

Overview of Storefront Workflow & Features

Storefront is a web-based ordering portal for print buyers allowing users to order products and create customized documents online. Users can upload PDF documents, personalize and customize their documents, preview proofs, manage orders and reorder in an easy-to-use web-based interface.

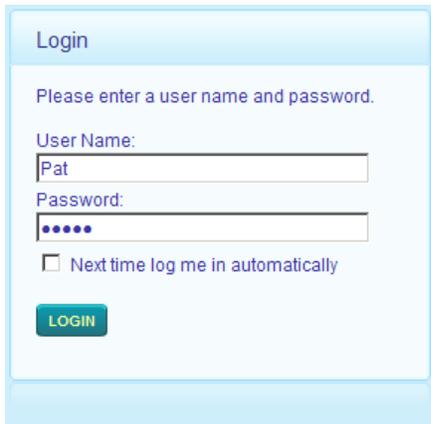
Some of the most common user features include:

- Web-based online ordering.
- No software to install.
- User login, profile, and user library for images, PDFs and data lists.
- Document customization and personalization.
- Document templates to ensure that all fonts, colors, logos and placement is consistent with brand specifications.
- Multi-language support.
- PDF preview for online approval.
- Intuitive check out & shopping cart.
- Support for eCommerce and third party shipping providers, such as FedEx and UPS.
- Approval workflow
- Interactive editing
- Variable print
- Data list acquisition and data merge for direct mail.
- Cross media capabilities
- Site skinning and localization

Site Skinning and Login

Your storefront site can be customized or skinned to look like your website or we can create a unique look for you. We can also change the site's terminology, insert ads, and support multiple languages.

Getting Started - Login

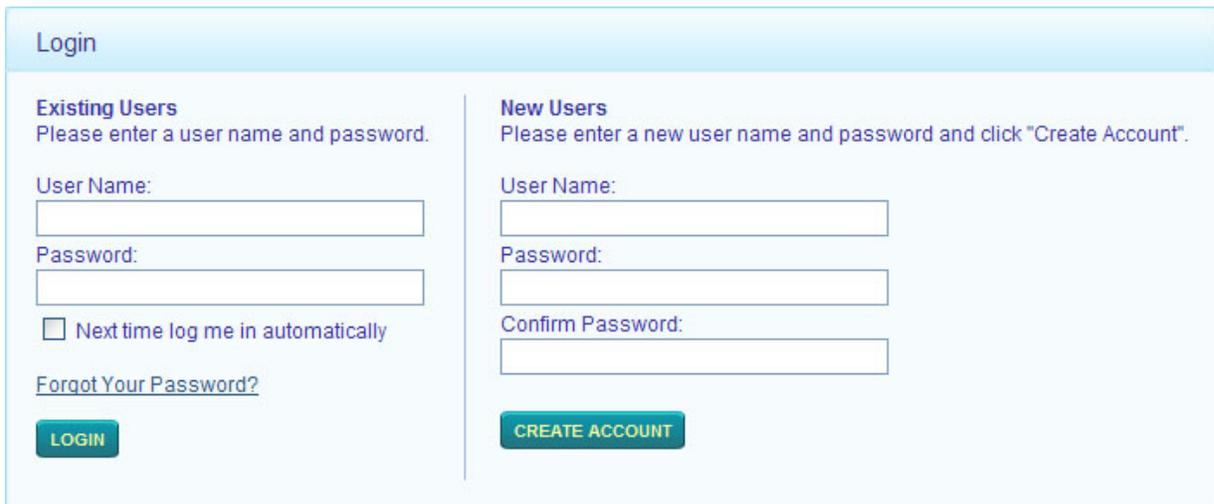


A screenshot of a simple login form. The form is titled "Login" and contains the following elements: a heading "Please enter a user name and password.", a "User Name:" label with a text input field containing the text "Pat", a "Password:" label with a password input field containing five dots, a checkbox labeled "Next time log me in automatically" which is unchecked, and a green "LOGIN" button.

Users must Login to access the site.

Login options include:

- Users must login to access the site.
- Anonymous users are allowed access to the site without logging in. Upon checkout the user will be asked to "self register" and to create their account.
- Users who have already logged into a site, such as an intranet or your website, can be automatically logged in to your storefront without logging in twice.

