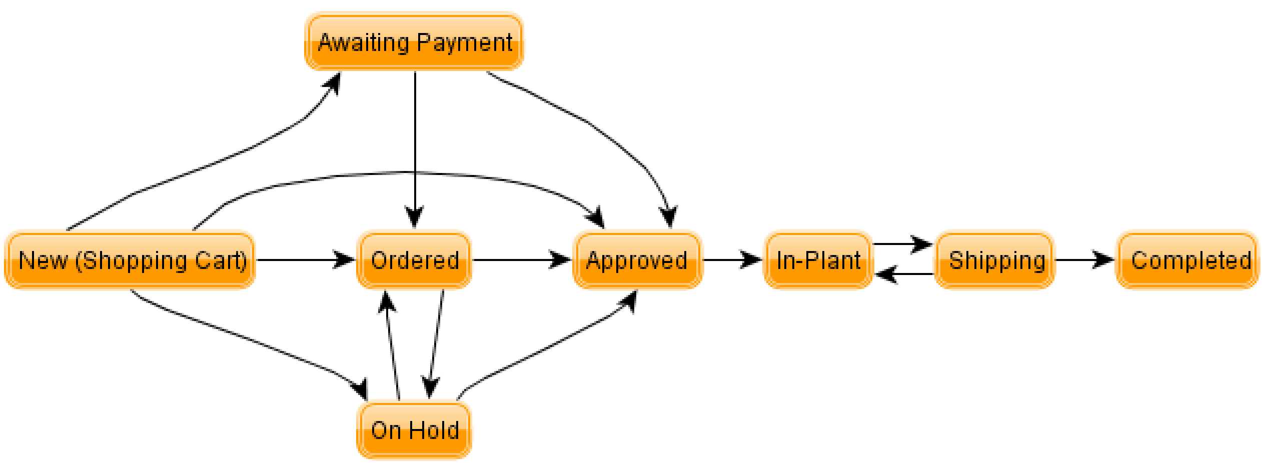
1. **Document Creation:** Customers use the "New Document" (page 65) section to create a new document and add it to the order. This process involves a variable number of steps depending on the document type. For more information on the optional steps involved, see "New Document" (page 65).

2. **Shopping Cart:** Once the customer is satisfied with the order, he may use the "Checkout" (page 73) section to review his shopping cart, adjust item quantities and review pricing. See "Shopping Cart" (page 73).
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. See "Shipping Options" (page 75).
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. See "Order summary" (page 76).
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.

Processing Workflow

The Processing Workflow consists of multiple order statuses through which the order passes in the "Order Manager" (page 69). Which statuses it uses depends on whether or not the order contains a document that requires a quote, whether there is a payment module other than Purchase Order activated in the system and what user role the customer has in PrintShop Mail Web.

The following diagram details the different statuses that are in PrintShop Mail Web along with the link between them (how the order can evolve). The arrows indicate the only path an order can take from one status to another:



Order Statuses

- **New (Shopping Cart)**: This represents a customer that is processing an order. It's not a status that is visible through the PrintShop Mail Web interface, it is simply the starting point. Depending on user rights and setup, a new order may go to the following statuses:
  - **Ordered**: If an order is placed by a user, paid for and the payment goes through, the order will go to Ordered status. This assumes that there is no price quote necessary for any of the documents in the order.
  - **Approved**: If the order is placed by a manager of any type, the order can go into Approved status if the manager clicks *Approve* instead of *Order* in the confirmation page.
  - **On Hold**: If any of the documents in the order require a price quote to be made, it is put on hold until a Production Manager gives a price for each required quote and a Department or Company Manager accepts the price quote and will then go into Ordered or Approved mode.

  - **Awaiting Payment**: If a payment is required on the order but the payment does not go through, for example if the customer cancels or closes the payment window. If the customer returns to complete the payment or a Production Manager manually approves the order, it will go into Ordered or Approved status.
- **Awaiting Payment**: Orders that are awaiting payment can be re-opened by the customer that made the order, a manager or an administrator. An order that is awaiting payment can either go to the Ordered or Approved status depending if the user or a Manager changed its status, respectively.
- **On Hold**: An order can either be put On Hold automatically if a new order requires a price quote, or manually by a Manager as required. An On Hold order can be put into Ordered status manually or Approved status when a price quote has been completed.
- **Approved**: An order goes into approved status once it's been quoted, paid for and approved by the appropriate managers. Once an order is Approved, it cannot revert to any previous status and must move forward unless it is deleted. An Approved order can be put into the In Plant state by a Production Manager.
- **In Plant**: An order goes into In Plant status by the Production Manager when it is ready to generate output. An Operator uses the In Planet status to see what jobs are ready and as a queue to know which job to output next. Once the job has been output, the Operator can place the order in Shipping status.
- **Shipping**: This status is used to indicate that an order has been generated and is ready to be shipped (or has already been shipped) to a customer.
- **Completed**: Once a customer confirms that his order has been received, an Operator or Production Manager will be able to place the job into Completed status, where no further processing is necessary.

New Document

The New Document tab is used as part of the Ordering process, and is the first step in creating and completing an order. It is used to select a document to order from a list of documents in publication types, and will only display documents that are active and related to the company you are logged on under.

To get to the New Document tab:

1. Access the PrintShop Mail Web site interface (See "Accessing PrintShop Mail Web" (page 55))
2. Click on New Document in the PrintShop Mail Web Menu (see "The PrintShop Mail Web Menu Tabs" (page 56))

Once you are within the New Document tab, you will see a list of publication types that are available for you to order.

When you click on a publication type in the New Document tab, two things can happen. If the publication type contains more than one document, you will be sent to the "Document Selection Screen" (page 65). If there is only one document in the publication type, you will be sent to one of the following windows:

- If the document requires a database upload, the "Ordering A Database-Upload Document" (page 66) window will be displayed.
- If the document uses input fields, the "Ordering a User Input Document" (page 67) window will be displayed.
- If the document is a Static PDF document, the Softproof window will be displayed directly.
- If the document is a File Upload document, the Upload File window will be displayed.

Document Selection Screen

When a publication type contains more than one file, clicking on that publication type will bring up a list of documents within it. Each document will display a preview (if possible) as well as a description as entered in the document's properties.

If there is only one document, or after click on a document in this screen, you will be taken directly to the correct screen depending on the type of document. See "Ordering Workflow" (page 61) for more details.

Ordering A Database-Upload Document

When you click on a document that requires a document upload in the New Document tab, you will need to go through the following steps for the document to be added to your cart:

- Upload your database through the "Database Upload Screen" (page 66).
- Verify the field mappings through the "Field Mapping" (page 66).
- Select your preview range in the "Preview Range" (page 67) window.
- Verify the result in the "Softproof" (page 68) window.
- Add the document to your cart and proceed to checkout.

Database Upload Screen

When a document requires a database in order to be processed, the Database Upload screen will be displayed.

The Fields table shows all of the fields that are expected to be in the uploaded database, and their order. If your database does not correspond exactly to this list, you will be able to re-order them in the next step.

> While it is recommended that the uploaded database be of the same type as the one used to create the document, this is by no ways mandatory. As long as the database you upload is compatible with PrintShop Mail Suite your document should output correctly. To verify this, make sure you double-check the softproof.

The Database file box lets you upload your database to PrintShop Mail Web to be merged with the document.

To upload the database:

1. Click the **Browse** button next to the *Source File* box.
2. Browse to your database file using your browser's *File Upload* dialog.
3. Click on the database in the *File Upload* Dialog
4. Click on **OK**.
5. When the filename and path appears in the *Source File* box, click **Upload**.

When you click **Upload**, you will be taken to the "Field Mapping" (page 66) window.

Field Mapping

The Field Mapping window is used to make sure the uploaded database file's fields correspond to the one that was used to create the document. The window displays the Fields table with the following rows:

- **Field Name**: The list of all fields that the document expects to receive from the database. If there are more fields than expected in the uploaded database, dashes (-) will be displayed as placeholders and the corresponding upload field will not be used.
- **Header**: The list of fields in your database. If your database contains less fields than what is expected, a dash (-) will be displayed as a placeholder, and nothing will be displayed in the output for this field.
- **Value**: Displays the first record in the uploaded database next to its field name.

PrintShop Mail Web will attempt to automatically match fields in your uploaded database that match the field names it knows to use. If it cannot do this for one or more of the fields, you will have to reorder them manually.

PrintShop Mail always expects to find headers in the uploaded database. If your uploaded database does not contain field headers, the first record will display as the headers and the output will not contain that record.

To map the fields correctly:

- Drag and drop the upload field that corresponds to the expected database field to the first position in the field mapping table.
- Drag and drop the upload field that corresponds to the expected database field to the second position in the field mapping table.
- Repeat for all the fields.
- If some fields to not match, you can match them to a dash (-) field for it to be ignored.

Once you have completed the field mapping, click Next to get to the "Preview Range" (page 67) window.

Preview Range

The Preview Range window will let you select what range of records will be used in the softproof. Previewing a smaller range will make the preview faster but will display less pages. On the other hand, previewing a larger number of records will take more time but will let you check the validity of more records.

Changing the preview range will not affect the number of records that will actually be generated in the output, it will only change the number of records displayed in the softproof.

To change the range of records to preview:

- In the Preview Range box, change the From box to the first record you want to preview.
- Change the To box to the last record you want to preview
- Click Next to generate and view the "Softproof" (page 68).

Ordering a User Input Document

When you click on a document that requires user input to determine the contents of its fields in the New Document tab, you will need to go through the following steps for the document to be added to your cart:

- Enter the field contents in the "User Input Fields" (page 67) window
- Verify the result in the "Softproof" (page 68) window.
- Add the document to your cart and proceed to checkout.

User Input Fields

The User Input Fields window will let you enter the information necessary to generate your output, when the document was set to have user input instead of a database upload.

- The **Fields** table will display all of the fields in the database, as well as an input box where you can enter the expected data.
- The **Update Preview** button will refresh the thumbnail on the right with the new user input information.
- The **Back** button will bring you back to the "New Document" (page 65) window.
- The **Next** button will generate and display the "Softproof" (page 68).
- The **Thumbnail** box displays the expected output with the user input that was entered. If more than one layout is present in the uploaded document, a Layout drop-down is displayed under the thumbnail. Click on it and select a new layout to display this layout preview in the Thumbnail box.

Ordering a Static PDF Document

When ordering a static PDF, there is no customization, so the only window you will get is the "Softproof" (page 68) window, which will display the complete PDF file in its preview. You can then add it to your cart and continue shopping.

Softproof

The Softproof window displays a PDF that corresponds to what the generated output will look like in your order. If you have previously selected a preview range, the PDF will only contain this range.

The Softproof window requires a PDF viewer such as Adobe PDF in order to display the PDF preview.

Once you are satisfied with the preview, click the Next button and the document will be added to your cart. The "Checkout" (page 73) tab will be opened with your current cart contents.

Order Manager

The Order Manager displays any and all orders that can be viewed, processed or modified by the currently logged on user. The Order Manager is divided into 4 sections:

- The **Order(s)** table displays the orders for the currently selected section. When first opening the Order Manager, it will most likely be empty. It displays the following information:
  - **ID**: The software-generated identification for the order.
  - **Company**: The company in which the order belongs.
  - **Department**: The specific department the document belongs to, if applicable.
  - **Created**: The date at which the order was created.
  - **Shipping Date**: The expected shipping date of the order.
  - **Price**: The order price including all taxes and shipping charges.
- The **Order Manager** section in the sidebar displays the different order statuses:
  - **General**: Orders will go through some of these statuses, following the "Ordering Workflow" (page 61). The visible statuses and actions which a user can do depends on user rights and the ordering workflow.
  - **Other**:
    - **Render Queue**: Click to displays a list of orders that are being rendered or have been rendered in the recent past. This includes softproofs for orders being created by users.
    - **Print Jobs**: Click to display a list of Print Jobs that have been generated. Jobs printed using PrintShop Mail Design's Print To Web functions appear here. See "Interaction With PrintShop Mail Design" (page 187).
  - **Personal Order folders**:
    - **My Orders**: Click to display all orders that the currently logged on user has access to.
    - **My Approved Orders**: Click to display all approved orders that the currently logged on user has access to.
    - **All Companies**: Click to display all the orders for all companies.
- The **Search** section in the sidebar lets you search through all orders:
  - **Search**: Enter a word (or words) to search for.
  - **In**: Select which field you want to search in (Document name, Shipping date, Contact name, Order ID) from the drop-down list, then click **Search**.
- The **Summary** section in the sidebar displays a summary of information about the current status of orders that the currently logged on user has access to:
  - **Number of orders**: Total number of orders.
  - **Total price**: Total combined price of all the orders.
  - **Rush orders**: The number of orders that were requested as rush orders.
  - **Required by today**: The number of orders that are due today.
  - **Exceeded date orders**: The number of orders that have gone over the shipping date, in other words late orders.

Viewing Order Details

There are different types of details available for orders in PrintShop Mail Web. Those details are divided into three distinct locations that are easily accessible from the Order Manager.

The first location is the Order Manager status pages themselves, as described above. This displays the ID, Company, Department, Created, Shipping Date and Price. You can also expand each order by clicking on the [+] sign next to the ID, which will display the list of documents in the order. The list of documents appear with the ID, Name, Quantity and Print Status of the document. Clicking on any document name will display its "Job Properties" (page 71).

The second location is the Order Properties page. This page displays detailed information about the order and is also the location where the status of the order can be changed. For more details see "Order Properties" (page 70).

The third location is the Order Details page, which lets a user modify options and shipping information for an order. For more details see "Order Details" (page 70).

Order Properties

The Order Properties page displays information on orders in the system as well as displays a list of available actions for the order.

The Order Properties is divided into 2 main sections with various details and links:

- **Order Information** section
  - **Toolbar**: The top area of the Order Information section contains the actions available for the current order.
    - **Action** : This lets you put the order in the appropriate status like Approved, In Plant, On Hold, etc.
    - **Details**: This brings up the "Order Details" (page 70) page.
    - **Set Paid**: Order is Awaiting Payment status display the Set Paid action. This displays a dialog that lets you place a Transaction number (which is optional but would correspond to your payment system's transaction confirmation number). Once you click Set paid in the dialog, the order goes in to Approved status.
    - **Delete**: This action will delete the order and all attached details, after a proper confirmation dialog appears of course.
  - **General group**: Displays information about the customer who created the order.
  - **Additional Information**: Displays information about the order itself, as well as the shipping address.
  - **History**: Displays the history of the order, when it was created and which statuses it went through. Each date and status also displays which user made the change.
- **Jobs Overview** section: This displays each document that is part of the order, including the ID, Description, Quantity and Price. It also displays the Subtotal, taxes and total price of the order. Clicking on any of the document details will display the "Job Properties" (page 71). page for the document.

Order Details

The Order Details page is used to modify the shipping details for an order. It is divided into 3 different groups:

- The **General** group displays the Order ID and current status. It is not editable.
- The **Options** group lets you change the shipping options such as a shipping Tracking and Reference number as well as shipping comments.
- The **Shipping Information** lets you change the shipping address and contact information.

Job Properties

The Job Properties page displays all the details for the selected document in an order. It also lets an Operator generate output for this document if the document is In-Plant status.

To generate the job's output, click Generate Output in the Action bar. The Output dialog is shown.

The Output dialog has the following options:

- **General Group**:
    - **Method**: Choose between these 5 output methods. The rest of the options will depend on the output method you choose.
        - Print: Sends the job to a physical printer installed on the PrintShop Mail Web server.
        - Print to File: Creates a postscript version of the job and saves it in the selected output folder.
        - Create PDF: Generates a PDF file of the job and saves it in the selected output folder.
        - Preflight: Does a verification of the document by simulating the output. However, it does not actually create any output. Will display a report with any error found.
    - **Printer**: Select the printer of which the drivers will be used to generate the job. Even when generating a PDF, the printer is necessary as it is the one who determines the page sizes and margins, etc. This printer selection should correspond to the printer selected when creating the document if it is a PrintShop Mail Design document that was used to create this job.
    - **Job Option File** (Create PDF output): When creating a PDF output, you can use one of the built-in job options files to adjust the quality of the PDF file.
    - **Output Folder** (Print to File and Create PDF outputs): This is where the output will be generated unless it is printed out. Output folder are created in the "Output Folders" (page 144) section of the Settings window.
- **Copies and Range Group**:
    - **Copies**: The number of copies for the file. Note that they will automatically be collated.
    - **Range**: Select whether you want the whole job to be generated or just a subset of records (not pages).
    - **From**: The first record you wish to use in the set.
    - **To**: The last record to use in the set.

Checkout

The Checkout tab will automatically appear when you start your checkout process from the New Document tab. It contains your shopping cart as well as the pages that will let you confirm your order and, if required, pay for it.

The Checkout Process

Checking out is a simple 3-step process that is seamlessly integrated within the ordering process that it may be easily missed when ordering a document.

- The Checkout Overview page displays your shopping cart including each document that you ordered. It will also let you change your ordering quantities. See "Shopping Cart" (page 73).
- The Shipping Options page is where you enter you shipping address and choose your preferred shipping dates. See "Shipping Options" (page 75).
- The Order Summary page displays your order information and reconfirms your ordered items, shipping address and payment options. It is also where you can enter a discount voucher if you have one. See "Order summary" (page 76).

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 shopping 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 database 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 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.

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 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

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.

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.

Prerequisites

To disable automatic price calculation:

- Disable pricing for the template

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

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* 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.

When done entering the information, the following buttons are available:

- **Back**: Return to the previous page.
- **Restore Address**: The address information is restored from the address information section from the company/department.
- **Proceed**: Displays the Order summary page.

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 *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.

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.

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.

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.

On this page, you can also enter a Discount Voucher Code. Discount vouchers are generated by PrintShop Mail Web administrators or production managers and can apply a discount on shipping or the price of your purchase. Only one discount voucher can be applied to an order. Simply type in or paste the discount code and click Apply to apply the discount to the order.

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.

Companies

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.

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 add dialog appears.
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.

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 *Companiesoverview* 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 companies properties screen appears.
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.

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

Add or modify address

To add the company address in PrintShop Mail Web:

1. Click *Companies* in the *Menu* bar. The *Companiesoverview* 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 Company Addresses screen appears.
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.

Add departments

To add a department to a company:

1. Click *Companies* in the *Menu* bar. The *Companiesoverview* 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.

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 *Companiesoverview* 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 Publication Types assignment dialog appears.
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 Typesoverview* page is shown.
2. Select a publication type from the overview by clicking the publication type name. The *Publication Types Summary* page appears:
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.

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 *Companiesoverview* page is shown.
2. Select a company from the overview.
3. Click *Web Design* in the side menu.
4. Click *Edit*. The Web Design screen appears.
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.

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 *Companiesoverview* page is shown.
2. Click *Pricing and Ordering* in the side menu, the *Pricing and Ordering Settings* page appears.
3. Click *Edit.* The Pricing and Ordering Settings screen appears:
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.

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

Users

This chapter explains Users, how to create them, edit them and assign them to companies and departments.

Add users

To create a new user account for a company:

1. Click *Companies* in the *Menu* bar. The *Companiesoverview* 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 Add User dialog appears.
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.

Modify user info

To modify the user information:

1. Click *Companies* in the *Menu* bar. The *Companiesoverview* 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.
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.

Assign users to a department

To assign a user account to a department:

1. Click *Companies* in the *Menu* bar. The *Companiesoverview* 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.
5. Click *Assign*. The Assign Users dialog appears.
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" (page 83) and "Modify user info" (page 83)). Users who are added directly to a department can be (re)assigned to other departments later.

Publication Types

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.

There are two ways to create publication types:

- Using PrintShop Mail Web.
- Using PrintShop Mail Design when using Publish To Web.

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

Create a publication type

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 Add Publication Type dialog appears.
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 from 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.

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 Typesoverview* 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 Publication Type Properties screen appears.
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.

Delete a publication type

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.

Adding documents to a Publication Type

In order for customers to be able to places orders, your publication type must contain one or more documents. There are multiple types of documents that are available, but only 3 are uploaded from the PrintShop Mail Web interface:

- Word Mail Merge documents.
- Static PDF files.
- File Upload documents (manual job submission).

PrintShop Mail documents, wether they are variable or static, should always be uploaded using PrintShop Mail Design. Please refer to the PrintShop Mail Design User Guide for more information.

To add a document, click the Add button. The Add dialog appears.

- **Document Type**: use the drop-down to select one of 3 types:
    - **Static PDF**: Select to upload a PDF that can be printed by the user directly. PDF files will display a softproof to the client whenever they are ordering.
    - **File Upload**: Select to let the user upload his own file for a printer order. Softproofs will not be available unless the document is a Word or PDF file.
    - **Word Mail Merge**: Select to have the user enter custom fields or upload a database. The Word document must be prepared in advance to be compatible.
- **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.
- **PDF File** (Static PDF document type only): 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.

Word Mail Merge Document

With the Word mail merge engine feature, users are able to prepare a document for mail merge in Word and do the actual merge in PrintShop Mail Web using user input fields or a database. This feature also enables upload of static Word documents. This provides with both a new static publication type and a dynamic one for companies who do not use or own PrintShop Mail Design or do not need any of its more advanced features.

The following is required for Mail Merge to be available in PrintShop Mail Web:

- Microsoft Word 2007 or higher.
- Microsoft Word to PDF Add-In for Microsoft Office (Word 2007 only).

Both the .doc and .docx extensions are supported for Microsoft Word documents you upload.

Mail Merge documents can contain user input or database fields. When you create your document in Microsoft Word, each field you create in Word becomes a new field in PrintShop Mail Web.

Only *MergeField* types are supported in PrintShop Mail Web's Mail Merge engine. Any other field type (Address, etc) will not function when creating a new order.

To upload a Mail Merge document, see "Adding documents to a Publication Type" (page 87). Once the document is uploaded in PrintShop Mail Web, you can change the type of each field by editing the document properties (see "User Input Fields" (page 92)).

To create an order using a Mail Merge document, see the PrintShop Mail Web User Guide.

You can also **kill any process from the Mail Merge engine** which may be "stuck" by using the Word Maintenance page in the Settings. See "Word Maintenance" (page 123) for details.

Correcting DCOM errors

When PrintShop Mail Web is installed after Microsoft Office it will automatically make the necessary changes to the DCOM configuration in your operating system. However, if Microsoft Office is installed after PrintShop Mail Web, the DCOM configuration must be changed manually. To do this, follow these steps:

1. Go to **Start** -> **Run**
2. Type **dcomcnfg** in 32-bit operating systems or **mmc comexp.msc /32** in 64-bit operating systems.
3. Go in **Components Services**
4. Go in **Computers**
5. Go in **My Computer**
6. Go in **DCOM Config**
7. Locate then Right-click on **Microsoft Office Word 97 - 2003** (or **Microsoft Word 97 - 2003**) then click **Properties**.
8. Go to the **Identity** Tab
9. Select **This User**.
10. Enter the username and password of the local administrator account used for PrintShop Mail Web.
11. Click **OK**.

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.
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.

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 Document Properties screen appears.
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.

Manage production settings

The *ProductionSettings* 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 Document Production Settings screen appears:
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.

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 Document Output Options screen appears.
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" (page 144).
    - **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 Document Output Options screen appears.
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.

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:

Documents

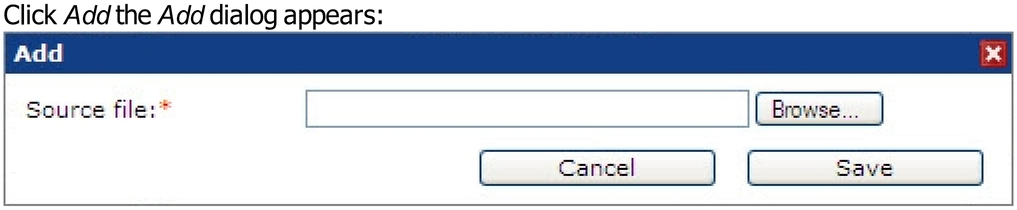
Linked Files Overview (8 items)

	File name	Size	File type	Modification date
☐	Amsterdam.jpg	1.01 Mb	jpg	2008-03-27 11:47:12
☐	Barcelona.jpg	820 Kb	jpg	2008-03-27 11:47:12
☐	Matiz_win_8bits.eps	15.17 Mb	eps	2008-03-28 13:54:54
☐	Newsletter.xls	17 Kb	xls	2008-03-27 11:47:12
☐	Paris.jpg	1.16 Mb	jpg	2008-03-27 11:47:12
☐	Sydney.jpg	952 Kb	jpg	2008-03-27 11:47:12
☐	Travel US Letter.pdf	176 Kb	pdf	2008-03-27 11:47:12
☐	watermark.bmp	597 Kb	bmp	2008-03-27 11:47:12

Delete Add

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.

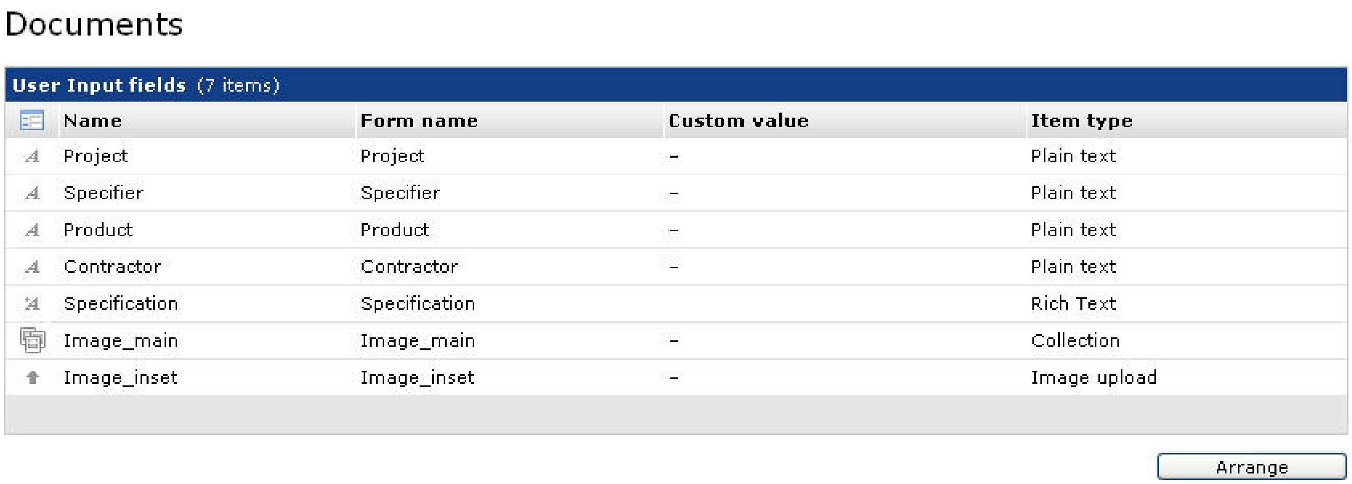
Setting up web forms

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.

User Input Fields

To make modifications to a user input field:

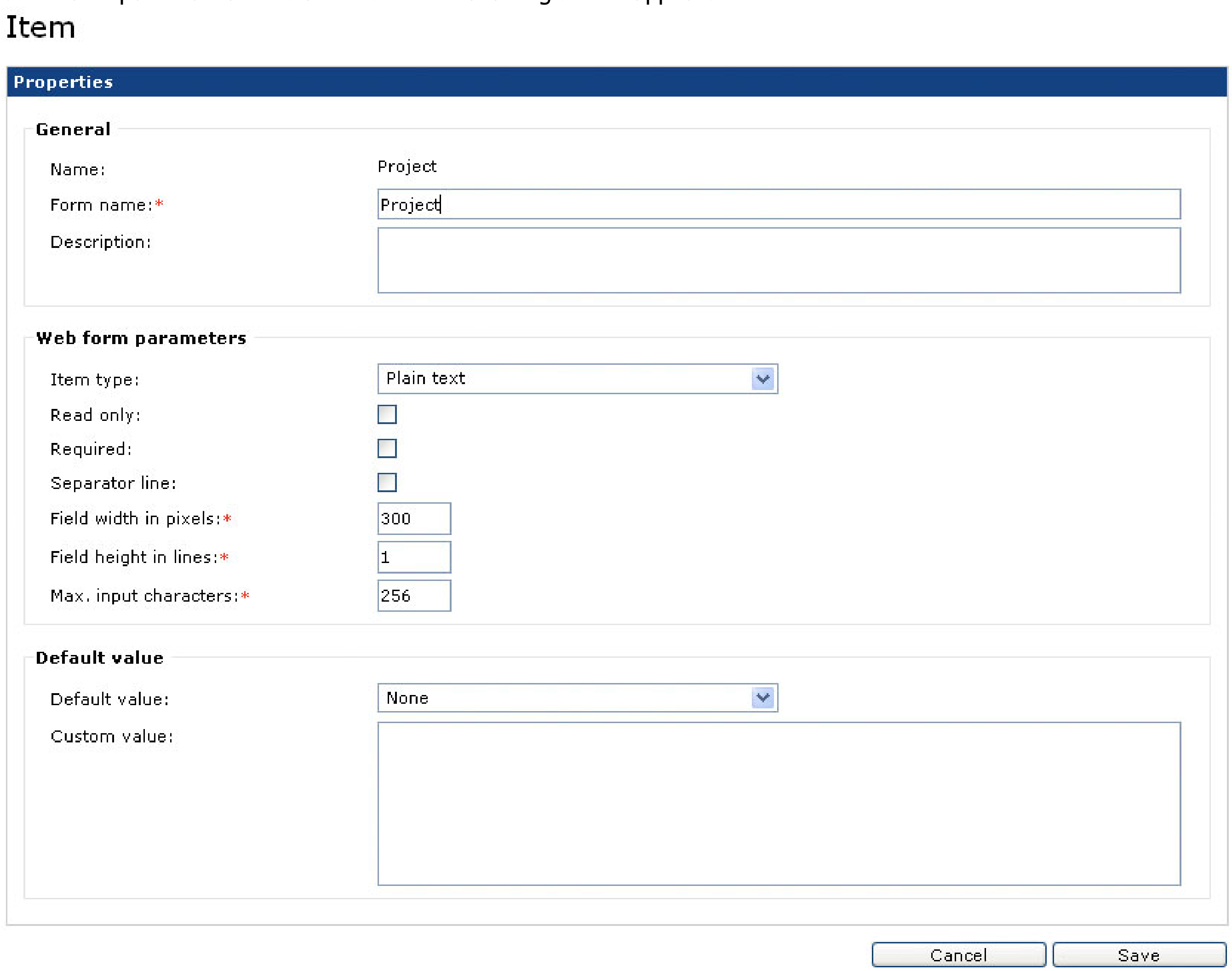
1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Click the + symbol next to the publication type to view a list of its documents. Documents containing user input fields have a value in the *User Input Fields* column ( ).
3. Select a document that requires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



Name	Form name	Custom value	Item type
Project	Project	-	Plain text
Specifier	Specifier	-	Plain text
Product	Product	-	Plain text
Contractor	Contractor	-	Plain text
Specification	Specification		Rich Text
Image_main	Image_main	-	Collection
Image_inset	Image_inset	-	Image upload

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

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



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.

User Input vs Database Upload

The difference between a User Input and a Database Input document in PrintShop Mail Web is the following:

- **User Input** documents will always have the same data on each page. The price and number of records printed will depend on how the pricing is setup for the document.
- **Database Upload** documents require a database matching what the document was designed with to be uploaded. The number of records produced will equal the number of records in the database itself.

While the setting that determines whether user input or a database will be needed can be made from PrintShop Mail Web in the Document's properties in the Publication type, your designer can also set it up beforehand in the PrintShop Mail Design document. In the datafield's properties, you can change the Source option from Database to User Input and vice-versa as required.

Note that you can both User Input and Database fields in the same document. When this happens, you will be presented with the user inputs first, then with the database upload.

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.

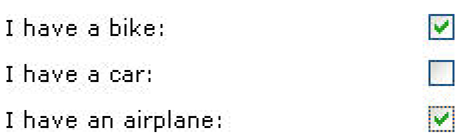
Default Value

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.



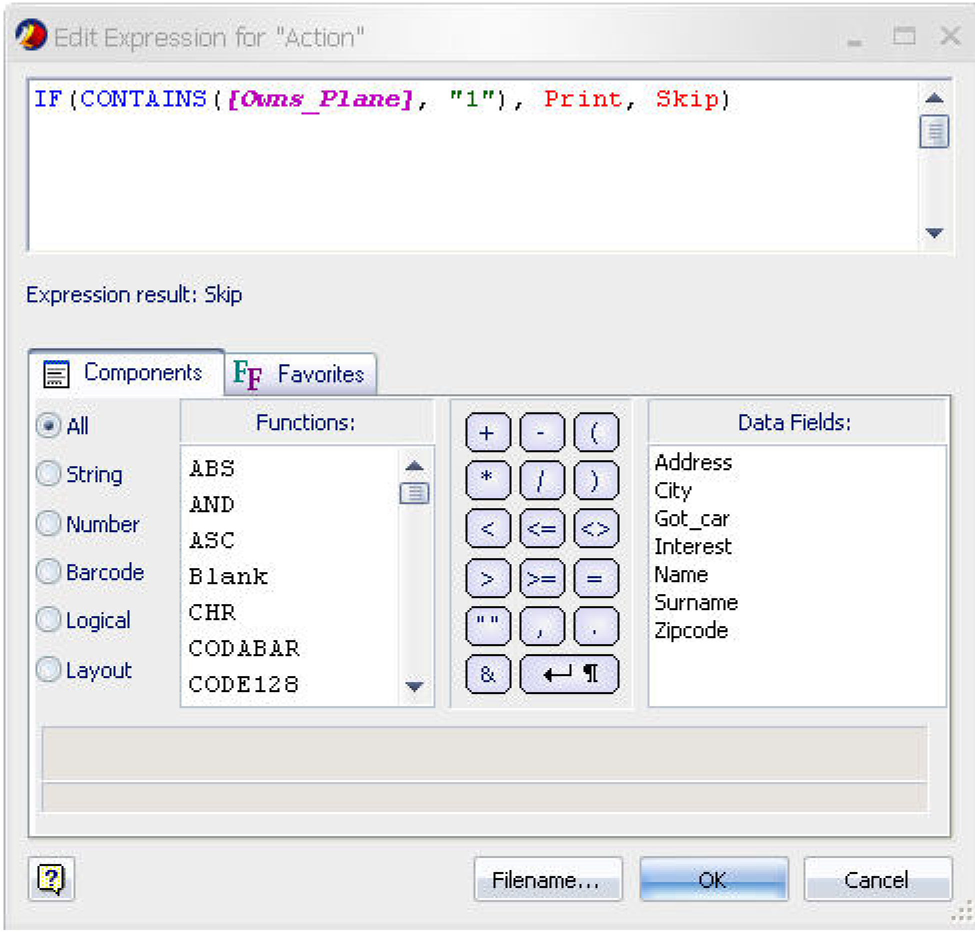
A range of checkboxes.

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

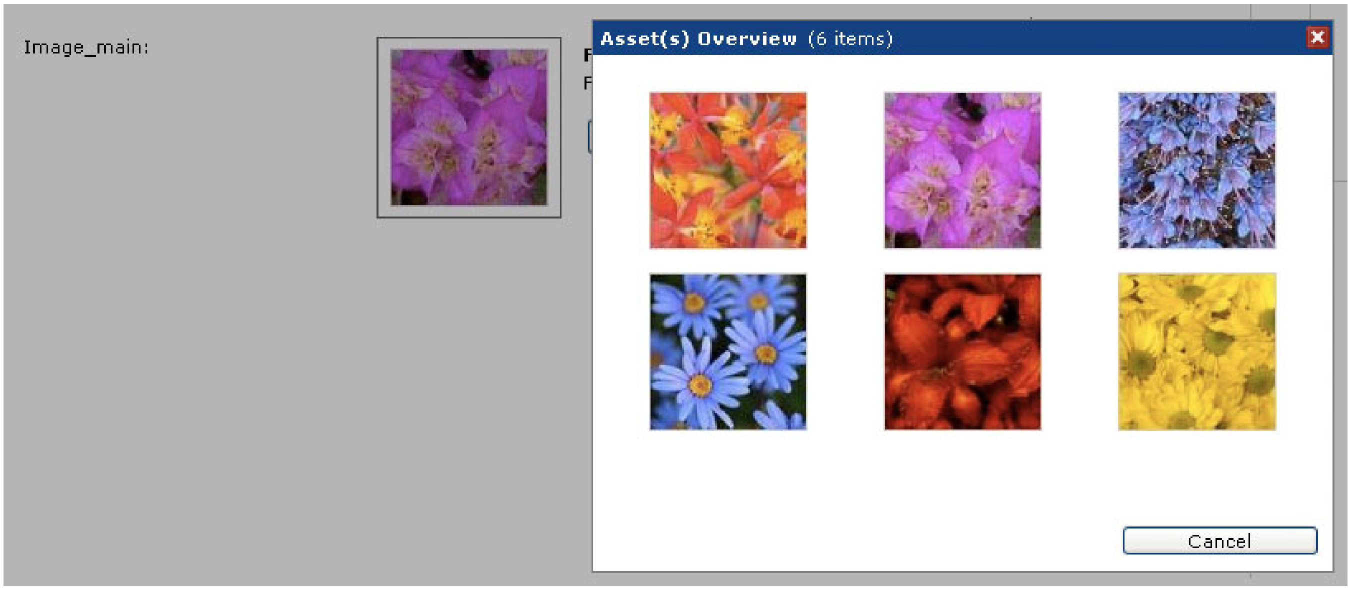
- **Custom Value:** Defines the initial status of the checkbox (checked or unchecked).



A layout condition to skip or print a layout, in PrintShop Mail Design

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.

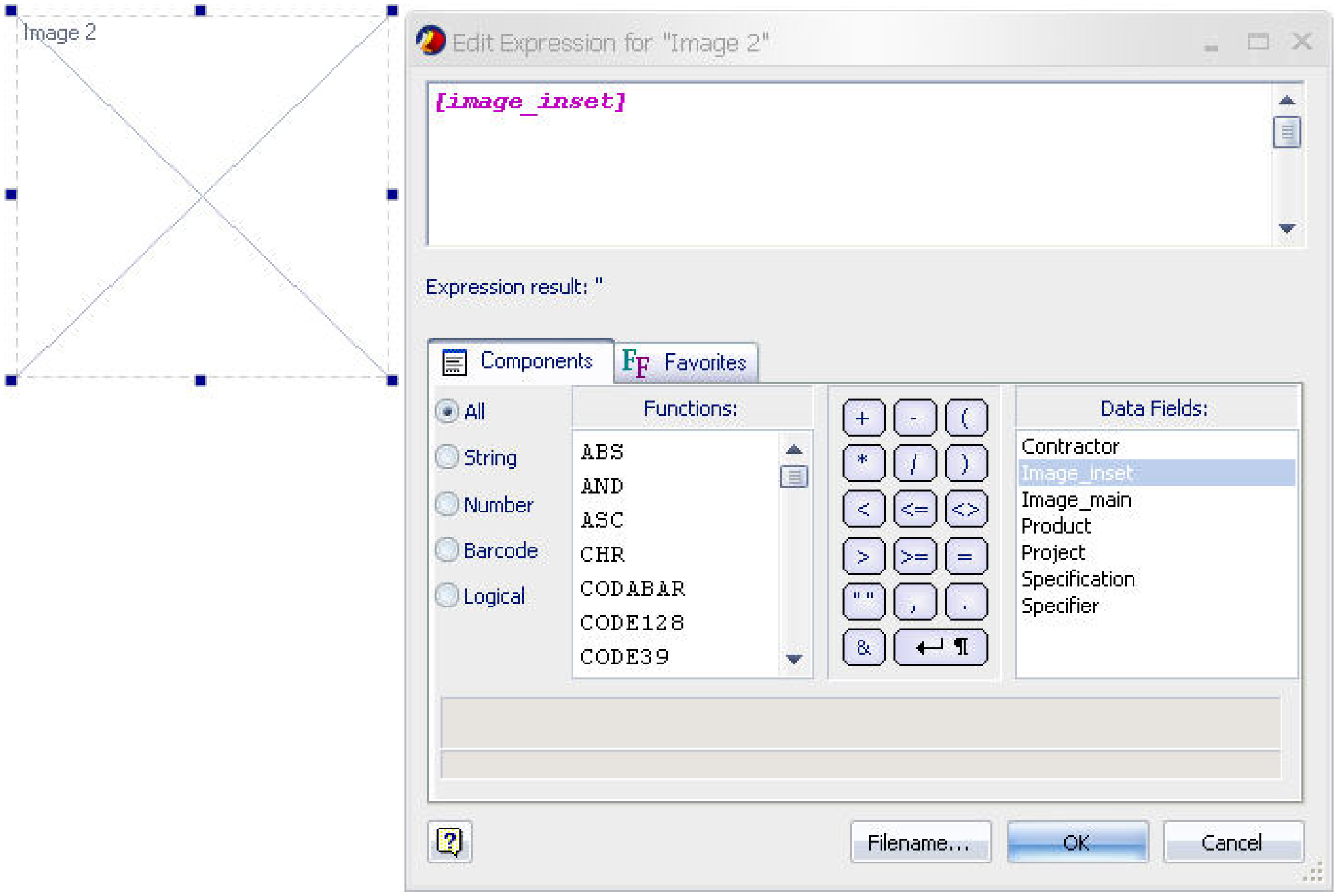
The supported image formats are: JPEG, GIF, PDF.

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 Design, 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:

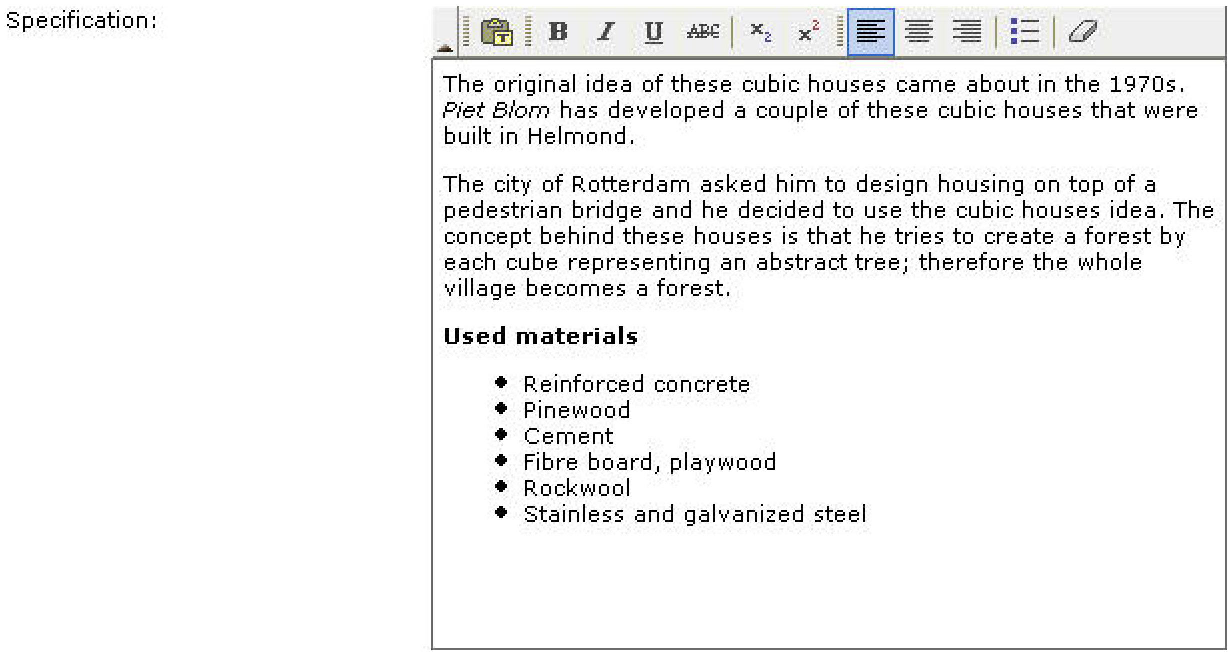
- **Default Value:** This pop-up-menu contains a list of items referring to company information and account details. The selected value defines the initial value for the field and it's retrieved automatically when creating new jobs. This is very useful for business cards, letterheads and other versioned 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.



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:

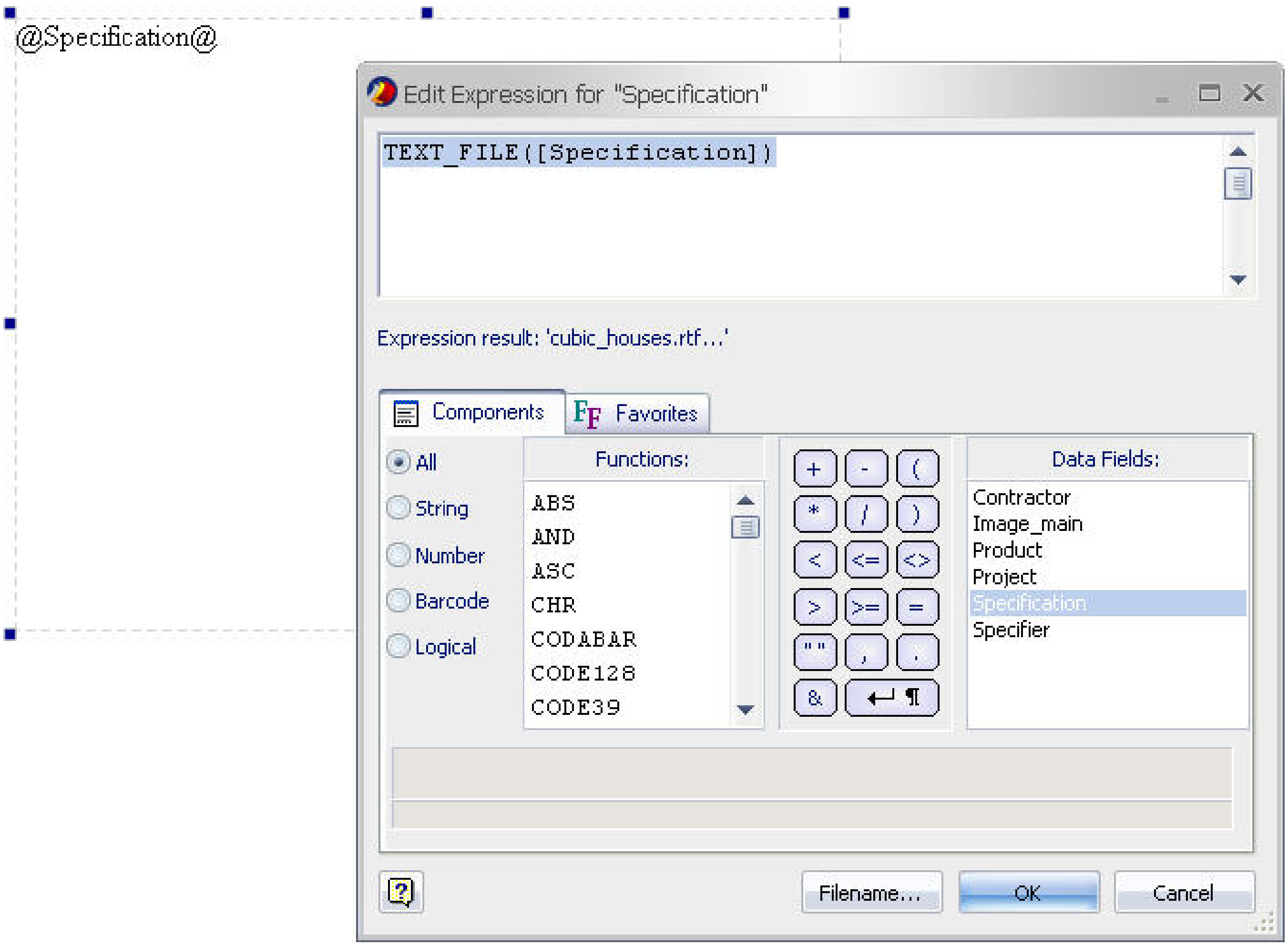
- **Custom Value:** Enter the initial value for the field.

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 Print-Shop 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

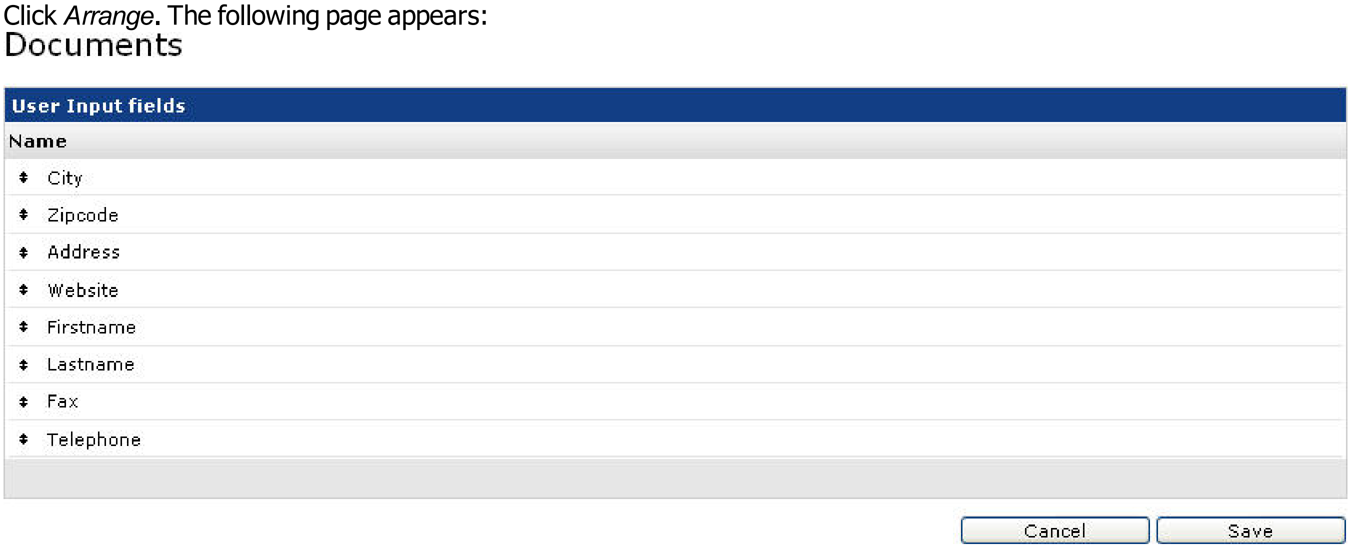
Arrange Fields

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:

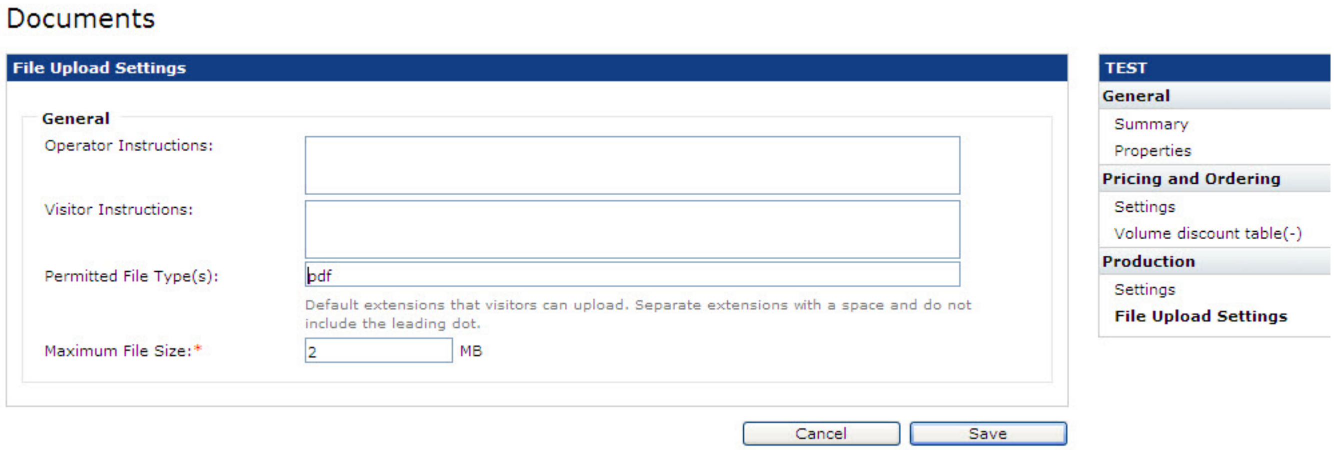
1. Click *Publication Types* in the *Menu* bar. The *Publication Types overview* page is shown.
2. Select a publication type from the overview by clicking the publication type name.
3. Click *Documents* in the side menu.
4. Select a document containing database input fields from the overview.
5. Click *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.

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.

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. You can also setup pricing using the "Price Groups" (page 137) feature.

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*.
7. Change the pricing settings:
   - **Source**: Select how the pricing will be determined.
     - **Custom**: Set the price manually in this window.
     - **Price Group**: Use a price group to set the price automatically. See "Price Groups" (page 137) for more details.
   - **Price Group**: Select the price group to use from the drop-down (disable when the source is Custom).
   - **General:** The items in this section let you enter a pricing comment and inherit pricing information from the publication type.
     - **Enable Pricing:** Check to activate the Costs, Tax and Shipping Rates groups.
     - **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 quantities. 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.
8. Click *Save* to store the changes.

Volume Discount Table

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. 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.

In PrintShop Mail Web the volume discount table is managed either from a document's properties (see "Setting up pricing" (page 103)) or through a price group (see "Price Groups" (page 137)).

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.

To create a volume discount table for a document:

1. Click on *Publication Type* in the *Menu* bar
2. Click on the publication type in which the document you want to edit is located.
3. Click on *Documents* in the sidebar.
4. Click on the document of which you want to change the pricing.
5. Click on *Settings* under the *Pricing and Ordering* section of the *Sidebar*.
6. Click on the *Edit* button
7. Choose *Custom* as a *Source* for the pricing
8. Put a checkmark under *Enable Pricing*
9. Choose *Predefined list* under the *Entry method*
10. Setup any other pricing options, then click *Save*
11. Scroll to the bottom of the page and click the *Edit* link on top of the *volume discount table*.

To add an entry:

To add an entry to the volume discount table:

1. Click *Add* to show the *Add* dialog.
2. Enter a *Quantity* and *Price*.
3. Click *Save* to store the changes and to return to the *Volume Discount Tableoverview*.

To delete an entry:

To delete entries from the *Volume Discount Table*:

1. Select one or multiple checkboxes in the first column.
2. Click *Delete*.

To import a volume discount table from a spreadsheet:

The *Volume DiscountTable* 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. Click *Import* to import a volume discount table. With the *Browse* button you can locate the file.
2. Click *Save* to process the tab delimited file.

Collections

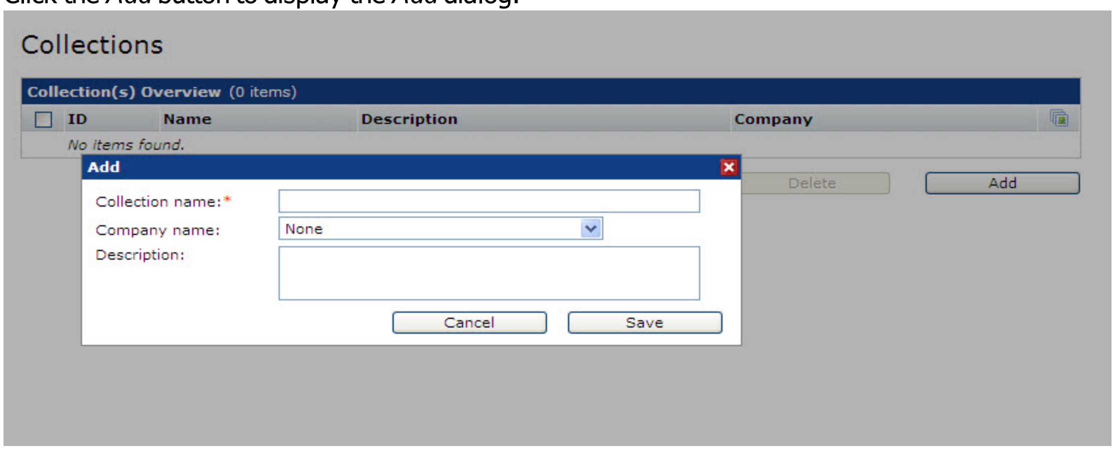
This chapter describes tasks related to image collections. Typically these tasks are performed by the designer, operator or the production manager.

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.

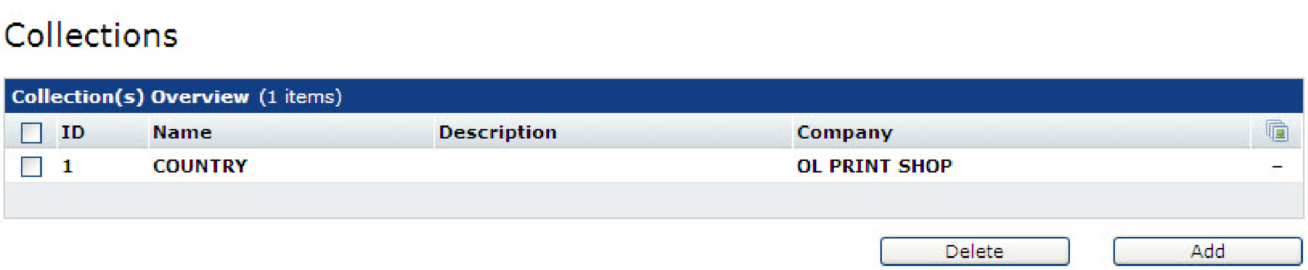
To create an image collection:

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

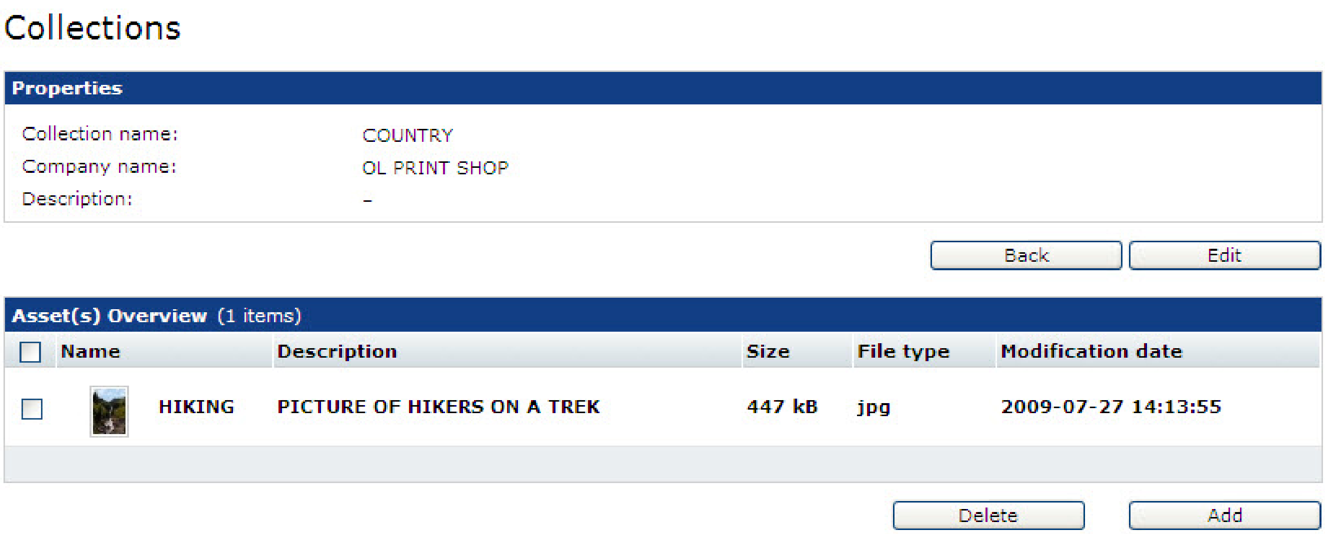


The collections overview

Add images to a collection

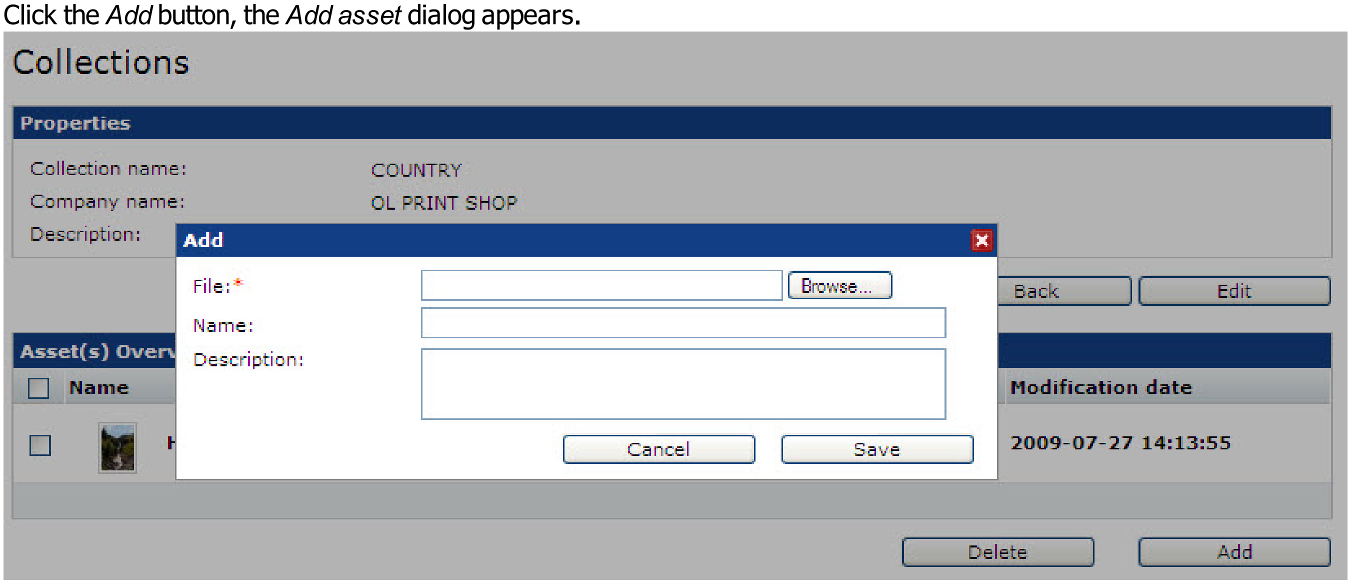
To add an image to a collection:

1. Click *Collections* in the *Menu* bar.
2. Select a collection from the *Collectionsoverview*. 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.

Delete image from a collaction

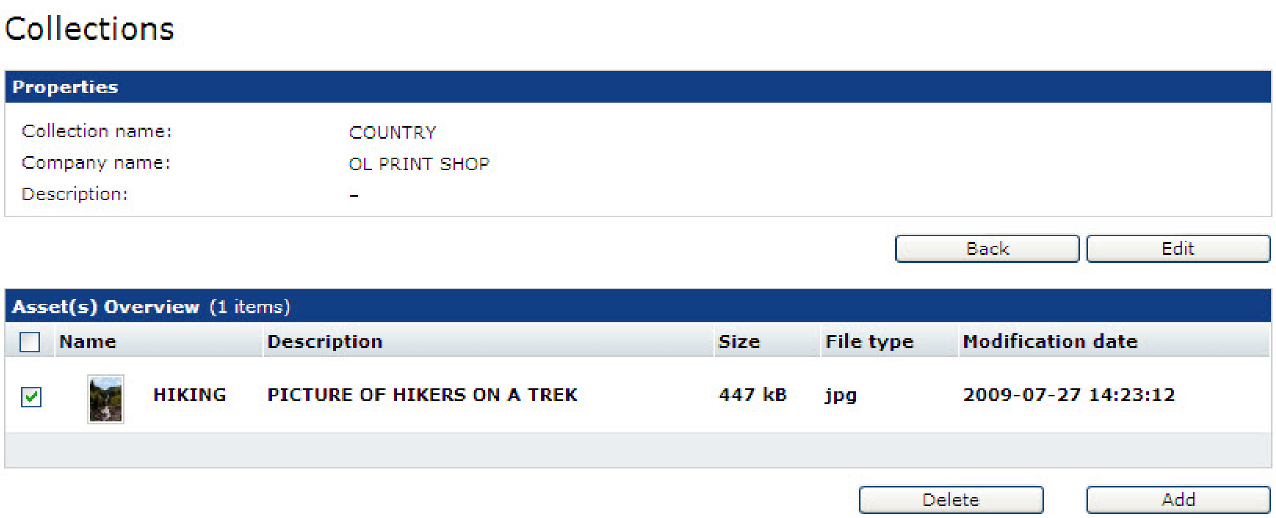
To remove an image from a collection:

1. Click *Collections* in the *Menu* bar.
2. Select a collection from the *Collectionsoverview* 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

Settings

The Settings tab in PrintShop Mail Web is used by administrators to change site-wide settings as well as configurations that can affect specific companies and documents.

To see and access the Settings tab, the current user's role must be Administrator. No other user role can access the settings.

When you click on Settings, the General Settings - "About" (page 113) page is displayed.

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 *SystemInformation* section shows information about the technical components of the system.
- **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 PrintShop Mail 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.

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 and a watermark is layered over each page 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 following information and buttons can be found on this page:

- **Details**: If a dongle is attached to the server, will display the information related to this dongle:
- **Serial number**: Indicates the serial number of the dongle.
- **Credits**: If the dongle has a limited amount of print credits, will display them. Otherwise indicates Unlimited credits.
- **OL Care license valid through**: Indicates the date until which OL Care is valid, or until which date you may obtain support and updates for the software.
- **License Information**: Click to look for the presence of a dongle, and refresh the license information on this page.
- **Upgrade Request**: Click to display a webpage on the Objectif Lune server that lets you either upgrade an existing dongle (for example to add new credits) or purchase a new dongle.
- **Voucher**: Click to display a webpage on the Object Lune servers that lets you enter a voucher number to redeem an upgrade or activation of your dongle. The Activation code provided is used with the next button.
- **Activate Ugrade**: Click to display the Activation Dialog. The *Activate Upgrade* dialog allows the administrator to upgrade the PrintShop Mail Web dongle using the upgrade code provided by Objectif Lune. Enter (or copy and paste) the *Activation code* in the *Activation code* entry field then click Activate. Once the upgrade process is completed the dialog is closed and the license page is refreshed to reflect the new dongle information.

Roles

Roles are PrintShop Mail Web's security feature and 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, but the default roles may not be deleted.

Roles Overview

This window displays the existing roles in the system with the following information:

- **ID**: The unique identifier of the role. Two roles will never have the same ID.
- **Name**: The display name of the role. Will be shown whenever the role is being refered to.
- **Comments**: A comment regarding the role. For example, a description of the tasks and rights of the role (if the name is not self-evident).
- **Users**: The number of users assigned to this role. Lets you quickly determine which roles are not used.

To add a new role:

1. Click the *Add* button.
2. 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.
3. Click *Save* to create the new role and close the dialog. The new role is added to the *Roles overview*.

To delete a role:

1. Select one or multiple user defined roles by clicking the checkbox in front of a role.
2. Click the *Delete* button.
3. The application will ask you to select a replacement role for the user accounts that have one of the selected roles.
4. Click the *Delete* button to remove the roles and assign the replacement role to the affected user accounts.

The system defined roles cannot be deleted.

To Modify a role, click on the role's display name.

Modify 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 displayed.
   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.
   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.

Here are the different properties that may be modified in the Role properties:

General

- **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.

- **View disabled...:** These 4 checkboxes 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*.

The **Access** checkbox controls whether the role can act as an Order Manager. When checked, it will give you access to all options for the order manager.

- **Access all orders:** Allows users to view and edit all orders (within all statuses and companies) in the Order Manager.
- **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:** 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.
- **Set Order Status**: Defines whether users with this role have access to a folder to adjust a print job to the selected statuses. One checkbox is displayed for each order status. A checkbox in any order status gives any user with this role the right to set an order to this status. The *Quote price* checkbox controls the right to add a price to an order with a quote request.
- **View Status folders**: Defines whether users with this role have access to view print jobs with any given status. For each status, a checkmark enables access and self-explanatory options are available to specify rights within that status.
- **View Personal Order folders**: This section controls whether users have right to see specific order folders and the jobs in these folders.
  - **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

The **Access** checkbox controls whether the users in the role can see the Companies tab in the Menu bar. When checked, it will give you access to all options for the companies section.

- **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.
- **Users Section**: Defines whether users in this role 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.
    - **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**: Defines whether users in this role see the *Publication Types* item in the side menu of the companies section.
    - **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**: Defines whether users of this role see the *Pricing and Ordering* item in the side menu of the companies section.
    - **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.
- **Department section**: Defines whether users see the *Departments* item in the side menu of the companies section.
    - **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.

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.

- **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.

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.

- **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.

Publication Types

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

- **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.

Collections

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

- **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.

PrintShop Mail

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

- **Publish Document:** Users with the *Publish document* checkbox checked have rights to publish PrintShop Mail documents to PrintShop Mail Web.

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

Languages

PrintShop Mail Web, while installed in English by default, can be used in multiple languages in which it has already been translated. You can also add your own languages by editing a plain text file containing every string used by PrintShop Mail Web. The Language Settings page displays the currently available languages and lets you manipulate them.

The Language Overview gives you information about the currently installed languages:

- Default: Indicates which language is the default one that displays when someone opens the website.
- ISO code: Displays the ISO Code of the language.
- Name: Indicates the display name of the language. The yellow star next to a language indicates it is the default used when anyone visits the site. This language is the one that will be used until a user has logged on or selected a different language from the Languages drop-down at the top-right of the site.

To add a new language:

1. Click the Add button.
2. Enter the following information:
   - **Name**: The full name of the language (preferably localized, Nederlands, Deutsch, Svenska).
   - **ISO**: The language ISO-code (two characters, NL, DE, SV, etc.).
3. Click OK.

To delete a language:

1. Select one or multiple languages by selecting the checkboxes in the first column.
2. Click *Delete*, which opens the delete confirmation dialog.
3. In the dialog,
4. Click OK to delete the selected items.

To edit a language:

- See Edit a language

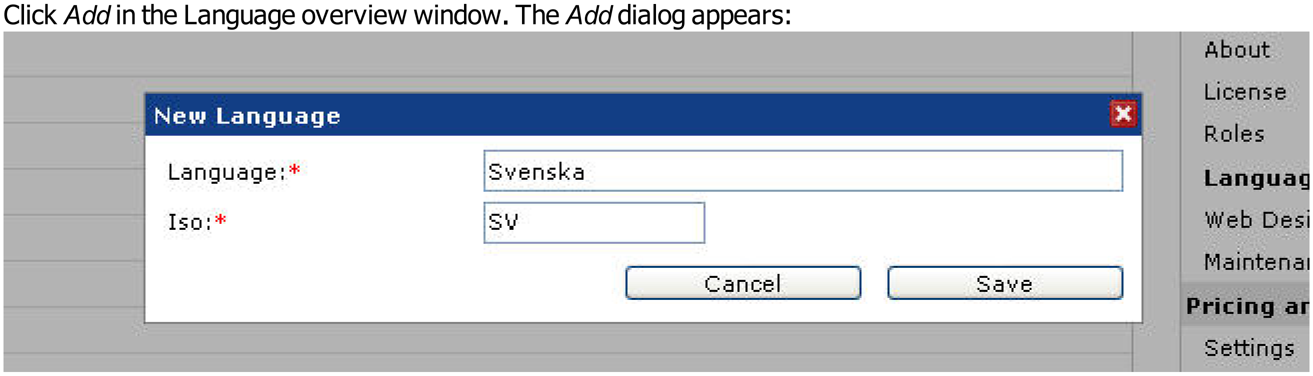
The administrator can set the system language. The system language is the default language for each company and all users. Each user can select the language they want to use. When a user selects a different language it is stored in the database. Users can change their own language preference by clicking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

Add 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*.

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.

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.
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.
   - **Status**: Select whether the language can be seen and used by users (enabled) or invisible to users (disabled).
   - **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.

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).

> The *Companies* section also has a *Web Design* section where individual settings can be applied to companies. This settings page will apply to all companies on the server, except where individual settings override them.

To change the Web Design settings:

1. Click *Edit*. The Edit window appears.
2. Edit the web design settings 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.
   - **CAPTCHA check**: Check if you want to protect yourself against automated scripts ("bots") registering on your site.
   - **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.
3. Click *Save* to store the changes and to upload the header image (if applicable).

Maintenance

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

- **Documents:** These are deleted templates/documents from the *PublicationType* 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.

To remove unused items from the PrintShop Mail Web database, select which items to delete and click *Delete*, a warning message is shown, after clicking *OK* the selected items are deleted from the database.

> 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).

Word Maintenance

Because PrintShop Mail Webuses Microsoft Word in the background and as a service, it may happen that the Word process fails for one of the following reasons amongst others:

- Microsoft Word is attempting to display a dialog such as the Activation dialog or a registration wizard.
- Microsoft Word is displaying an error such as a database or processing error and is waiting for an answer.
- msword.exe has crashed and is no longer responding.

Since Word is running as a service, dialogs and popups will not appear to any user, and a stalled or crashed window will be invisible.

This may happen while generating a softproof or an actual job output for your Mail Merge document. In these cases, the Word Maintenance Settings window can be used to kill any such "stuck" process.

> If you kill a Mail Merge process that is generating a document, this document will need to be generated again.

The Word Maintenance displays the following information for each process:

- **Process ID**: The ID of the process (as seen in the Windows Task Manager)
- **Started**: The date and time at which the process started.
- **Running Time**: The time (in minutes) for which the task has been running.

To kill a running Mail Merge process:

1. Put a checkmark next to the process you want to kill
2. Click the **Kill** button.

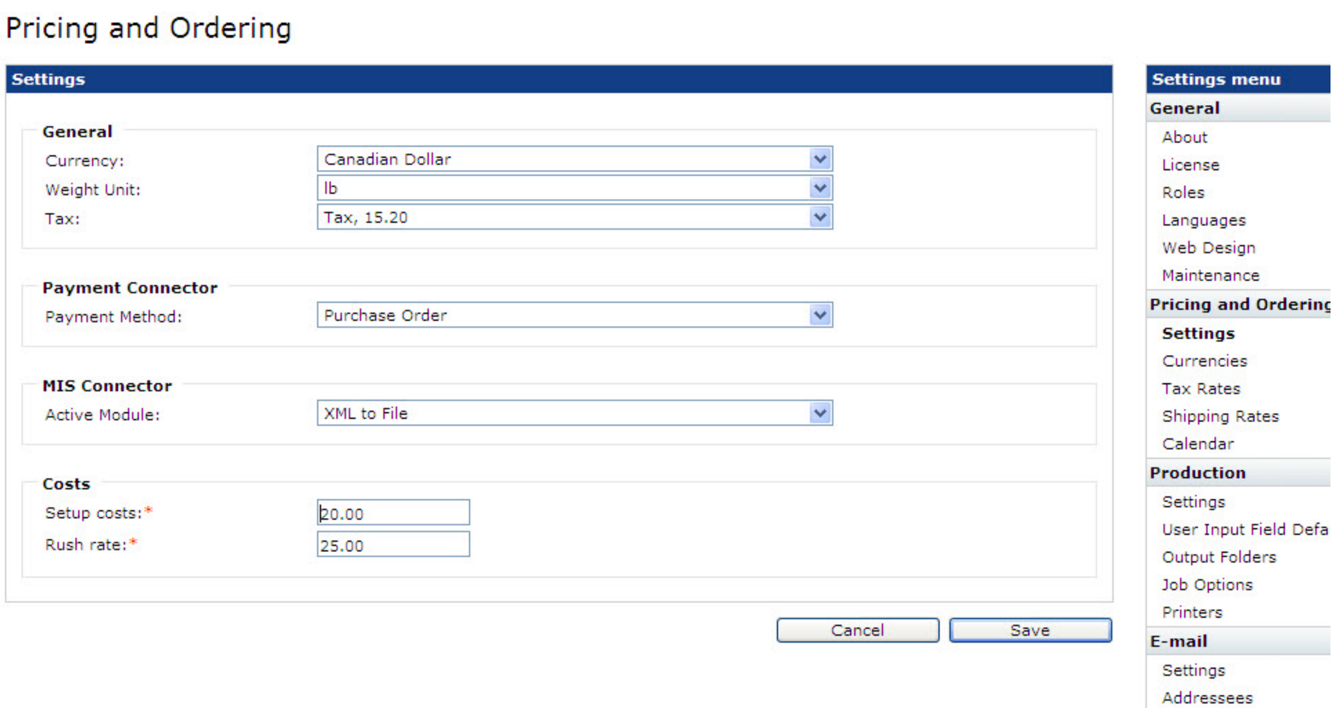
Settings

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.

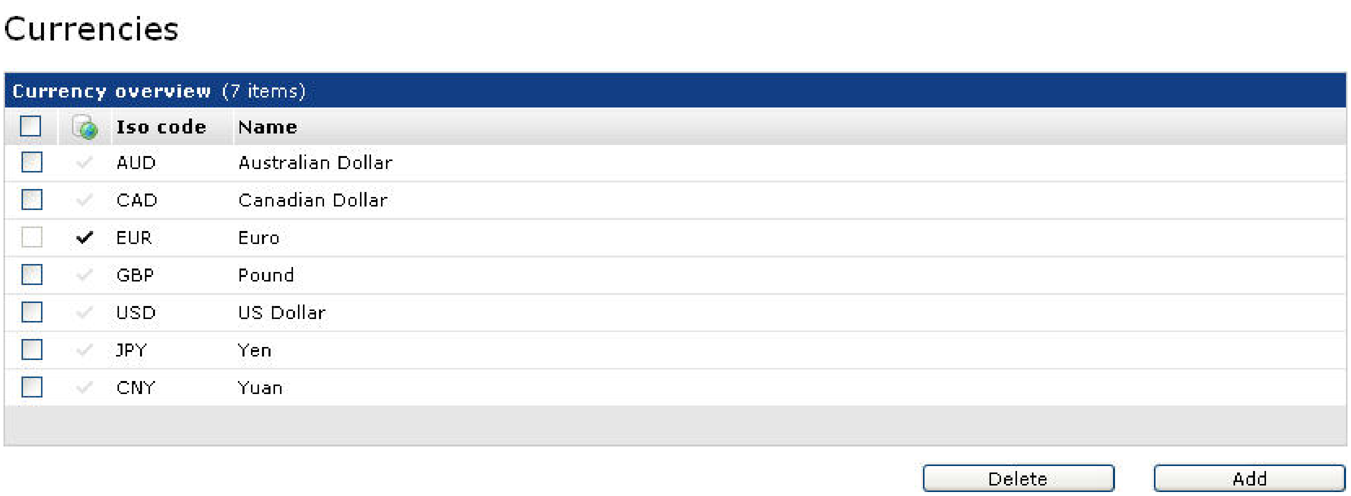
- **Costs:** In the *Costs* section defaults can be defined for:
  - **Setup Costs**: A surcharge for setting up your production environment and workstations.
  - **Rush Rate**: A surcharge for urgency printing (if applicable).

  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 Add publication types.

5. Click *Save* to store the changes.

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.

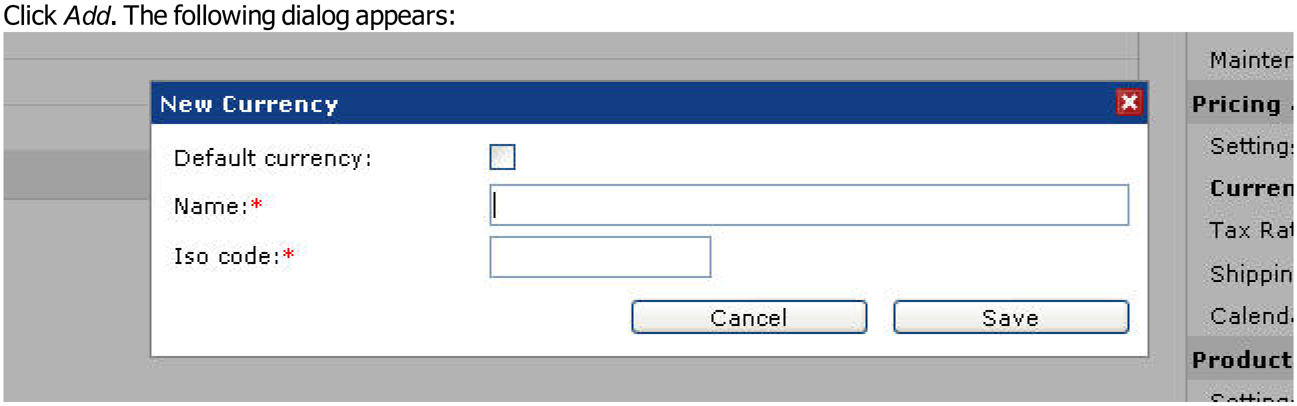


The Currency overview page

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.

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.

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.

Tax Rates

Tax Rate overview (2 items)

	Description	Country	State/Zip code	Tax Rate	Last Modified
	BTW	All regions		20.00	2008-03-11
	Sales Tax	**cUnitedStates**	**CO**	**6.13**	**2008-03-11**

Delete Add

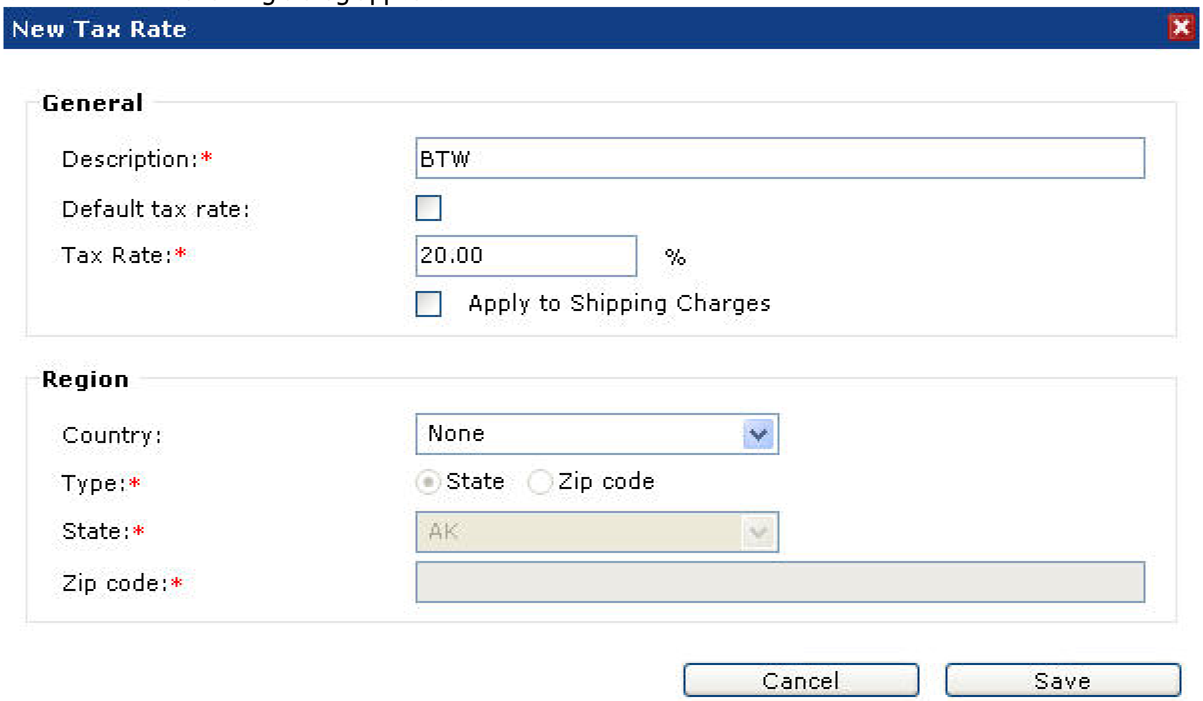
The Tax rates overview shows all available tax rates

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.

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:



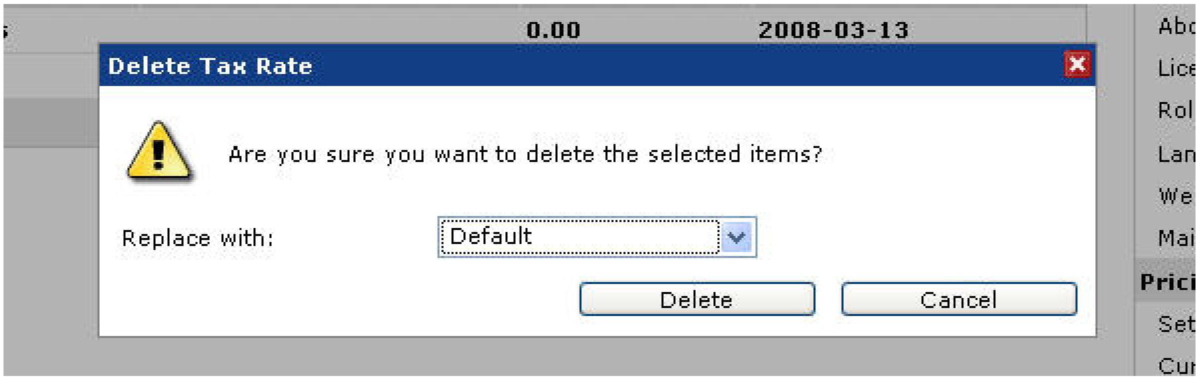
The Add new tax rate dialog

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.

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.