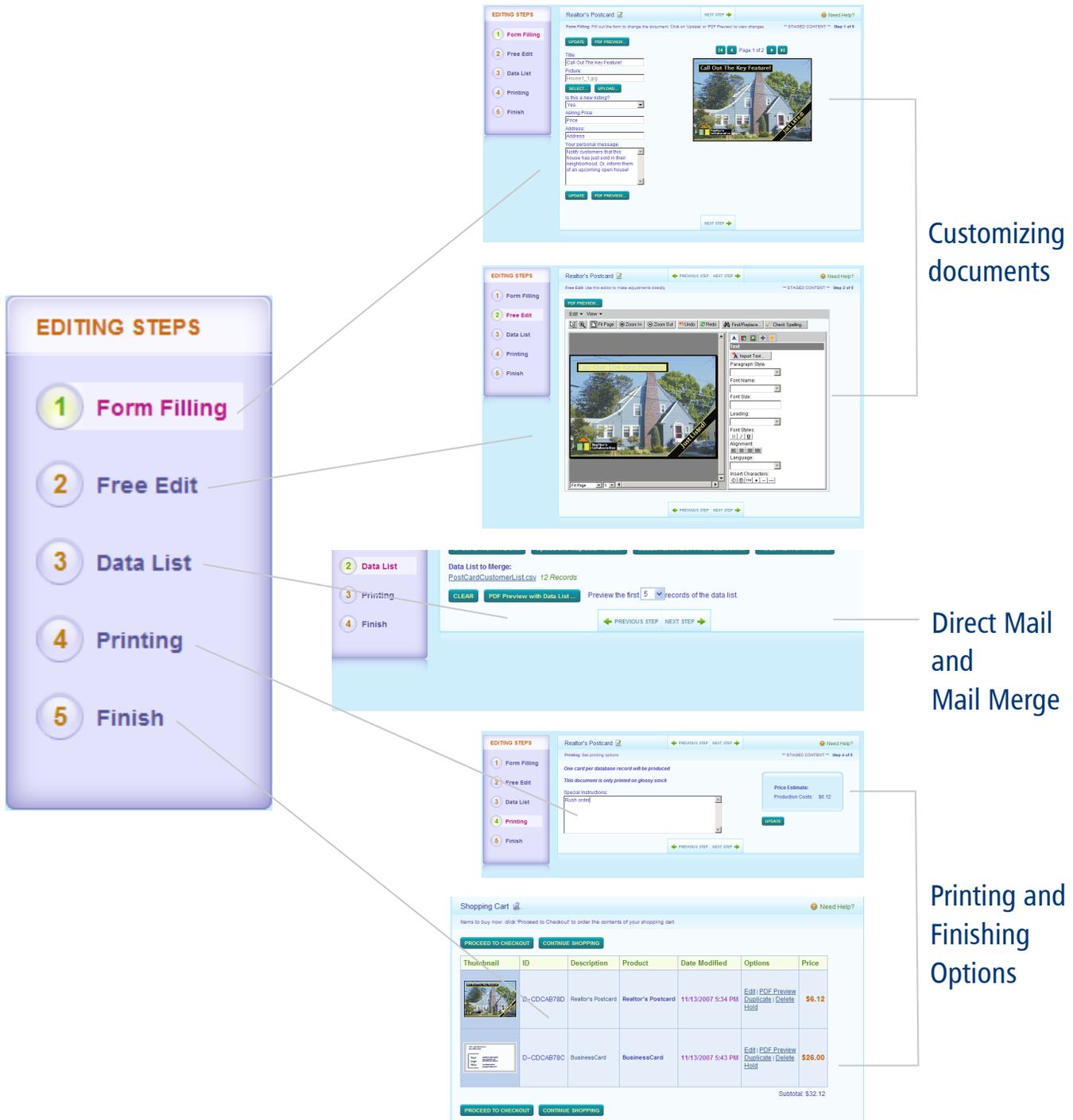


A screenshot of a login and registration form. The form is titled "Login" and is divided into two columns. The left column is titled "Existing Users" and contains the text "Please enter a user name and password.", a "User Name:" label with an empty text input field, a "Password:" label with an empty password input field, a checkbox labeled "Next time log me in automatically" which is unchecked, and a link "Forgot Your Password?". Below these is a green "LOGIN" button. The right column is titled "New Users" and contains the text "Please enter a new user name and password and click 'Create Account'". It has a "User Name:" label with an empty text input field, a "Password:" label with an empty password input field, a "Confirm Password:" label with an empty password input field, and a green "CREATE ACCOUNT" button.

Users can Login to access their account, self register, or enter the site anonymously. If they forgot their password, they can choose to have an e-mail sent to them, allowing them to reset their password.

EOS Touchpoint Storefront Workflow

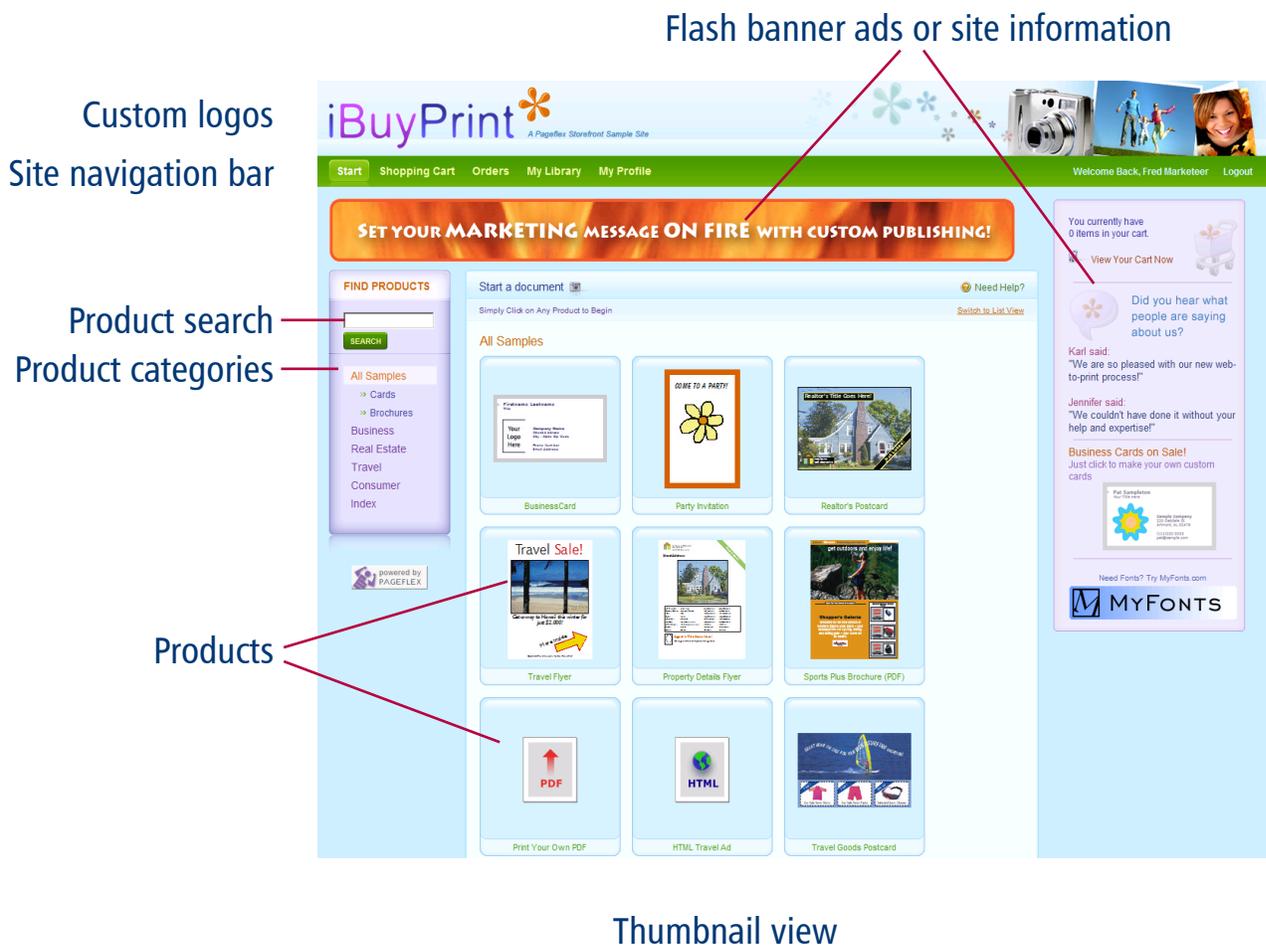
The storefront workflow guides the end user through their document creation and ordering process. Some steps may be hidden if they are not available or if the user does not have privileges to for example, upload a data list. Once the order is placed and the user completes the shipping and payment steps (if included in the product), their order is placed and depending on the user's group, it may be sent through an approval process.