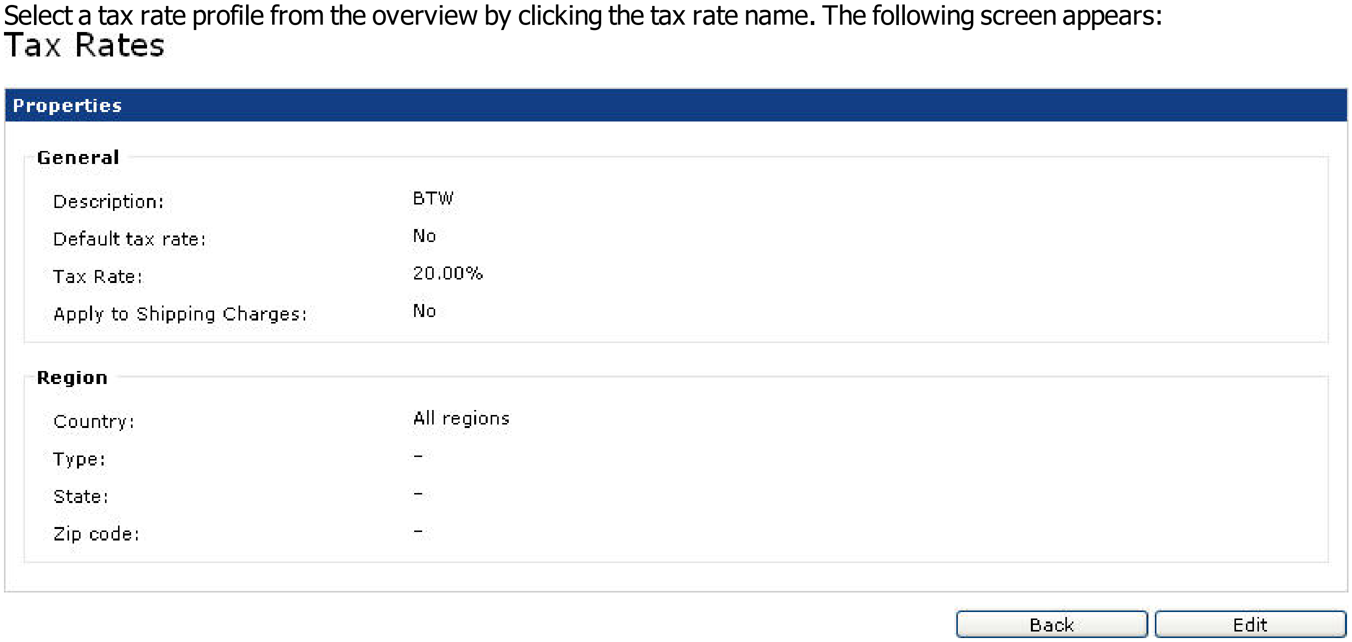
The Delete tax rate dialog

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.

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.

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).

Shipping Charges

Shipping Charge Profiles overview (1 items)

Shipping method	Service region	Delivery time	Last modified
Standard Shipping	Domestic	2-3 Business Days	2008-03-13

Delete Add

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.

Rates overview (5 items)

Weight (kg)	Rate (EUR)
1.000	2.15
1.500	2.45
2.000	3.15
2.500	3.65
3.000	3.85

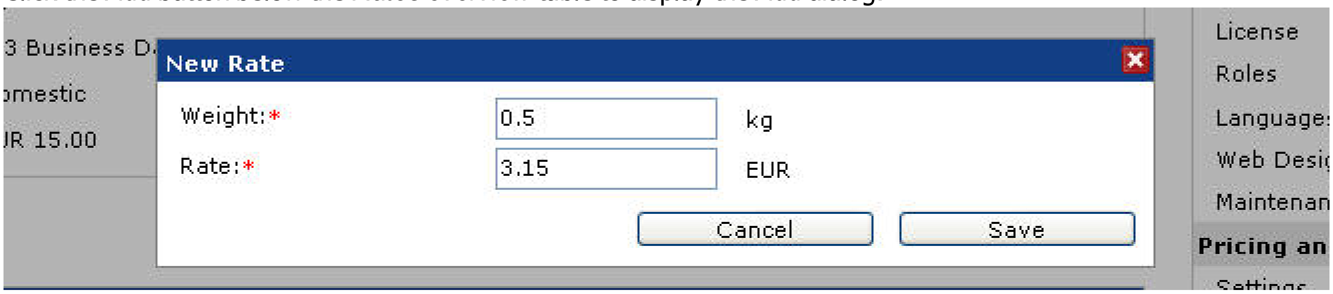
Delete Export Import Add

The Rates overview table

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:



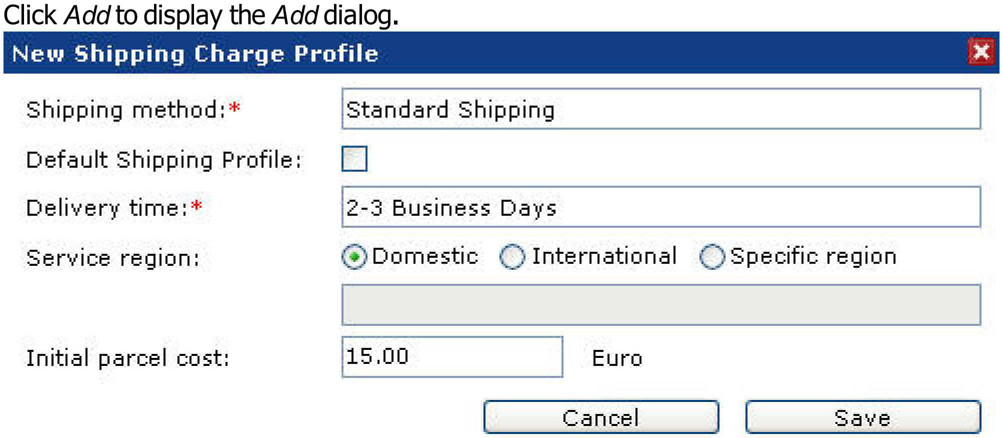
The Add new rate dialog

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

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.

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).

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.

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.

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.

Import and Export a Rates table

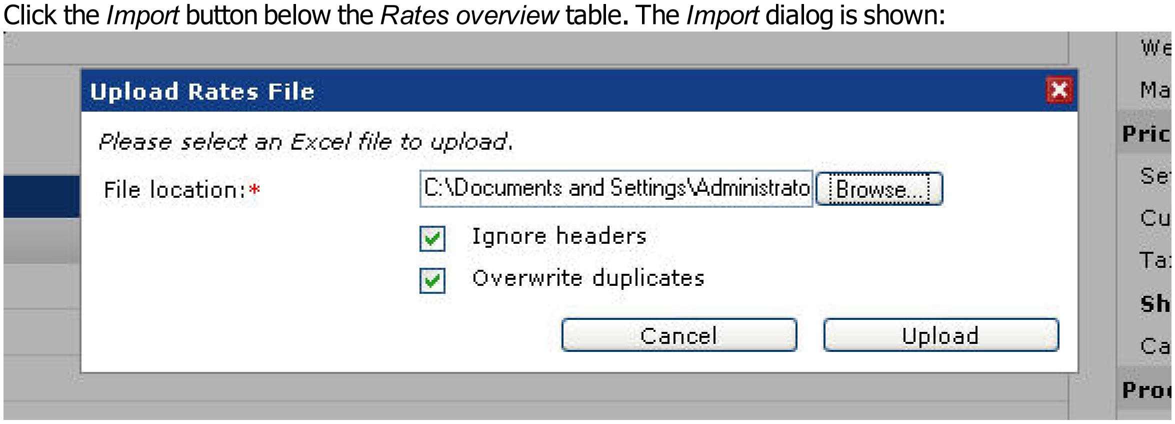
The import and export options allows the rates table to be updated without the need to re-enter the entries via the PrintShop Mail Web interface. The current rate table will be available for download by clicking the *Export* button below the *Rates* table. The easiest way to start working with these 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:

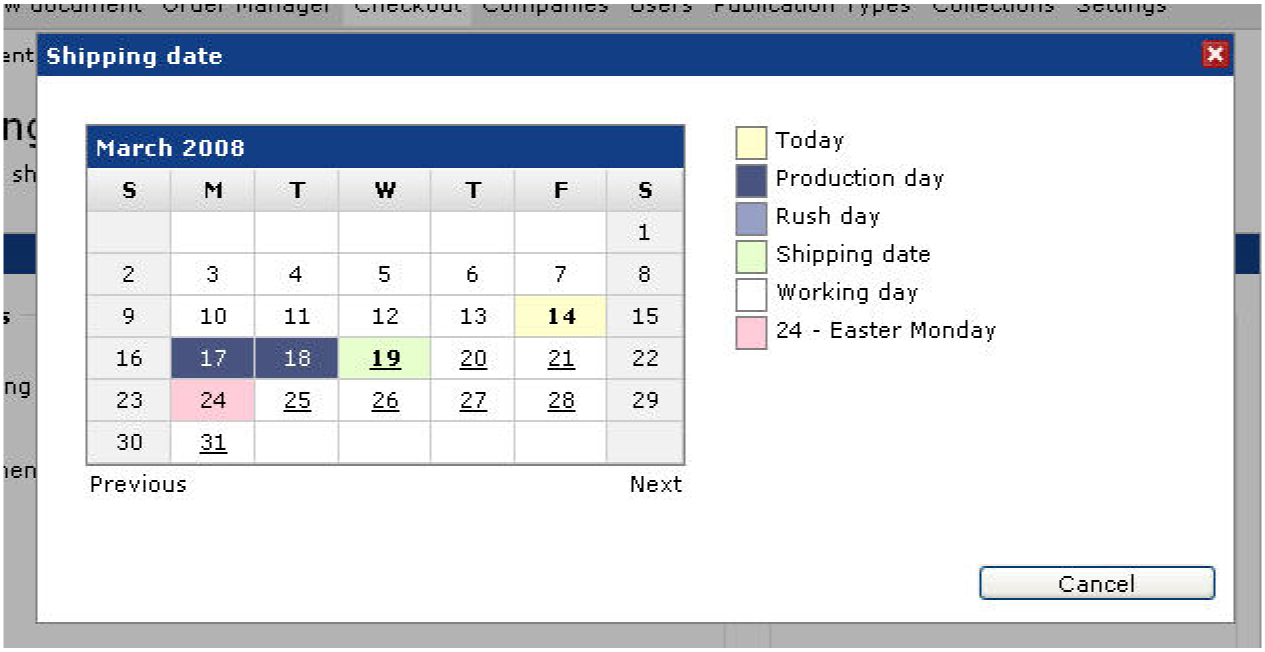


The Upload rates file dialog

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.

Calendar

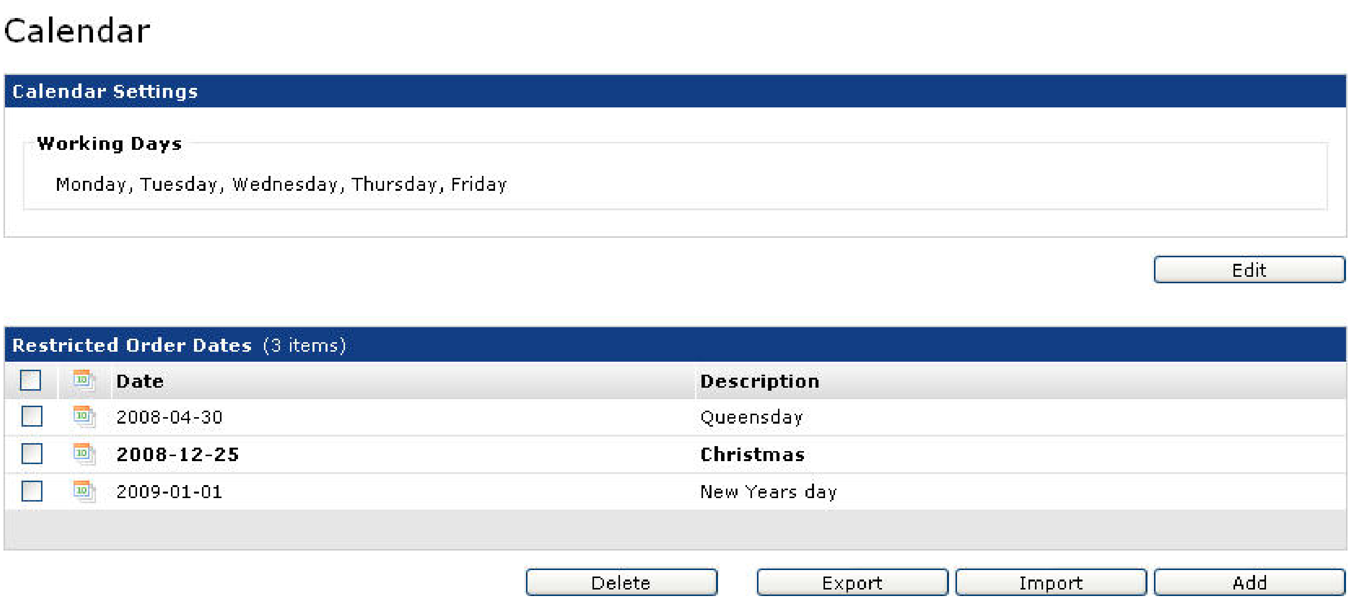
The *Calendar Settings* section lets the administrator define the working days of the print provider and setup a list with restricted order dates. These items are reflected in the shipping date calendar in the ordering process.



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.

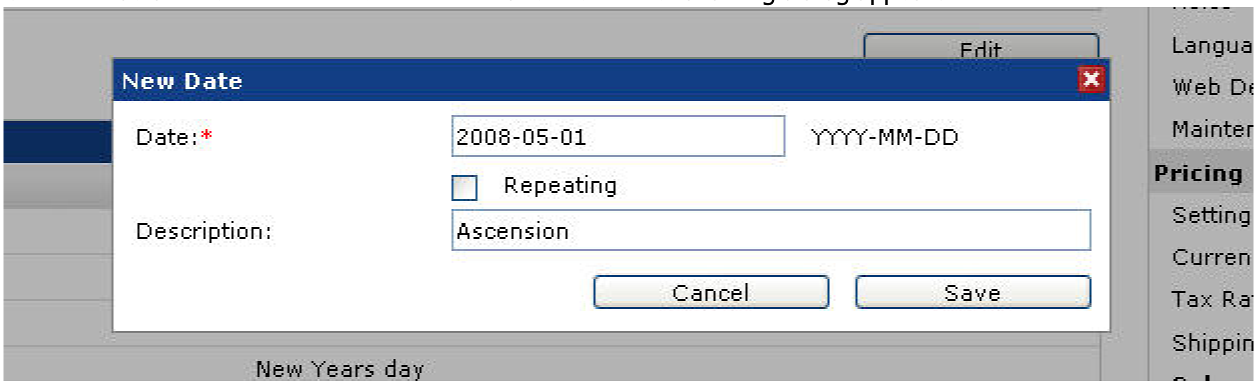


The Calendar settings page

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.

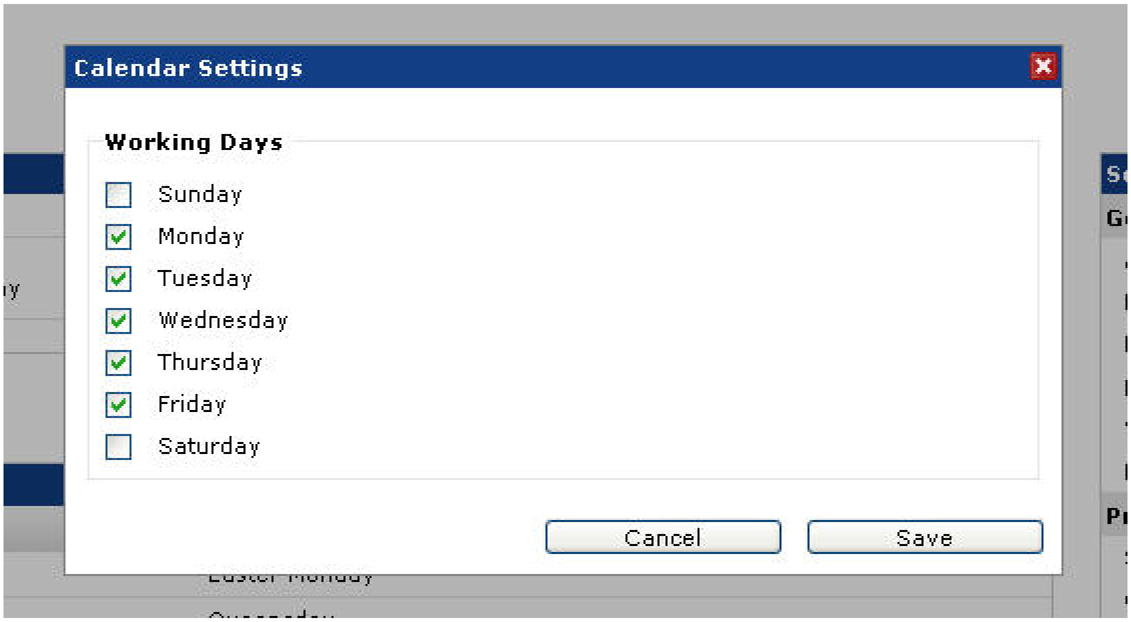
```
English
cQueensday=Queen's Day
cNewYearsDay=New Year's Day

Dutch
cQueensday=Koninginnedag
cNewYearsDay=Nieuwjaarsdag
```

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

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.

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.

Import and Export Restricted Order Dates

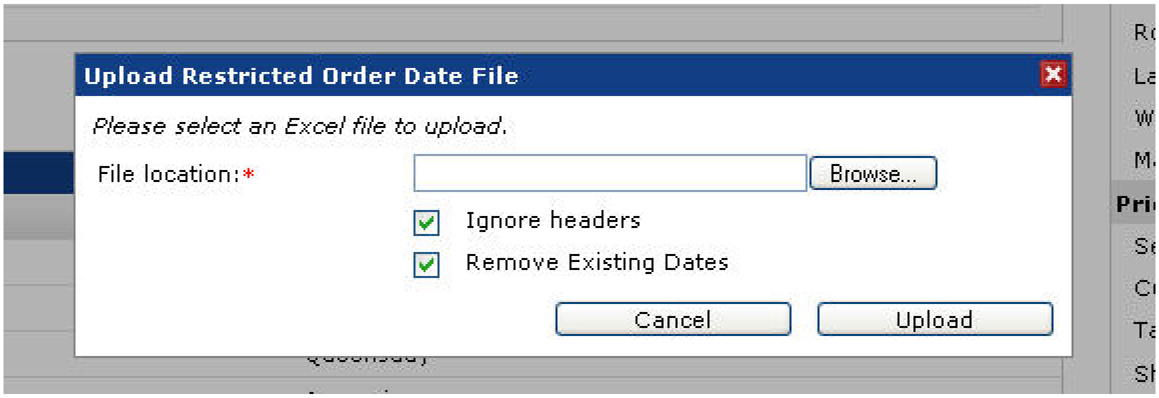
The import and export options allows the restricted order dates table to be updated as needed without the need to re-enter the entries via the PrintShop Mail Web interface. The current table will be available for download by clicking the *Export* button below the *Restricted Order Dates* table. The easiest 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.

Price Groups

Price Groups are a method by which you can define a shared pricing for publication types and documents, either for your whole site or for a specific company. This lets you speed up the setup of new documents when they are of the same type of pricing.

To access the Price Groups settings page:

1. Click *Settings* in the *Menu* bar.
2. Click *Price Groups* in the *Pricing and Ordering* section.
3. The *Price Group Overview* displays the current price groups that have been configured in the system.

To edit an existing price group

1. Click on the price group name
2. Change the price group settings
3. Click Save.

To add a new price group

1. Click the **Add** button
2. Setup the parameters for the price group:
   - **General Group**
     - **Name**: The name that is displayed when selecting the price group.
     - **Comments**: The comment text is shown in the checkout overview (shopping cart) and can be used to point out pricing information to the end user.
     - **Enable Pricing**: Check to activate the Costs, Tax and Shipping Rates groups.
     - **Global**: Check for the price group to be available for all companies.
     - **Company**: Select a company to which the price group should apply (disabled if the Global option is checked).
   - **Quantities Group**: The *Quantity* section defines the entry method of quantities. 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 (volume discount table)**: 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 Group**: 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 Group**: 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 Group**: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.

3. Click **Save**.

Discount Vouchers

Discount Vouchers are codes that you can generate and distribute to your clients in order to offer discounts on the order prices. Vouchers may have expiry dates and a limit on the number of times it may be used.

Discount vouchers are always unique and will never be used twice within the same installation of PrintShop Mail Web. The characters used in generating voucher codes is limited to this set: 23456789BCDFGHJKLMNPQRSTVWXYZ . This avoids confusion between characters (O and 0, l and I, etc) as well as the creation of improper, damaging or funny words in the vouchers. Vouchers consist of 12 characters separated in 3 groups of 4 (e.g. B5KP-RZ92-TSF6).

> There are *353 814 783 205 469 041* different possible vouchers codes with this combination of parameters, so you never need to worry about running out.

The Discounts Voucher Overview displays all your current vouchers:

- **Status**: Displays whether a voucher is enabled or disabled. Click to change this status.
- **Name**: Displays the name of the voucher as given when it was created.
- **Code**: Displays the voucher code. This is what should be given to your clients.
- **Used**: Displays the number of times the voucher was used. A voucher is "Used" when the order in which it has been applied has been approved.
- **Reserved**: Displays the number of times the voucher was reserved. A voucher is "Reserved" whenever it is added to an order and until it is approved. Once the order is approved, the voucher goes into "Used" status.

> Reserved vouchers are included in the total number of used vouchers. So if you limit the number of used vouchers to

50, you may have up to 50 reserved vouchers, used vouchers, or a mix of both.

To add a new voucher, click the Add button then fill in all the required information:

- **General Group**:
  - **Name**: Enter a name for the voucher. This can be, for example, the name of a promotion, a client or an event.
  - **Status**: Select whether this voucher is enabled or disabled. This can be easily set from the overview one the voucher is created.
  - **Minimum order amount**: If you wish for a minimum order amount to be necessary for the voucher to apply, enter it here.
- **Discount Group**:
  - **Free Shipping**: Check if the voucher should remove all shipping charges on the order.
  - **Calculate discount on prices including taxes**: Check for the discount to be calculated after taxes are applied, instead of before. Please note that depending on local regulations, enabling this may go against the law. Please use this option accordingly.
  - **Discount**: Select whether the discount should be of a static **amount**, or a **percentage** of the order.
  - **Amount**: If the discount type is a static amount, enter the amount here (e.g. 10.00)
  - **Percentage**: If the discount type is a percentage, enter it here. (e.g. 20)
- **Expiration Group**:
  - **Limit voucher to date range**: Check if the voucher should be limited in time.
  - **Start Date**: Enter the date where the voucher will be valid.
  - **End Date**: Enter the date where the voucher will be disabled and no longer be accepted.
  - **Limit number of times the voucher can be used**: Check if the number of uses of the voucher should be limited by number. This can be combined with the date limit.
  - **Number of times voucher can be used**: The maximum number of vouchers. This includes both reserved and used vouchers.
- **Products Group**:
  - **Global**: Check to apply the voucher to all companies.
  - **Company**: Use the drop-down to select to which company this voucher applies. Only available if Global is unchecked.
  - **Limit voucher to certain documents**: Check to activate the Documents box and limit the voucher to certain documents.
  - **Documents**: Check each of the document this voucher should apply to. Only available if the previous option is checked.

To delete an existing voucher:

1. Put a checkmark next to the voucher(s) you wish to delete.
2. Click the **Delete** button
3. In the confirmation dialog, click **Yes** to confirm deletion or **Cancel** if you change your mind.

Notes about vouchers:

- Vouchers that have reached their limit either by date or by number of times used are automatically disabled.
- Vouchers that are deleted from the PrintShop Mail Web interface are kept in a hidden status in the database in order for the code not to be re-used in the future.
- Clients that try to redeem a voucher that is expired will have a warning that the voucher is invalid due to expiry.
- Clients that try to redeem a voucher that was deleted will have a warning that the voucher is invalid due to deletion.
- Orders that contain price quotes can use vouchers only once the administrator has quoted a price. When the client reviews the price to checkout the order, the voucher field will appear.

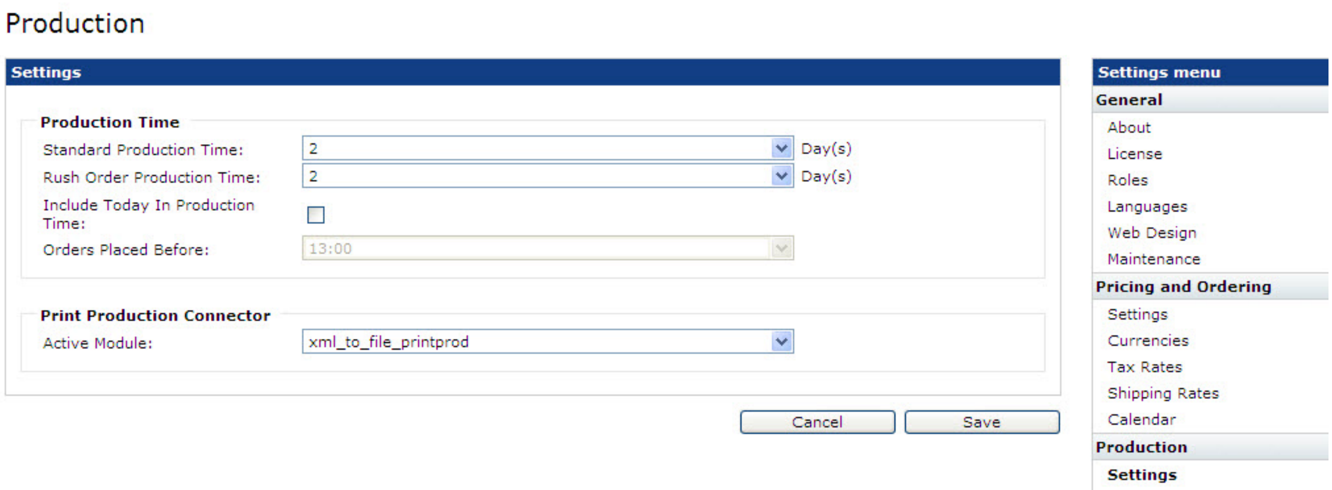
Production Settings

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. For more information see 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.

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.

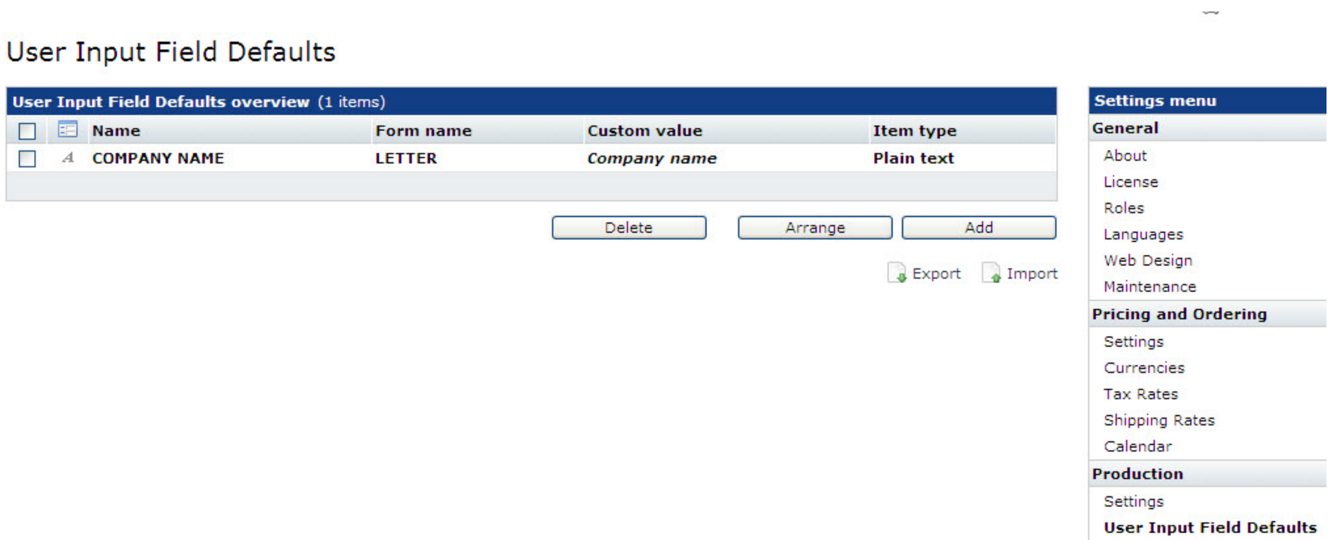
To invoke this process the designer needs to specifify the name of the "default item" in the *Remarks property* in PrintShop Mail. The name of the "Default item" should be surrounded by square brackets.

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

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.
   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.
4. 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.

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.

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.

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.

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 PDF files that are sent to those folders are print jobs that are sent to PDF instead of a printer or spooler, when the job is processed by the operator. See "Job Properties" (page 71).

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.

To add a new output folder:

1. Click the *Add* button below the *Output Folders overview* to show the *Add* dialog.
2. 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.
3. Enter a *folder path* for the output folder. This must be a correctly defined path on the computer (such as C:\Path\To\Output\ ) or a full UNC network path (such as \\server\share\path\to\output\ ).
4. Click *Save* to create the new folder.

UNC Paths are subject to security restrictions. PrintShop Mail's security on the network is determined by the credentials given to the Apache2 service. To modify the credentials, go to Control Panel, Administrative Tools, Services. Right-click on Apache2 and click Properties. Go in the Log On tab, and change the username/password for the ones you wish you use. You will need to restart the Apache service from here or from the PrintShop Mail Web Services Manager.

To edit an existing output folder:

1. Click the name or path of the output folder you wish to modify. The Edit dialog appears.
2. Edit the Name or New output folder server path to your liking.
3. If the output folder has changed, use the options in this window to either *Copy the content from the previous folder to the new folder* and/or *Delete the previous folder and its contents*.

To delete an output folder:

1. Put a checkmark on the line for the folder(s) you want to delete.
2. Click the *Delete* button.
3. In the *Delete* dialog, you will be prompted to choose towards which output folder you want to point any document currently using the output folder. Select a folder from this dropdown, or leave it as the *Default* output folder.
4. Click *Ok*.

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>

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.

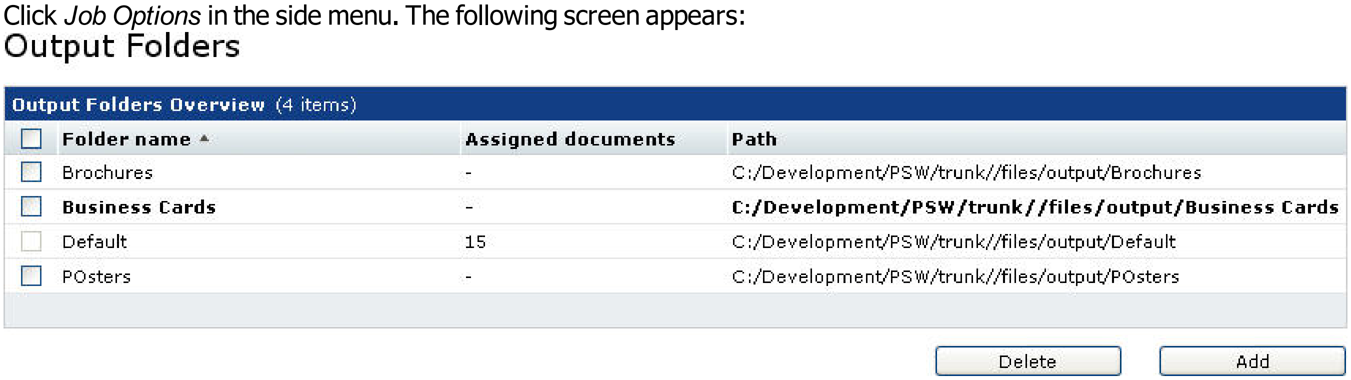
Job options files are plain text files, a common text editor, like NotePad++, can be used to change the settings in the file. PrintShop Mail Web does not have an option to preflight job options files and cannot determine if a job options file is valid. Manually edited job options files and even job option 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.

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:



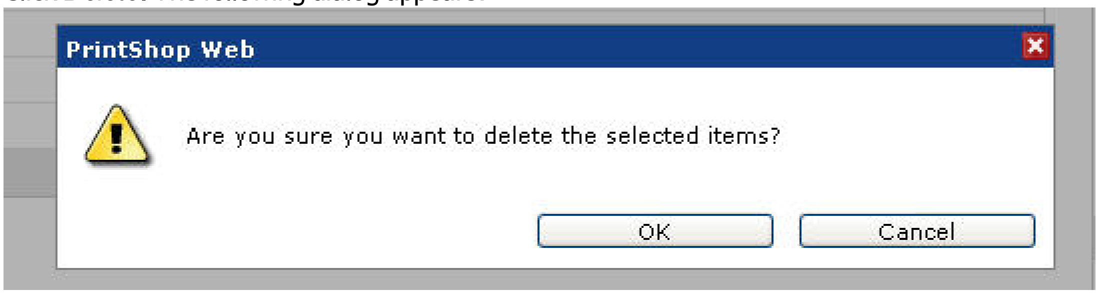
The Job options overview

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.

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.

Printers

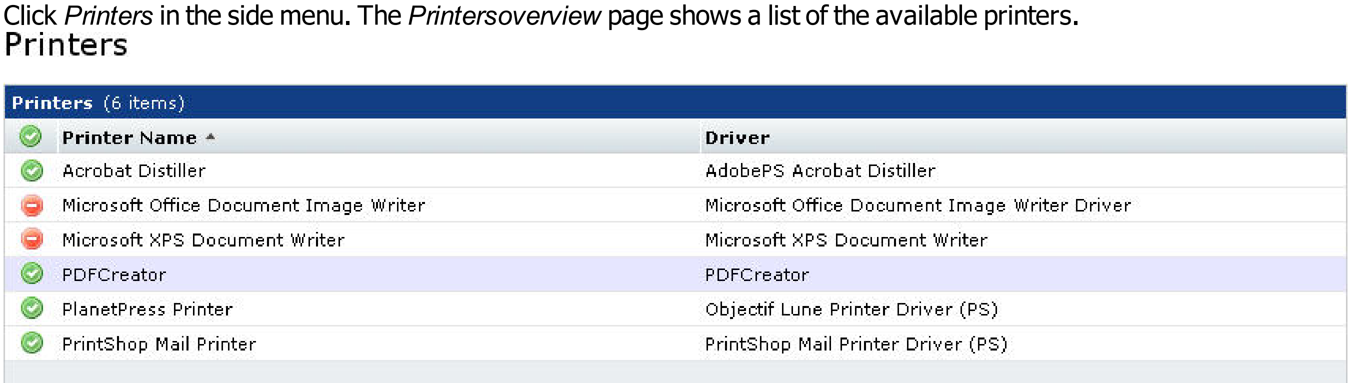
In the *Printers overview* from the *Settings* section all the available printers are displayed. This list is provided by PrintShop Server. Stopping and starting PrintShop Server will refresh this printer list.

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.

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 *Printersoverview* page shows a list of the available printers.



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.

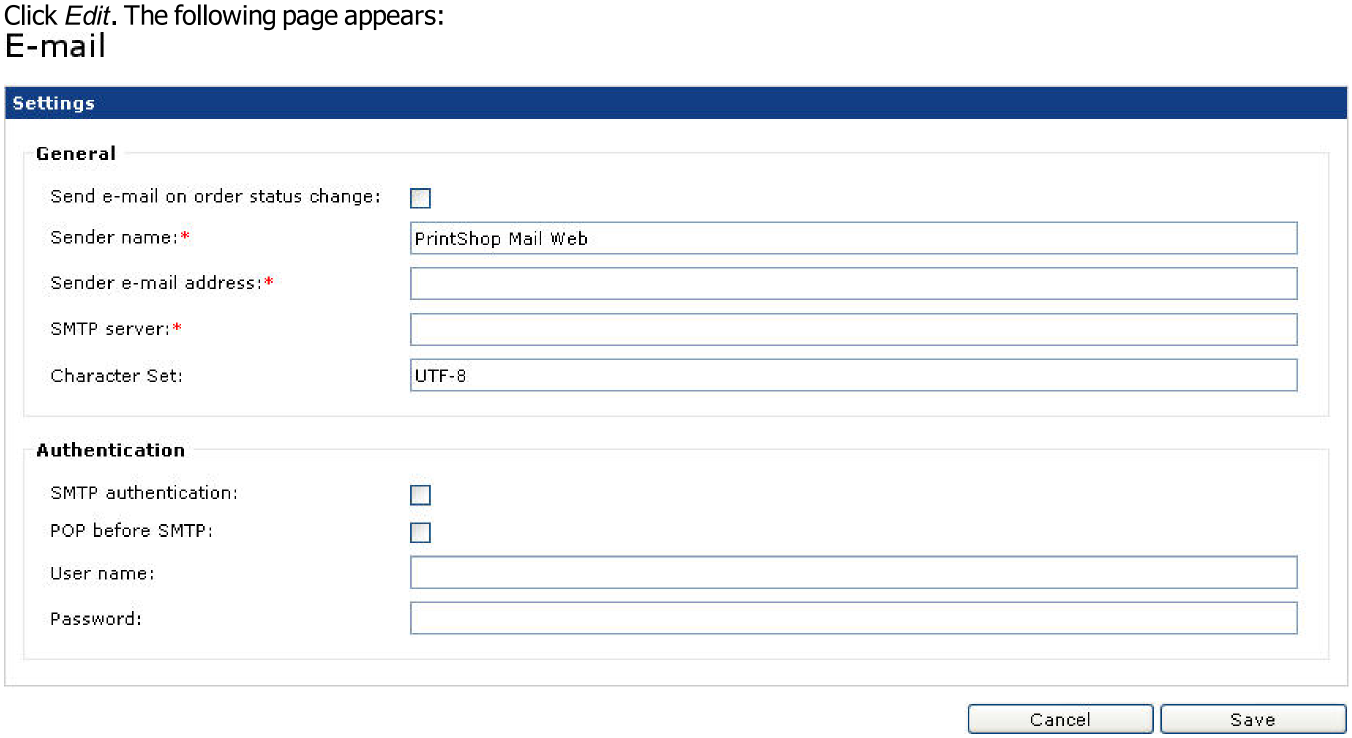
E-mail Settings

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.

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:



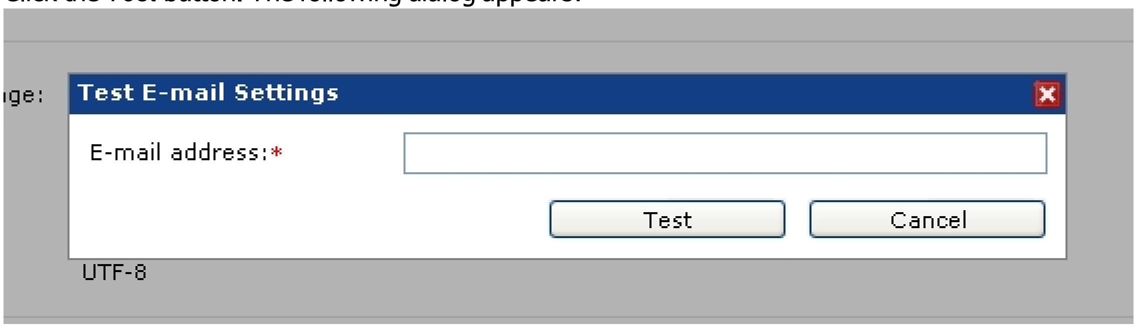
The E-mail Settings page

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.

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.

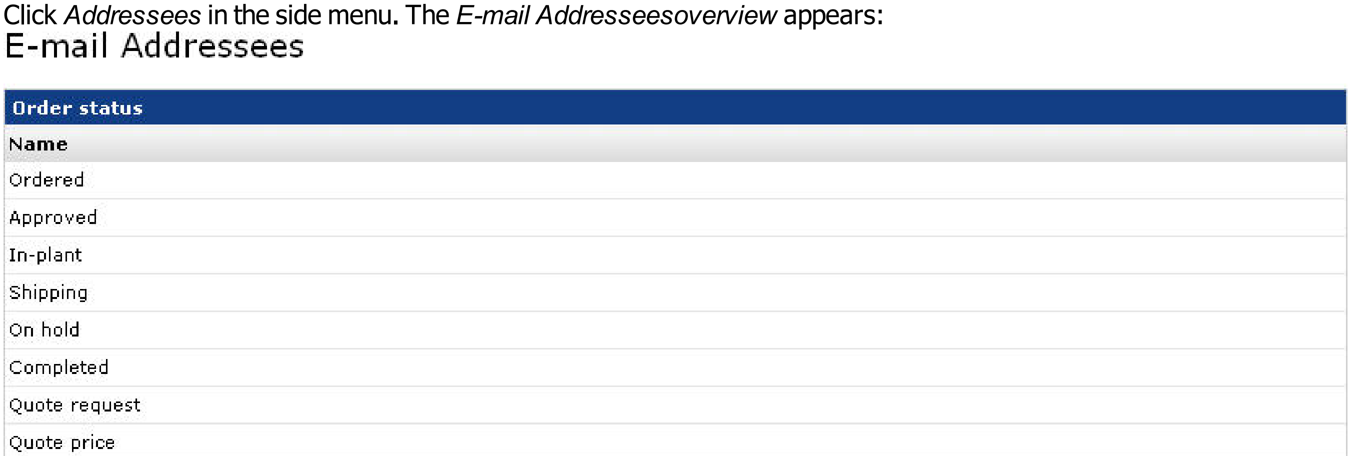
E-mail Addressees

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 Addresseesoverview* appears:

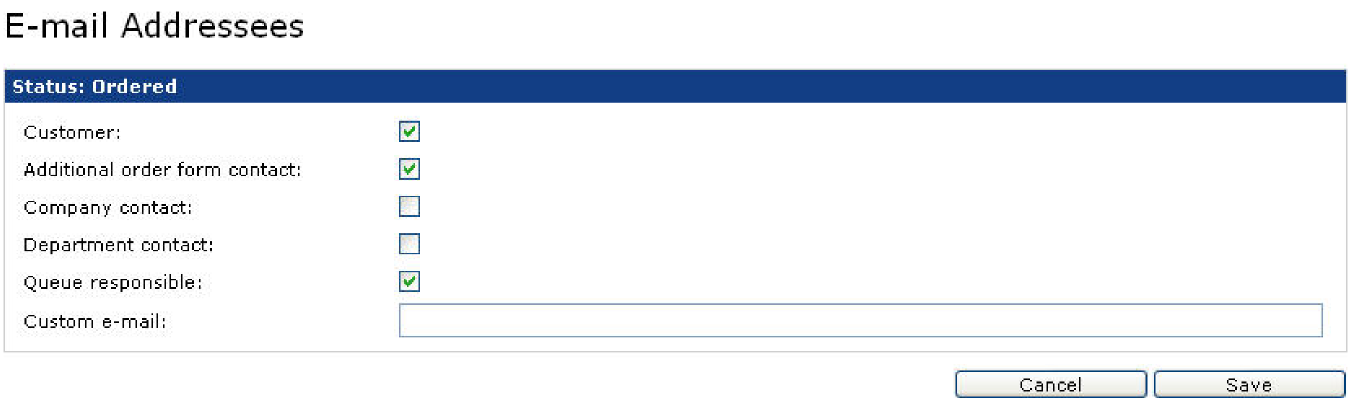


E-mail Addressees

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:



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.

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

Edit a default e-mail template

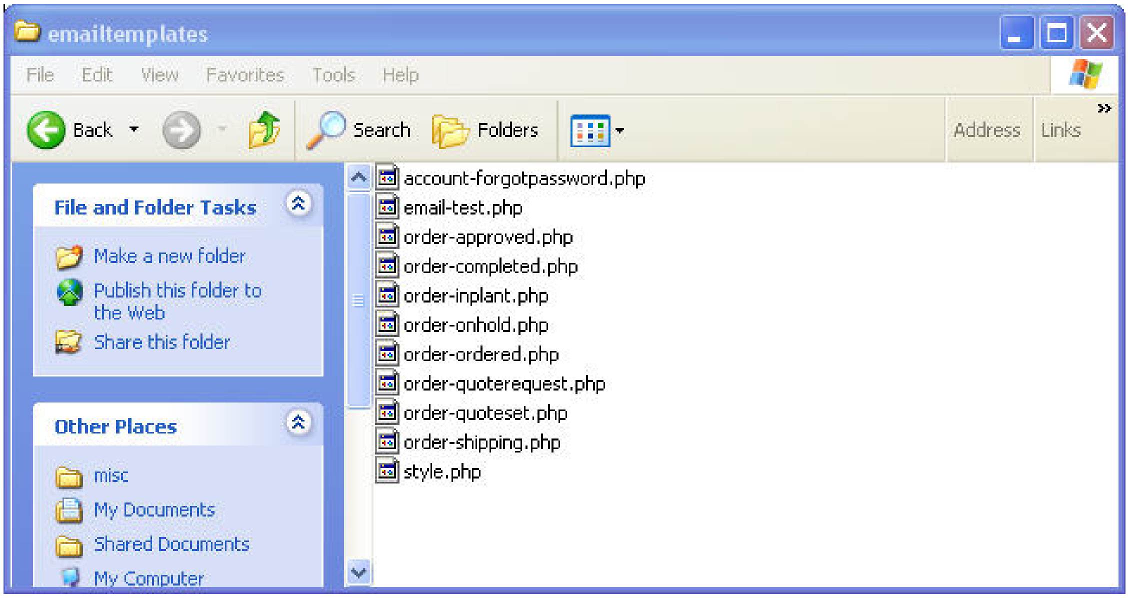
To edit a default e-mail template:

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.

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.



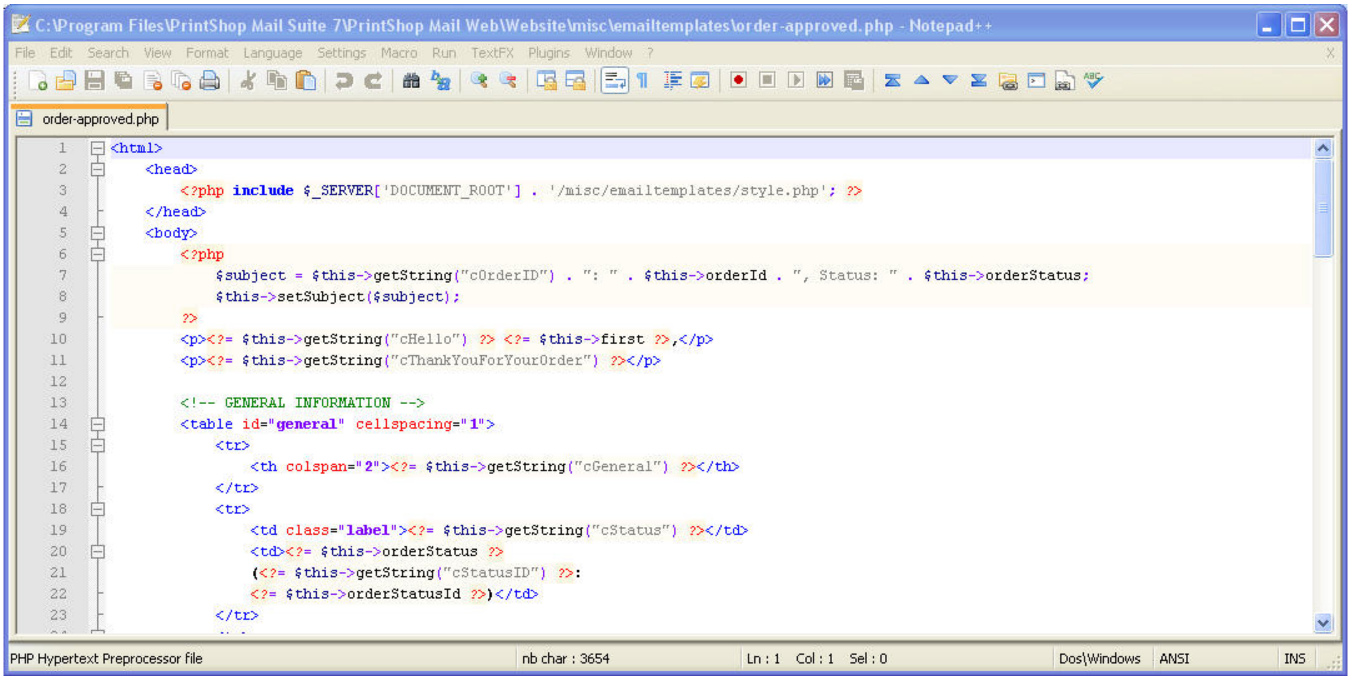
E-mail templates folder

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.

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 . "
"); ?>
  <?php echo $this->skipEmpty($this->shippingaddress2); ?>.

Modules Settings

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

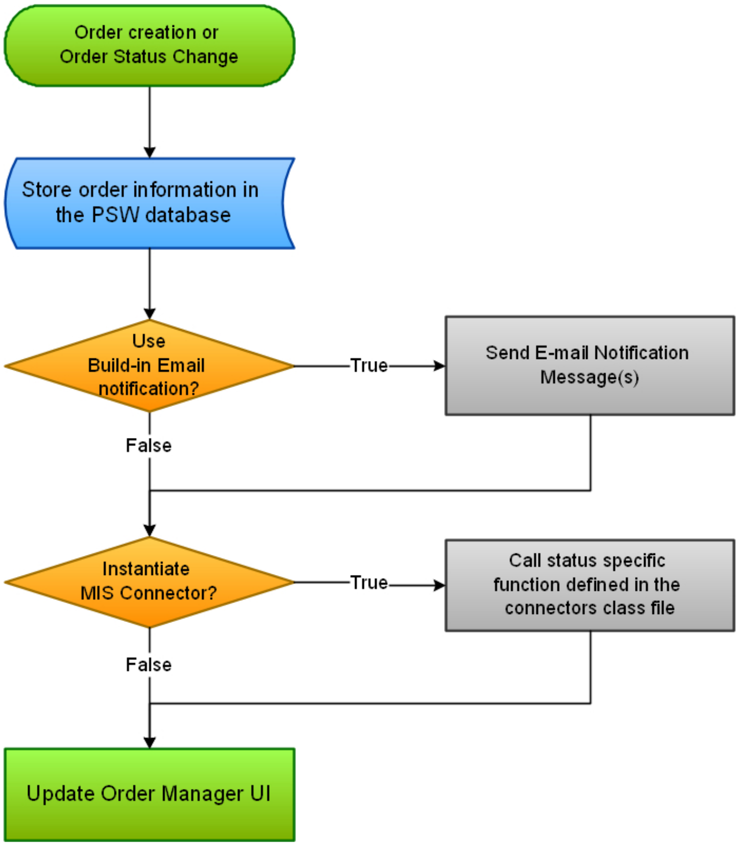
The *Overview* option in the *Modules* section from the *Settings* side menu shows an overview of the installed modules. The modules are grouped by their module type. Click the plus-icon in front of a module type to view the available modules for that type. For more information see the guides of the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

Here are the different module types that are available in PrintShop Mail Web:

- The **MIS** Connector Framework is build on top of this module framework and is called at order creation and order status changes. MIS Connectors are used to automatically transfer order information from PrintShop Mail Web to external MIS systems.
- The **Print Production** Connector Framework is build on top of this module framework and is called at order creation and order status changes. Print Production Connectors are used to automatically transfer order and job information from PrintShop Web to external print production systems.
- **Payment** modules allow your store to communicate with merchant banks to transfer money following a sale. Payment modules allow you to collect money following a sale. With the introduction of PrintShop Mail Web administrators can install additional payment module. Payment modules require a Business To Consumer (B2C) license on the PrintShop Mail Web dongle."Moneris Payment Module" (page 173)

MIS Connectors

MIS connectors add functionality to the PSM Web order creation and order status change processes. The following diagram outlines these processes.



Order process flow diagram

The system performs the following tasks:

1. Order information is stored in the PSM Web database.
2. The system defines if email notification messages should be send.
3. The system checks for the active MIS connector, if found the functions of this connector are called.
4. The user interface (UI) of the system is updated.

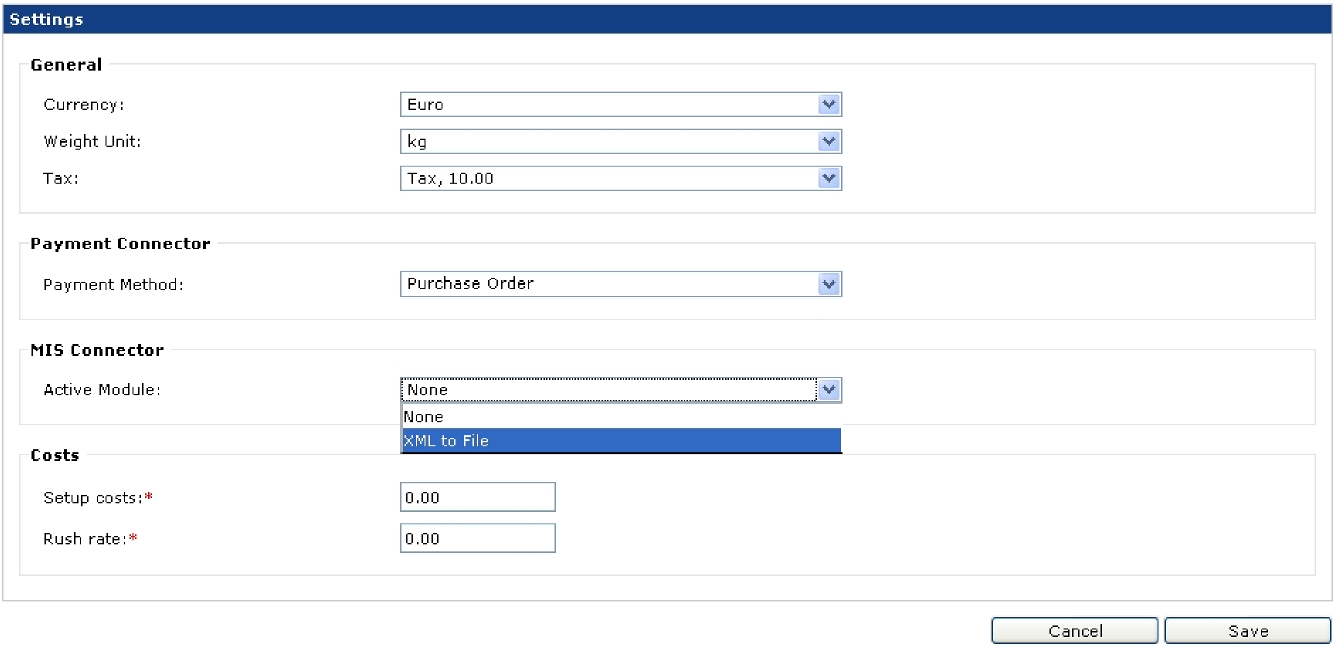
Enabling a MIS connector

In order to activate a MIS connector:

1. Log on to PrintShop Mail Web using an Administrator account.
2. Click on *Settings* in the PSM Web menu bar, the *Settings* sections appears.
3. Click *Settings* in the *Pricing and Ordering* section of the *Settings* sub menu. The *Pricing and Ordering* page appears. This page shows information about the current pricing and ordering settings as wel as the active MIS connector (if one is selected).
4. Click *Edit*.
5. Select a connector from the *Active Module* pull down menu in the MIS Connector section. The pull down menu shows

the available MIS connectors.
6. Click *Save* to activate the module.

Pricing and Ordering



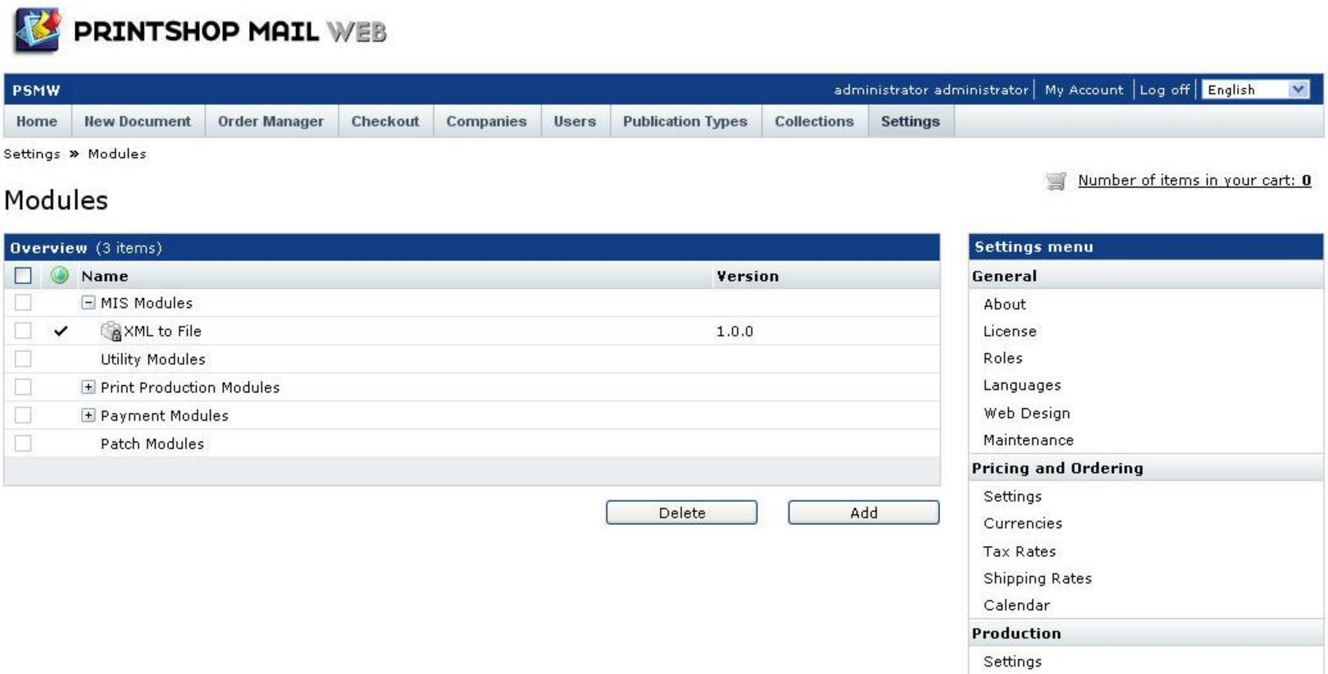
Select a module from the list and click Save to activate the connector

Note: Orders that reside in your PSM Web environment upon enabling a connector are not handled by the connector and thus their information is not pushed to an external application.

Installed modules

To view the installed modules:

1. Log on to PrintShop Mail Web using an Administrator account.
2. Click on *Settings* in the PSM Web menu bar, the *Settings* sections appears.
3. Click *Overview* in the *Modules* section of the *Settings* sub menu. The *Modules Overview* page appears. This page shows an overview of the installed modules. The modules are grouped by their module type.
4. Click the plus-icon in front of a module type to view the available modules for that type.
5. To access the properties page of a module simply click its name.



The Modules overview page

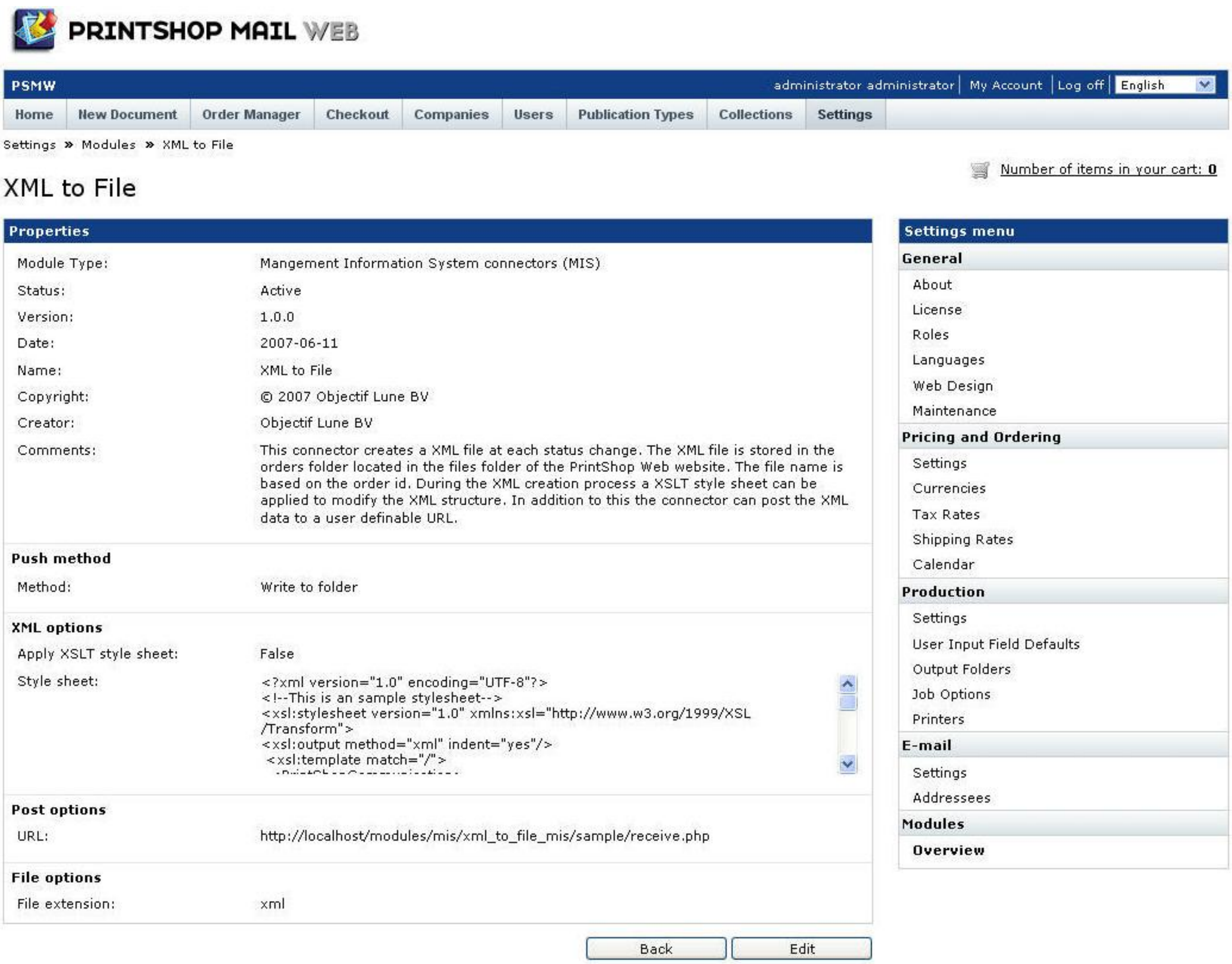
Properties

The properties of a connector differ from connector to connector. They depend on the options and functions of that specific module.

To view and modify the properties of a connector (module) do the following:

1. Log on to PrintShop Mail Web using an Administrator account.
2. Click on *Settings* in the PSM Web menu bar, the *Settings* sections appears.
3. Click *Overview* in the *Modules* section of the *Settings* sub menu. The *Modules Overview* page appears. This page shows an overview of the installed modules. The modules are grouped by their module type.
4. Click the plus-icon in front of a module type to view the available modules for that type.
5. To access the properties page of a module simply click its name.

The following figure shows the properties page of the XML to File connector.

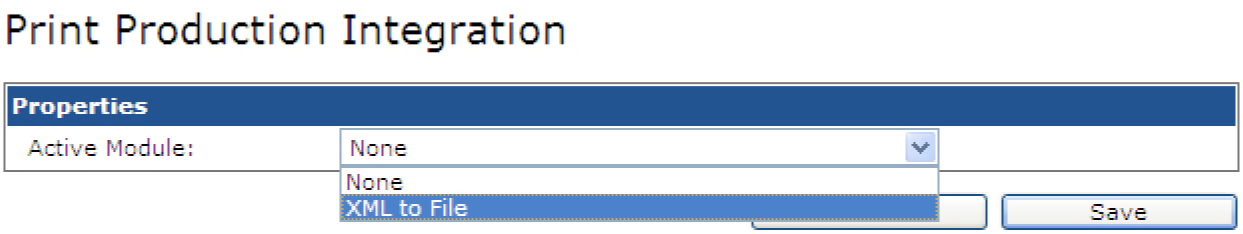


The properties page of the XML to File connector

Enabling a Print Production connector

In order to activate the XML to File connector, carry out the following steps:

1. Click on *Settings* in the PrintShop Mail Web menu bar, the *Settings* sections appears.
2. Click *Print Production Integration* in the *Settings* sub menu. The *Print Production Integration* page appears and shows information about the current connector (if one is selected).
3. Click *Edit*.
4. Select a connector from the *Active Module* pull down menu. The list shows the available Print Production connectors.
5. Click *Save* to activate the module.



Select a module from the list and click Save to activate the connector

Note: Orders that reside in your PrintShop Mail Web environment upon enabling a connector are not handled by the connector and thus their information is not pushed to an external application.

Installed modules

The *Modules* option in sub menu of the *Settings* section 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. To access the properties page of a module simply click its name.

Properties

The properties of a connector differ from one to another. They depend on the options and functions of that specific module.

To view and modify the properties of a connector (module) do the following:

1. Click on *Settings* in the PrintShop Mail Web menu bar, the *Settings* sections appears.
2. In the *Settings* sub menu click *Modules*. The *Modules* overview page is shown.
3. Open *Print Production Modules* entry in the overview by clicking the plus-icon in front of its name. A list of the available connectors for this type is shown.
4. Click the name of the connector to view its properties. To modify the properties click the *Edit* button. The *Edit Properties* page appears.

Payment Modules

Payment modules allow your store to communicate with merchant banks to transfer money following a sale. Payment modules allow you to collect money following a sale. With the introduction of PrintShop Mail Web administrators can install additional payment module. Payment modules require a Business To Consumer (B2C) license on the PrintShop Mail Web dongle.

The following payment modules are included with PrintShop Mail Web:

- "PayPal Payment Module" (page 164)
- "Authorize.Net Payment Module" (page 168)
- "iDeal Payment Module" (page 170)
- "Moneris Payment Module" (page 173)

PayPal Payment Module

In order to use PayPal as your payment solution, you must have a PayPal account. Signing up is really simple via the PayPal web site. Once you have signed up, you need to verify your account and upgrade to a Premier or Business Account depending on the service you wish to use. Consult the appropriate documentation and customer service on their website.

We suggest to install the PayPal module on your PrintShop Mail Web server and familiarize yourself with its functionalities using the PayPal sandbox (a test environment facilitated by PayPal).

The following sections will guide you through this process and explain how to configure the module.

Why use PayPal?

PayPal is an easy, cheap way for you to deliver secure checkout to your customers. You can accept credit card payments, eChecks, and PayPal transfers from the millions of people already signed up to use PayPal. There is even a service that lets your customers who do not have PayPal accounts pay by credit card through the PayPal server. PayPal is a great payment solution for small businesses and is a good option for larger ones, too. It's fast, easy, and secure.

PayPal payments are immediate and accepted worldwide. The PayPal module for PrintShop Mail Web integrates PayPal Website Payments Standard. In the PrintShop Mail Web checkout process customers are redirected to PayPal after reviewing their order to complete payment; they return to your PrintShop Mail Web site once payment is completed.

Requirements

Please ensure that the following requirements have been met before using the payment connector:

1. **Installation:** The installation constists of the following steps:
   - Install PrintShop Mail Web 7.0 or upgrade to this version.
   - Configure PrintShop Mail Web by completing the First Run Wizard.
   - Install the payment module as described in the PrintShop Mail Web - Administrator Guide.
2. **Licensed B2C module**: You must have a licensed Business To Consumer (B2C) module on the PrintShop Mail Web dongle in order to use the payment module in your production environment.
3. **PayPal account**: Sign up with PayPal for a Business account, the details provided by PayPal are required to configure the PayPal connector for PrintShop Mail Web.
4. **Public IP address**: Your website must be reachable from the internet on port 80 (when using HTTP) or port 443 (when using HTTPS). When you are using a router/firewall the port must be added and routed to your local ip-address. In the web browser you need to enter the real domain name or public ip address of the PrintShop Mail Web website (localhost will not work). This is required for Instant Payment Notification (see the Instant Payment Notification section).
5. **Set up pricing in PrintShop Mail Web**: Set up pricing for your customers and their documents.
   - Enable pricing for your document(s) and define the volume discount table for them (required for price calculations)
   - Assign the payment module(s) to the appropriate companies

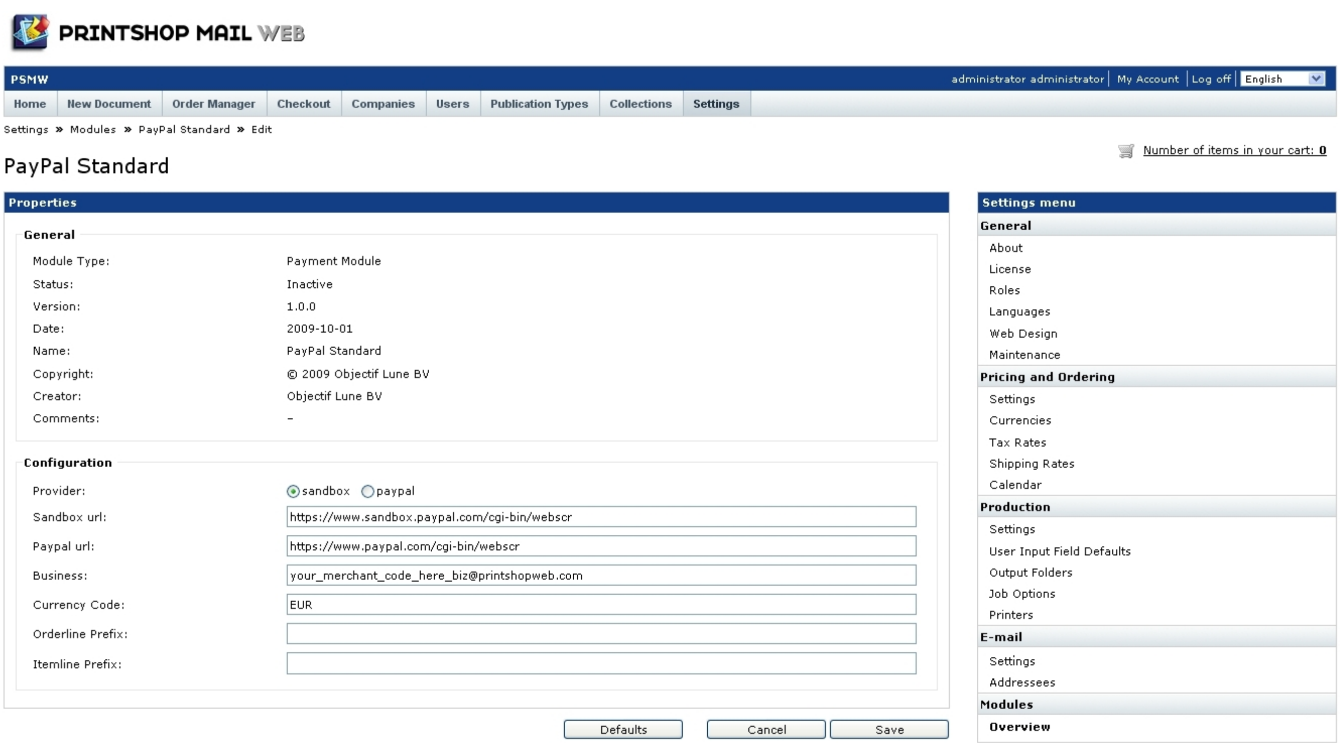
Instant Payment Notifications

The PayPal module is setup to accept Instant Payment Notifications (IPN) from PayPal. This means that any time someone completes an order using PayPal, your site will receive a confirmation message from PayPal that PrintShop Mail Web uses to verify completed payments. When an IPN is received, its data is verified and the payment is then logged to the appropriate order. The Transaction ID is logged to the order and displayed for your customers to review any time they log into their accounts and check their order histories.

Configuring the module

After the installation of a payment module you will need to configure it. To configure the module:

1. Launch your web browser and log in to PrintShop Mail Web using an administrator account.
2. Select *Settings* in the menu bar.
3. Click *Overview* in the *Modules* section (*Settings* side menu). The *Modules Overview* page is shown.
4. Click the plus-symbol next to the *Payment Modules* group to view the installed payment modules.
5. Click *PayPal Standard* to view the settings of the module.
6. Click *Edit.* The *Edit Properties* page appears.



The Edit Properties page

7. You can change the following parameters:
   - **Provider**: If you plan to test the connector using the PayPal Sandbox site you will need to select *sandbox*, select *paypal* to use the 'live' PayPal site.
   - **Sandbox url**: The URL to the PayPal Sanbox site
   - **Paypal url**:The URL to the live PayPal site
   - **Business**: this is the identifier of your PayPal account, provided to you by PayPal. When testing the module with the PayPal Sandbox you should enter the e-mail address of the *Business* test account.

- **Currency Code**: Make sure that the currency code matches the default currency set for PrintShop Mail Web. Examples are:
    - AUD: Australian Dollars
    - CAD: Canadian Dollars
    - EUR: Euros
    - GBP: Pounds Sterling
    - JPY: Japanese Yen
    - USD: United States Dollars
- **Orderline Prefix**: The entered text is added before PayPals standard order line.
- **Itemline Prefix**: The entered text is added before PayPals standard item lines.

8. Click *Save* to store the changes.

The PayPal Sandbox

The PayPal Sandbox is a testing environment that is a duplicate of the live PayPal site, except that no real money changes hands. The Sandbox allows you to test the integration with PrintShop Mail Web before submitting transactions to the live PayPal environment. The Sandbox allows you to create and manage test accounts, and view emails for those test accounts.

You can sign up for a test account via the following url: https://developer.paypal.com/

Detailed information can found in the PayPal Sandbox User Guide.

In order to test the integration you will need the following accounts:

- You personal PayPal Sandbox Access Account (using your own e-mail address
- A PayPal Sandbox seller/business test account. This account represents the owner of PrintShop Mail Web.
- A PayPal Sandbox buyer/personal test acccount. This account represents the visitor of the PMS Web website (your customers).

The following section will guide through the process of creating these accounts.

Creating a PayPal Sandbox Access account

This account will allow you to use the PayPal Sandbox Test Environment to try out online Payments, Instant Payment Notification and other features. To sign up for a PayPal Sandbox Access account:

1. Launch your web browser and enter the following URL: https://developer.paypal.com/
2. Click *Sign Up Now*.
3. Complete the web form. Use your real contact information and e-mail address.
4. Click *Agree and Submit.* Instructions on how to activate the account are send by e-mail.
5. Click the activation link in the e-mail message.

Creating a PayPal Sandbox Seller test account

To create a PayPal Sandbox Seller account:

1. Launch your web browser and enter the following URL: https://developer.paypal.com/
2. Enter your credentials and click *Login.*
3. Click the *Test Accounts* link.
4. Click the *Preconfigured* link in the *Create Account* section. The *Create a Sandbox Test Account* page appears.
5. Select the *Seller* as the Account Type

6. Click *Create Account.* The *Test Accounts* page appears. This page shows the newly created account. The *Type* column states *Business.*

Creating a PayPal Sandbox Buyer test account

To create a PayPal Sandbox Seller account:

1. Launch your web browser and enter the following URL:
   https://developer.paypal.com/
2. Enter your credentials and click *Login.*
3. Click the *Test Accounts* link.
4. Click the *Preconfigured* link in the *Create Account* section. The *Create a Sandbox Test Account* page appears.
5. Select the *Buyer* as the Account Type
6. Click *Create Account.* The *Test Accounts* page appears. This page shows the newly created account. The *Type* column states *Personal.*

Processing orders

To process an order via PayPal:

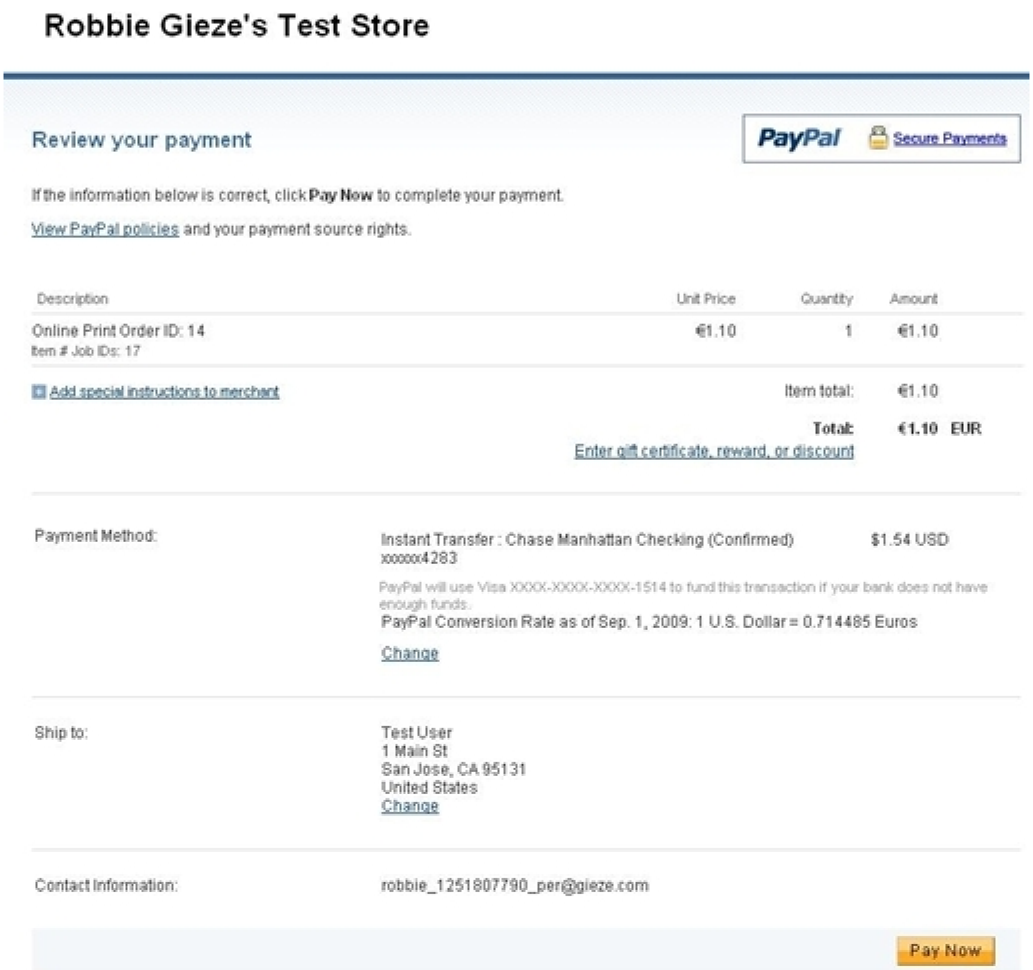
PayPal Sandbox

When testing the integration with the *PayPal Sandbox* the following requirements should be met:

1. Before making a payment you must first login to the PayPal developer/sandbox site using the same browser that is used to create and pay for the order. This can be achieved by opening a separate browser window or tab. Navigate to https://developer.paypal.com/ and login using your PayPal Sandbox Access account (typically this is your *real* e-mail address). Leave this window/tab open after logging in.
2. Navigate to PrintShop Mail Web using a different window or tab and use the production domain or public IP of your PrintShop Mail Web server. *Do not use localhost*. PayPal tries to communicate with your PrintShop Mail Web website, this will not work when using the *localhost* domain.

Payment process

1. Log in to PrintShop Mail Web and add one or multiple documents to your shopping cart. Make sure that you enabled pricing for these documents, that you have setup a volume discount table and that the payment connector is assigned to the company of the current user. Walk through the steps of the ordering process and click *Pay* on the order summary page. This redirects you to the PayPal website.
   - PayPal does not accept orders that does not have a value (0.00).
   - In case you are testing using the PayPal Sandbox the website will be redirected to the PayPal Sandbox website.
2. Enter the credentials of a PayPal Seller account to pay for the order.
   - When testing the integration using the PayPal Sandbox use the credentials of PayPal Sandbox Seller account.
3. Click *Login.* The *Review* page appears.
4. Review the information and click *Pay Now.* The *Thank You* page is shown.



The PayPal order Review page

5. Click *Return* to return to the PrintShop Mail Web website. This shows the *Thank You* page in PrintShop Mail Web.
6. Click *Order Manager* in the menu bar to view your order in the *Approved* basket. The payment status is set to *paid.* If the payment failed or is aborted you should see the order in the *My Orders* folder, the payment status is set to *Pending.*

Authorize.Net Payment Module

Authorize.net is a payment gateway service provider for merchants in the USA. The Authorize.net payment module for Print-Shop Mail Web uses the Advanced Integration Method (AIM) for Card Not Present Transactions.

The workflow for a shop owner to add Authorize.net to his webshop is the following:

1. Apply for an Authorize.net account
2. Configure the account on the Authorize.net website
3. Add the Authorize.net payment connector to PrintShop Mail Web
4. Configure the Authorize.net payment connector

The following sections will guide you through this process and explain how to configure the module.

Requirements

Please ensure that the following requirements have been met before using the payment connector:

1. **Installation:** The installation constists of the following steps:
    - Install PrintShop Mail Web 7.0 or upgrade to this version.
    - Configure PrintShop Mail Web by completing the First Run Wizard.
    - Install the payment module as described in the PrintShop Mail Web - Administrator Guide.
2. **Licensed B2C module**: You must have a licensed Business To Consumer (B2C) module on the PrintShop Mail Web dongle in order to use the payment module in your production environment.
3. **Authorize.net account**: You must have a Authorize.net account.
4. **Set up pricing in PrintShop Mail Web**: Set up pricing for your customers and their documents.
    - Enable pricing for your document(s) and define the volume discount table for them (required for price calculations)
    - Assign the payment module(s) to the appropriate companies

Configuring the Authorize.net module

After the installation of a payment module you will need to configure it. To configure the module:

1. Launch your web browser and log in to PrintShop Mail Web using an administrator account.
2. Select *Settings* in the menu bar.
3. Click *Overview* in the *Modules* section (*Settings* side menu). The *Modules Overview* page is shown.
4. Click the plus-symbol next to the *Payment Modules* group to view the installed payment modules.
5. Click *Authorize.net* to view the settings of the module.
6. Click *Edit.* The *Edit Properties* page appears.
7. The following configuation options must be configured:
    - *Gateway*:Radio group field with the following options:
        - *Test* use this setting to use the Test gateway
        - *Live* use this setting to use Live gateway
    - *Test URL*: the URL to the Test gateway
    - *Live URL*: the URL to the Live gateway
    - *Transaction Type*: Radio group with the following options (see "Test mode" (page 169)):
        - *Test* use this mode to set testing mode
        - *Live* use this mode to disable testing mode
    - *API Login ID*: the Login ID for the account being used
    - *Transaction Key*:the Transaction Key for the account being used
    - *Order Description Prefix*: the contents of this field is combined with the order id to create the Order Description for Authorize.net
    - *Check for AVS*: enables AVS (Address Verification) checking where individual AVS checks may be enabled and disabled. See "AVS and CCV checks" (page 170) for more information.
    - *Check for CCV*: enables CCV (Credit Card Verification)checking where individual CCV checks may be enabled and disabled. See "AVS and CCV checks" (page 170) for more information.
8. Click *Save* to store the changes.

Test mode

With a Developer account the test mode setting will influence the response codes generated by Authorize.net. If the test mode is enabled the amount of the order will determine which response code will be returned by the payment gateway and if the transaction will be successful or not. If you set the test mode off all transactions will succeed no matter what the amount is. Please note that the AVS and CCV options should be unchecked as a Developer account does not support these options. Using the test mode the response codes that AVS and CCV can generate can be simulated by varying the payment amounts. Please refer to the Merchant Integration Guide of Authorize.net for more details

With a Live account the test mode setting will only allow an authorization request to succeed but will never actually debit any money from the credit card. This mode is usefull to check AVS and CCV options. Please note that the transaction number will always be 0 and the payment will never succeed. Authorizion requests done with this setting will have to be manually cancelled (voided) using the Authorize.net account pages.

AVS and CCV checks

If you are planning on using AVS (Address Verification) and/or CCV (Credit Card Validation) checks it's important to configure your Authorize.net account correctly.

The AVS and CCV checks are additional; this means that those checks could fail but you could still have a successful transaction. In the Authorize.net account you can specify which response you would allow. It's important to allow all responses in this account and to limit the responses in the Authorize.net payment module settings in PrintShop Mail Web.

If the Authorize.net account is configured to reject certain AVS/CCV responses those payments are not automatically voided. The merchant should void them using the Authorize.net account site. Therefore it's better to accept all responses on the account site and configure PSMW to reject certain responses. That way PrintShop Mail Web will first do an authorization request and if the AVS/CCV fails it will then automatically do a void to release the funds on the credit card.

Please note that with a developer test account you can't test AVS/CCV responses

Payment page

The payment page for the Authorize.net module varies based on the AVS and CCV settings of the module.

The AVS setting controls whether the address fields will be shown. When AVS is enabled the address fields will be shown and will be preset based on the billing address. The CCV setting controls whether the CCV field is shown.

iDeal Payment Module

iDEAL is a payment method that is often used in the Netherlands for online payments. Several banks offer the possibility to receive payments that are made with iDEAL. The shop owner should have a bank account at a bank that supports receiving payments made by iDEAL. The shop user should have an internet banking account at a bank that supports making payments with iDEAL.

Most banks in the Netherlands support iDEAL because it's the most used method for making online payments and the number of users are still growing.