Catalog of Products

The first page the user comes to after logging in is the catalog of products. It contains the main navigation to all links on the site (library, profile, shopping cart, help, etc). The catalog also contains a product search and navigation panel with all the product categories.

Users will see the number of orders they have pending and the number of items in their shopping cart.



Flash banner ads or site information

Custom logos

Site navigation bar

Product search

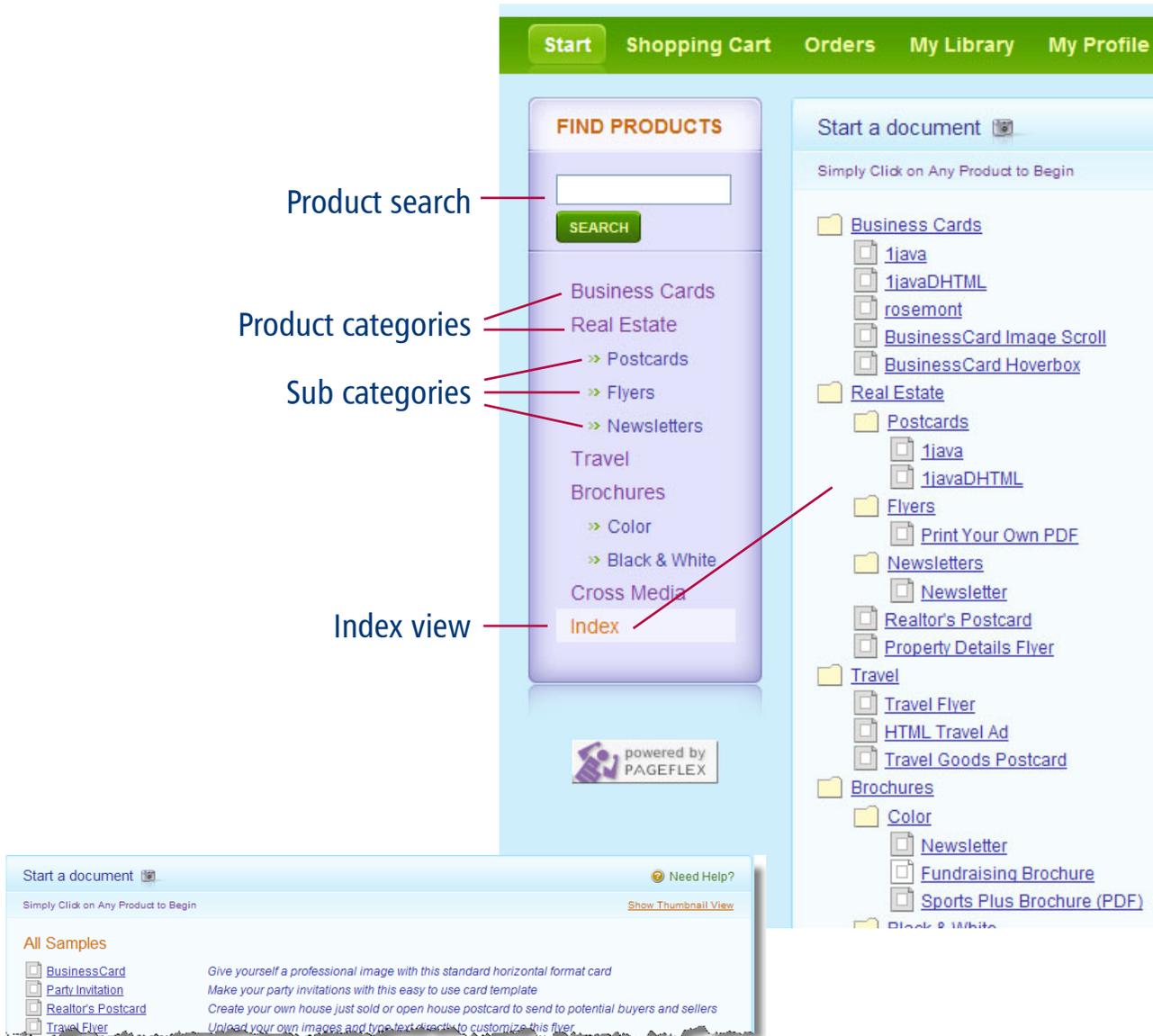
Product categories

Products

Thumbnail view

Navigating the Catalog of Products

Users can choose the product they want by selecting a thumbnail image, or selecting the name from a list or index. Product search allows users to search by the product name, product ID or SKU number.



The screenshot shows the EOS touchpoint product catalog interface. At the top, there is a green navigation bar with links for Start, Shopping Cart, Orders, My Library, and My Profile. Below this is a 'FIND PRODUCTS' section with a search input field and a green 'SEARCH' button. To the right of the search bar is a 'Start a document' section with a dropdown arrow and the text 'Simply Click on Any Product to Begin'. Below this is a list of product categories and sub-categories, including Business Cards, Real Estate, Postcards, Flyers, Newsletters, Travel, Brochures, and Cross Media. The 'Index' option is highlighted in orange. To the right of the categories is a list of product thumbnails, including Business Cards, Real Estate, Travel, and Brochures. A red line points from the 'Index' label to the 'Index' option in the categories list. Another red line points from the 'Index view' label to the 'Index' option in the product list. A third red line points from the 'Product search' label to the search input field. A fourth red line points from the 'Product categories' label to the 'Business Cards' category. A fifth red line points from the 'Sub categories' label to the 'Postcards' sub-category. At the bottom left, there is a 'Start a document' section with a dropdown arrow and the text 'Simply Click on Any Product to Begin'. Below this is a list of product thumbnails, including BusinessCard, Party Invitation, Realtor's Postcard, and Travel Flyer. A red line points from the 'Index view' label to the 'Index' option in the product list.

List View

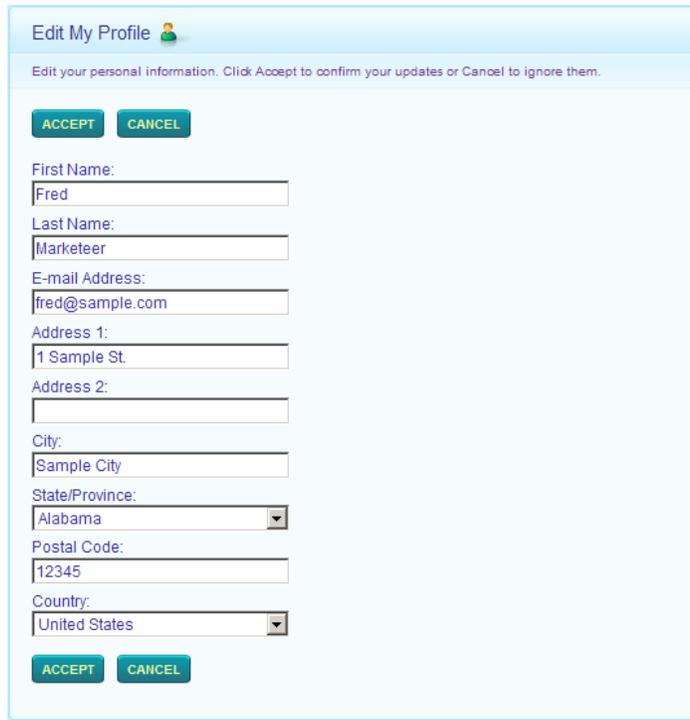
- Users can browse through the catalog of products available to them.
- Using different views - a thumbnail view that shows icons for all of the products, a summary list view, or an index.
- Users can be segmented into groups and different groups can be granted access to specific products.