The following iDeal product are supported in PrintShop Mail Web:

- ABN Amro iDEAL Only Kassa
- Fortis (NEOS) iDEAL Only
- Rabo iDEAL Kassa
- ING (TWYP) Standaard Internetkassa

The workflow for a shop owner to add iDEAL to his webshop is the following:

1. Go to the website of the bank of the shopowner and create an iDEAL test account
2. Configure the test account on the banks website
3. Add the iDEAL payment connector to PrintShop Mail Web

4. Configure the iDEAL payment connector
5. Make test payments with PrintShop Mail Web
6. Request the bank to upgrade the test iDEAL account to a production account
7. Activate the production account on the banks iDEAL dashboard
8. Switch the payment connector to production mode in PrintShop Mail Web

The following sections will guide you through this process and explain how to configure the module.

Requirements

Please ensure that the following requirements have been met before using the payment connector:

1. **Installation:** The installation constists of the following steps:
   - Install PrintShop Mail Web 7.0 or upgrade to this version.
   - Configure PrintShop Mail Web by completing the First Run Wizard.
   - Install the payment module as described in the PrintShop Mail Web - Administrator Guide.
2. **Licensed B2C module**: You must have a licensed Business To Consumer (B2C) module on the PrintShop Mail Web dongle in order to use the payment module in your production environment.
3. **iDeal account**: Each bank offers several iDEAL products for receiving payments. The products differ in price and options. The iDEAL payment connector for PrintShop Mail Web supports the following iDEAL products:
   - ABN Amro iDEAL Only Kassa
   - Fortis (NEOS) iDEAL Only
   - Rabo iDEAL Kassa
   - ING (TWYP) Standaard Internetkassa
4. **Public IP address**: Your website must be reachable from the internet on port 80 (when using HTTP) or port 443 (when using HTTPS). When you are using a router/firewall the port must be added and routed to your local ip-address. In the web browser you need to enter the real domain name or public ip address of the PrintShop Mail Web website (localhost will not work). This is required for Instant Payment Notification (see the Instant Payment Notification section).
5. **Set up pricing in PrintShop Mail Web**: Set up pricing for your customers and their documents.
   - Enable pricing for your document(s) and define the volume discount table for them (required for price calculations)
   - Assign the payment module(s) to the appropriate companies

Requesting a test account

Before the shop owner can receive iDEAL payments he must request a test account from his bank. You will have to first create a test account, do some payments and then you can request a production account. The website of the bank has a separate website often called the iDEAL Dashboard or the Internet Kassa (cash register) where the shop owner can login to configure the iDEAL settings and see the payment history. The bank usually offers a test dashboard and a production dashboard that have different URLs.

The procedure for requesting a test account is different for each bank, the shop owner should look on the website of his bank for instructions. Usually the shop owner can request a test account via an internet page and he will receive the following e-mails:

- Confirmation e-mail containing a link to the iDEAL Test Dashboard
- Password e-mail containing the generated password needed to login to the dashboard

After the shop owner receives both e-mails he can login to the iDEAL test dashboard of his bank. Next he will need to configure the iDEAL Dashboard.

Configuring the iDEAL test dashboard

Each bank has his own dashboard that allows the shop owner to modify his iDEAL account. The first time the shop owner logs into the dashboard he will usually go through a wizard. On most questions the default settings are ok; there are however some settings that should be changed from their default values.

1. **Payment methods**
   1. On the dashboard there is a link called *Payment methods* in that menu the shop owner should add and activate the iDEAL payment method.
2. **SHA-1-IN Signature**
   1. On the dashboard there is a link called *Technical information* and on the tab called *Data and origin verification* there is a field called *SHA-1-IN-Signature* the shop owner should enter a random string of at least 16 characters.
   2. The shop owner should note which string he has entered and save that string because it needs to be entered at the PSMW iDEAL payment connector settings page later on.
3. **SHA-1-OUT Signature**
   1. On the dashboard there is a link called *Technical information* and on the tab called *Transaction feedback* there is a field called *SHA-1-OUT Signature* the shop owner should enter a random string of at least 16 characters.
   2. The shop owner should note which string he has entered and save that string because it needs to be entered at the PSMW iDEAL payment connector settings page later on.
4. **Direct HTTP server-to-server request**
   1. On the dashboard there is a link called *Technical information* and on the tab called *Transaction feedback* there are two fields under the section called *URL of the merchant's post payment page* both fields should have the same value. The URL should start with the public URL of the webshop so *localhost* is not allowed here. It's very important that the info in the two fields is correct otherwise the webshop will not receive any payment notifications.
      1. The URL should follow this format: http://<PUBLIC_WEB_ADDRESS>/site.php?module=ideal_kassa&formid=ideal_kassa_post_payment_form
      2. Example: http://www.mywebshop.com/site.php?module=ideal_kassa&formid=ideal_kassa_post_payment_form
      3. If PrintShop Mail Web is setup using https you should use https in the URL fields above
   2. *Timing of request*
      1. The option *Online but switch to a deferred request in intervals when the online requests fail* should be selected.
5. **HTTP request for status changes**
   1. In the same location as mentioned in 1.4 there is a URL field under the section called *HTTP request for status change* the value here should be the same value as mentioned in 1.4.1
   2. *Timing of the request*
      1. The option *For each offline status change(payment, cancellation…)* should be selected.

After all those settings are made the last thing the shop owner should do on the dashboard is activate the test account. Please note he should not activate or create a production account at this stage but he should activate the test account.

Configuring the iDeal module

After the installation of a payment module you will need to configure it. To configure the module:

1. Launch your web browser and log in to PrintShop Mail Web using an administrator account.
2. Select *Settings* in the menu bar.
3. Click *Overview* in the *Modules* section (*Settings* side menu). The *Modules Overview* page is shown.
4. Click the plus-symbol next to the *Payment Modules* group to view the installed payment modules.
5. Click *PayPal Standard* to view the settings of the module.
6. Click *Edit.* The *Edit Properties* page appears.
7. The following configuation options must be configured:
   - *Environment*
     1. Radio group field with the following options
        1. *Test* use this setting for testing the URL of the *Payment Test Server URL* field will be used.
        2. *Production* use this setting for production the URL of the *Payment Production Server URL* field will be used.
   - *iDEAL Cash Register*
     1. Pulldown field with the following values
        1. *Other* allows the user to enter his own production and test URLs
        2. *ABN Amro*
        3. *Rabobank*
        4. *Neos*
        5. *TWYP*
   - *Payment Production Server URL*: Default value is determined by the selected *iDEAL Cash Register* this value is used when *Environment* is set to *Production*
   - *Payment Test Server URL*: Default value is determined by the selected *iDEAL Cash Register* this value is used when *Environment* is set to *Test*
   - *SHA-1-IN signature*: Value should be the same as the value that is entered in the iDEAL dashboard of the bank. The actual value doesn't matter; most banks require the value to be at least 16 characters long. This value is used for security to prevent hackers from changing the amount.
   - *SHA-1-OUTsignature*: Value should be the same as the value that is entered in the iDEAL dashboard of the bank. The actual value doesn't matter; most banks require the value to be at least 16 characters long. This value is used for security to prevent hackers from setting an order to paid on the PSMW site.
   - *Order Description*: The end user will see this value in his bank environment as the description of the order he is about to pay. The shop owner also sees this information in his internet bank account website.
8. Click *Save* to store the changes.

Moneris Payment Module

Moneris Solutions is a Canadian based credit card payments processor. Moneris offers several products for online payments. The PSMW Moneris module uses the Moneris product called eSELECT Plus eCommerce. More information about this product can be found on this website: http://www.eselectplus.ca/

Credit Card transactions consist out of the following actions:

- **Purchase**
  - A purchase request will authorize and capture the funds of the card owner and transfer them to the bank account of the web shop owner
- **Void**
  - A void request can only be done when there was a successful purchase request done before.
  - A void will cancel the purchase; the card owner will not see the purchase or void transaction on his credit card receipt.

The payment gateway requires that each transaction has a unique order id. We can't use the order id of PSMW directly because if a payment attempt fails and the user will perform another attempt the order id should be different.

Therefore the Order ID that is visible on the credit card receipt and in the moneris transaction reports will have the following format:

75_12344893

Where 75 is the order id and the rest is a timestamp code

The workflow for a shop owner to add Moneris to his webshop is the following:

1. Go to the website of Moneris and request a live account
2. Add the Moneris payment connector to PrintShop Mail Web
3. Configure the Moneris payment connector
4. Configure the Moneris account

The following sections will guide you through this process and explain how to configure the module.

Requirements

Please ensure that the following requirements have been met before using the payment connector:

1. **Installation:** The installation constists of the following steps:
   - Install PrintShop Mail Web 7.0 or upgrade to this version.
   - Configure PrintShop Mail Web by completing the First Run Wizard.
   - Install the payment module as described in the PrintShop Mail Web - Administrator Guide.
2. **Licensed B2C module**: You must have a licensed Business To Consumer (B2C) module on the PrintShop Mail Web dongle in order to use the payment module in your production environment.
3. **Moneris account**: You must request a moneris account.
4. **Set up pricing in PrintShop Mail Web**: Set up pricing for your customers and their documents.

- Enable pricing for your document(s) and define the volume discount table for them (required for price calculations)
- Assign the payment module(s) to the appropriate companies

Configuring the Moneris module

After the installation of a payment module you will need to configure it. To configure the module:

1. Launch your web browser and log in to PrintShop Mail Web using an administrator account.
2. Select *Settings* in the menu bar.
3. Click *Overview* in the *Modules* section (*Settings* side menu). The *Modules Overview* page is shown.
4. Click the plus-symbol next to the *Payment Modules* group to view the installed payment modules.
5. Click *Moneris eSELECTplus* to view the settings of the module.
6. Click *Edit.*
7. The following configuration options must be configured:

- *Gateway*
  - Radio group with the following options
    - *Test* in this mode the transactions are sent to the value of the *Test Host* field
    - *Live* in this mode the transactions are sent to the value of the *Live Host* field
- *Test Host* Host where all the transactions in the test mode are sent to
- *Live Host* Host where all the transactions in the live mode are sent to
- *Store Identifier* value should be set to the store identifier the shop owner has received from Moneris.
- *API Token* value should be set to the api token the shop owner has received from Moneris.

- *Order Description Prefix* The end user will see this value in his bank environment as the description of the order he is about to pay. The shop owner also sees this information in his internet bank account website. This description consist of this field followed by the order id.
- *Check for AVS(address verification system) response code*If this option is checked Moneris will perform an address verification check. Below this option there is a list of all the possible response this address verification check can produce. The user must choose which response he will accept by checking that option. If the response PSMW receives is not accepted PSMW will do a void action to cancel the purchase.
- *Check for CVD (card validation digits) response code* If this option is checked Moneris will perform a card validation digit check. Below this option there is a list of all the possible results that this check can generate. The user must choose which result he will accept by checking that option. If the result PSMW receives is not accepted PSMW will do a void action to cancel the purchase.

Test mode

You can also request a developer test account from Moneris to make test payments.

The developer test account is actually a shared account that is used by all the people who are currently testing their web shop against the Moneris test gateway. Therefore you should not make any changes in the test account settings. You can also see other transactions that where not generated by yourself.

Moneris has provided several documents on their website which describe how the testing process goes. The shop owner should download the following documents from http://www.eselectplus.ca/en/downloadable-content if the shop owner doesn't have access to this part of the site he must sign up before he can download the documents.

The following documents should be downloaded:

- Integration Guide - General -> PHP API Integration Guide
- Others -> Other Documents -> eFraud verification result codes
- Others -> Other Documents -> Response Codes
- Others -> Other Documents -> Test Environment CVD/AVS Result Table
- Others -> Other Documents -> Test Environment Penny Value Response Table

The test environment of Moneris uses shared test accounts. In the PHP API Integration Guide on page 21 there is a list of several test accounts that can be used. If you want to test CVD or AVS you must use store5. In the same document on page 22 there is al list of credit card numbers that can be used in the test environment.

In the payment connector settings on the PSMW website you must enter the store id and api token of a test account and set the gateway to test before you can make any test payments.

The penny value will determine if the payment will be successful in the test environment please read the Test Environment Penny Value Response Table document for more details.

The AVS and CVD checks are additional; this means that those checks could fail but you could still have a successful transaction, if that happens PSMW will perform a void action on the payment to cancel it. The AVS or CVD check will only be performed if you have enabled them in the payment connector's settings page.

In the settings page you can also select which AVS and CVD response code you want to accept. If the transaction was successful PSMW will do an additional check by looking at the AVS and CVD response code. If the response code is not accepted according to the payment module settings PSMW will do a void action to cancel the transaction, that void action is than visible in the moneris account website.

To manage your Moneris account you will have to go to the Moneris developer merchant account website: https://esqa.moneris.com/mpg/

Requesting a live account

To request a live account the shop owner should visit the moneris website and request an account for their eSELECTPlus eCommerce product.

To manage your Moneris account you will have to go to the Moneris merchant account website and login with your account details

- Live account: https://www3.moneris.com/mpg/

In the Moneris account website it's possible to perform manual transactions or actions such as void or capture. You can also look up reports that will list the transactions that where made with that account. For more details please look at the documentation that is provided by Moneris on their website.

AVS and CVD checks

If you are planning on using AVS (Address Verification) and/or CVD (Credit Card Validation Digit) checks it's important to configure your Moneris account correctly.

The AVS and CCV checks are additional; this means that those checks could fail but you could still have a successful transaction. In the Moneris account you can specify which response you would allow. It's important to allow all responses in this account and to limit the responses in the Moneris payment module settings in PrintShop Mail Web.

If the Moneris account is configured to reject certain AVS/CVD responses those payments are not automatically voided. The merchant should void them using the Moneris account site. Therefore it's better to accept all responses on the account site and configure PSMW to reject certain responses. That way PrintShop Mail Web will first do an authorization request and if the AVS/CVD fails it will then automatically do a void to release the funds on the credit card.

Payment page

When you have correctly configured the Moneris payment module in PrintShop Mail Web the end user will a payment page.

Please note that the *Address Verification System* section is only visible if you have enabled the *Check for AVS* option on the module settings page. The *Card Validation Digits* section is only visible if you have enabled the *Check for CVD* option on the module settings page.

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 PrintShop Mail 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*.

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

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

Before you can add a module to PrintShop Mail Web you must have completed the first run successfully.

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

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

XML to File connector

The XML To File connector is a generic MIS connector that ships with PrintShop Mail Web. It uses common technologies and methods to communicate between applications. The XML To File connector has the following features:

- Write order information to a XML file.
- Use a HTTP POST call to submit XML data to a predefined URL.
- A combination of the above (write and POST)
- Apply a XSLT style sheet to the XML data before writing it to disk and/or submitting the data (optional)

XML (eXtensible Markup Language)

XML stands for eXtensible Markup Language. Since XML data is stored in plain text format, XML provides a software- and hardware-independent way of sharing data. This makes it much easier to create data that different applications can work with. It also makes it easier to expand or upgrade a system to new operating systems, servers, applications, and new browsers.

The XML to File connector collects the order information and writes this data to XML files. The sample below shows a part of a XML file generated by the XML to File connector. The names of the elements match the fields names in the PrintShop Mail Web database tables.

```
<?xml version="1.0" encoding="UTF-8"?>
<PrintShopCommunication>
 <PSW_to_MIS>
 <Order>
 <Properties>
 <fnCompanyID>1</fnCompanyID>
 <fcCompanyName>OL BV</fcCompanyName>
 ....
 <fcShippingContactName>Peter Parker</fcShippingContactName>
 <fcShippingEmailAddress>pparker@finco.com</fcShippingEmailAddress>
 <fnShippingCompanyID>1</fnShippingCompanyID>
 <fcShippingCompanyName>OL BV</fcShippingCompanyName>
 <fnShippingDepartmentID>0</fnShippingDepartmentID>
 <fcShippingDepartmentName></fcShippingDepartmentName>
 <fcShippingAddress1>Daltonstraat 42-44</fcShippingAddress1>
 <fcShippingAddress2></fcShippingAddress2>
 <fcShippingZipCode>3846 BX</fcShippingZipCode>
 <fcShippingCity>Harderwijk</fcShippingCity>
 ...
 </Properties>
 <Jobs>
 <Job>
 <fnJobID>1</fnJobID>
 <fnTemplateID>1</fnTemplateID>
 <fnPersonID>0</fnPersonID>
 ...
 <fbDatabaseInput>0</fbDatabaseInput>
 <fbUserInput>1</fbUserInput>
 <fcTemplateName>Business Card</fcTemplateName>
 <fnEngineID>4</fnEngineID>
```

```
 <fnPublicationTypeID>1</fnPublicationTypeID>
 <fcTemplateProductCode></fcTemplateProductCode>
 <fcEngineShort>PSM</fcEngineShort>
 <fcPublicationType>Business Cards</fcPublicationType>
 <fcPublicationTypeProductCode></fcPublicationTypeProductCode>
 <UserInputFields>
 <Field name="First">Peter</Field>
 <Field name="Last">Parker</Field>
 <Field name="Email">pparker@finco.com</Field>
 <Field name="Title">Web Developer</Field>
 </UserInputFields>
 </Job>
 </Jobs>
 </Order>
 </PSW_to_MIS>
</PrintShopCommunication>
```

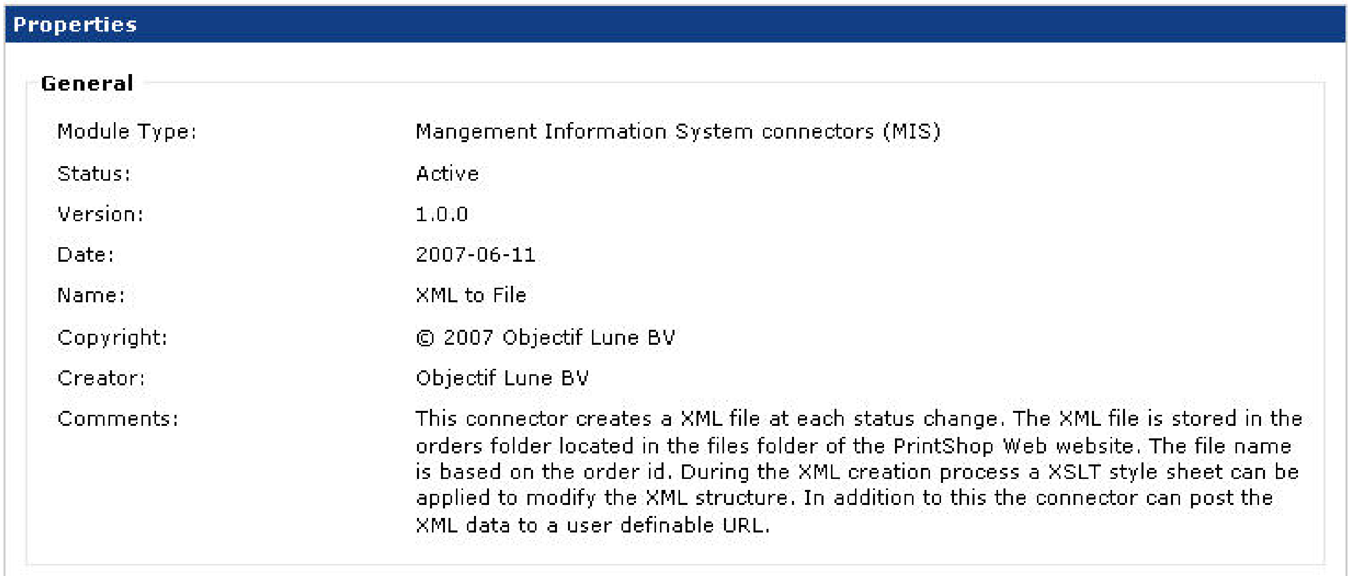
Options

This section describes the following options of the XML to File MIS connector:

General information

The first section of the properties and edit properties page shows general information about the connector. The information is static and cannot be changed through the PrintShop Mail Web interface.

XML to File



The General Information section of the XML to File properties

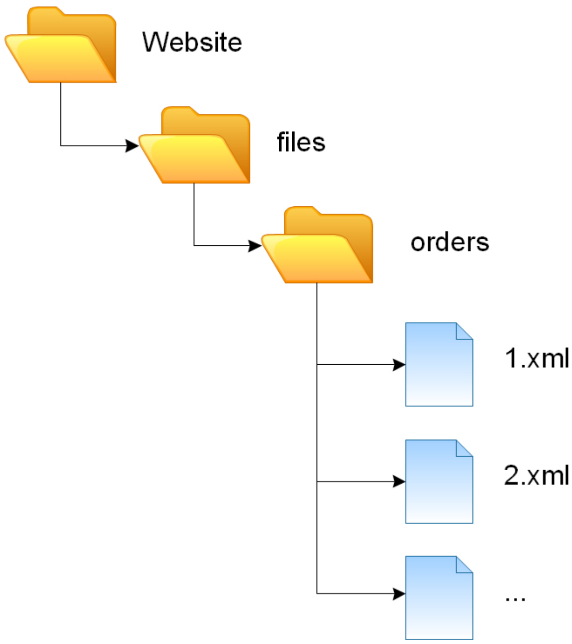
Push method

The *Push method* defines the method used for providing the order information to the outer world. You can select one of the following options:

- Write to folder
- Post
- Write to folder and Post

Write to folder

When the *Write to folder* option is selected an XML with the order information is created in a central location. The element names in the XML data match the fields names in the PrintShop Web database tables (tblorder). The files are stored in the *Orders* folder located in the *Files* folder of the PrintShop Web web site folder. A file is created for each order using the orders internal database ID (primary key). External systems could monitor this folder and act when files are added to this folder. For this you could use applications like PlanetPress Watch.



The location of the XML files created by the XML to File connector

Post

The XML to File connector has the ability to POST the XML data to a HTTP server. This enables the connector to be truly server/application independent. All the HTTP server needs to do is have the capability to receive HTTP POST calls and be able to pass the call on to some form of program (ASP, CGI, Java Servlets, etc).

The combination of XML via HTTP calls acts as a kind of middle ware or glue to tie systems together.

The connector lets you specify the URL of the HTTP server. A sample POST receive script (written in PHP) is stored in the folder of the XML to File connector.

XML options

XSLT is a language for transforming XML documents into XML documents or even plain text. With XSLT you can add/remove elements and attributes to or from the output file. You can also rearrange and sort elements, perform tests and make decisions about which elements to remove and keep. More information can be found at: http://www.w3schools.com/

By activating the *Apply XSLT style sheet* option the connector will apply the XSLT style sheet stated in the *Style sheet* text area to the XML output. It is applied before writing the information to disk or before sending it using a HTTP POST call. This way the XML structure can be modified to match the requirements of the receiving application.

Sample XML files may be obtainded by setting up a demo version of PrintShop Mail Web on your local machine and using the *Write to file* option. The resulting file than can be used in a application like XML Spy or Cooktop to develop the XSLT style sheet.

```
<!--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>
    <xsl:attribute name="status"><xsl:value-of
select="//fcOrderStatus"/></xsl:attribute>
    <Information>
     <Created><xsl:value-of select="//fdCreated"/></Created>
    </Information>
   </Order>
  </PrintShopCommunication>
 </xsl:template>
</xsl:stylesheet>
```

The sample XSLT code creates the following XML output:

```
<PrintShopCommunication>
  <Order id="19" statusid="1" status="cOrder">
    <Information>
      <Created>2007-10-08 16:01:41</Created>
    </Information>
  </Order>
</PrintShopCommunication>
```

Post options

The URL field lets you state the HTTP server address that is used when the POST method is selected.

File options

The File extension field lets you specify the extension that is used for the data file. By default the file extension wil be *XML* as the connector exports XML files. A XSLT style sheet could be created to output text files (f.e. Comma separated or tab delimited), in this case you can change the file extension to *txt.*

Sample POST receive script

The following script is a sample on how to receive POST data in PHP. The code receives the XML data sent by the XML to File connector and writes this information to disk using the ID of the order. The sample file can be found at the following location:

C:\Program Files\PrintShop Mail Suite 7\PrintShop Mail Web\Website\modules\mis\xml_to_file_mis\sample

```
<?php
/**
 * Sample POST receive page
 *
 * This demo script creates a xml file based on the OrderID of the received XML.
 * The file is saved directly under the "C" directory
 *
 * To use this script, the following must be applied
 * The module "XML to File" must be activated on "Settings"
 * Either "Post" or "Move to folder and Post" must be selected as "PushMethod"
 * "http://localhost/modules/mis/xml_to_file_mis/sample/receive.php" must be entered in
"URL"
 * Finally, as you change the status of the order, then "OrderID.xml"
 * will be created in "C" directory
 *
 */

$aJobXML = simplexml_load_string($_POST['PSW_XML']);
if ($aJobXML === false) {
        echo "Cannot parse XML";
        exit();
}

$aOrderID = $aJobXML->xpath('//fnOrderID');
if ($aOrderID === false) {
        echo "Cannot extract fnOrderID from XML";
        exit();
}

$cPath = "C:/" . intval($aOrderID[0]) . ".xml";
$handle = @fopen($cPath, 'w');
if ($handle === false) {
        echo "Cannot open or create xml file ($cPath)";
        exit();
}

$nWritten = @fwrite($handle, $_POST['PSW_XML']);
if ($nWritten === FALSE) {
        echo "Cannot write to xml file ($cPath)";
}
fclose($handle);
chmod($cPath, 0777);
?>
```

The $_POST variable is an array of variable names and values sent by the HTTP POST method. PrintShop Mail Web sends the XML stream in the *PSW_XML* POST variable. The script reads the value of this variable and stores the data in a local variable.

The *simplexml_load_string* function is used to read the XML data and tto define the ID of the order. The SimpleXML extension of PHP provides a set of functions to convert XML to an object that can be processed with normal property selectors and array iterators. More information can be found at the following url: http://www.php.net/simplexml

A xpath expression is used to retrieve a specific node of the XML order data (the fnOrderID element). You can use the same method to retrieve any of the elements from the XML data and use it values according to your needs.

At the end the XML data is written to a XML file using the order id as the file name.

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.

Interaction With PrintShop Mail Design

This chapter describes how PrintShop Mail Web interacts and integrates with PrintShop Mail Design, the other software of the PrintShop Mail Suite.

Receiving Jobs from Print to Web

PrintShop Mail Web, on top of being a Web-To-Print solution, is also a print server that can receive jobs from any PrintShop Mail Design software whether this installation is local or remote. However, there are a few specific points that must be handled for this integration between Design and Web to be functional.

- Each PrintShop Mail Design user must have a their own username and password defined in PrintShop Mail Web.
- Printers that will receive jobs from PrintShop Mail Web must be accessible from the PrintShop Mail Web server and activated within PrintShop Mail Web's interface.
- Printshop Mail Design users must have the printer drivers installed on their local machines for every printer they intend to output to through PrintShop Mail Web. It does not matter if the output printer is accessible or not from the Design machine, only that the driver be present. This is because the page setup and driver settings are set from PrintShop Mail Design but will actually be used from PrintShop Mail Web so they must match.

Once the setup is done properly, you can use the Print to Web feature from PrintShop Mail Design. The Print to Web dialog will display the URL of the PrintShop Mail Web server, a list of companies on that server and the printers that are installed and activated on the server. PrintShop Mail Design will send the job to PrintShop Mail Web for processing.

> When using Print to Web, you can change the print technology to correspond to the printer you are outputting to. If you select Adobe PDF or PDF/VT-1 technology, however, the job will not output to a printer, obviously. Instead, the PDF file will be available in the Print Jobs, accessible through the Order Manager.

Print Driver Matching

When preparing your PrintShop Mail Design document to be printed through PrintShop Mail Web, it is important to take into account which printer you have selected to setup your document as well as the one that will be used to finally print out the file.

The main concern is your page setup, including your page size and margins, tray selections, etc. For example, say you designed your document on white letter-sized paper which has a half-inch margin. The second page (or layout) of your document however is printed on blue paper which is called using a tray selection. The printer you selected is from one major manufacturer.

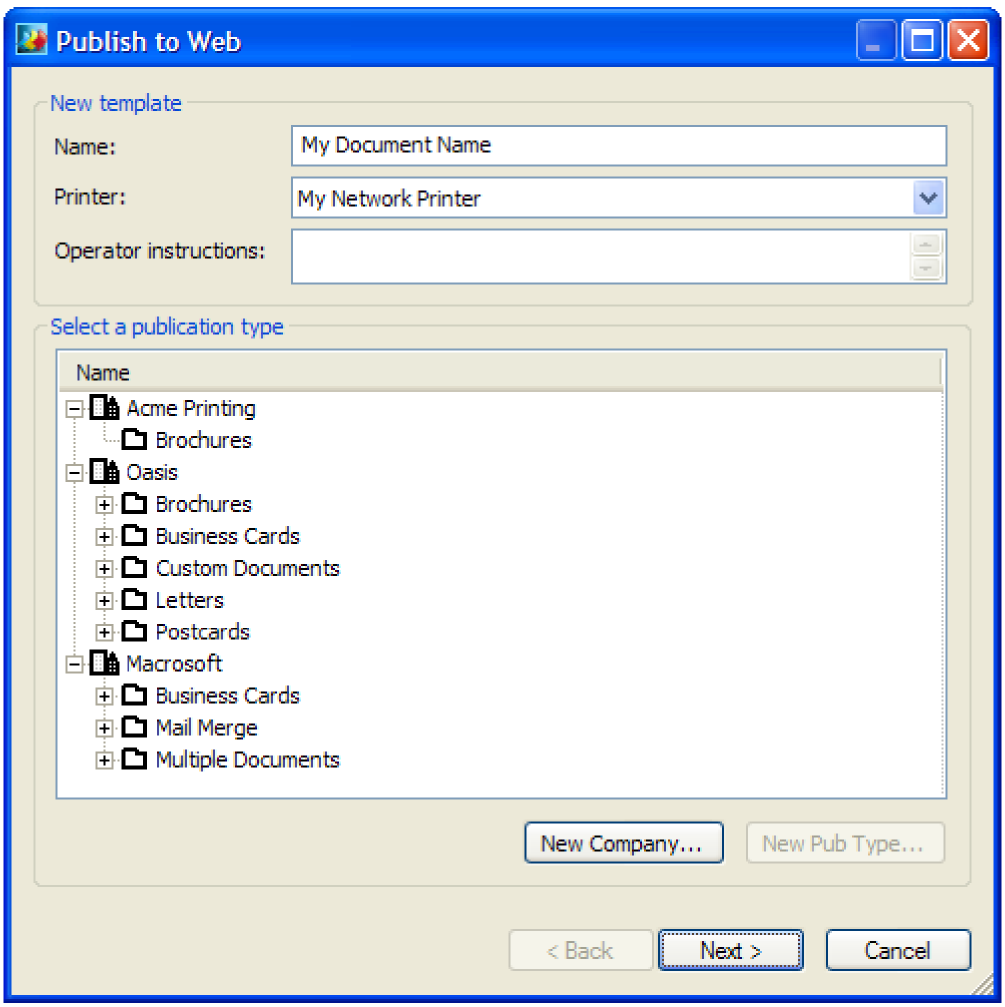
On the PrintShop Mail Web server, this printer is not installed. You are aware of this fact and fully intend to print to a different one that is not from another manufacturer. This other printer does not have the same tray names and the margins is only a quarter-inch on the Letter-sized paper.

What will happen when you send your document and start a new print job depends on a number of technical factor but the results may be different than what is expected. Your second page may not come out of the right tray or your contents may be shifted higher and to the left because of the difference in margins.

To resolve the issue, you would need to have the same driver on your PrintShop Mail Design machine as the one you ultimately output to on PrintShop Mail Web. If the printer is not accessible from the computer, you can simulate this by simply installing the driver and point it to a port that is not in use (either LPT or TCP/IP port). You won't be able to actually print to it, but your page setup will still be valid when your document ends up in PrintShop Mail Web.

Creating Companies And Publication Types

When using the Publish to Web feature from PrintShop Mail Design, depending on the rights of the user that is publishing the document. The following window is from PrintShop Mail Design:



As you can see, two buttons are available under the list of publication types:

- **New Company...**: Click to create a new company in PrintShop Mail Web. The user currently logged on will be assigned to this company by default.
- **New Pub Type...**: Is disabled if no company is selected. When a company is selected, click to create a new publication type in that company.

When you click on Next, PrintShop Mail Design will prepare the files and then send them to PrintShop Mail Web (refer to the PrintShop Mail Design User Guide for more details on this process). Note that by default any new document you send to PrintShop Mail Web is disabled so you will need to enable it for clients to use them. If you create a new publication type or a company, they will also be disabled by default.

Images VS Image Collections

When it is necessary to display different images in the same location of your document, and your image set is limited to a few repeating images, you can use Image Collections in order to present a list of available images to clients ordering the document as part of an order.

In order for an image collection to be used, you will need to create an image box in your PrintShop Mail Design document. The expression for the image format must also be specifically refer to a database field, even if it doesn't exist. You can simply edit the expression and type in a field name such as [MyImageField] to do this. Once your document is ready, send it to PrintShop Mail Web.

On the PrintShop Mail Web side, you can create a new image collection using the "Collections" (page 107) menu link. Make sure the collection is assigned to the same company as your uploaded document. In your document's properties in the "Publication Types" (page 85) menu, go in the User Input fields section. Click on the field name that corresponds to the one you entered in the image's expression (for example, MyImageField) and change the Item Type to Collection. Choose the image collection you created, and click Save.

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

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 \\.

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

Introduction

The PrintShop Mail Web (PrintShop Mail Web) web site is fully *skinnable*, everything except the actual textual content of the page can - and will - vary from skin to skin. By combining the powerful skinning engine with custom web development, new features can be added and new workflows implemented. System integrators and web developers can create custom login forms, create custom store front pages and redirect visitors to specific pages in PrintShop Mail Web.

These options are very useful for web sites or portals that requires a user to logon. By re-using login details, the visitor no longer needs to enter login details for a second time to access PrintShop Mail Web (so called *underwater login*). The administrator should make sure that the correct account information is available in PrintShop Mail Web and that proper identifiers are used in the communication between the two systems.

This chapter assumes you have basic understanding of HTML and the PHP scripting language.

PrintShop Mail Web integration

Integration methods

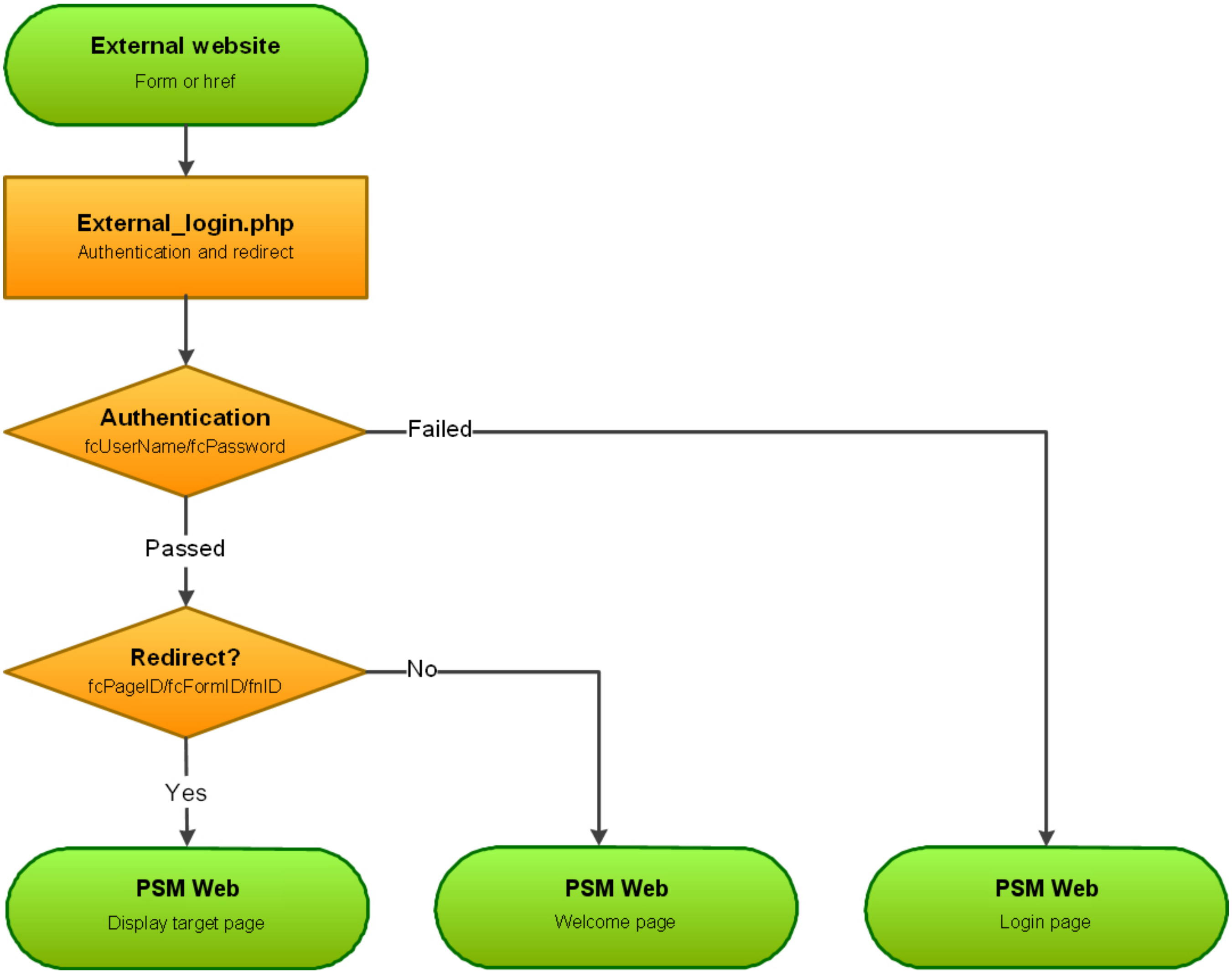
This chapter describes the *underwater login* mechanisms of PrintShop Mail Web. In all scenarios user name and password information is send to PrintShop Mail Web. This information is used to authenticate the account and optionally redirected the web site.

The *underwater login* procedure begins when a login request to PrintShop Mail Web is made from any Internet or Intranet website. In order to instantiate the underwater login, the request can be made to either of the files mentioned below. The call can include POST or GET parameters which are explained in the following sections:

- **external_login.php**, used for basic authentication and browser redirection
- **external_person_access.php**, used for account authentication

The *external_person_access.php* file is used solely to authenticate a user account and is typically used to create a custom login form. The file returns an encrypted password on success (the encrypted password is also accepted by the *external_login.php* file)

External_login.php performs account authentication but its main purpose is to redirect the web browser to a specific page in PrintShop Mail Web and instantiate the correct skin.



Underwater login page flow

External login

The *external_login.php* file handles the authentication and forwards any parameters included in the request (POST or GET). If the authentication fails the PSW login page will be shown. Optional parameters are used to redirect the web browser to a specific PrintShop Mail Web web page and to set the skin.

The *external_login.php* file requires the following attributes in order to authenticate the user:

- **fcUserName**, the login name
- **fcPassword**, the users password or
- **fcPasswordMD5**, the users password using a MD5 hash

The latter variable can be used to send the password in non readable format.

The following attributes are optional:

- **fcPageID**, used to redirect the user to a specific page.
- **fnID**, used to send a unique ID to PSW allowing to retrieve the information of a specific template or order.

- **fcFormID**, used to redirect the user to a specific edit or submission page. Example: To show the user input/database input page of a template you will need to call the *preview_init_form* form and specify the unique ID of the template in the fnID parameter. The *preview_init_form* retrieves all information of that template in order to show the correct information in the web browser.
- **fcWebDesign**, this parameter lets you toggle the skin of the web site. The value of this parameter should match the *Design name* which can be setup in the *Web Design* section of a company.

When no *fcPageID* or *fcFormID* is specified the site will be directed to the PSW *Welcome* page. The *fnID* parameter is used in conjunction with the *fcPageID* or *fcFormID* parameters. When no *fcWebDesign* parameter is stated the system default skin will be used.

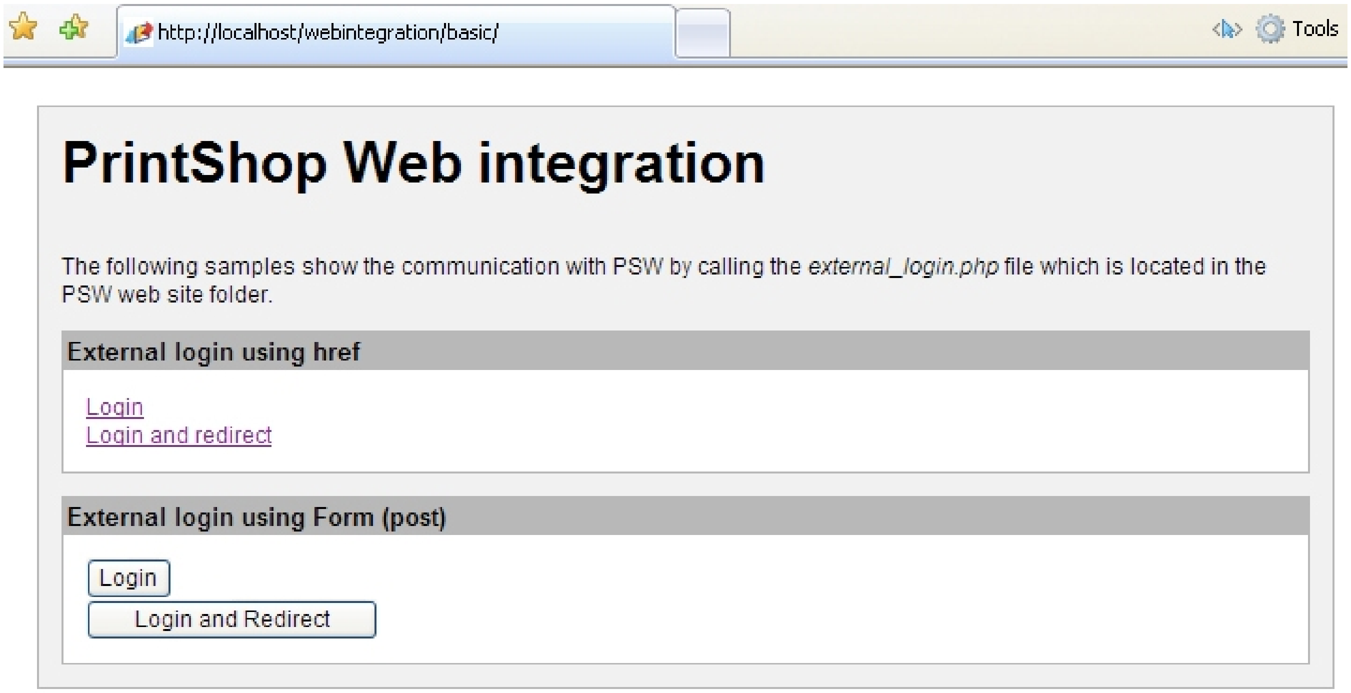
For security reasons it is recommended to pass parameters to *external_login.php* via a POST request over HTTPS.