User Profile and Library

User Profile

The user profile page enables the user to update their information and change their password. It may also contain information about them that is used to customize their products or apply discounts on their order.

For example, if the user belongs to a regional sales group, the address and logo for that group can appear in all products he or she orders.



Edit My Profile 

Edit your personal information. Click Accept to confirm your updates or Cancel to ignore them.

ACCEPT **CANCEL**

First Name:

Last Name:

E-mail Address:

Address 1:

Address 2:

City:

State/Province:

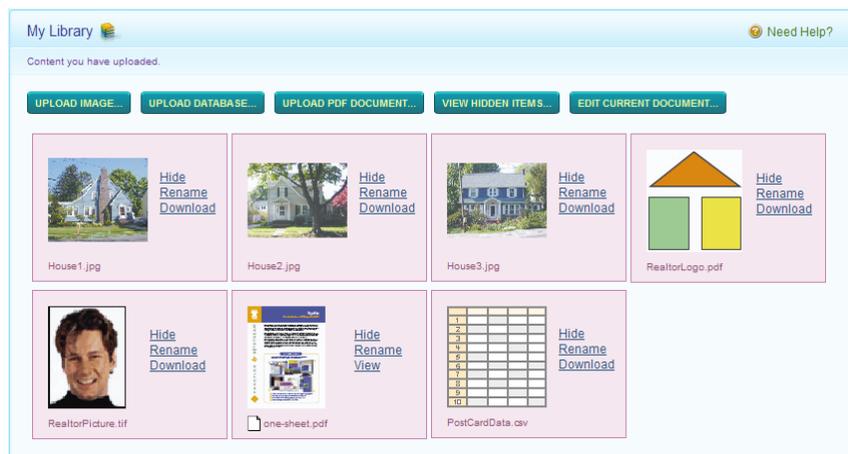
Postal Code:

Country:

ACCEPT **CANCEL**

Library

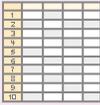
The user's library contains all the images, documents or data lists that the user has uploaded and elected to save.



My Library  [Need Help?](#)

Content you have uploaded.

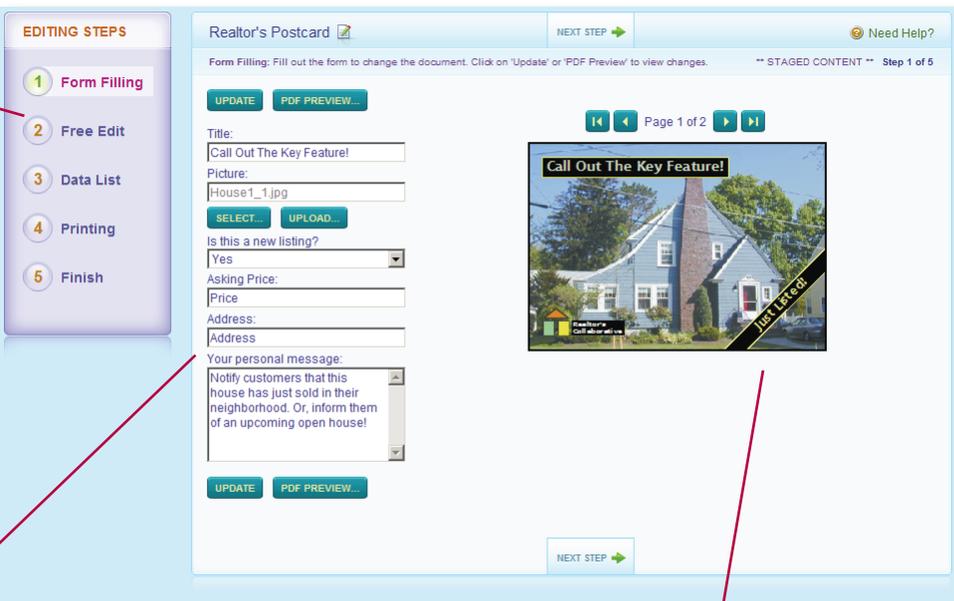
UPLOAD IMAGE... **UPLOAD DATABASE...** **UPLOAD PDF DOCUMENT...** **VIEW HIDDEN ITEMS...** **EDIT CURRENT DOCUMENT...**

| | | | |
|---|---|---|--|
|  House1.jpg Hide Rename Download |  House2.jpg Hide Rename Download |  House3.jpg Hide Rename Download |  RealtorLogo.pdf Hide Rename Download |
|  RealtorPicture.tif Hide Rename Download |  one-sheet.pdf Hide Rename View |  PostCardData.csv Hide Rename Download | |

Customizing a Document (Currently not available to EOS Touchpoint users)

Form Filling

To order a document, the user simply clicks on the product in the catalog. If the product can be customized, a form will appear with the customization options. They will see a bitmap or a PDF preview of their product.