Examples

Examples are included with your PrintShop Mail Web installation and can be found in the *webintegration* folder of the PrintShop Mail Web web site folder. The sample below is taken from the *index.php* stored in the *basic* folder.

```
<!-- Sample href -->
<a href="external_login.php?fcUserName=administrator&fcPassword=administrator">Login</a>

<!-- Href with redirect -->
<a href="external_login.php?f-
cUserName=administrator&fcPassword=administrator&fcPageID=storefront_overview">Login</a>
```

```
<!-- Sample form -->
<form method="POST" action="external_login.php">
  <input type="hidden" name="fcUserName" value="administrator"/>
  <input type="hidden" name="fcPassword" value="administrator"/>
  <input type="submit" value="Login"/>
</form>

<!-- Sample form including redirect -->
<form method="POST" action="/external_login.php">
  <input type="hidden" name="fcUserName" value="administrator"/>
  <input type="hidden" name="fcPassword" value="administrator"/>
  <input type="hidden" name="fcPageID" value="storefront_overview"/>
  <input type="submit" value="Login and Redirect"/>
</form>
```

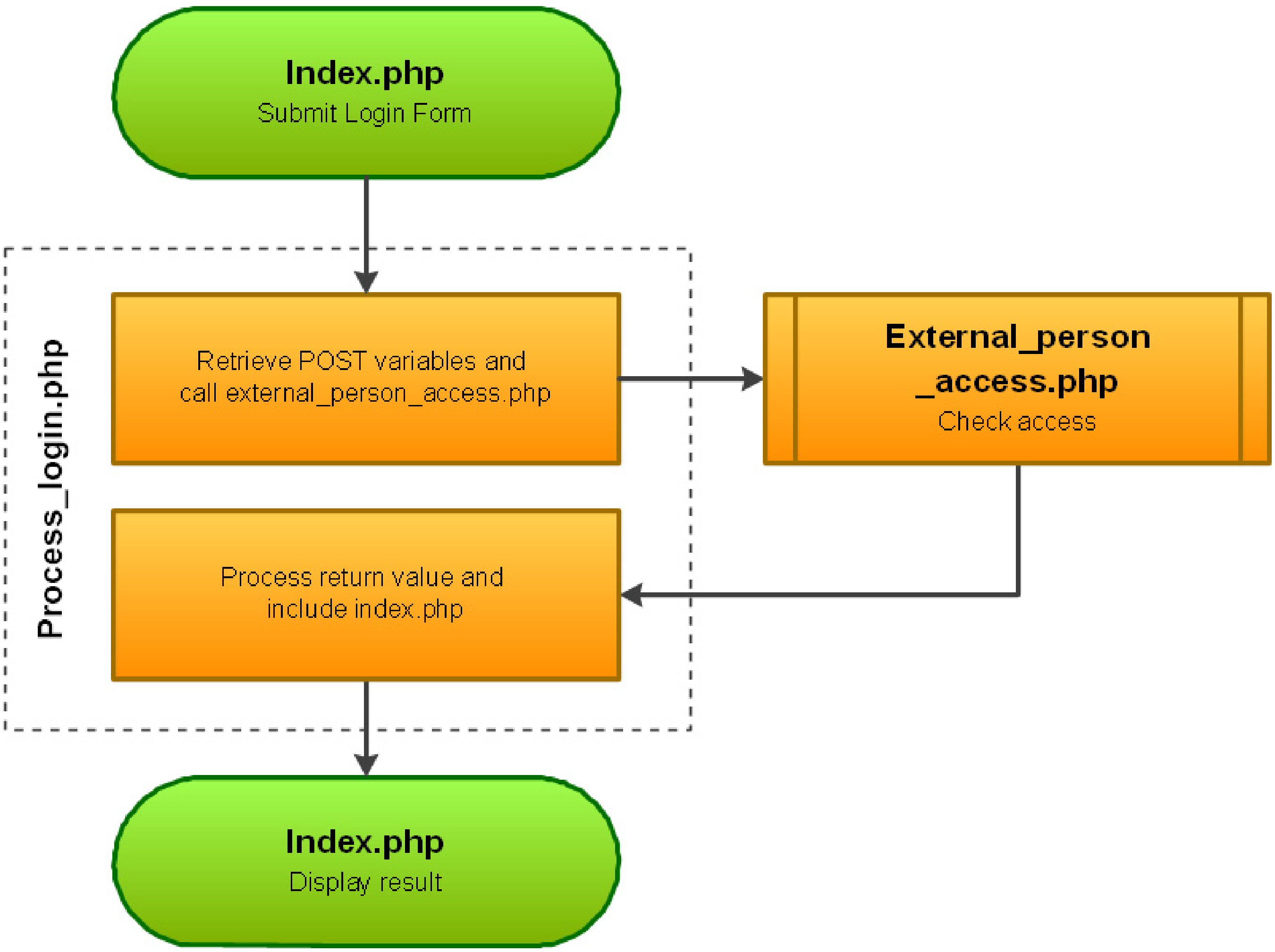


The basic webintegration index.php file

External person access

Where the *external_login.php* handles both authentication and redirect parameters, the *person_access.php* file is solely used for authentication. The return value of the *external_person_access.php* file differs form the *external_login.php* file as it returns an MD5 hashed password on success or a zero (0) when authentication has failed

This method may be used to create a custom login form where the feedback is used to notify the user in case of an invalid login or password. On success the hashed password can then we used in the *fcPasswordMD5* attribute of the *external_login.php* file.



Custom login form workflow

Examples

In the *webintegration* folder of the PrintShop Mail Web *Website* folder you will find an authentication sample. The *index.php* file contains a standard web form, the actual verification is handled by the code in the *process_login.php* file. The form uses the POST method and sends the information to the *process_login.php* file.

```
<!-- Index.php -->
<!-- Custom login form, communication with PrintShop Mail Web is handled
by the process_login.php file  -->

<form method="POST" action="process_login.php">
  <div>
    <span>Username: </span>
    <input type="text" name="fcUserName" value="administrator"/>
  </div>
  <div>
    <span>Password: </span>
    <input type="text" name="fcPassword" value=""/>
  </div>
  <div>
```

```
    <input type="submit" value="Login"/>
  </div>
</form>
```

The *process_login.php* file retrieves the user name and password send by the login form (POST). The curl library, that comes with PHP, is used to send the information to the *external_person_access.php* file. The return value is stored in a local variable which is used by the *index.php* to show feedback to the user. In this case the *index.php* is shown no matter what the outcome is of the authentication process. One could implement an option to show a different page when the authentication was successful.

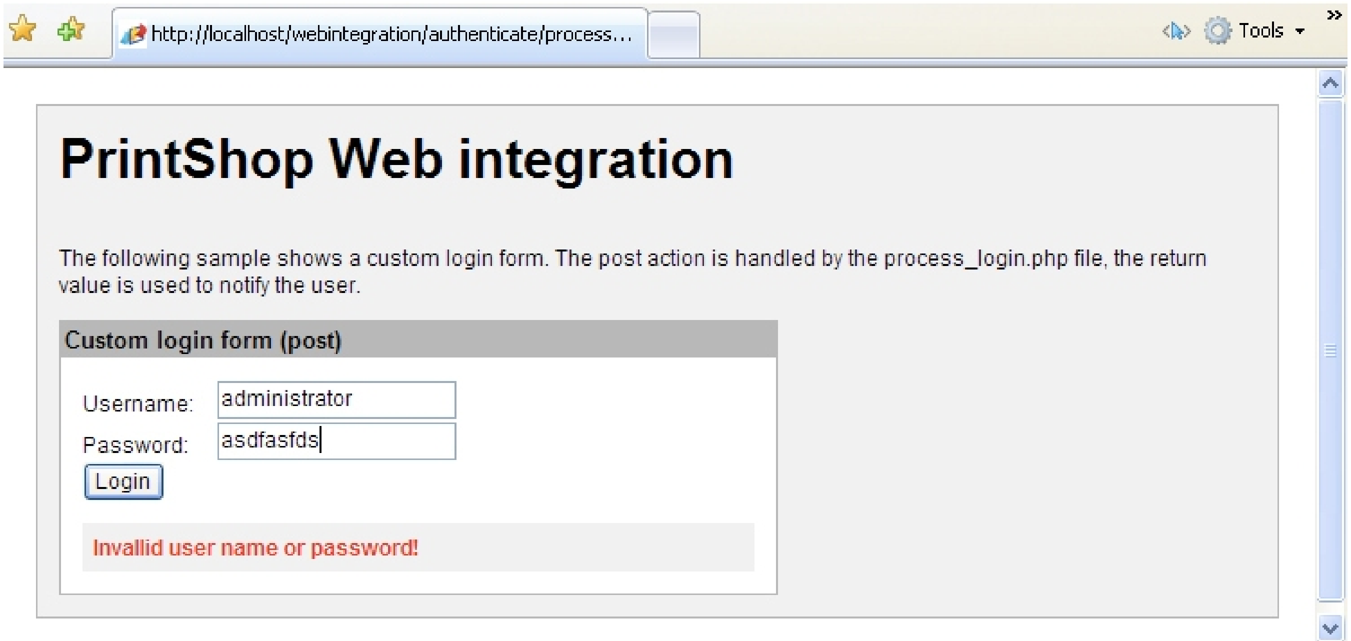
```
<!-- Process_login.php -->
<?
// The process_login.php file (the following process is an example and
// should be handled by your web site or portal)
$hCurl = curl_init(); //Initializes a new session and return a cURL handle
curl_setopt($hCurl, CURLOPT_URL, $_SERVER['HTTP_HOST']."/external_person_access.php");
curl_setopt($hCurl, CURLOPT_POST, 1);
curl_setopt($hCurl, CURLOPT_RETURNTRANSFER, 1);
curl_setopt($hCurl, CURLOPT_TIMEOUT, 10); // times out after 4s
curl_setopt($hCurl, CURLOPT_POSTFIELDS, "fcUserName=".$_REQUEST[fcUserName].
"&fcPassword=".$_REQUEST[fcPassword]); // add POST fields

$cReturn = curl_exec ($hCurl);

curl_close ($hCurl);

if ($cReturn != "0") {
  //Success
  $cReturn = urlencode($cReturn);
  $fcUserName = $_REQUEST[fcUserName];
} else {
  //Failed
  $fcUserName = $_REQUEST[fcUserName];
  $cReturn = false;
}
include_once("index.php");
?>
```

Important: The PHP *urlencode()* function is applied to the encrypted password to make sure that it is properly encoded when using it in a URL (f.e. Href).

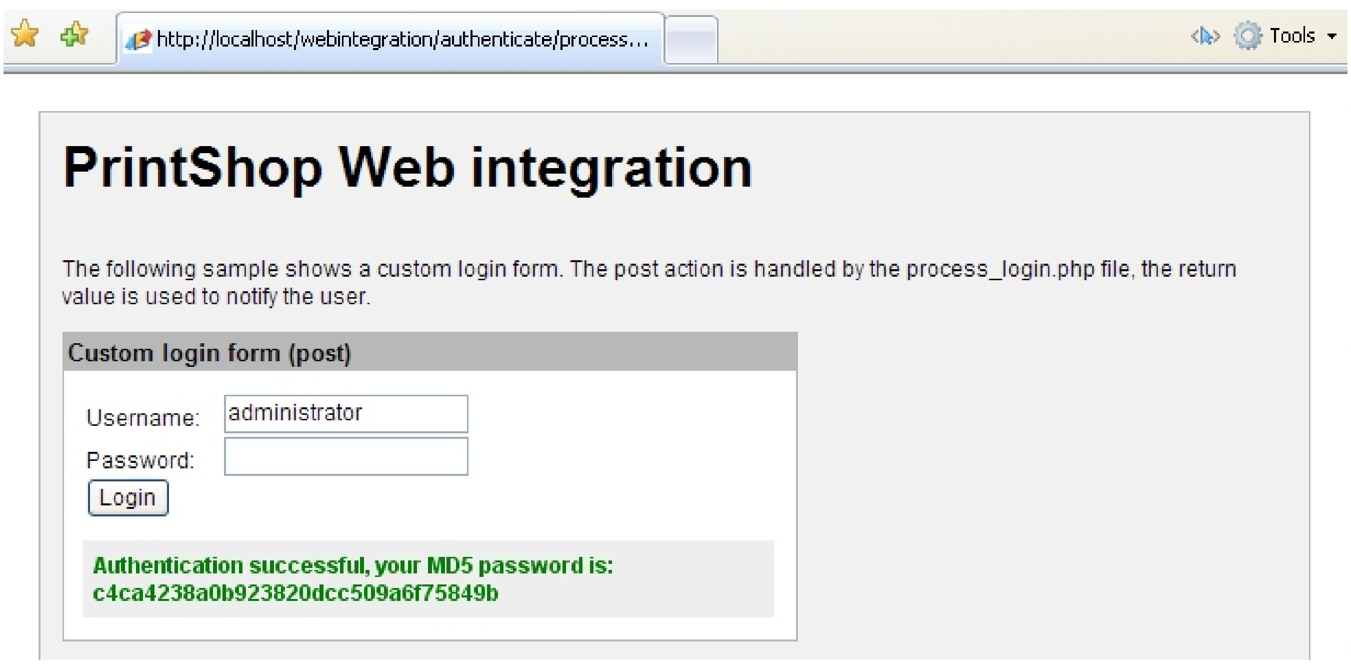
In our example a few simple statements are used to show the return value of the authentication process.

```
<!-- Index.php -->
<!-- Statements to show the return value -->
<?
  // Following variables are generated by process_login.php and
  // used to show the repsonse of PSW.
  if(isset($cReturn)){
    if($cReturn == false){
      echo "<div class=\"status error\">Invallid user name or password!</div>";
    } else {
      echo "<div class=\"status success\">Authentication successful,
```

```
      your todays secret password is: ".$cReturn."</div>";
    }
  }
?>
```



Authentication failed



Authentication passed

Implementing a custom store front

By combining the methods described in the previous chapters a custom store front page can be developed. This page resides outside PrintShop Mail Web and is probably stored on a different domain and can be developed in a scripting language other than PHP. Implementing a custom store front involves the following subjects:

- Account authentication
- Storefront pages, including redirect information to PrintShop Mail Web
- Redirection from PrintShop Mail Web to your web site/portal at the end of the ordering process

Sample files can be found in the *storefront* folder located in the *webintegration* folder of the PrintShop Mail Web *Website* folder.

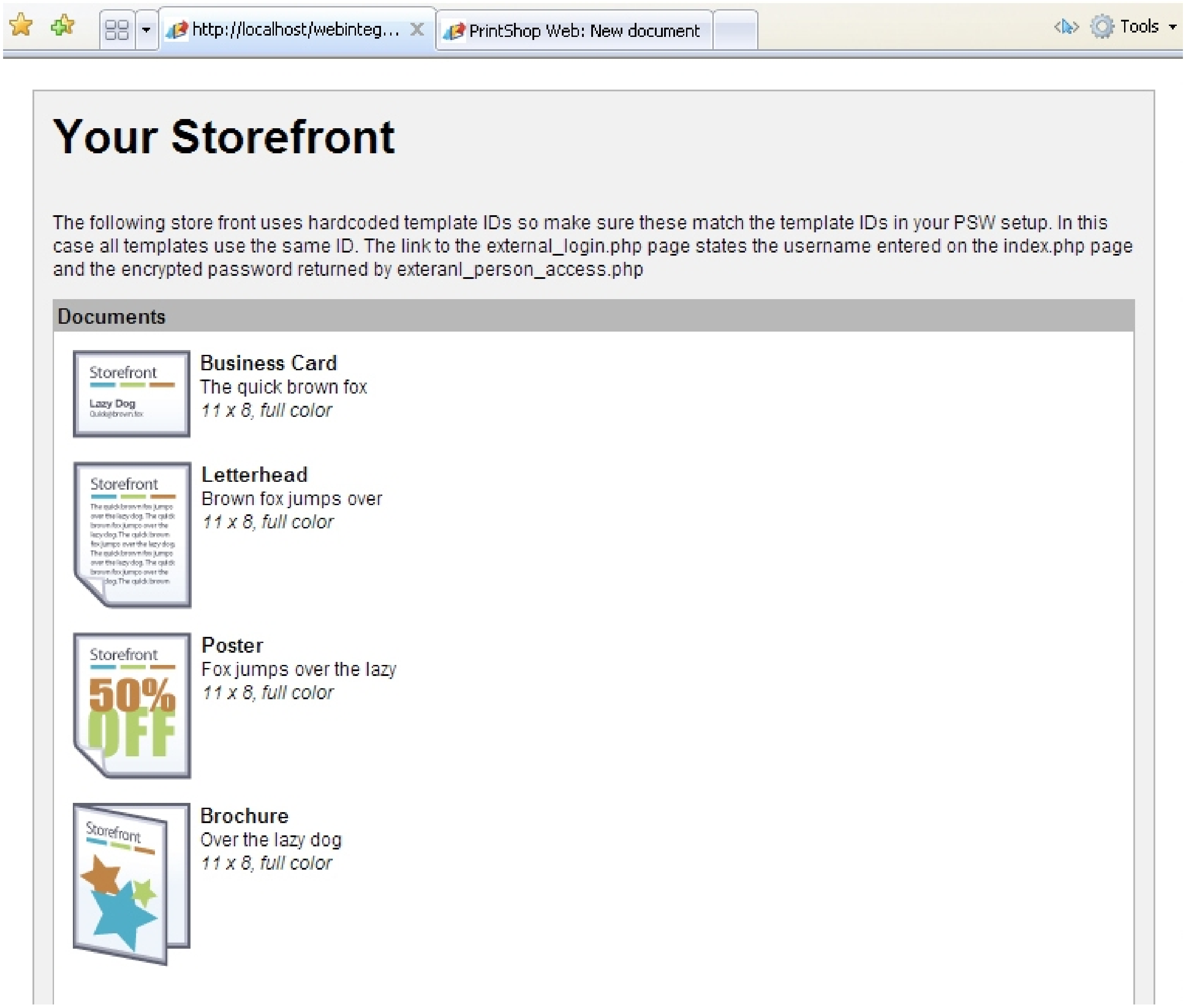
Account authentication

The authentication is handled using the *external_person_access.php* and is similar to the *External person access* process as described in the previous chapter. A change is made to the *process_login.php* file where a custom storefront file (*storefront.php*) is included when the authentication was successful.

```
<!-- Process_login.php snippet-->
<?php
if ($cReturn != "0") {
  //Success
  $_SESSION[fcUserName]= $_REQUEST[fcUserName];
  $_SESSION[fcPassword]= urlencode($cReturn);
  include_once("storefront.php");
} else {
  //Failed
  $fcUserName = $_REQUEST[fcUserName];
  $cReturn = false;
  include_once("index.php");
}
?>
```

Custom store front pages

In our example the *storefront.php* contains a hard coded list of documents. The images on the page have a hyperlink pointing to the *external_login.php* file.

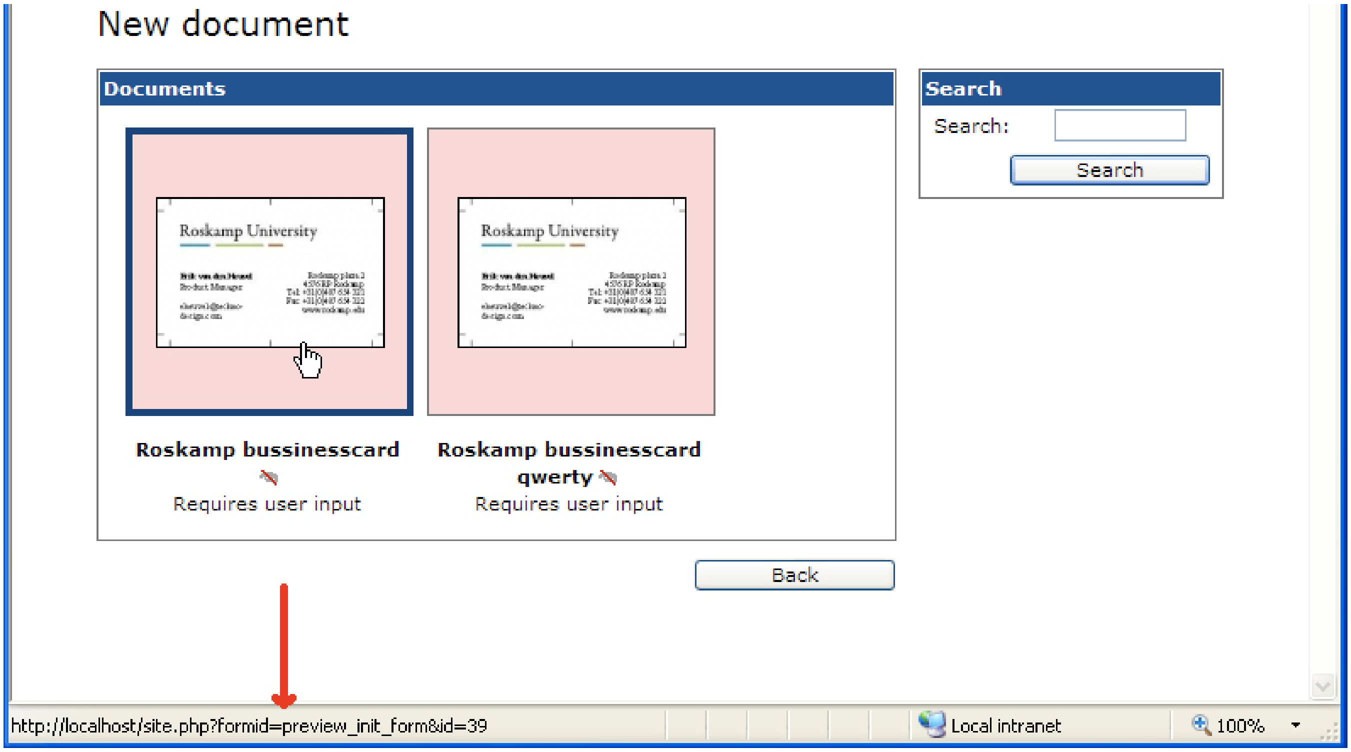


A custom store front page

The URL is targeted towards the PrintShop Mail Web system running on the localhost and states the entered user name and the hashed password returned by the authentication process. The *fcFormID* parameter states *preview_init_form* . This page is used by PrintShop Mail Web to determine the data entry workflow (user input versus database input) and populates the sessions required to create a new order. The *fnID* parameter states the internal database ID of the template (primary key). As these IDs are hard coded they need to match the *psw* database.

```
<a href="/external_login.php?fcUserName=administrator
&amp;fcPasswordMD5=1104db662edc1905aeffaeeedf1c4fd1
&amp;fcFormID=preview_init_form
&amp;fnID=1">Business Card</a>;
```

The page IDs, form IDs and internal IDs can be retrieved easily from the *Status bar* of your web browser. Below the *Status bar* information is shown when hovering the cursor over a template in the standard Store Front page of PrintShop Mail Web.



Page IDs, form IDs and internal IDs are displayed in the Status bar of the browser

Adding a redirect to PrintShop Mail Web

After completing the document the customer is guided through the ordering process. At the end of this process the PrintShop Mail Web web site is redirected to the *checkout_confirmation.php* page. The creating a page exception file for the active skin you could redirect the user to your own web site/portal.

This can be achieved by creating a template exception file using the following name: *template-checkout_confirmation.php.* Place the following snippet in this file:

```
<html>
  <head>
    <script language='JavaScript'>
      document.location.href='http://www.urltoyourwebsitehere.com';
    </script>
  </head>
  <body></body>
</html>
```

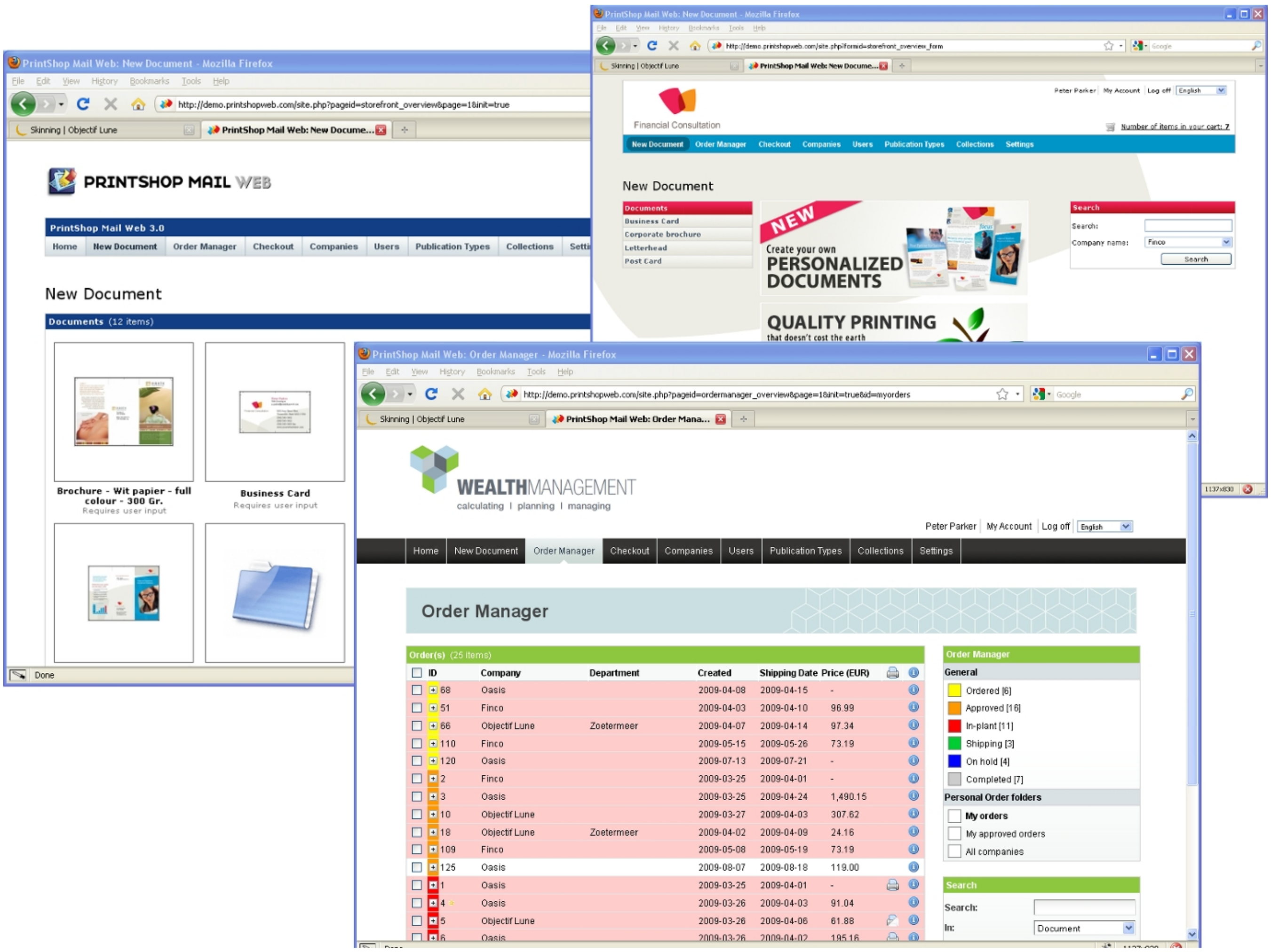
To redirect to the Thank You Page located in the webintegration sample folder enter the following URL:

```
document.location.href='http://localhost/webintegration/storefront/thankyou.php'
```

Do not setup a custom redirect in the default skin of your PrintShop Mail Web installation as none of your users will be able to access the *Order Manager* section. Use a duplicate or a custom skin.

Skinning Guide

The PrintShop Mail Web website is fully *skinnable* which means everything except the actual textual content of the page can vary from skin to skin. A skin is a series of files that control the presentation of the web site. 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 documents, allowing the styles to be changed and manage the styles without the need to change the source code.



PrintShop Mail Web skin examples

Getting started

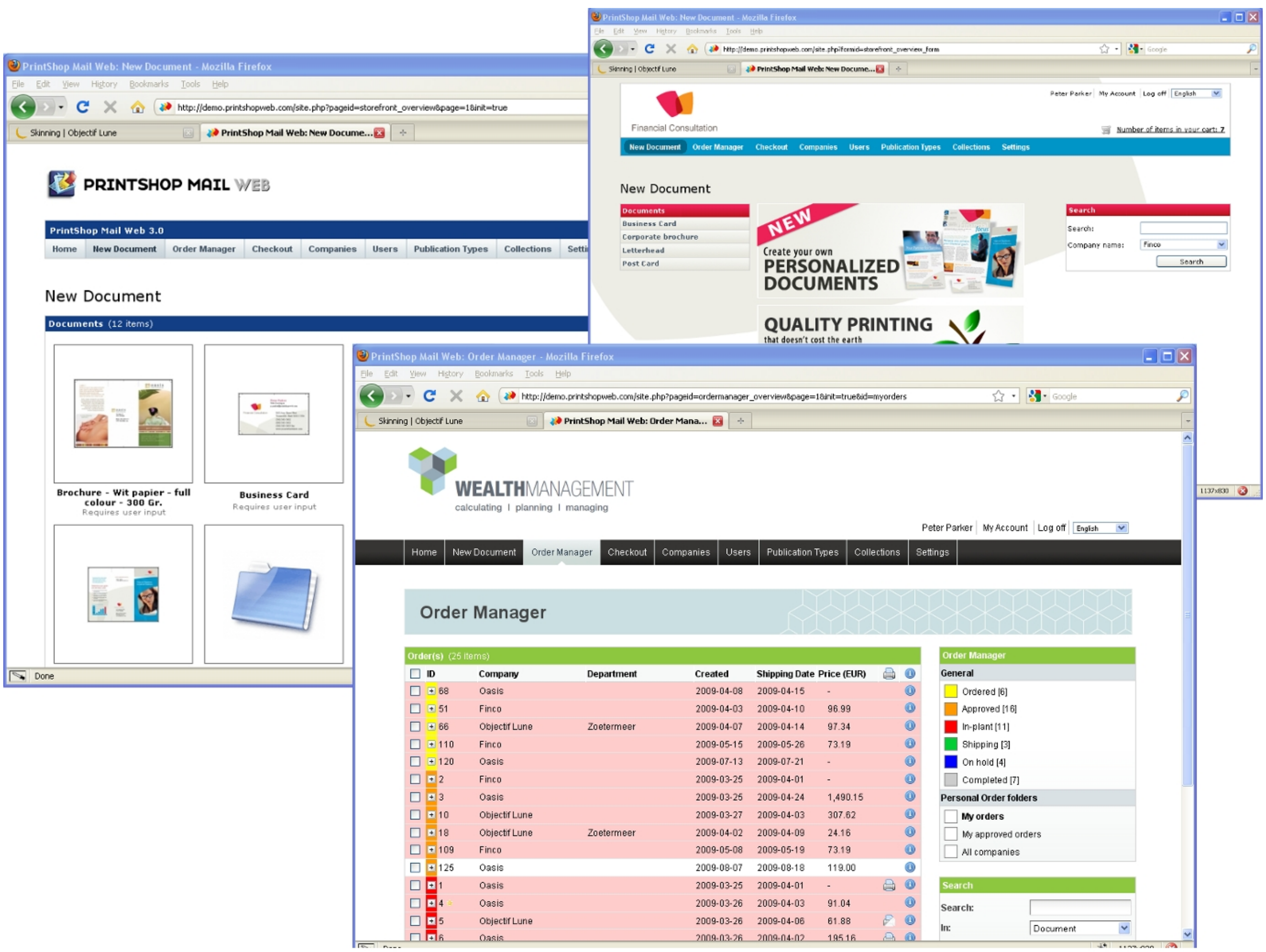
Creating a skin for the first time can be a daunting and sometimes a time consuming task. This section gives you an overview of useful tools and sources on the web.

This section answers the following questions:

- "Skinning" (page 211)
- "How are skins organized in PrintShop Mail Web?" (page n)
- "Creating your own skin" (page 214)

Skinning

The term *Skinning* refers to a software architecture which provides you with a manageable way of separating application logic and content from its presentation. This abstraction of *form* and *function* is sometimes referred to as a two-tiered presentation model. This allows web designers and system integrators to customize the user interface without the risk of interfering with the functionality of the application. Skins are used to define colors, fonts, images, borders and the placement of various components in the web site.



PrintShop Mail Web skin examples

PrintShop Mail Web can use a different *skin* for each company, allowing your customers to use the system in their own house style or a style that closely matches their house style (depending on the time and effort you have spend to match there corporate site). Users of that company can access the PrintShop Mail Web web site via a personalized URL which will invoke their skin. Personalized URL is controlled by the PrintShop Mail Web administrators by defining an URL variable for each company.

For example: http:/www.yourprintshopmailwebsite.com/yourclientscompanyname.

Templates and styles

Skinning involves the use of templates. A template is a series of files within the PrintShop Mail Web web site that control the presentation of the content and their position on the page. An embedded skinning engine is used to assemble the dynamically generated content into the final HTML pages.

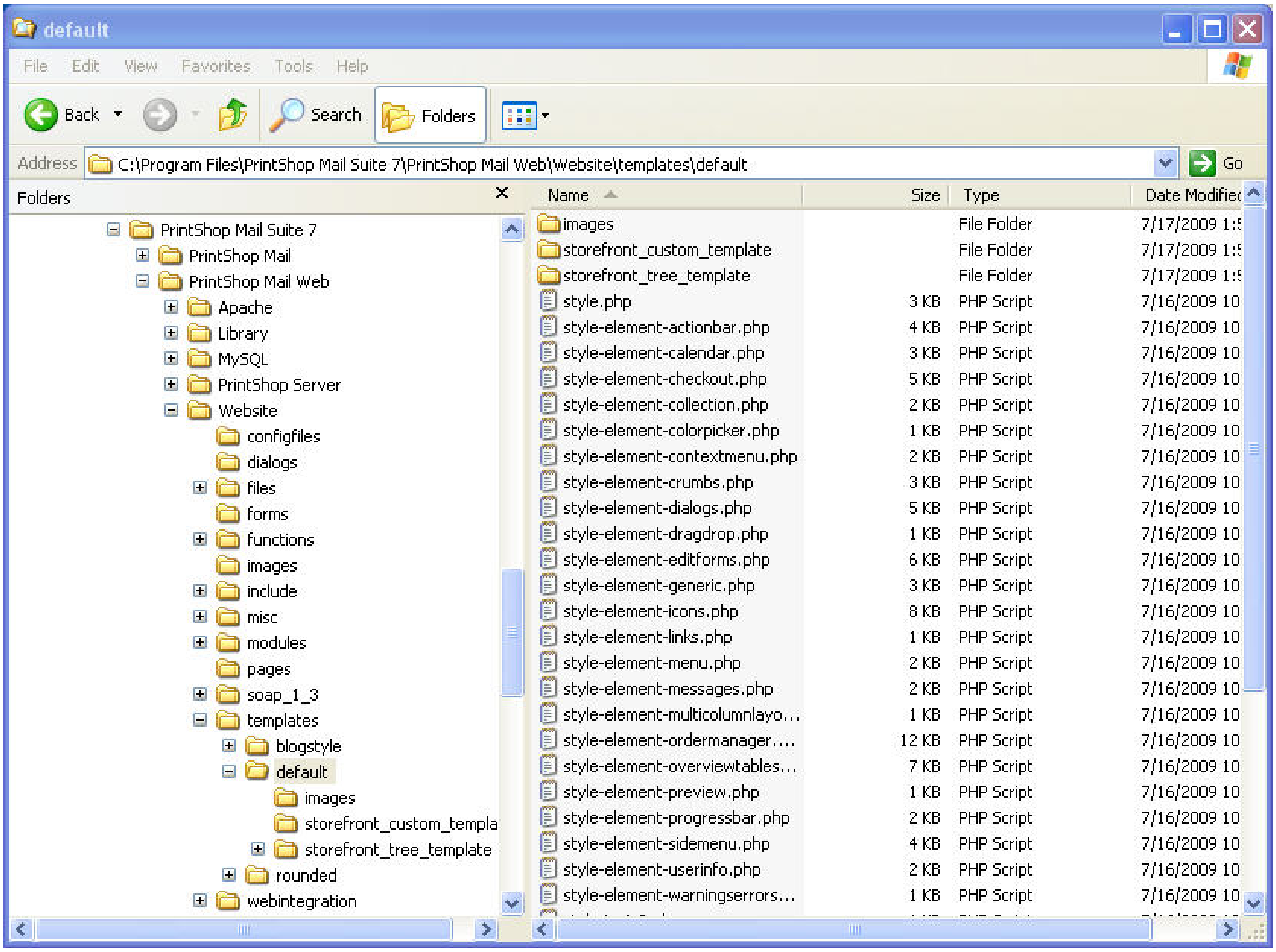
Skins are used in combination with *Cascading Style Sheets* (CSS). This is a mechanism for adding style (e.g. fonts, colors, spacing) to Web documents, standard by the World Wide Web Consortium (W3C). A skin combines uses HTML, JavaScript and PHP to define the look & feel of PrintShop Mail Web. To create a new skin or modify an existing skin some experience with these techniques is necessary.

File organization

Skins are organized under the *Templates* folder located in the PrintShop Mail Web web site folder. Each skin has its own directory tree. The name of this folder will be visible in the *Skin*-pull down menu in the Web Design section of a company and in the web design page in the *Settings*-menu.

Skin folders stores the items required to render a skin and can contain an unlimited number of files and sub folders. A skin consists of the following elements:

- Template.php
- Cascading Style Sheet documents
- Images
- Web design parameters stored in the PrintShop Mail Web database



The contents of skin folder

Template.php

The *Template.php* file is the main file for your skin and can be compared with an index.html file of a regular HTML web site. The file calls the different functions of the skinning engine that assembles the final HTML output. The *Template.php* file controls the logical positions of the page elements and processes the items in the order that they appear in that file.

Style.php

As stated before skins are used in combination with Cascading Style Sheets (CSS). PrintShop Mail Web uses a PHP file that generates a CSS structure. To be able to call special functions that insert special variables like color information or an image file. The variable information is retrieved from the PrintShop Mail Web database and can be set by the administrator in the *Edit Web Design* page. This can be done per company (f.e. to match the companies color scheme) or for the system wide web design settings.

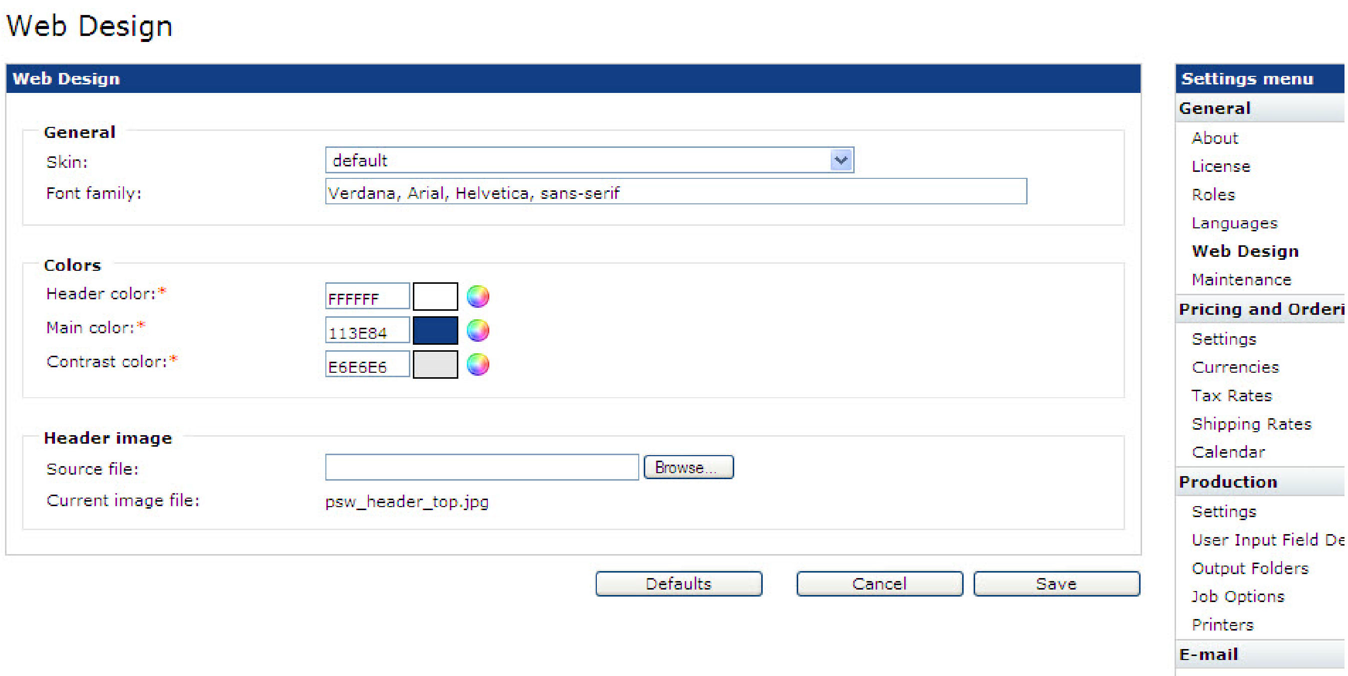
PrintShop Mail Web comes with a browser detection mechanism. This allows you to make style exceptions for specific browsers, browser versions and operation systems.

Images

To enhance your skin even more you might want to add custom images and icons. You can place these images inside your skins folder and refer to them from within your style documents.

Web design parameters

By editing the web design settings of a company you can specify company specific colors, fonts and logo. Using special functions a skin can retrieve these parameters and use them in the *Style.php* file.



The Edit Web Design page

Creating your own skin

Before creating your own skins you should have some basic knowledge of HTML, CSS, PHP and Javascript.

Resources

There are fine books on these subjects and you will find a lot of information on the web. The web is probably your best source. If you're not familiar with HTML, CSS and Javascript please visit the following web sites:

- http://www.w3schools.com
- http://www.htmldog.com
- http://jquery.com

Tools

What is a craftsman without a good set of tools. Below you'll find a list of tools that will help you with skin development.