Editing steps

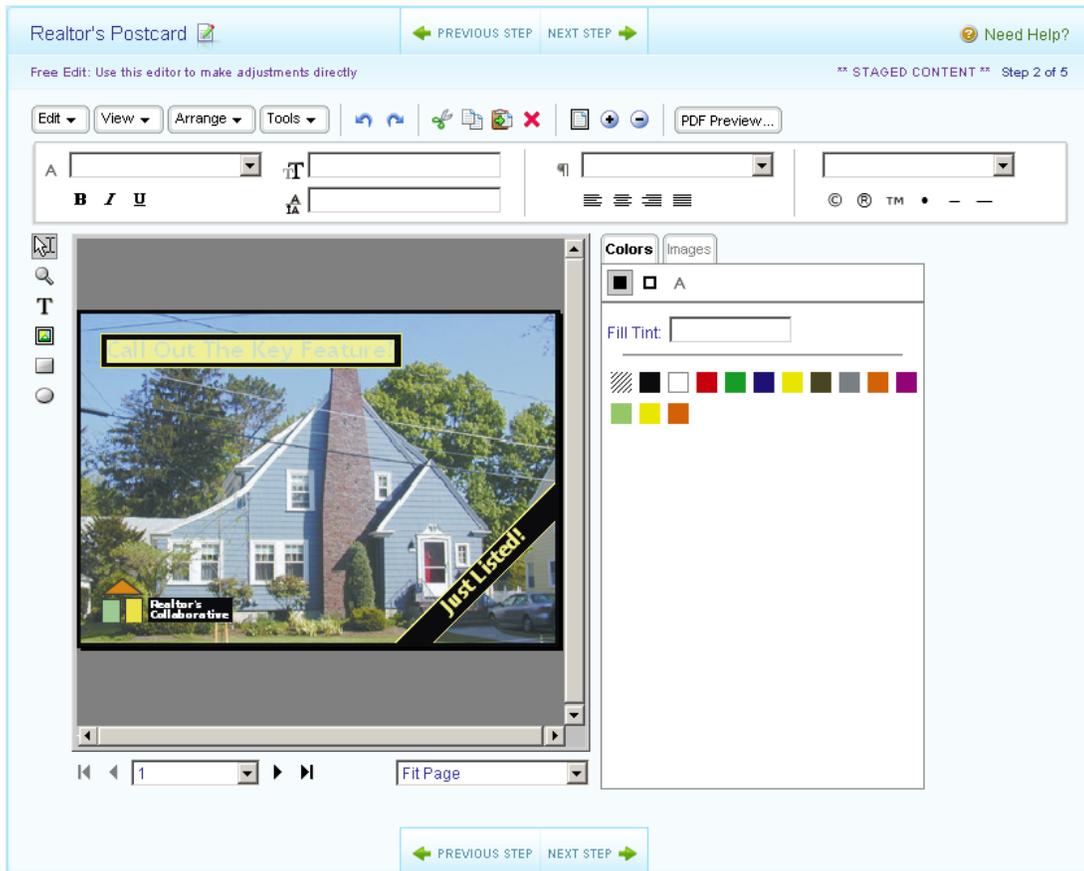
Web form for customized options

Bitmap preview

Customizing a Document (currently not available to EOS Touchpoint users)

Interactive Editing

Free Edit is an interactive editor that can be enabled for certain users or groups who need the ability to select and edit text and text attributes such as font, size and color. Users can also select, upload, scale and crop images. Users can take control of the design process to create truly personal and unique documents on their own.



Free Edit can be configured to use Java, Flash or DHTML.

Direct Mail

Obtaining a Data List

If the document is a variable print document a Data List step will appear for the user to set up the mailing list. Users can add a data list several different ways. They can upload their own or select one from a library of lists available to them. Users can also be given access to a data list service to create a list. Users select the list criteria and can then see a preview of the list as well as the documents generated using the list data. This way users can verify the job, including any costs associated with the list, before committing to using the data.

Leads Please Data Widget has been integrated into EOS Touchpoint.

Start Shopping Cart Orders My Library My Profile User Library
Welcome Back, Pat Sampleton

Data List: Acquire a Data List

Find Consumer Data based on:

Geographic Location

Search by:

Enter up to 12 ZIP codes (5 digits each)

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Demographic

Search by:

Age Range
 Have Children
 Dwelling Type
 Marital Status
 Income Range

Age Range:

Include:
 Exclude:

18-19
 20-21
 22-23
 24-25

Dwelling type:

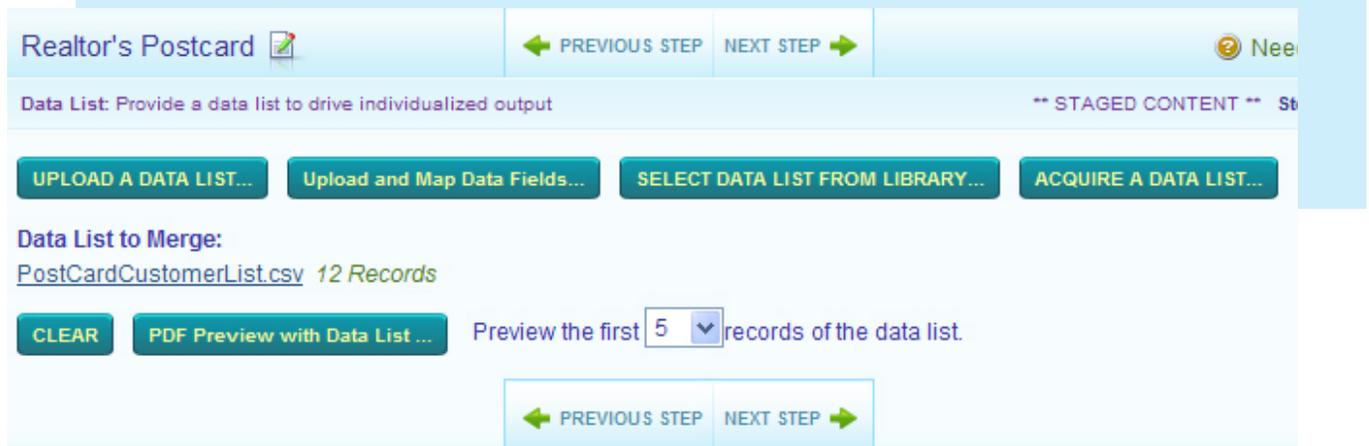
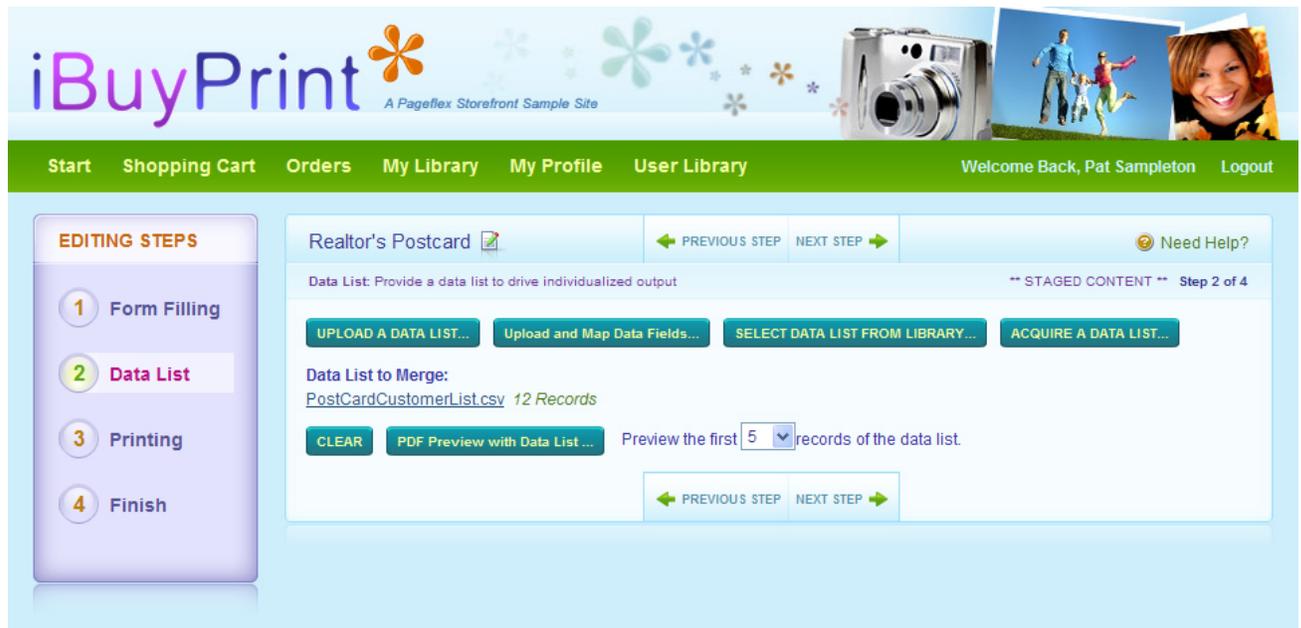
Single-family
 Multi-family

Target Number of Records

Mail Merge

Adding a Data List

Users can upload data lists or select a list from shared global libraries or from their personal library. Acquiring data lists from list providers is also available. If a user uploads their own data list they have the option to map the data fields to match the fields in the document. For example, the user would map the “myaddress” field in their list to the “Address1” field in the document.



After a user has uploaded their data list, they have the option to preview the records from their list with the document and approve a PDF preview online.

Printing and Finishing Options

In the printing step, users enter order quantities and choose finishing options. The quantity can be pre-defined ranges set up for each item with minimum and maximum quantities. The finishing options define the details for the job, such as the type of stock, coatings, laminations, and bindery choices.



Two examples of the printing options step. The example above shows a printing step for a data merge job, so there is no field for quantity.

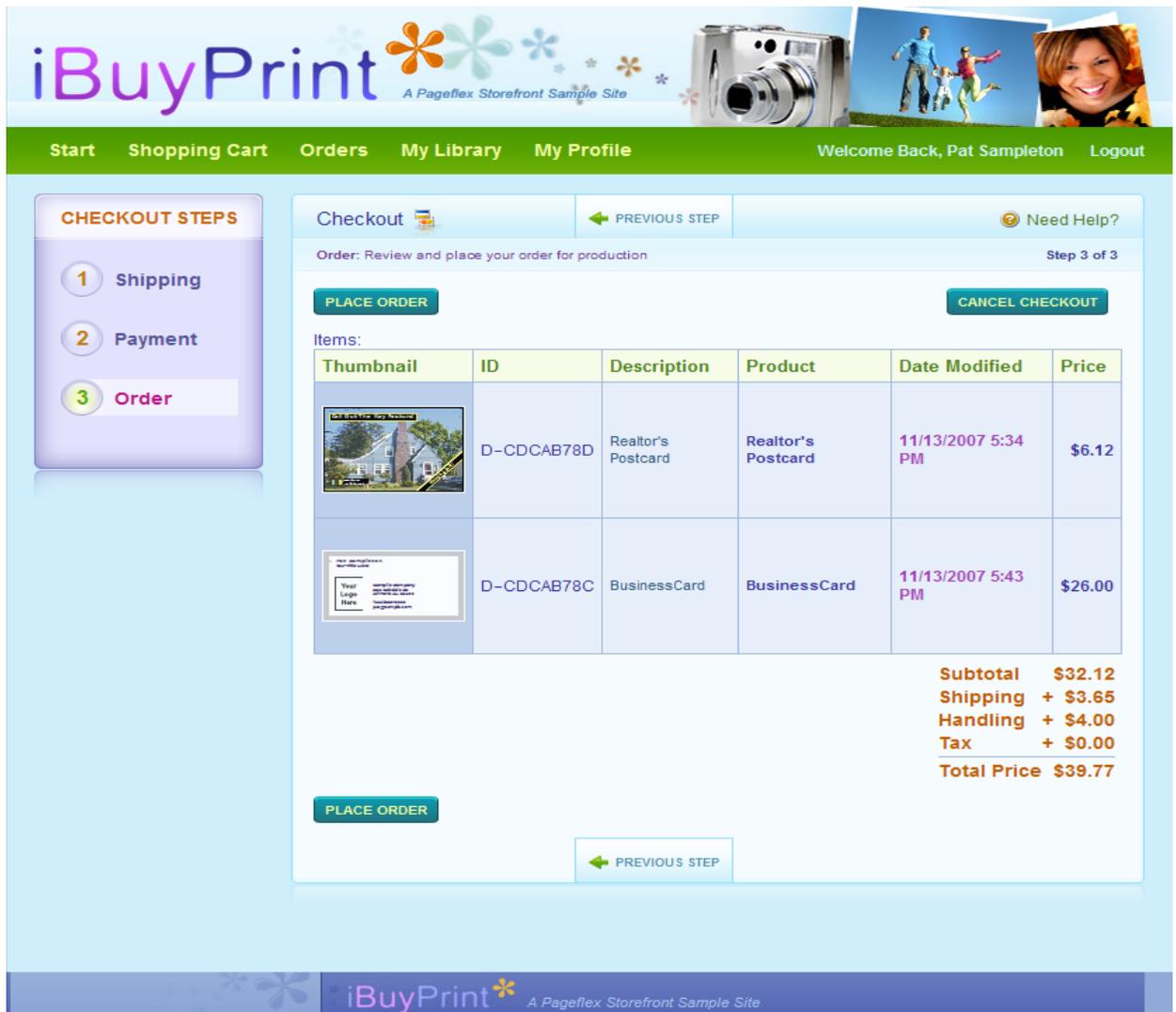
| Quantity | 500 | 750 | 1000 | 1250 | 1500 |
| --- | --- | --- | --- | --- | --- |
| Price | 50.00€ | 67.50€ | 80.00€ | 87.50€ | 105.00€ |