PrintShop Mail Web demo version

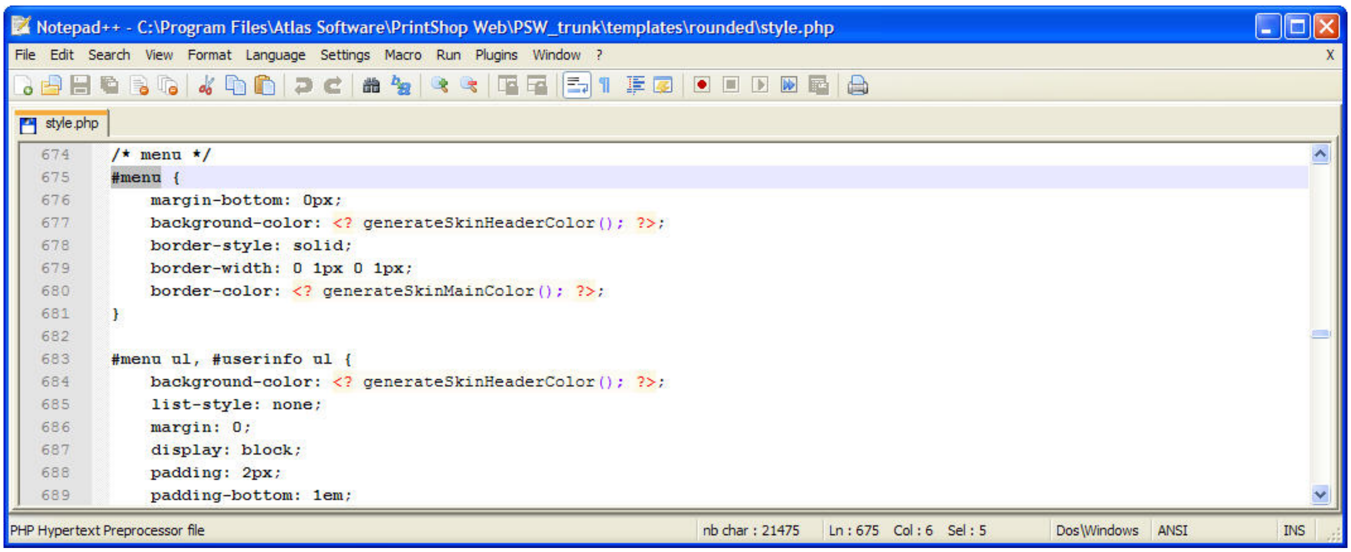
Download and install the demo version of PrintShop Mail Web on your local machine. This allows you to develop your skins off-line without the risk of interfering with your production environment. The demo version is limited regarding printing and previewing PrintShop Mail documents but has a fully functioning user interface. A demo version can be downloaded from the Objectif Lune web site (www.objectiflune.com), PrintShop Mail Web is part of the PrintShop Mail Suite.

Design

Before you start creating a skin you should have a visual theme which determines the look & feel of your web site. This can be the design of your current corporate site, your customers web site or a new design. You'll probably start your design in an application like Adobe Photoshop ending up with a bunch of sliced images (background images, icons, button backgrounds etc). On the web you can find several samples and downloadable .psd files which will get you up and running in no time.

Text editor

There are several specialized CSS editors available. The PrintShop Mail Web style sheet documents are a combination of CSS and PHP so we advise you to use a text editor like Notepad++. This is an open source editor (a Notepad replacement) that support coding in several programming languages. The application runs under the MS Windows and can be downloaded for free at the following location: http://notepad-plus.sourceforge.net/

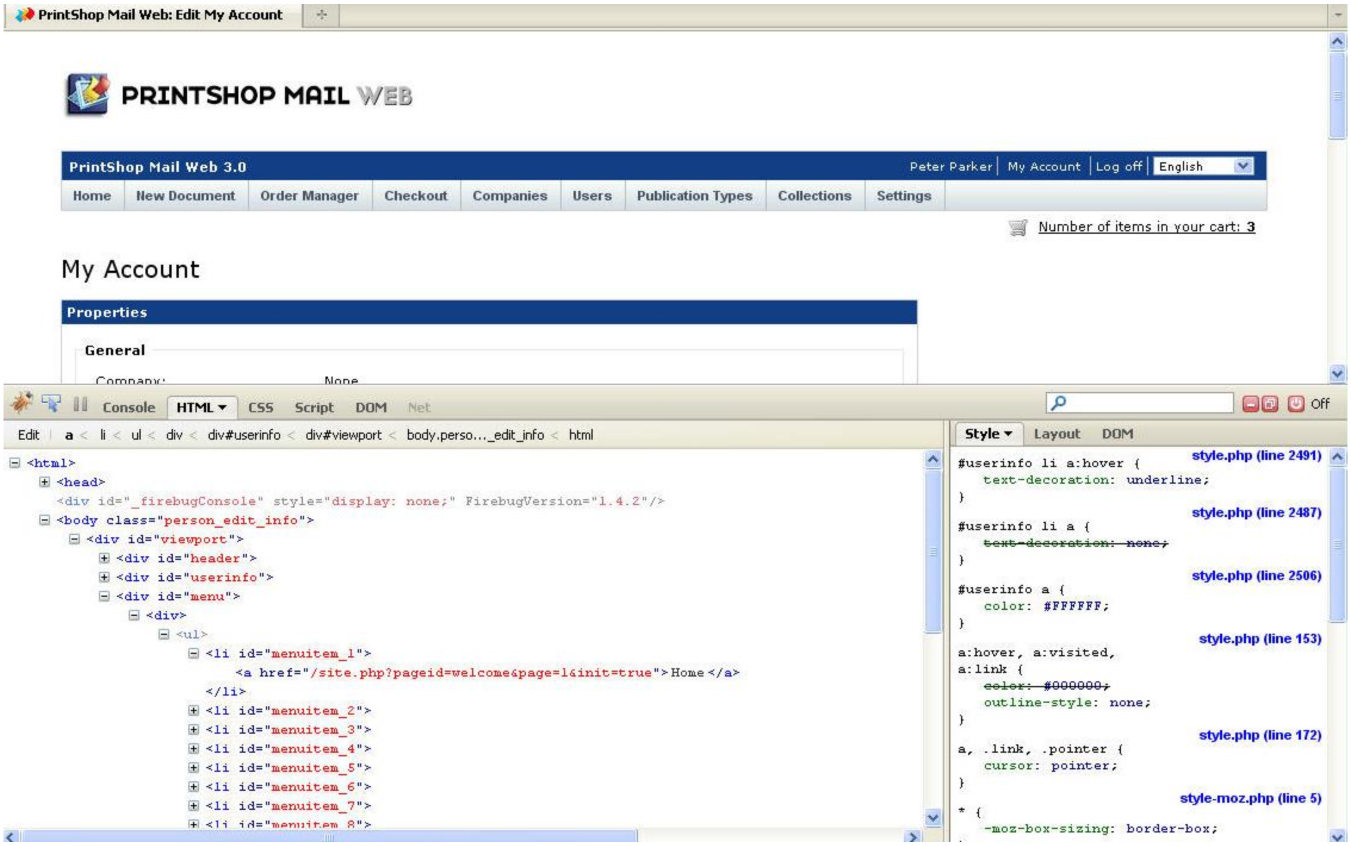


The style.php file in Notepad++

Browser extensions

The toughest part will be to keep your skin compatible with the various browsers and browser versions. You can download and install additional browser extensions that will help you during skin creation. Typically these extensions expose the hierarchical structure of your web page allowing you to identify tag names, ids and CSS classes quickly. These extensions are available for all popular web browsers and can be downloaded for free. Below you'll find a list of popular extensions:

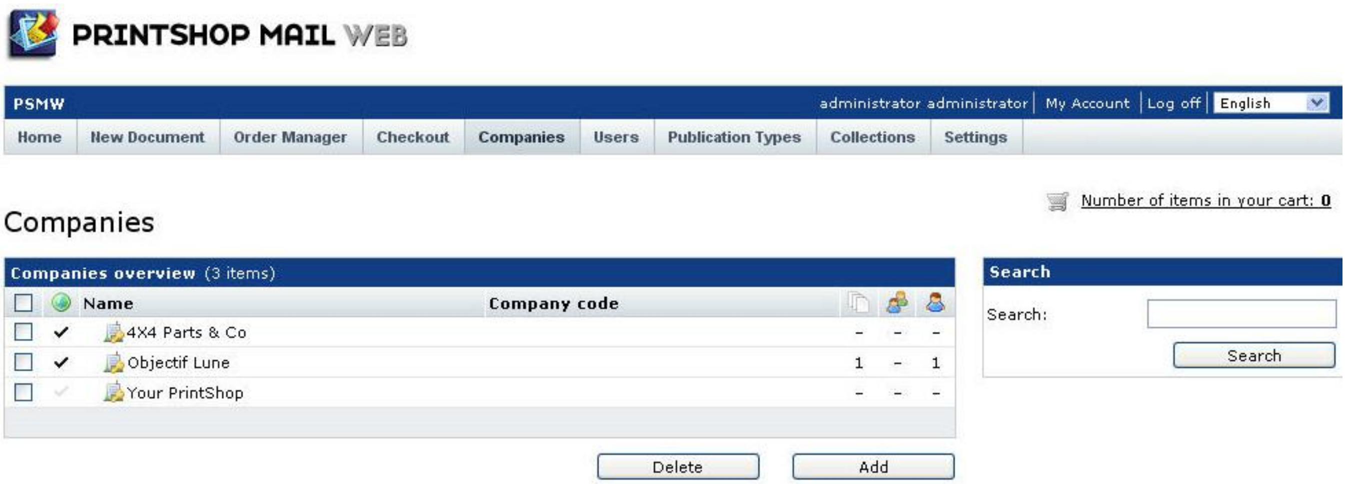
- Firebug for Fire Fox (our personal favorite)
- Microsoft Internet Explorer Developer Toolbar



The HTML DOM exposed by the Firebug extension for Fire Fox

The template file

The Template.php file contains the main outline of the PrintShop Mail Web web site, it contains HTM code with a few snippets of PHP. It is invoked for each page request and outputs the final page contents. The PHP snippets control the rendering of Print-Shop Mail Web function blocks on a page by page basis. Examples of functions blocks are: the menu bar, sub menus, the user info bar, the main content area.



A sample PrintShop Mail Web web page showing various function blocks

HMTL Outline

The *Template.php* file contains regular HTML code combined with PHP. The main structure of the file contains the standard HTML elements like <html>, <head> and <body>. Custom HTML code can be added to insert information/content to the pages and to change the positioning of the elements.

The design and positions of the function blocks can be changed by altering the *Style.php* file or by adding inline styles.

Typically function blocks are placed inside HTML <div> tags. The following sections describe the main function blocks. Please note that the structure of the *Template.php* will probably be different for each skin. The following code snippets are derived from the default PrintShop Mail Web skin.

```
<!DOCTYPE HTML PUBLIC "-//W3C//DTD HTML 4.01 Transitional//EN">
<html>
<head>
  <meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
  <title><? generateSystemName(); ?>: <? generateTitle(); ?></title>
  <link rel="shortcut icon" href="/favicon.ico" type="image/x-icon" />
  <? generateCSSIncludes(); ?>
  <? generateJavaScriptIncludes(false); ?>
</head>
<body>
  <div id="viewport">
  <div id="header"><h1>Hello World</h1></div>
```

```
<? if(function_exists("generateUserInfo")) { ?>
  <div id="userinfo">
    <div>
      <h3><? generateAdditionalInfo(); ?></h3>
      <? generateUserInfo(); ?>
    </div>
  </div>
<? } ?>

<? if(function_exists("generateMenu")) { ?>
  <div id="menu">
    <div>
      <? generateMenu(); ?>
    </div>
  </div>
<? } ?>

<? if(function_exists("generateCrumbs")) { ?>
  <div id="crumbs">
    <? generateCrumbs(); ?>
  </div>
<? } ?>

<? if(function_exists("generateMessages")) { ?>
  <div id="messages">
    <? generateMessages(); ?>
  </div>
<? } ?>

<div id="content">
  <? if (getFormCount() > 0){ ?>
    <? generateContent(); ?>
  <? } ?>
</div>

<? if(function_exists("generateSubMenu")) { ?>
  <div id="submenu">
    <? generateSubMenu(); ?>
  </div>
<? } ?>

<? if(function_exists("generateSubMenu1")) { ?>
  <div id="submenu1">
    <? generateSubMenu1(); ?>
  </div>
<? } ?>

<? if(function_exists("generateSubMenu2")) { ?>
  <div id="submenu2">
    <? generateSubMenu2(); ?>
  </div>
<? } ?>
```

```
  <? if(function_exists("generateSearch")) { ?>
    <div id="search">
      <? generateSearch(); ?>
    </div>
  <? } ?>

  <? if(function_exists("generatePreview")) { ?>
    <div id="preview">
      <? generatePreview(); ?>
    </div>
  <? } ?>

  <? if(function_exists("generateSummary")) { ?>
    <div id="summary">
      <? generateSummary(); ?>
    </div>
  <? } ?>

  </div>
  <div id="footer"></div>
</body>
</html>
```

As you can see the PHP snippets perform a *function_exists* check. You should not alter these checks but you may add HTML tags and information inside or outside these checks. To meet your design you will probably need to add additional <div> and/or <table> tags to change the positioning of the function blocks.

Page title

The <title> tag is part of the <head> and contains the name of the web page. The contents of this tag are shown in the browser title bar - at the very top of the window. The title bar shows the name of your browser and the name of the page. When a visitor adds your page to their favorites or bookmarks, the page title is the default name it will assign to the bookmark. Search engines use the page title as the listing name for their results.

You can enter a custom title or use the predefined PHP functions to set the title dynamically. By default the <title> tag will be populated with the systems name and the title of the current section/subsection. These two values are separated by a colon as follows:

```
<title><? generateSystemName(); ?>: <? generateTitle(); ?></title>
```

The *generateSystemName* returns the value of the *cSystemName* string and depends on the selected language. You can change the value for this string in the *Edit Language* page of the *Settings* section. The *generateTitle* will return the name of the current PrintShop Mail Web section.

CSS includes

This function retrieves the proper location of your skin and its accompanying CSS files. This PHP function is required to dynamically load your CSS files. You should not remove this.

```
<? generateCSSIncludes(); ?>
```

Header

The information stated in the header div is used to display the main page header or title (not to be confused with the browser window title). Using the *Style.php* you can replace the contents of this element with the logo uploaded through the *Edit Web Design* page. It allows the skin to show a company specific text or image.

```
<div id="header"><h1>Hello World</h1></div>
```

User information

This function will add the *User Info* block to your site. This block shows the name of the logged on user, an option that lets the user edits his or her personal information and the *Log off* option. The *My Account* option is optional and depends on the role of the logged on user.

In the default the user User Info block is dark blue and placed just above the menu bar

In the picture above additional text is added to the user info bar (the text PrintShop Mail Web). You may hard code this text, in this case it is retrieved using the *generateAdditionalInfo* function. The returned value depends on the selected language and can be changed by editing the *cAddiontalInfo* string in the *Edit Language* page (*Settings*).

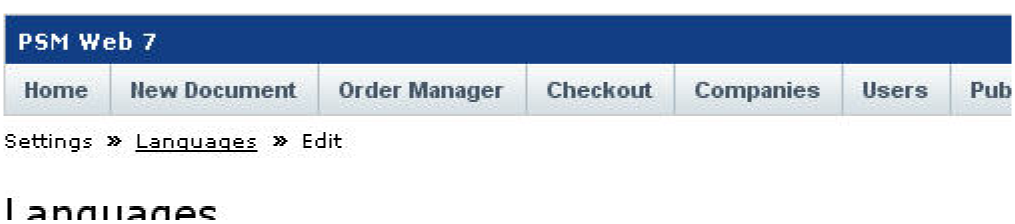
Menu

This function generates the main menu bar.

In the default skin the Menu bar is the part below the User Information bar

Crumbs

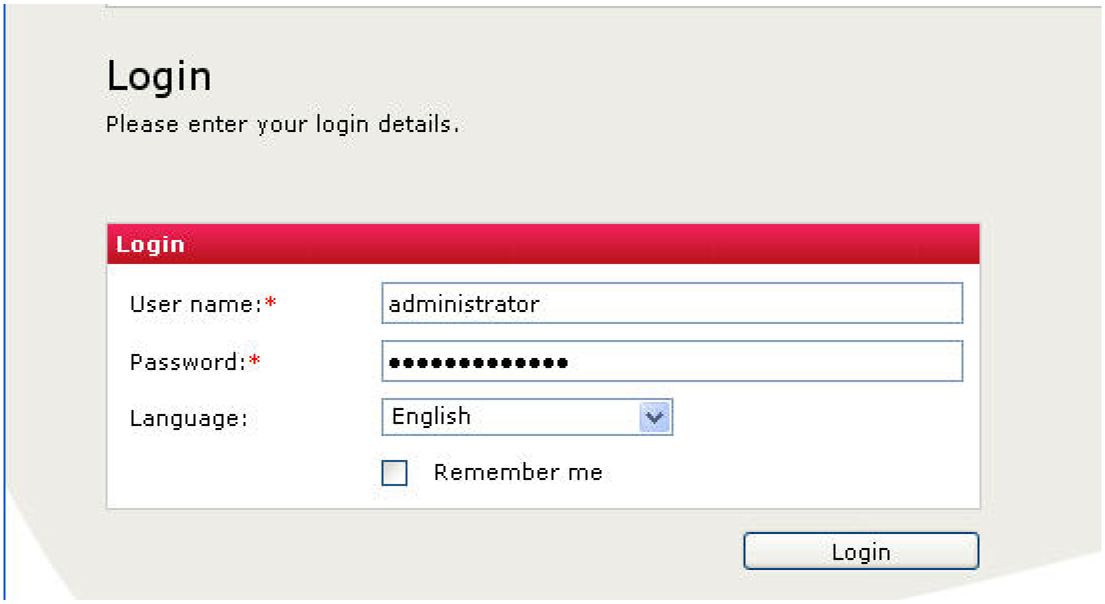
On a Web site, a bread crumb trail is a navigation tool that allows a user to see where the current page is in relation to the Web site's hierarchy. The term bread crumb trail comes from the story of Hansel and Gretel, who left a trail of bread crumbs as they walked through the forest so they could trace their way back home.



Bread crumbs in action

Messages

The *generateMessages* inserts the main headline and descriptive text for each page.



The login page showing a headline and descriptive text

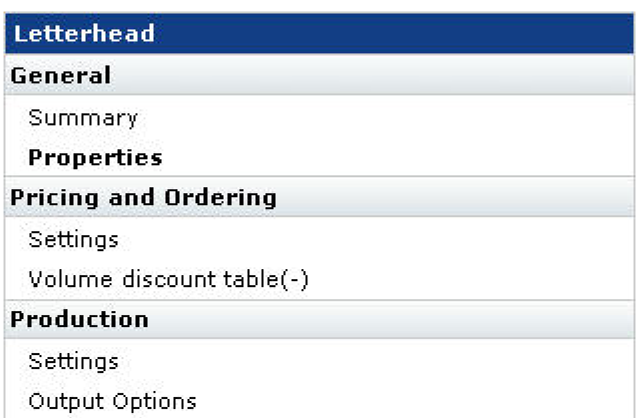
Content

The *generateContent* function renders the main area. It holds the overview information, forms, buttons and the main process functionality of the PSW system. At the *Login* page shown previously the login details and the *Login* button are part of the information rendered by the *generateContent* function.

Sub menus

Sub menus are uses throughout the PrintShop Mail Web web site. A good example is the *Settings* sub menu and sub menus inside the *Publication Types* and *Companies* sections. These sub menus typically show a list of items that can be used to navigate to a sub item of that section. Using the Style files you will be able to alter the look of these list items, for example changing the color of the list item when you place the mouse over the item (hover).

Because some sections have multiple sub menus, there are multiple *generateSubmenu* blocks in the template file.



A part of the company section showing the Company sub menu

Search

Many overview pages have a search option. The *generateSearch* functions renders this block depending on the section the contents of this block can change.

Summary

The summary is a special block in the *Order Manager* that shows summary information regarding the orders in a specific order folder.

Preview

The *generatePreview* function renders the sidebar items that hold preview information. This can be the part of the site that hold the thumbnail when previews are requested or hold the thumbnail information and download link in the *Order Manager* section.

Footer

This functions lets you render a site wide footer. You may also place static information in this area to state your address and Internet information.

Styling

The style files hold the styling parameters for your skin. It defines the fonts, colors, borders, backgrounds, width and height specifications of the user interface elements.

This section contains answers to the following questions:

- "Tags, IDs and classes" (page 223)
- "CSS Syntax" (page 223)
- "Style organization" (page 224)

Key Concepts

To apply styling to HTML elements, you should understand the following key concepts:

- "Tags, IDs and classes" (page 223)
- "CSS Syntax" (page 223)

Tags, IDs and classes

Each element on the page is rendered using standard HTML tags or by using <div> and <span> tags that have a unique identifier and/or a class.

IDs are used when there is only one occurrence on a page, classes are used when there are one or more occurrences on a page. CSS IDs are similar to classes in that they define a special case for an element. In other words, they assign an identifier. Standards specify that any given id name can only be defined once within a page or document.

You can reveal ID and class information by viewing the source of the web page or by using additional web developer browser extensions. Your style files will need to refer to these elements to set their formatting.

```
<div id="fcCompanyNameLine">
 <span id="fcCompanyNameLabel">Company name:
   <span>*</span>
 </span>
 <span>
   <input type="text" value="Oasis" name="fcCompanyName"
    id="fcCompanyNameField"/>
 </span>
</div>
```

CSS Syntax

The CSS syntax is made up of the following parts: a selector, a property and a value:

```
selector {property: value}
```

Normally the selector is the HTML element/tag you wish to style, the property is the attribute you wish to change, and each property can take a value. A colon is used to separate the property and its value. They are surrounded by curly braces, see the snippet below:

```
h1 {color: lime}
```

You can specify more than one property, the properties should be separated by a semicolon.

```
fieldset {
 width: 70%;
 margin-left: 1.25em;
}
```

Selectors can be grouped by separating each selector with a comma.

```
a:hover, a:visited, a:link{
 color: black;
 outline-style: none;
}
```

With the class selector you can define different styles for the same type of element. The class selector is defined using a point.

```
.totalprice {
 font-weight: bold;
}
```

You can also define styles for HTML elements using the id selector. The id selector is defined as a # followed by the id.

```
#tableOverview td {
  padding: 2px;
  border-width: 0 0 1px 0;
  border-color: black;
  border-style: solid;
}
```

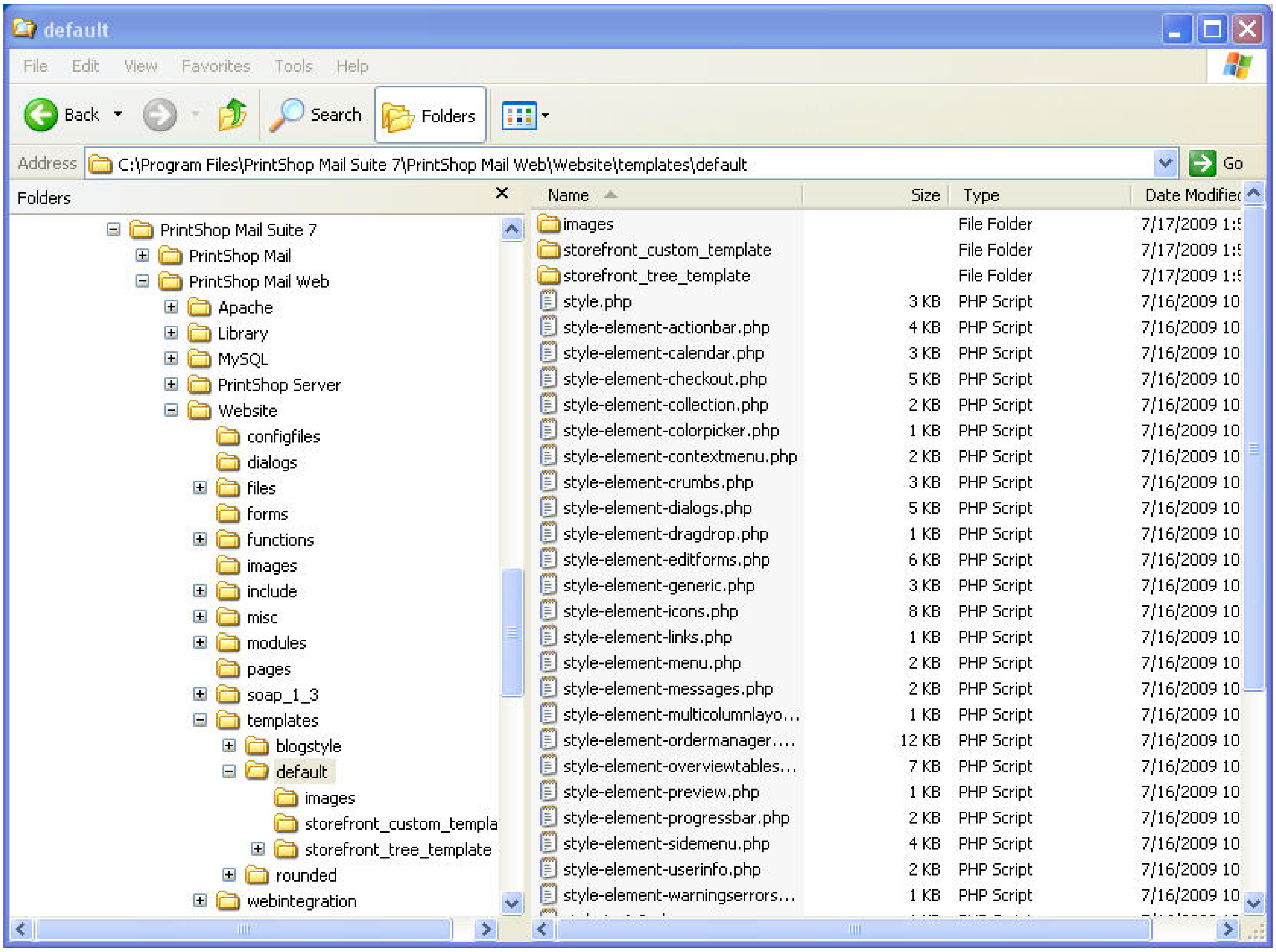
You can insert comments in CSS to explain your settings. Like HTML comments, CSS comments will be ignored by the browser. A CSS comment begins with "/*", and ends with "*/".

```
/* Submenu and Search items start here */
#search, #submenu, #submenu1, #submenu2, #preview, #summary {
 width: 100%;
}
/*
multi-line
comment here
*/
```

Style organization

The styles that come with PrintShop Mail Web are organized using the following structure:

- "Global styles" (page 225) (generic interface elements)
- "Page specific styles" (page 226) (exceptions)
- "Browser exceptions" (page 226)



The contents of skin folder

Global styles

The *style.php* file and the *style-element-<subject>.php* files hold the style definitions that apply to all pages in the system. At the beginning of the file the *skin_customization.php* file is included using the PHP *include_once* function. The *skin_customization.php* allows you to use web design parameters like colors and fonts that can be specified per company (*Edit Web Design*). Please refer to the *Special Variables* chapter for more information regarding this option.

```
<?php include_once "../../functions/skin_customization.php" ?>
```

At the end of the *style.php* file the separate *style-element-<subject>.php* and page specific exception files are included. These documents hold the item specific and page specific style exceptions. You could also add your exceptions to the main style file.

```
// Element/Item Specific CSS includes
include_once "style-element-actionbar.php";
include_once "style-element-editforms.php";
include_once "style-element-calendar.php";
include_once "style-element-colorpicker.php";
...
```

```
// Page Specific Items
<? include_once "style-pagespecific.php" ?>
```

Page specific styles

Each page comes with a body tag that has a unique class (there can only be one body tag in a HTML page). This class set on the <body> tag allows you to create page specific exceptions. In the skins supplied with PrintShop Mail Web the page specific styles are stored in the *style-pagespecific.php* file. This file is included at the end of the *style.php* file.

```
/*
** The width of the required date field is changed for
** the order_information and order_edit page
*/

body.order_information #fdRequiredDateField,
body.order_edit #fdRequiredDateField
{
 width: 10em;
}
```

Browser exceptions

To solve browser specific rendering issues you can create style exceptions for a specific browser or browser version. Below a snippet from the *style-moz.php* exception file (FireFox).

```
/*
** Mozilla specific style sheet entries
*/

* {
 -moz-box-sizing: border-box;
}

.formLabel, .downloadLineLabel, .formStatic, .fieldComment, .formStaticUnits,
.formStaticPrice, .formLink, .formStaticFlex, .formSelect, .formField,
.formFieldNoWidth, .progressLabel, .progressBarWrapper, .progressBarItemDone,
.progressBarItemTodo, .warningLabel, .warningIcon, .warningItem
{
 display: table-cell;
}
```

Search order

The search order is as follows:

1. browsername
2. browsername-version
3. browsername-os
4. browsername-os-version

Browser names

The browser names use the following abbreviations:

- ie = Internet Explorer
- moz = Mozilla
- saf = Safari

Operating systems

The operations system names use the following abbreviations:

- nt = Windows XP
- nt = Windows 2003 Server
- nt = Windows NT
- mac = Mac OS X

Note: Exceptions made for FireFox are stored in a moz exception file. When making an exception for a specific version of FireFox the version number should refer to the Mozilla engine, this number differs from the FireFox version number.

Header

The information stated in the header div is used to display the main page header or title. This is the place to show a system wide logo or the logo of your customer.

The default skin showing the PrintShop Mail Web logo as the header image

Replacing content

The HTML snippet below shows the header div containing a *<h1>* tag. Using the *Style.php* you can replace its contents by a logo uploaded in the *Edit Web Design* page. This allows the system to show a company specific image or logo.

```
<div id="header"><h1>PrintShop Web</h1></div>
```

The first style sets the width and height for the header div and sets a background image. The *generateSkinLogo* function (PHP) retrieves the path of the company logo which can be set in the *Edit Web Design* page. Of course this can be replaced by a hard coded path a custom image. The *generateSkinHeaderColor* retrieves the header color specified in the *Edit Web Design* page. This color can be used to fill up the background to match the color of your background image.

```
/* header */
#header {
 height: 70px;
 width: 100%;
 background-image: url(<? generateSkinLogo(); ?>);
 background-position: center left;
 background-repeat: no-repeat;
 background-color: <? generateSkinHeaderColor();?>;
}
```

```
#header h1 {
 display: none;
}
```

The second style hides the contents of the <h1> tag (display: none;).

User information

The *User Info* block displays the name of the logged on user, an option that lets the user edit his or her personal information and the *Log off* option. The *Edit User Info* is optional and depends on the users role.

In the default the user User Info block is dark blue and placed just above the Menu bar

In the default skin the *User Info* bar is placed just above the *Menu* bar. Using styling parameters the two seem to be surrounded by border. This is achieved by adding a border to the top, left and right of the *User Info* bar and a border to the bottom, left and right of the *Menu*bar.

CSS Lists

The *User Info* bar is created using an HTML list. This allows you to easily change its orientation from horizontal to vertical using CSS styling. Below the CSS code for the user info items in the *style-element-userinfo.php* file.

```
#userinfo ul
{
  padding-right: 5px;
  float: right;
}


#userinfo li
{
  display: inline;
  border-right : 1px solid silver;
  margin: 0;
  padding: 2px 0.4em;
  font-size:10px;
  font-size-adjust:none;
  line-height: 2.2em;
}

#userinfo li a
{
  text-decoration: none;
}

#userinfo li a:hover
{
```

```
  text-decoration: underline;
}
```

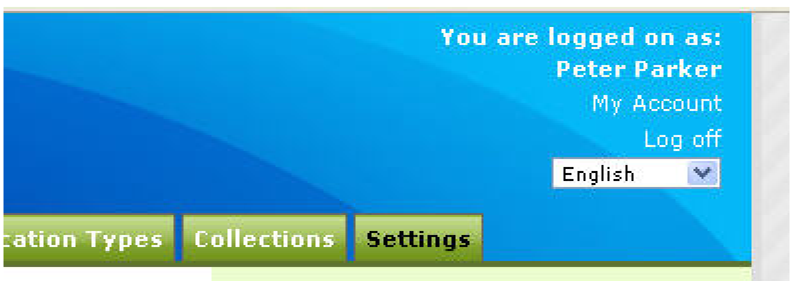
By removing the *display: inline* attribute of the <li> tag the orientation is changed from horizontal to vertical.

Adding additional information

The *User Info* bar has additional information. The code in the template file uses *generateUserInfo* to retrieve the *cAdditionalInfo* text from the language strings. The value for this string can be changed using the *Edit Language* page in the *Settings* section. This variable is used for a global language dependent message. In the default setup the value for this string is *PrintShop Mail Web*. Hard coded text and other elements can be added to the HTML code.

```
<? if(function_exists("generateUserInfo")) { ?>
 <div id="userinfo">
  <div>
    <h3><? generateAdditionalInfo(); ?></h3>
    <? generateUserInfo(); ?>
  </div>
 </div>
<? } ?>
```

Below you'll see a variant of the *User Info* bar. In this case the orientation is placed vertical and a custom string was added.



A variant of the User Info bar showing additional information.

Highlighting "hovered" items

The *hover* attribute set for the *a* tag will render a different background color when the user places the cursor over this item. Additional parameters can be added to change the style of the text (for example the text color, font weight, text decoration or font style).

Menu bar

The *Menu* bar provides access to the main sections of PrintShop Mail Web. Like the *User Info* bar the items of the *Menu* bar are created using HTML lists, which means that you can change its orientation by altering the CSS file.

In the default skin the Menu bar is placed directly beneath the User Info bar

Styling the menu items

The *Menu* bar is generated using HTML lists, within the list items hyperlinks (<a> tags) are used to define the target when the user clicks the item. The code snippet below shows a HTML code generated for a menu bar.

```
<div id="menu">
  <div>
    <ul>
      <li id="menuitem_1">
        <a href="/site.php?pageid=welcome&amp;page=1&amp;init=true">Home</a>
      </li>
      <li id="menuitem_2">
        <a href="/site.php?pageid=storefront_overview&amp;page=1&amp;init=true">
          New Document
        </a>
      </li>
      <li id="menuitem_3">
        <a href="/site.php?pageid=ordermanager_overview&amp;page=1&amp;init=true">
          Order Manager
        </a>
      </li>
    </ul>
  </div>
</div>
```

Below you'll the see CSS of the menu items in *style-element-menu.php* file. The following CSS code is used to show a horizontal menu bar. By removing the *display: inline* attribute of the <li> tag the orientation is changed from horizontal to vertical.

```
/* Menu */
/*
  Remove the commented lines to use the web design contrast color in the menu.
  Comment the background lines to hide the gradient image
*/

#menu
{
  border-width: 0 1px 1px 1px;
  border-color: #CDCDCD;
  border-style: solid;
  width: 100%;
  /* background-color: <? generateSkinContrastColorHighLight(1); ?>; */
  background: #D9E1E5 url('images/nav_bg.gif');
  height: 26px
}

#menu a
{
  /* background-color: <? generateSkinContrastColorHighLight(1); ?>; */
  background: #D9E1E5 url('images/nav_bg.gif');

  border-right: 1px solid #AFBEC7;
```

```
  color: #456;
  display: block;
  float: left;
  text-decoration: none;
  font-weight: bold;
  font-family: sans-serif;
  font-size: 1em;
  line-height: 25px;
  padding: 0 10px;
}

#menu li.selected a
{
  /* background-color: <? generateSkinContrastColorHighLight(1.3); ?>; */
  background-position: left bottom;
  color: #234;
}

#menu a:hover
{
  /* background-color: <? generateSkinContrastColorHighLight(0.9); ?>; */
  background-position: left bottom;
  color: #234;
}

#menu ul
{
  display: inline;
  list-style: none;
}

#menu li
{
  float: left;
  margin:0;
  padding:0
}
```

Creating a Tabbed menu

Below is a sample of the *Menu* bar where the menu items have a tabbed style. To achieve this a repeating background image is added to the <li> tag. Space is added between the items by adding a right margin. To complete the design border attributes are set for top, left and right sides of the <li> tag.

The Menu bar with repeated background image

```
#menu li {
  display: inline;
  border-width: 1px 1px 0 1px;
  border-color: #666666;
  border-style: solid;
  padding: 5px;  l
  line-height: 2em;
  margin-right: 3px;
  margin-left: 0;
  background-image: url("images/btn-bg.gif");
  background-repeat: repeat-x;
}
```

Styling the selected menu item

PrintShop Mail Web will add an additional class to the selected menu item. This allows the style for the selected menu item to change to make it stand out. The color, font-weight, background color or background image can be used to create various effects.

```
#menu li.selected a {
 color: black;
}
```

The following code snippet shows how both the font color and background color of the selected item can be changed.

```
#menu li.selected a {
 color: black;
 background-color: <? generateSkinContrastColorHighLight(1.1); ?>;
}
```

Background

The <body> tag has two attributes to specify backgrounds. The background can be a color and/or an image. These attributes can be added directly in the *Template.php* file (bgcolor and background) or to the *Style.php* file.

Adding a background image

Background-images can be used in most HTML elements - not just for the whole page (body) and can be used for simple but effective results, such as rounded corners. Example:

```
body {
 background-image: url("images/main-bg.gif");
}
```

Overview tables

Overview pages show tabular data (for example the Companies, Users and Publication Types pages). An overview table is build using the table tag and follows the regular HTML <table> tag structure.

The Companies overview table

An overview table consists of the following elements:

- Head (dark blue bar)
- Subhead
- Content (the actual records)
- Footer (navigation/browse bar)
- Buttons (tool bar)

Looking at the source of an overview table page you can see that the table is part of a more complex hierarchy. The following code snippet shows a stripped version of an overview page:

```
<div id="companyOverviewFormContent">
  <table cellspacing="0" cellpadding="0" id="tableOverview">
    <thead>
      <tr>
        <th colspan="8" id="cCompanyOverviewHeader">
          Companies overview<span>(3 items)</span>
       </th>
      </tr>
    </thead>
    <tbody>
      <tr>
       <td id="select_header">
         <input type="checkbox" value="0" name="select" id="headerField"
          onclick="doSelectAll()"/>
       </td>
        <td id="fbCheckLogin_header">
          <span/>
        </td>
       <td colspan="2" id="cName_header">Name</td>
       <td id="cCompanyCode_header">Company code</td>
       <td id="_header"><span/></td>
       <td id="_header"><span/></td>
       <td id="_header"><span/></td>
      </tr>
      <tr>
       <td id="fnCheckCompanyID[]_2">
         <input type="checkbox" value="2" name="fnCheckCompanyID[]"
          id="2Field"/>
       </td>
       ...
      </tr>
    </tbody>
```

```
  </table>
</div>
```

The content is enclosed by a <div> element. Each page contains a <form> tag, which is used to catch information entered by the user or to perform an action when the user clicks a button.

The <form> tag has two main components: the actual table and the toolbar/buttons to perform specific actions. A page will only contain a single overview table.

Head

The <th> tag indicates that the table cell(s) of the first row is a header cell, in this case the title for the table. In the *Style.php* file an id selector with a subselector of <th> is created to avoid styling conflicts with other tables.

```
#tableOverview th {
 background-color: <? generateSkinMainColor(); ?>;
 padding: 2px;
 font-weight: bold;
 text-align: left;
 border-width: 0 0 1px 0;
 border-color: #FFFFFF #FFFFFF #FFFFFF #FFFFFF;
 border-style: solid;
 color: #FFFFFF
}
```

Subhead

The second row shows the names for the columns. Often the first column contains a check box to select and deselect (toggle) the records of the current page in the overview.

Content

The rows (<tr> tag) that form the body of the table have the *record* class selector. In hierarchical overviews a second class selector is used to specify the level in the hierarchy. The <td> tags contained by the table row can have different class selectors. This depends on the type of content, examples are: text, icon and check box.

In the skins supplied with PSW the background color for the element is set when the user places the cursor over a specific row (hovers).

```
#tableOverview tr.level0:hover,
#tableOverview tr.level1:hover,
#tableOverview tr.record:hover {
 background-color: #E6E6FF;
}
```

Footer

The last table row is used to display navigation options. The navigation options become visible when the overview contains more than the number of records set in the *setRowsPerPage*variable (default 15). Please refer to setRowsPerPage for more information about this function.

```
#tableOverview tr.level0:hover,
#tableOverview tr.level1:hover,
```

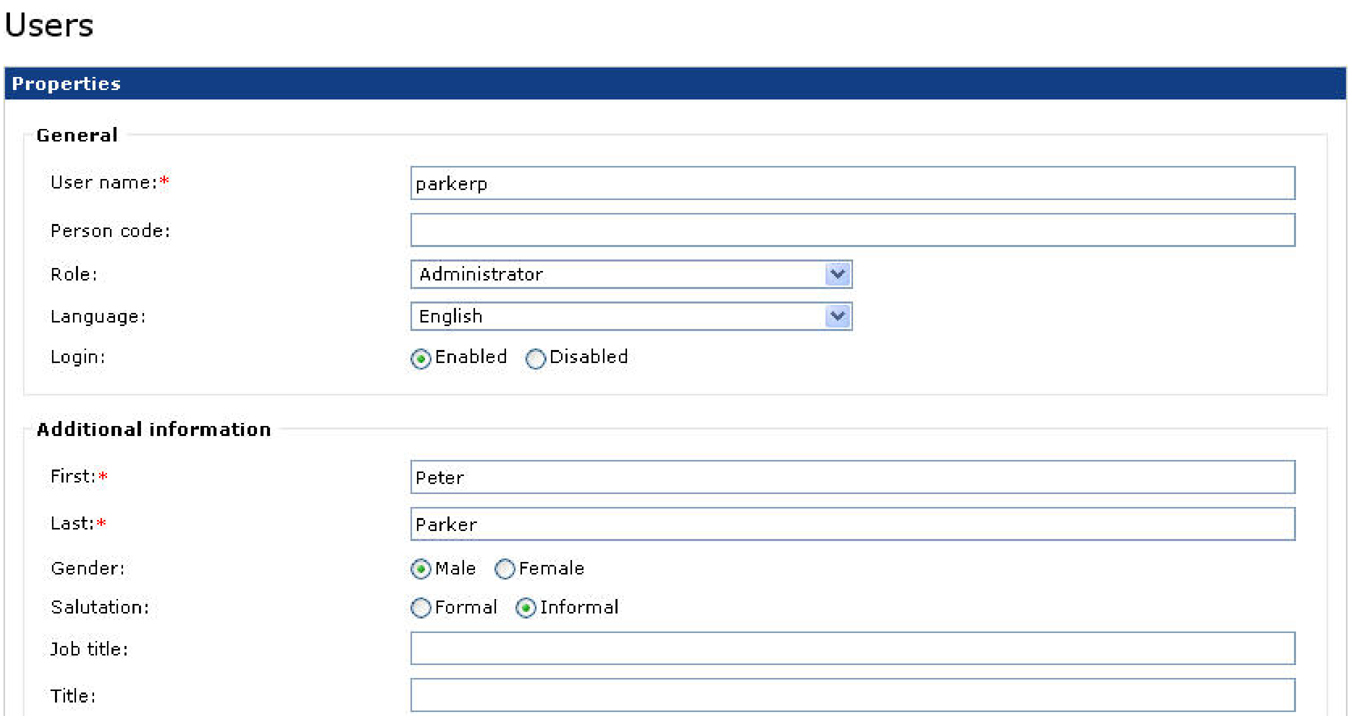
```
#tableOverview tr.record:hover {
 background-color: #E6E6FF;
}
```

Buttons

The buttons below the overview table are created using the <input> tag with a class *formButton*. The buttons have a unique id allowing you the specify the style per button. The buttons are enclosed by a <div> tag with a class of *toolbar*.

Edit forms

A form is an area that can contain form fields. Form fields are objects that allow the visitor to enter information - for example text boxes, drop-down menus or radio buttons. When the visitor clicks a submit or save button, the content of the form is sent to PrintShop Mail Web.