 Below the table are fields for 'Enter Quantity' (set to 500), 'Select Paper Stock' (set to 100# Uncoated Cover Stock), and 'Request Date' with a calendar icon. Navigation buttons for 'PREVIOUS STEP' and 'NEXT STEP' are at the bottom." data-bbox="203 475 900 936"/>

Shopping Cart

When users are finished customizing documents, the user adds them to the online shopping cart. Storefront handles every step required to complete the e-Commerce transaction and process the order including:

- Integrated shipping information
- Credit card authorizations
- Approval routing



The screenshot shows the iBuyPrint checkout interface. At the top, the iBuyPrint logo is displayed with the tagline "A Pageflex Storefront Sample Site". Below the logo is a navigation bar with links for Start, Shopping Cart, Orders, My Library, My Profile, and a user greeting "Welcome Back, Pat Sampleton" with a Logout link. The main content area is titled "Checkout" and includes a "PREVIOUS STEP" button and a "Need Help?" link. The order status is "Order: Review and place your order for production" (Step 3 of 3). A "PLACE ORDER" button is on the left, and a "CANCEL CHECKOUT" button is on the right. The items table lists two items: a Realtor's Postcard and a BusinessCard. A summary table shows the Subtotal (\$32.12), Shipping (\$3.65), Handling (\$4.00), Tax (\$0.00), and Total Price (\$39.77). A "PLACE ORDER" button is at the bottom left, and a "PREVIOUS STEP" button is at the bottom right.

| Thumbnail | ID | Description | Product | Date Modified | Price |
|---|------------|--------------------|--------------------|--------------------|---------|
|  | D-CDCAB78D | Realtor's Postcard | Realtor's Postcard | 11/13/2007 5:34 PM | \$6.12 |
|  | D-CDCAB78C | BusinessCard | BusinessCard | 11/13/2007 5:43 PM | \$26.00 |

| | |
|--------------------|-----------------|
| Subtotal | \$32.12 |
| Shipping | + \$3.65 |
| Handling | + \$4.00 |
| Tax | + \$0.00 |
| Total Price | \$39.77 |

Check Order Status and Reorder

Each user has access to their order history to check the progress of their order and to reorder items. Items selected for reorder may also be edited in the form filling step. For example, if the user wants to reorder business cards and change their phone number, they can edit the order.

G-CDCAB78E 
 Need Help?

Order summary

[GO BACK](#)

Order G-CDCAB78E, created 11/13/2007 6:03 PM

| Thumbnail | ID and Product | Description | Status | Comments | Options | Price |
|--|----------------------------------|--------------------|------------|----------|--|----------------|
|  | D-CDCAB78D Realtor's Postcard | Realtor's Postcard | In Process | | Reorder Details | \$6.12 |
|  | D-CDCAB78C BusinessCard | BusinessCard | In Process | | Reorder Details | \$26.00 |

| | |
|--------------------------|-----------------|
| Subtotal | \$32.12 |
| Shipping | + \$3.65 |
| Handling | + \$4.00 |
| Tax | + \$0.00 |
| Total Price | \$39.77 |
| Payment Received- | \$0.00 |
| Balance Due | \$39.77 |

Shipping Information:

Shipping Address

First Name: Pat

Last Name: Sampleton

Address 1: 220 Oakdale St.

Address 2:

City: Arlmont

State/Province: Alabama

Postal Code: 02478

Country: United States

Delivery Method Standard (5-7 business days): \$3.65

Payment Information:

Billing Address

First Name: Pat

Last Name: Sampleton

Address 1: 220 Oakdale St.

Address 2:

City: Arlmont

State/Province: Alabama

Postal Code: 02478

Country: United States

Payment Information

Method of Payment: Purchase Order

Purchase Order Number: 101

The following section includes a Storefront Planning Guide and a Product Planning Guide. They can be used to gather information and requirements from your prospects or clients. You can customize these to suit your needs.

General Information

General Information

| | |
|--|--|
| Site name: | Describe the site's function or purpose: |
| Go "Live" date: | |
| Proposed site URL: | |
| <input type="radio"/> Retail storefront (B2C - business to consumer) <input type="radio"/> B2B - business to business | |
| <input type="radio"/> Will the site need to support multiple countries? | If Yes, what countries will be accessing the site? |
| <input type="radio"/> Will the site need to support multiple languages? Will users be using <input type="radio"/> PC's <input type="radio"/> Mac's <input type="radio"/> Both | If Yes, what languages? Average user's browser resolution: |
| What is the total number of estimated users for this site? | Frequency of usage for each user (weekly): |
| Pricing: <input type="radio"/> Credit cards <input type="radio"/> Purchase orders <input type="radio"/> No pricing | Pricing comments: |
| Shipping: <input type="radio"/> UPS <input type="radio"/> Fedex <input type="radio"/> Other | Shipping comments: |
| Taxes: <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Depends on the product or user | <input type="radio"/> I will provide a list of states/counties/countries for tax collection. |
| Discounts: <input type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Depends on the product or user If yes, how will discounts be structured? <input type="radio"/> Total price <input type="radio"/> First order | Discount comments: |
| <input type="radio"/> Approval process (Will users or user groups need approval before their order is placed?) <input type="radio"/> Allow interactive editing? If Yes, <input type="radio"/> Java version <input type="radio"/> Flash version *Note the Java version requires the user to download and install Java. Currently unavailable. | If Yes, please describe the desired approval workflow process. |
| How many unique products will there be in your storefront? _____ | |
| How many product categories are planned? _____ | <input type="radio"/> Will products exist in multiple categories? |
| <input type="radio"/> Inventory Management - Will you need us to manage an inventory of products? | If Yes, approximately how many products will be inventoried? |

Notifications

| | |
|---|--|
| <input type="radio"/> Notify user when their order is placed | <input type="radio"/> Notify another user or group when a user places an order |
| <input type="radio"/> Notify user when their order is pending approval | <input type="radio"/> Notify a user or group when a new user has self-registered |
| <input type="radio"/> Notify user when their order is approved and placed | Other: |
| <input type="radio"/> Notify user when their order is declined | Other: |
| <input type="radio"/> Notify user when their order has shipped | Other: |