The Edit User Info form

The following sample shows a stripped down source code of an edit form. Like the overview pages all elements are surrounded by a content <div> tag. The first child of this tag is the <form> tag.

```
<div id="content">
  <form action="site.php?formid=person_edit_form&amp;id=2"
  autocomplete="off" name="personEditForm" method="POST" id="personEditForm">

    <div id="personEditFormContent">

      <div id="cPropertiesHeader">Properties</div>

      <fieldset id="cGeneralFieldset">
```

```
        <legend id="cGeneralLegend">
          <span id="cGeneralLegendLabel">General</span>
        </legend>

        <div>
          <div id="fcUserNameLine">
            <span id="fcUserNameLabel">
              User name:<span>*</span>
            </span>
            <span>
              <input type="text" value="pp" name="fcUserName"
              id="fcUserNameField"/>
            </span>
          </div>

          <div id="fcPersonCodeLine">
            <span id="fcPersonCodeLabel">Person code:</span>
            <span>
              <input type="text" value="" name="fcPersonCode"
              id="fcPersonCodeField"/>
            </span>
          </div>
        </div>

      </fieldset>

    </div>
  </form>
</div>
```

The <form> tag is used to process the information entered by the user. The contents of the <form> tag are captured by a <div> with a unique id.

Form head

The first content element is the form header. In the default skin the information in this tag is used to visually group the elements in the form.

```
.formHeader {
  display: block;
  width: 100%;
  background-color: <? generateSkinMainColor(); ?>;
  color: #FFFFFF;
  padding: 2px;
  font-weight: bold;
}
```

Form lines

Each line in an edit form is enclosed by a <div> tag. This element has an unique id and a *Formline* class. Normally each line contains two child elements: a label and a field. The form fields can be of various types, for example: plain text input, a pull down menu, radio buttons or a range of check boxes. The following snippet shows a form line containing a form label and a regular text input field. As the field requires input an additional <span> tag is added for the asterisk symbol.

```
<div id="fcUserNameLine">
  <span id="fcUserNameLabel">
    User name:<span>*</span>
  </span>
  <span>
    <input type="text" value="" name="fcUserName" id="fcUserNameField"/>
  </span>
</div>
```

Warnings and Errors

Warnings and errors are hidden elements for which the visibility is changed when the actual warning/error occurs. A warning line has two child element: a warning label and a container element for the warning icon and message.

```
<div id="personEditInfoForm_fcPassword_Required">
  <div>
    <span> </span>
    <span>
      <span>Password is a required field!</span>
    </span>
  </div>
</div>
```

The *warningLabel* <span> is used as spacer to make sure that the warning icon and message align with the field of the accompanying form line. The *warningIcon* <span> holds the actual warning message which is stored in a separate <span> tag. The warning icon is set using CSS. The following snippet shows *background-image* attributes for the warning icon.

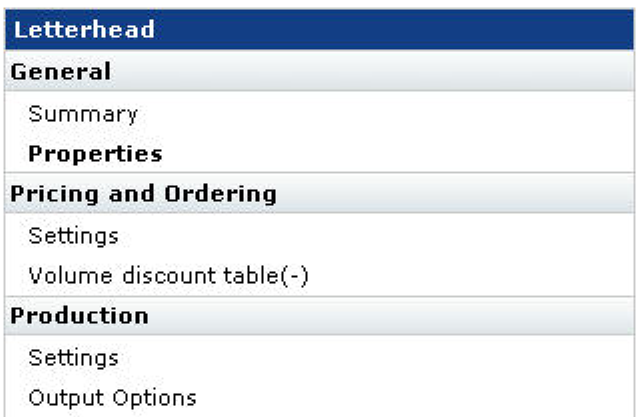
```
.warningIcon {
  display: inline-block;
  width: 73%;
  background-image: url(../../images/icon_alert.gif);
  background-repeat: no-repeat;
  background-position: 0px 3px;
  display: inline-block;
  vertical-align: top;
}
```

In this case the icon is coming from the image folder stored in the PrintShop Mail Web web site root. You can use you own icon by placing an image within the skins folder (or an images folder in your skin folder) and changing the path to that image file.

A required field warning

Sub menus

Several sections have one or multiple sub menus. Sub menus are used to navigate to sub sections of that specific section. Sub menus have their own classes and styles.



The sub menu of the Settings section

Like the *Main* menu and the *User Info* block the sub menus are created using HTML lists (<ul> tag and <li> tags). The following code snippet shows source code of a sub menu (*Publication Type* section):

```
</div>
  <div id="submenu2">
   <div id="LetterheadID">
   <div>Letterhead</div>
   <span>
     <ul>
      <li>General</li>
      <li>Summary</li>
      <li>Properties</li>
      <li>Pricing and Ordering</li>
      <li>Settings</li>
      <li>Volume discount table (-)</li>
      <li>Production</li>
      ...
```

```
      </ul>
    </span>
  </div>
</div>
```

The list items have two class selectors. The first defines the indent level. The sub menu of the Settings section uses sub levels for the items that relate to the Email subsection. The second selector is optional and will only be set to mark the selected menu item. This allows you to visually mark the selected item by changing its style in the style documents.

```
#submenu li.level0{
  text-indent: 2px;
  background-color: <? generateSkinContrastColor(); ?>;
  background: #D9E1E5 url('images/nav_bg.gif');
  background-repeat: repeat-x;
  background-position: top left;
  border-top: 1px solid #CDCDCD;
  border-bottom: 1px solid #CDCDCD;
}

#submenu li.level1{
 padding-left: 1em;
}

#submenu .selected{
 font-weight: bold;
}
```

Multiple sub menus

The *Template.php* file allows pages to have multiple sub menus. The source code of such a page has a unique id for each sub menu. In the style documents these IDs are grouped by separating each selector with a comma:

```
#submenu li.level0, #submenu1 li.level0, #submenu2 li.level0{
}

#submenu li.level1, #submenu1 li.level1, #submenu2 li.level1{
 padding-left: 1.5em;
}

#submenu .selected, #submenu1 .selected, #submenu2 .selected {
 font-weight: bold;
}
```

Special variables

In this section we list the special variables you can use in the *Template.php* and *Style.php*files.

Variables for template files

These functions can be used in templates files (e.g. *Template.php*).

setRowsPerPage

The *setRowsPerPage* function can be used to change the number of rows shown in overview tables. The function can added to the *Template.php* file and should be insert before the *generateContent* function. By default overview tables show 15 rows per page.

```
<? setRowsPerPage(25); ?>

<div id="content">
  <? if (getFormCount() > 0){ ?>
    <? generateContent(); ?>
  <? } ?>
</div>
```

generateString

The *generateString* function retrieves a language string based on the supplied parameter. It is used to insert language dependent text.

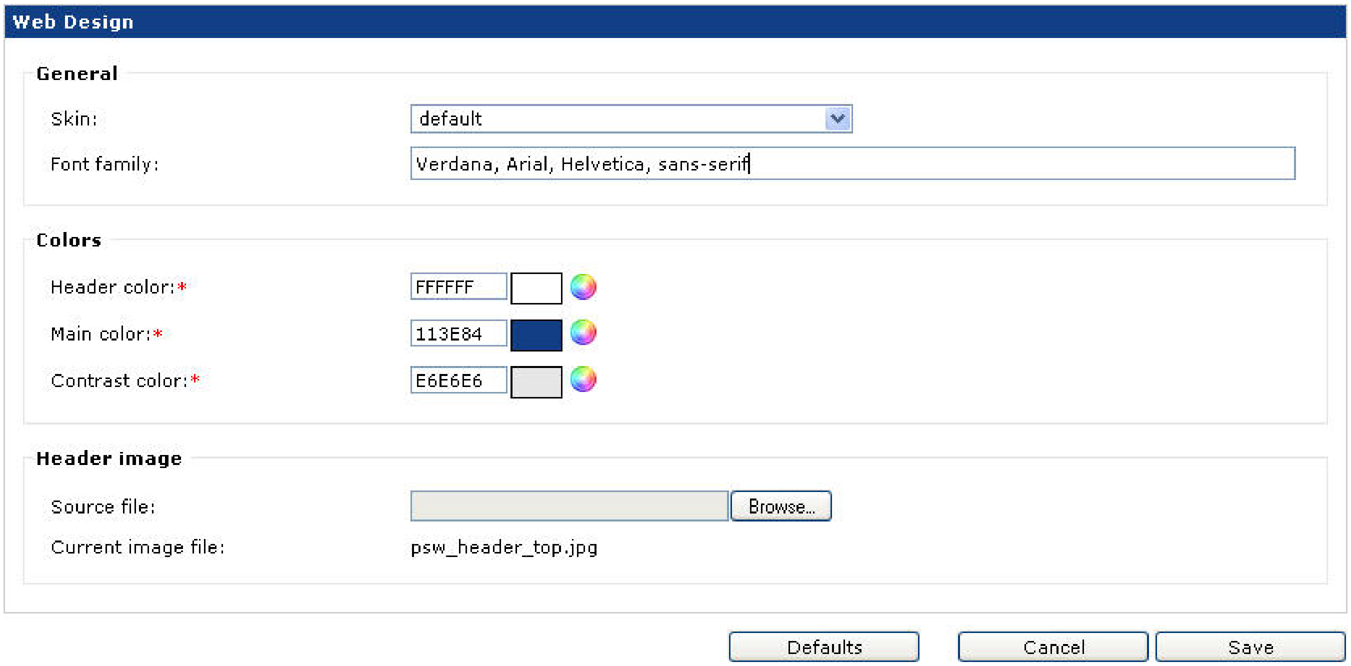
```
<? generateString(cSystemName); ?>

/* Renders to following text */
PrintShop Web
```

Custom strings can be added to the language strings. A string is made up of a name and a value, which are seperated by the = symbol.

```
cSystemName=PrintShop Mail Web
cAdditionalInfo=PrintShop Mail Web
cFooter=PrintShop Mail Web, www.objectiflune.com
```

Variables for style files

The PrintShop Mail Web style files (e.g. *Style.php*) are regular CSS files. Its a PHP file that renders a CSS file. By including the *skin_customization.php* line at the beginning of your *Style.php* file the values entered in the *Edit Web Design* pages can be used in your style. Once included special PHP functions can be used to retrieve style information that is entered in the *Edit Web Design* page of the companies in PrintShop Mail Web.



The edit Web Design page

These values are retrieved from the PrintShop Mail Web database and or calculated based on these values. You can set these values per company in the companies Web Design page. The first few lines of the *Style.php* document are as follows:

```
<?php include_once "../../functions/skin_customization.php" ?>

*
{
 margin:0;
 padding:0;
}

h1,h2,h3,h4,h5,h6,p,blockquote,form,label,ul,ol,dl,fieldset,address
{
 margin: 0;
}

li,dd
{
 margin-left:1em;
}
```

generateSkinContrastColor

The *generateSkinContrastColor* function retrieves the contrast color information set in the *Edit Web Design* page of the PrintShop Mail Web site. In the default skin this color is used for the menu bar items, table subheads and table footers. Below an example on how this color can be set using this function:

```
#tableOverview .subhead td {
 background-color: <? generateSkinContrastColor(); ?>;
```

```
 border-width: 0 1px 0 0;
 border-color: #FFFFFF;
}
```

generateSkinContrastColorHighLight

The *generateSkinContrastColorHighLight* function retrieves the skins contrast color set in the *Edit Web Design* page. A parameter can be supplied to change the tint of the color. Fractional values are used, where 0.0 will be black, 1.0 the original color and higher values will result in a lighter tint of this color.

Below an example on how this color can be set using this function. In this case the background color of the selected menu item will have a lighter color:

```
#menu .selected a {
 background-color: <? generateSkinContrastColorHighLight(1.1); ?>;
}
```

generateSkinFont

The *generateSkinFont* function retrieves the font information set in the *Edit Web Design* page of the PrintShop Mail Web site. The value entered in the *Edit Web Design* page (Font family) can be a single font name or a comma separated list. Below an example on how the *Font family* can be set using this function:

```
input, select, body, textarea {
 font-size: 70%;
 line-height: 1.3em;
 font-family: <? generateSkinFont(); ?>;
}
```

generateSkinHeaderColor

The *generateSkinHeaderColor* function retrieves the header color information set in the *Edit Web Design* page of the PrintShop Mail Web site. The value entered in the *Edit Web Design* page can be entered manually or selected in the color picker. Typically this color will match the background color of the company logo. This color can be used to set the background so the logo or background image nicely blends in wich the overall design.

Below an example on how this color can be set using this function:

```
#header {
 height: 90px;
 background-image: url(<? generateSkinLogo(); ?>);
 background-position: center left;
 background-repeat: no-repeat;
 background-color: <? generateSkinHeaderColor();?>;
 width: 100%;
}
```

generateSkinHeaderColorHighLight

The *generateSkinHeaderColorHighLight* function retrieves the skins header color set in the *Edit Web Design* page. A parameter llows the tint of the color to be changed. Fractional values are used, where 0.0 will be black, 1.0 the original color and higher values will result in a lighter tint of this color.

Below an example on how this color can be set using this function:

```
#tableOverview td {
 padding: 2px;
 border-width: 0 0 1px 0;
 border-color: background-color: <? generateSkinHeaderColorHighLight(1.1); ?>;
 border-style: solid;
}
```

generateSkinLocation

This functions returns the path to your skin folder. It can be used in both style files and the template file to insert the path to the folder of the skin. This prevents you from entering the full path making it easier to duplicate a skin folder.

```
<img src="<? echo generateSkinLocation() ?>/banner-image1.png"/>
```

generateSkinLogo

The *generateSkinLogo* retrieves the path to the header image specified in the *Edit Web Design* page. If no image is specified the path of the header image from the system default skin will be returned. Below an example on how this function can be used in your *Style.php* file:

```
#header {
 height: 90px;
 background-image: url(<? generateSkinLogo(); ?>);
 background-position: center left;
 background-repeat: no-repeat;
 background-color: <? generateSkinHeaderColor();?>;
 width: 100%;
}
```

generateSkinMainColor

The *generateSkinMainColor* function retrieves the main color set in the *Edit Web Design* page of the PrintShop Mail Web site. The value entered in the *Edit Web Design* page can be entered manually or selected in the color picker. Below an example on how this color can be set using this function. In this case the background color is set for the edit forms header bar class (or title bar).

```
.formHeader {
 display: block;
 width: 100%;
 background-color: <? generateSkinMainColor(); ?>;
 color: #FFFFFF;
 padding: 2px;
 font-weight: bold;
}
```

generateSkinMainColorHighLight

The *generateSkinMainColorHighLight* function retrieves the skins main color set in the *Edit Web Design* page. The parameter of this functions lets you change the tint of the color. Fractional values are used, where 0.0 will be black, 1.0 the original color and higher values will result in a lighter tint of the main color.

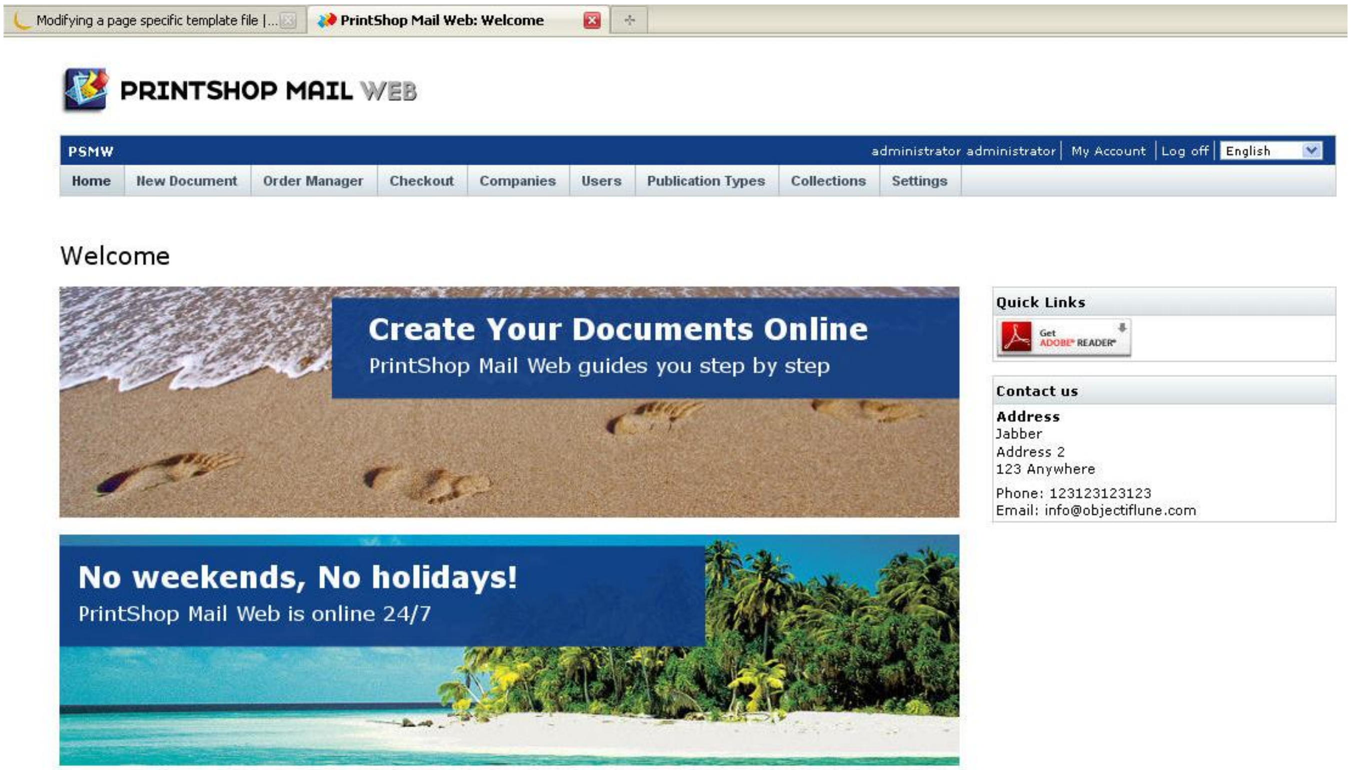
Below an example on how this color can be set using this function. In this case the background color of the user info bar will have a darker tint when the user places the cursor over these items (hover).

```
#userinfo li a:hover{
 background-color: <? generateSkinMainColorHighLight(0.6); ?>;
 line-height: 2em;
}
```

Creating page exceptions

The Template.php file contains the main outline of the PrintShop Mail Web web site, it contains HTM code with a few snippets of PHP. It is invoked for each page request and outputs the final page contents.

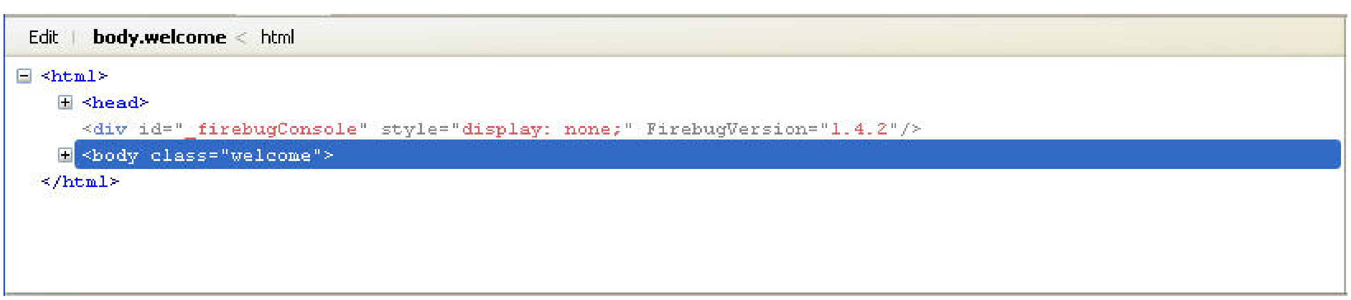
The skinning engine lets you create templates for pages (page exceptions). This method can be used to add information and/or custom functionality to a specific page.



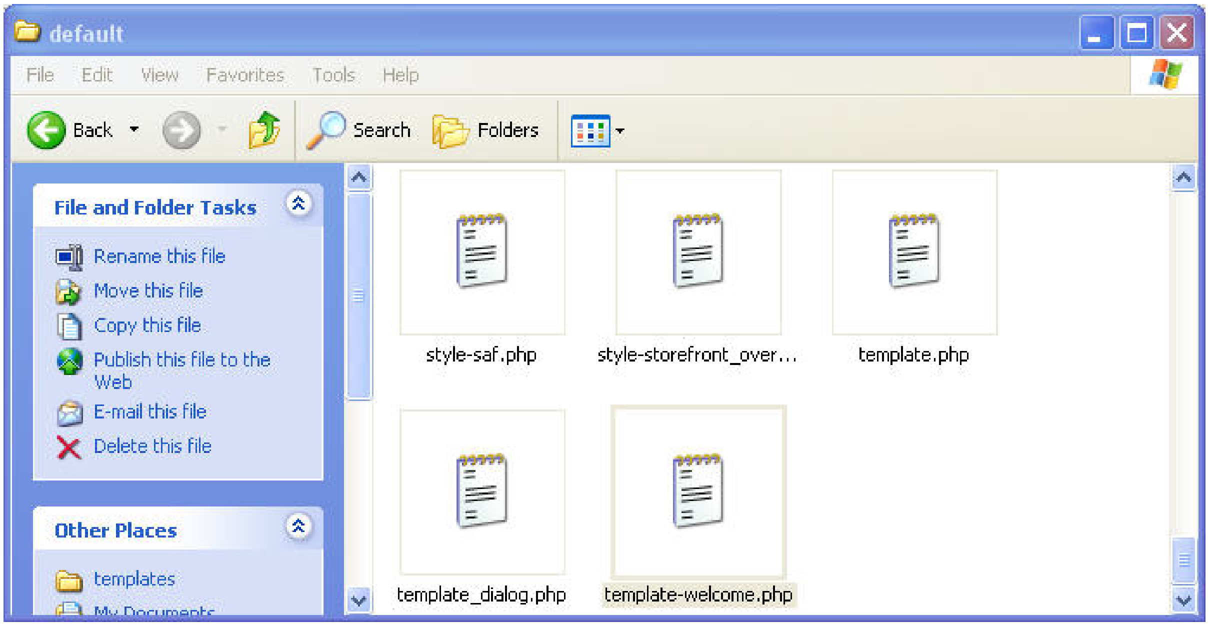
The Welcome page showing a banner image and custom side menus.

Creating a page specific template file

To create a page specific template file you should create a copy of the main *template.php* file in the directory of your skin. Then, you need to rename to the file to template-<pageid>.php. The ID of the page should match the name of the class name of the body-element of that page (view the HTML source of the page in your browser or use webdevelopment plug-in like Firebug for Fire Fox).



Use the class name of the body element in the template name (<pageid>).



A template exception file for the Welcome page.

Modifying a page specific template file

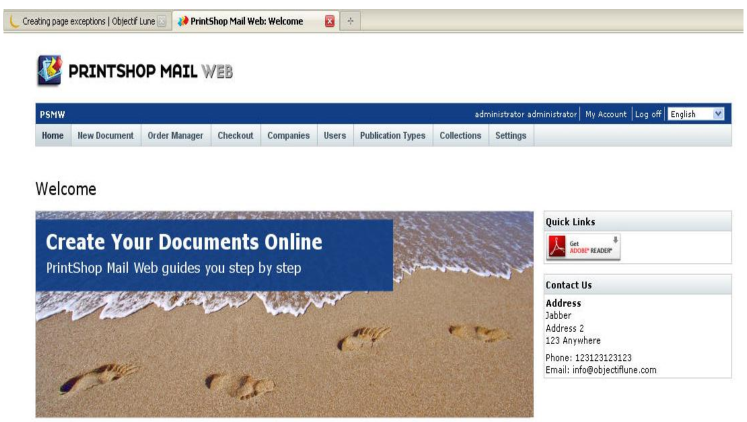
The duplicated template file contains various function blocks that render the final output. The position of these blocks combined with the style files define the presentation of the web site. By inserting HTML and PHP code you can add functions and information to the page. In some cases you might want to *remove* unwanted elements from the template, be very *careful* when experimenting with this at it might lead to a non working skin.

The following HTML/PHP code was used to replace the text and sidemenu elements of the Welcome page. The content selection is replaced by an banner image and side menus are added for some quick links and contact information. Note that in this sample we added style information in-line, typically this information is added to one of the style files (or a custom style file). The images used in this sample are stored in the folder of the skin.

```
<div id="content">
  <div style="float:left;width:100%;">
    <ul style="list-style-type: none;margin:0;" id="banners">
      <li style="margin:0 0 1em 0;">
        <img src="<? echo generateSkinLocation() ?>/banner-steps.png"/>
      </li>
      <li style="margin:0 0 1em 0;">
        <img src="<? echo generateSkinLocation() ?>/banner-holiday.png"/>
      </li>
    </ul>
  </div>
</div>

<div style="clear:right;float:right;width: 27%;">
  <div style="border:1px solid #CDCDCD;">
    <p style="
```

```
      background:#D9E1E5 url(<? echo generateSkinLocation() ?>/images/nav_bg.gif)
      repeat-x scroll left top;
      border-bottom:1px solid #CDCDCD;line-height:2em;
      text-indent:2px;font-weight:bold;">Quick Links</p>
    <div style="padding: 2px">
      <p><img src="resources/images/get_adobe_reader.gif"/></p>
    </div>
  </div>
  <div style="border:1px solid #CDCDCD;margin-top: 1em;">
    <p style="background:#D9E1E5 url(<? echo generateSkinLocation() ?>/images/nav_
bg.gif)
    repeat-x scroll left top;
    border-bottom:1px solid #CDCDCD;line-height:2em;
    text-indent:2px;font-weight:bold;">Contact us</p>
    <div style="padding: 2px">
      <p style="margin-bottom: 0.5em;">
        <b>Address</b></br>Jabber<br/>Address 2</br>123 Anywhere
      <p>
      <p>Phone: 123123123123<br/>Email: info@objectiflune.com</p>
    </div>
  </div>
</div>
```

The following image shows the outcome of the page specific template exception.



A custom welcome page.

As the web site is created in PHP custom statements could be added based (for example based on the logged on user). With a little help of Javascript (jQuery) you could create an image rotator to show images as slide show. The following code creates a very simple image rotator. Note that we added *display:none* to the second banner in order to initially hide the image.

```
<div id="content">
  <div style="float:left;width:100%;">
    <ul style="list-style-type: none;margin:0;" id="banners">
      <li style="margin:0 0 1em 0;">
        <img src="<? echo generateSkinLocation() ?>/banner-steps.png"/>
      </li>
      <li style="margin:0 0 1em 0;display:none;">
        <img src="<? echo generateSkinLocation() ?>/banner-holiday.png"/>
```

```
      </li>
    </ul>
  </div>
</div>

<script type="text/javascript">
  $(document).ready(function() {
    setInterval('rotateBanners()',5000);
  });

  function rotateBanners() {
    var currentBanner = $('#banners li:visible');
    var firstBanner = $('#banners li:first');

    //Get next banner, when it reaches the end, rotate it back to the first banner
    if(currentBanner.next().length){
      currentBanner.next().fadeIn(1000);
      currentBanner.hide();
    } else {
      firstBanner.fadeIn(1000);
      currentBanner.hide();
   }
  }
</script>
```

DOM manipulation using jQuery

jQuery is a fast and concise JavaScript Library that simplifies HTML document traversing, event handling, animating, and Ajax interactions for rapid web development. With the introduction of PrintShop Mail Web 2.x the jQuery library is part of the PrintShop Mail Web installation. Information about jQuery can be found at: http://www.jquery.com

The following sections describe the jQuery basics and give you helpful tips about how to use jQuery in PrintShop Mail Web.

Launching code on Document Ready

jQuery has a simple statement that checks the `document` and waits until it's ready to be manipulated, known as the ready event. Inside the ready event you can add the code that you want to run right when the page is loaded.

```
<script type="text/javascript">
  $(document).ready( function(){
    //Your code here
  });
</script>
```

You can add this Javascript code in the head section of the template.php file or create an external Javascript file. If an external Javascript file is used make sure that it is added (inlcuded) in the head section of the template.php file. The following snippet shows how to include a Javascript file (*template-welcome.js*) located in the folder of the skin.

```
<html>
 <head>
   <meta http-equiv="Content-Type" content="text/html; charset=UTF-8">
   <title><? generateSystemName(); ?>: <? generateTitle(); ?></title>
   <link rel="shortcut icon" href="/favicon.ico" type="image/x-icon">
   <? generateCSSIncludes(); ?>
   <? generateJavaScriptIncludes(false); ?>
   <script src="<? echo generateSkinLocation() ?>/template-welcome.js"></script>
 </head>
 <body>
   ...
 </body>
</html>
```

The following could be the content of the Javascript file.

```
$(document).ready(function() {
    alert('hello world');
});
```

Populating fields with computed values

The following sample populates a user input field of a PSM document with the current date (New Document section). First a string is created (*toDay*) with the current date. The last line in the code retrieves the input field based on the fields label (Today:) and populates the input field with the computed date string.

```
<script type="text/javascript">
  $(document).ready( function(){

    var currentDate = new Date()
    var month = currentDate.getMonth() + 1
    var day = currentDate.getDate()
    var year = currentDate.getFullYear()
    var toDay = month + "/" + day + "/" + year

    $("span:contains('Today:')").next("input").val(toDay);

  });
</script>
```

Todays date is automatically entered in the input field.

The code sample could be added directly into the template.php file and/or included using an external Javascript file.

Removing elements from the DOM

The following snippet is a simple sample on how to remove an HTML element based on its ID. The element is removed once the page is rendered by the browser.

```
<script type="text/javascript">
  $(document).ready( function(){
    $("#legend_joboverviewList").remove();
  });
</script>
```

Removing elements is not without risk and should be tested carefully (especially save actions).

Adding information to the DOM

The following snippet adds an HTML snippet to the DOM. An comment line is added to the web form of the User Input fields page.

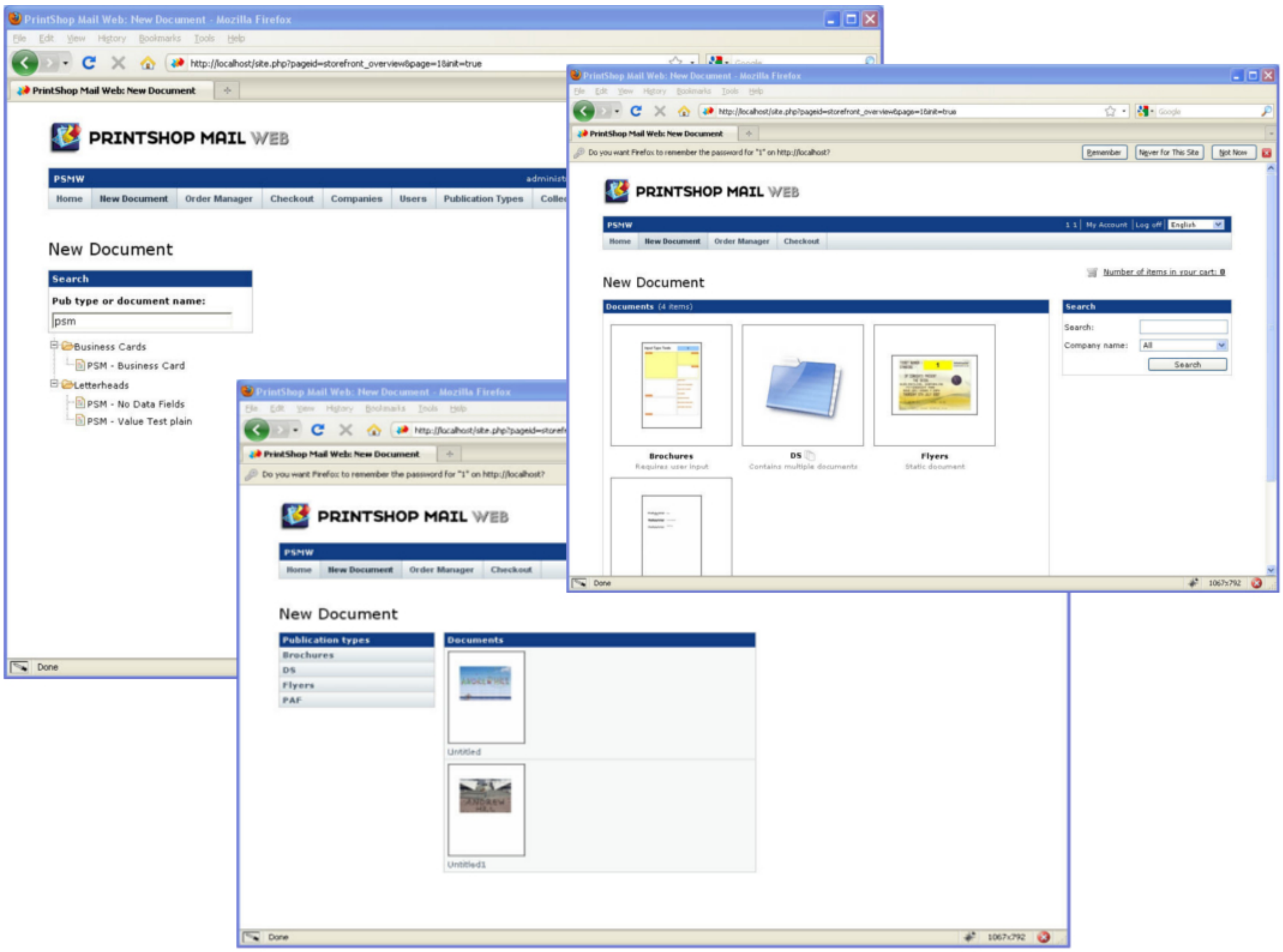
```
<script type="text/javascript">
  $(document).ready( function(){

    var  formline = "<div class=\"formLine\">" +
    "<span class=\"formLabel\" style=\"width: 100%\">" +
    "<i>All fields signed with a <span class=\"asterisk\">*" +
    "</span> are mandatory</i></span></div>";

    $("body.preview_userinput #content div.content").append(formline );

  });
</script>
```

Customizing the store front

Combining template page exceptions with skinning techniques allows the creation of custom store front pages. This can be used to create a unique design with for example a tree view or accordeon menu. To achieve this the skinning engine includes a special function to retrieve a list of documents and publication in a PHP array. This data can be used to generate custom HTML code in the template file (preferably a template exception for the store front pages).

The PHP getTree() function of the Storefront class retrieves a list of publication types and documents that the current user has access to.

Store front samples can be found in the folder of the *default* skin. They can be used as a reference when creating your own pages. The samples use template exception for the store front page and custom Javascript/jQuert code.



Storefront class

The Storefront class lets web designers and developers retrieve publication type and document information to create custom store front pages. The following sections describe the functions of this class:

getTree();

getTree();

Description

getTree(string`$searchfor`, string`$delimiter`, int`$publicationtypeid`)

Parameters

- $searchfor: the string to search for (leave emtpy to return all publication types and templates).
- $delimiter: the boundary string to create virutal sub folders.
- $publicationtypeid: return the documents of the specified publicationtype id.

Return Values

An associative array.

The following PHP code shows how to implement this getTree() function:

```
<?php
//Retrieve the publication types and templates for the logged on user
$storeFront = New Storefront();
$treeData = $storeFront->getTree();
?>
```

The following code is a sample of the array returned by the getTree() function.

```
[1] => Array
(
 [id] => 1
 [name] => Business Cards
 ...
 [documents] => Array
   (
   [1] => Array
     (
     [id] => 1
     [name] => BC-Portrait
      ...
     )
   [2] => Array
     (
     [id] => 2
     [name] => BC-Landscape
     ...
     )
   )
)
```

The snippet below shows how to use this information in a link (<a>). In order to show the correct subsequent page in the ordering workflow the link should refer the *preview_init_form* page (fromid parameter of the url).

```
<a href='site.php?formid=preview_init_form&id=<?php echo $document['id']; ?>'>
<?php echo $document['name']; ?>
</a>
```

Creating a hierarchical tree

This example explains how to replace the default thumbnail view of the store front with a hierachical tree view. The example combines PHP, CSS and makes use of the Treeview plugin for jQuery to hide and show branches of a tree.

To install the example copy the *template-storefront_overview.php* from the *storefront_tree_template* folder to the root of the *default* skin.

The store front using a hierarchical view (tree view).

The sample file contains links to external Javascript files and some custom code to generate the actual tree.

The Javascript file

This is the Javascript code stored in the *feil "tree.js":*

```
$(document).ready( function(){
  $("ul.filetree").treeview({
    collapsed: true
});
```

The code invokes the Treeview plugin once the browser has finished loading the page. The Treeview pluging uses a standard HTML <ul> element (unordered list) to render the tree.

The template file

The actual code that retrieves the publication type and document list is placed in the contect block of the template file (template-storefront_overview.php). The first section instantiates the *Storefront*. The getTree() returns a hierachical array of the publication types and documents. In the following section we will access each *array* item using the *foreach* function of PHP.

```
//Retrieve the publication types and templates for the logged on user
$storeFront = New Storefront();
$treeData = $storeFront->getTree();
```

Once the publication type and document information is collected in a PHP array we need to iterate through the array values. For this we use a PHP foreach loop. Within this function a custom PHP function (*renderPublicationType*) is called to generate the actual HTML.

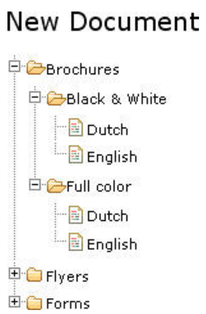
This function generates the <li> elements required by the Treeview plugin. When a publication type contains one or multiple documents a sub list is created, again using <ul> and <li> elements. For each document a link to the *preview_init_form* is inserted supplying the internal ID of the document. The functions of the *preview_init_form* file determine the workflow of that document (e.g. show the User Input fields page or Database Upload page).

```
foreach ($treeDataArray as $publicationTypes)
{
  renderPublicationType($publicationTypes);
}

function renderPublicationType($publicationType)
{
  echo "<li><span class='folder'>" . $publicationType['name'] . "</span><ul>";

  if (isset($publicationType['publicationTypes'])) {
    foreach ($publicationType['publicationTypes'] as $subPublicationType) {
      renderPublicationType($subPublicationType);
    }
  }

  if (isset($publicationType['documents'])) {
    foreach ($publicationType['documents'] as $document) {
      echo "<li><span class='file'>";
      echo "<a href='site.php?formid=preview_init_form&id=" . $document['id'] . "'>";
      echo $document['name'];
      echo "</a>";
      echo "</span></li>";
    }
  } else {
    if (!isset($publicationType['publicationTypes'])) {
      echo "<li><a href='#'>-</a></li>";
    }
  }

  echo "</ul></li>";
}
```

Virtual Subfolders

In the current version of PrintShop Mail Web a publication type can not contain subfolders. You can however simulate nested publication types. The getTree() function can create virtual sub publication types or sub folders based on a delimiter character that appears in a document name.

When you call the function as follows getTree('', '_');, it will split the template names using the *underscore* character (if it exists in the name). The parts are used for the virtual folder name, the last part is used as the document name.



The tree view with virtual subfolders.

The following shows the returned array:

```
Array (
  [1] => Array  (
    [id] => 1
    [name] => Brochures
    ...
    [publicationTypes] => Array
    (
      [Black & White] => Array (
        [name] => Black & White
        [documents] => Array (
            [1] => Array (
              [id] => 1
              [name] => Dutch
              ...
            )
            [2] => Array (
              [id] => 2
              [name] => English
              ...
            )
         )
      )
      [Full color] => Array (
        [name] => Full color
        [documents] => Array (
            [1] => Array (
              [id] => 1
              [name] => Dutch
              ...
            )
            [2] => Array (
              [id] => 2
              [name] => English
              ...
            )
         )
      )
    )
```

```
    )
)
```

Adding a live search option

This example demonstrates a live search, where you get search results while you type. An event is triggered when the user presses, and releases a key in the input field. When the event is triggered, a Javacscript function is executed. The result of this function is used to update a placeholder element on the web page. The function performs an AJAX request to retrieve the document list from the database. AJAX (Asynchronous JavaScript and XML) is a method of building interactive applications for the Web that process user requests immediately.

To install the sample copy the *template-storefront_overview.php* from the *storefront_tree_livesearch* folder to the root of the *default* skin.

The tree view with a search block.

This sample constists of the following parts:

- Store front specific template file (exception file). The template file contains links to external JavaScript files and some custom HTML code for the search and tree areas.
- An php file that retrieves the document list. The result set is used to generate the HTML for the tree. This file is called by a custom Javascript function in the <head> section of the template file. This functions calls this php file using an AJAX request.

The Javascript file

This is the JavaScript code stored in the file "livesearch.js":

```
$(document).ready( function(){
    getTree();
    generateTree();
```

```
});

function getTree(){
    var searchfor = $('#searchfor').val();
    $('#searchfor').css({backgroundPosition: '100% -18px'})

    $.ajax({
        type: "GET",
        url: "templates/default/storefront_tree_livesearch/livesearch.php",
        data: "searchfor=" + searchfor,
        success: function(msg){
            $('#searchfor').css({backgroundPosition: '100% 2px'})
            $("#tree").html(msg);
            generateTree();
        }
    });
}

function generateTree(){
    $("#tree ul").treeview({
        collapsed: true
    });
}
```

$(document).ready

This code is executed when the browser is finished loading the web page. It executes the *getTree()* and *generateTree()* function. This section makes sure that the full list is retrieved when the store front page is invoked (New Document).

getTree()

This function executes every time a character is entered in the input field. It retrieves the text from the search field and sends the contents to the *livesearch.php* file on the server. The HTML code returned by the *livesearch.php* file is used to update a placeholder element on the page (<div id="tree">).

generateTree()

Once the tree information is loaded in to the DOM the generateTree() function is called to apply the final tree view and tree functionality.

The template file

In the content area of the template file (template-storefront_overview.php) an input field is added. The *getTree()* function is added to the onkeyup event of the <input> field. This event is triggered when the user presses, and releases a key in the input field.

```
<div id="content">
  <div style="border:1px solid silver;width:250px;margin-bottom:0.5em;">
    <div id="cSearchHeader">Search</div>
    <div style="padding: 4px;">
      <p><b>Pub type or document name:</b></p>
      <input style="
```

```
        background-image:url('<? generateSkinLocation(); ?>/
        storefront_tree_search/images_tree/throbber.gif');
        background-repeat:no-repeat;background-position:100% 2px;
        width:220px;margin-top:0.5em;" id="searchfor" onkeyup="getTree(this.value)"/>
    </div>
  </div>
  <div id="tree"></div>
</div>
```

Livesearch.php

The PHP page called by the JavaScript code is called "livesearch.php". The code retrieves the publication types and templates on the server based by the search string entered by the visitor.

The getTree() accepts a search string parameter (getTree('cards')). The getTree() function returns a list of publication types and documents where the case sensitive search string appears at least in one of the fields:

- Document name
- Document code
- Publication type name
- Publication type code

The search result is used to create an hierchical tree using unorderedlists (<ul>). The response is used by the getList() function

Copyright Information

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