Workflow

| |
|--|
| Describe the workflow for the end user when they enter the site. |
| |
| |

| User Information | | | | | | |
|---|---|-----------------------|--|-----------------------|-----------------------|-----------------------|
| User Information | <input type="radio"/> Allow anonymous users (any one will be able to browse this site) | | <input type="radio"/> If Yes, allow anonymous users to upload files? | | | |
| | <input type="radio"/> Logins & passwords are required to access site | | <input type="radio"/> If Yes, will we be provided with a data list of users and profile information? | | | |
| | <input type="radio"/> Self register (users will be allowed to self register) | | <input type="radio"/> If Yes, add new users to what group? | | | |
| | <input type="radio"/> Authentication (users already logged in to another site won't be required to login again) | | If yes, what information must be updated or passed through for the user (e.g. name, password, account ID etc.) | | | |
| <p>When a new user self registers they are asked to fill out a user profile. User profile fields can also be input from a data file. The information from the user's profile can be used to prefill forms and to determine content. For example, when a user creates a business card, the form fields can be prepopulated from the user's profile.</p> <p>Please provide a list of user profile fields that the user will fill out, for example, Name, Phone, Email, Address, etc. Check "Required" if the user must enter a value before they can place the order.</p> | | | | | | |
| User Profiles | Profile | Required | User Profile Field | Required | User Profile Field | Required |
| | <input type="radio"/> First Name | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Last Name | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Address | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Suite, Floor, P.O. Box | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> City | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> State | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Postal Code | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Country | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Phone | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Email | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Fax | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Company | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Title | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Pricing Discount | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| | <input type="radio"/> Account ID | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> |
| <input type="radio"/> Tax Exempt Status | <input type="radio"/> | | <input type="radio"/> | | <input type="radio"/> | |
| Notes | Notes | | | | | |
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User Groups

User Groups - Users can be segmented into geographic or department/position groups and granted access to specific products, special promotions, etc.

| Group name | Description | Upload images ¹ | Upload PDFs ² | Upload data lists ³ | Access to user library ⁴ | Approval required ⁵ | View & modify profile info ⁶ | Sees payment step ⁷ | Sees shipping step ⁸ | Access to all products ⁹ | Approvers ¹⁰ |
|------------|-------------|----------------------------|-----------------------------|--------------------------------|-------------------------------------|--------------------------------|---|--------------------------------|---------------------------------|-------------------------------------|-------------------------|
| Anonymous | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| Everyone | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
| | | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | |
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Product Information (to be used with each product)

Product Information

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| Product name: | | Product description: | |
| Type of product: <input type="radio"/> PDF reprint <input type="radio"/> Customizable document <input type="radio"/> HTML eMail <input type="radio"/> Data merge (Direct Mail) <input type="radio"/> Other (non print item) | | | |
| Product options: <input type="radio"/> Form filling <input type="radio"/> Display pricing <input type="radio"/> Interactive editing <input type="radio"/> Taxable <input type="radio"/> Data merge <input type="radio"/> Finishing options <input type="radio"/> Available for download <input type="radio"/> Pre set quantities <input type="radio"/> Keep in inventory <input type="radio"/> Shipping step <input type="radio"/> Other | | This product will appear in the following categories: | |
| User preview options: <i>(can select more than one)</i> <input type="radio"/> Bitmap Preview <input type="radio"/> PDF preview <input type="radio"/> No preview <input type="radio"/> Watermark PDF <input type="radio"/> Low-res PDF <input type="radio"/> Hi-res PDF | | This product will be accessible to the following groups: <input type="radio"/> All users | |
| Product search keywords: | | | |
| Final print size: | | | |
| Product Code: | | This product requires an approval for the following groups: <input type="radio"/> All users | |
| Product SKU: | | | |
| Minimum order quantity: | | | |
| Maximum order quantity: | | | |
| Pre-set order quantities: | | | |
| Minimum quantity to keep in inventory: Data merge options - allow users to: <input type="radio"/> Upload data lists <input type="radio"/> Select a data list from user's library <input type="radio"/> Select a data list from global library <input type="radio"/> Map data fields <input type="radio"/> Download a data sample <input type="radio"/> Acquire a data list <input type="radio"/> Preview merged data from uploaded lists or library * Note Preview is not available for acquired lists | | Approval Comments: | |

Notes

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Product Customization - Form Filling - Images

Product name:

List all the image variables that will be included in the form filling step.

| Image name Field label ¹ | Page ² | Profile field ³ | Data source ⁴ | Rule ⁵ | Default value ⁶ | User library ⁷ | Global library ⁸ | User upload ⁹ | Custom library ¹⁰ | Required ¹¹ | Affects Price ¹² |
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¹ Field label - this is the text the user will see.

² Page the image appears on.

³ Image selection comes from a profile field, for example, the user's photo.

⁴ Image selection will come from a data source.

⁵ Image is the result of the evaluation of a rule. Please describe below.

⁶ You can specify a default image for all users or get an image from one of the user's profile fields.

⁷ Select this if the user can select an image from their library

⁸ Select this if the user can select an image from the global library

⁹ Select this if the user can upload an image

¹⁰ Required field - user must select an image.

¹² Check this if the user will be charged if an image is selected.

Custom Images

| Image name | Custom Images for this element |
|------------|--------------------------------|
| | |
| | |
| | |

Rules

| Image name | Please describe the rule. |
|------------|---------------------------|
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| | |



Product Customization - Form Filling - Text

Product name:

List the text areas the user will be able to customize in the form filling step, for example, name, address, etc.

| Field name Field label ¹ | Page # ² | Profile field ³ | Data source ⁴ | Rule ⁵ | Default value ⁶ | Field Type ⁷ | Required ⁸ | Validation Type ⁹ | Affects Price ¹⁰ |
|--|---------------------|----------------------------|--------------------------|-------------------|----------------------------|-------------------------|-----------------------|------------------------------|-----------------------------|
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¹ Field label - this is the text the user will see.

² Page that the text appears on.

³ Text can come from the user's profile. Enter the profile field name to use.

⁴ Text can come from an external data source. Enter the source and field.

⁵ Text can be the result of an evaluation or a rule. Describe the rule below.

⁶ You can specify a default value for all users or get a value from one of the user's profile fields.

⁷ Field Types include: Single line text, multi line text, list box, drop down list, checkbox, radio buttons, or read only text.

⁸ Required field - user must enter a value.

⁹ Validation types include: number, phone number, zip code, email, date, etc.

¹⁰ Check this if the value of this field will change the price.

Form Filling Field Options

Rules

List the text field options and values for drop down lists, check boxes or radio buttons. Describe the evaluation or if, then statement.

| Field name | Display label | Value(s) | Field name | Rule |
|------------|---------------|----------|------------|------|
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Product Customization - Interactive Editing - Images

List the elements the user will be able to edit interactively

Product name:

Interactive Editing - Images

| Element name ¹ | Page ² | Description ³ | Change Size & Position | Scale & Crop Images | Upload Image | User Library | Global Library | Custom Library | Rotate | Add New Image |
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¹ For reference, enter a name for the element.
² Enter the page number the element is on in the document.
³ Optional.

Custom Images

Images

| Image name | Custom Images for this element |
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