

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.

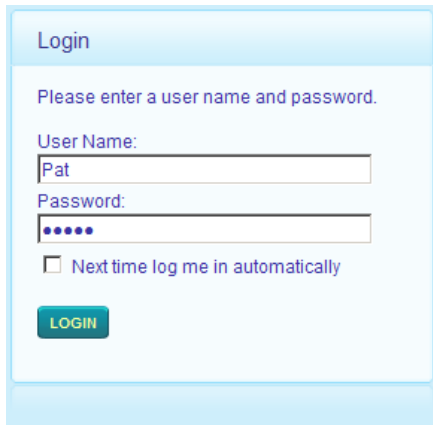
Some of the most common user features include:

- 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

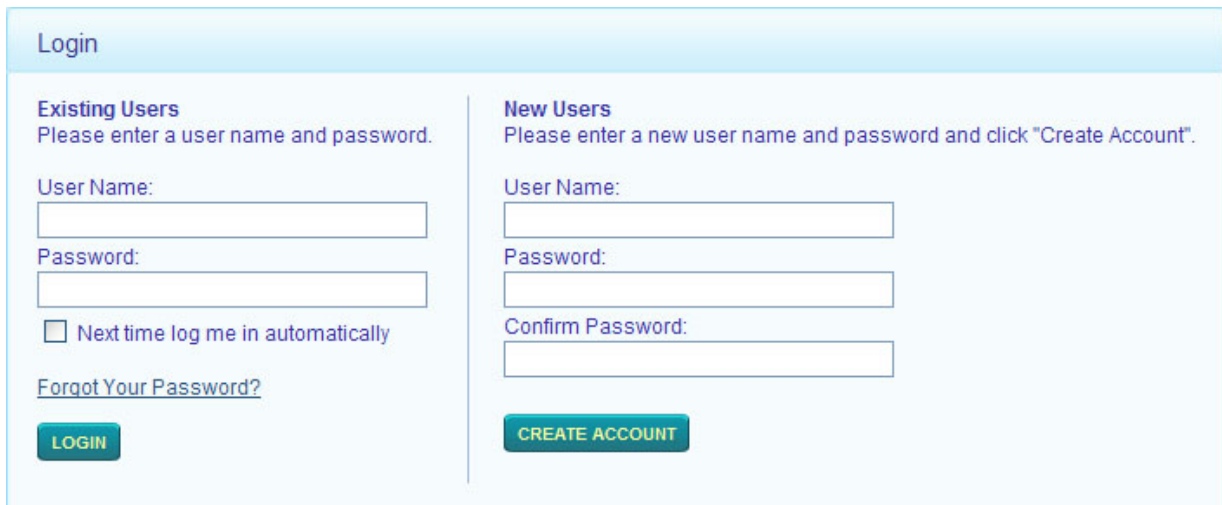


A screenshot of a login form titled "Login". It contains a prompt "Please enter a user name and password." followed by input fields for "User Name:" (containing "Pat") and "Password:" (masked with dots). There is a checkbox for "Next time log me in automatically" and a green "LOGIN" button.

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 titled "Login". It is divided into two columns. The left column, "Existing Users", has a prompt "Please enter a user name and password.", input fields for "User Name:" and "Password:", a checkbox for "Next time log me in automatically", a link "Forgot Your Password?", and a green "LOGIN" button. The right column, "New Users", has a prompt "Please enter a new user name and password and click 'Create Account'", input fields for "User Name:", "Password:", and "Confirm Password:", 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.



The screenshot shows the iBuyPrint website interface. The header includes the iBuyPrint logo, a navigation bar with links (Start, Shopping Cart, Orders, My Library, My Profile), and a welcome message for a user named Fred Marketeer. A large orange banner at the top reads "SET YOUR MARKETING MESSAGE ON FIRE WITH CUSTOM PUBLISHING!". On the left, a "FIND PRODUCTS" sidebar contains a search bar and a list of product categories: All Samples, Cards, Brochures, Business, Real Estate, Travel, Consumer, and Index. The main content area displays a grid of product thumbnails, including BusinessCard, Party Invitation, Realtor's Postcard, Travel Flyer, Property Details Flyer, Sports Plus Brochure (PDF), Print Your Own PDF, HTML Travel Ad, and Travel Goods Postcard. On the right, there are promotional banners for "Did you hear what people are saying about us?", "Business Cards on Sale!", and "MY FONTS".

Flash banner ads or site information

Custom logos

Site navigation bar

Product search

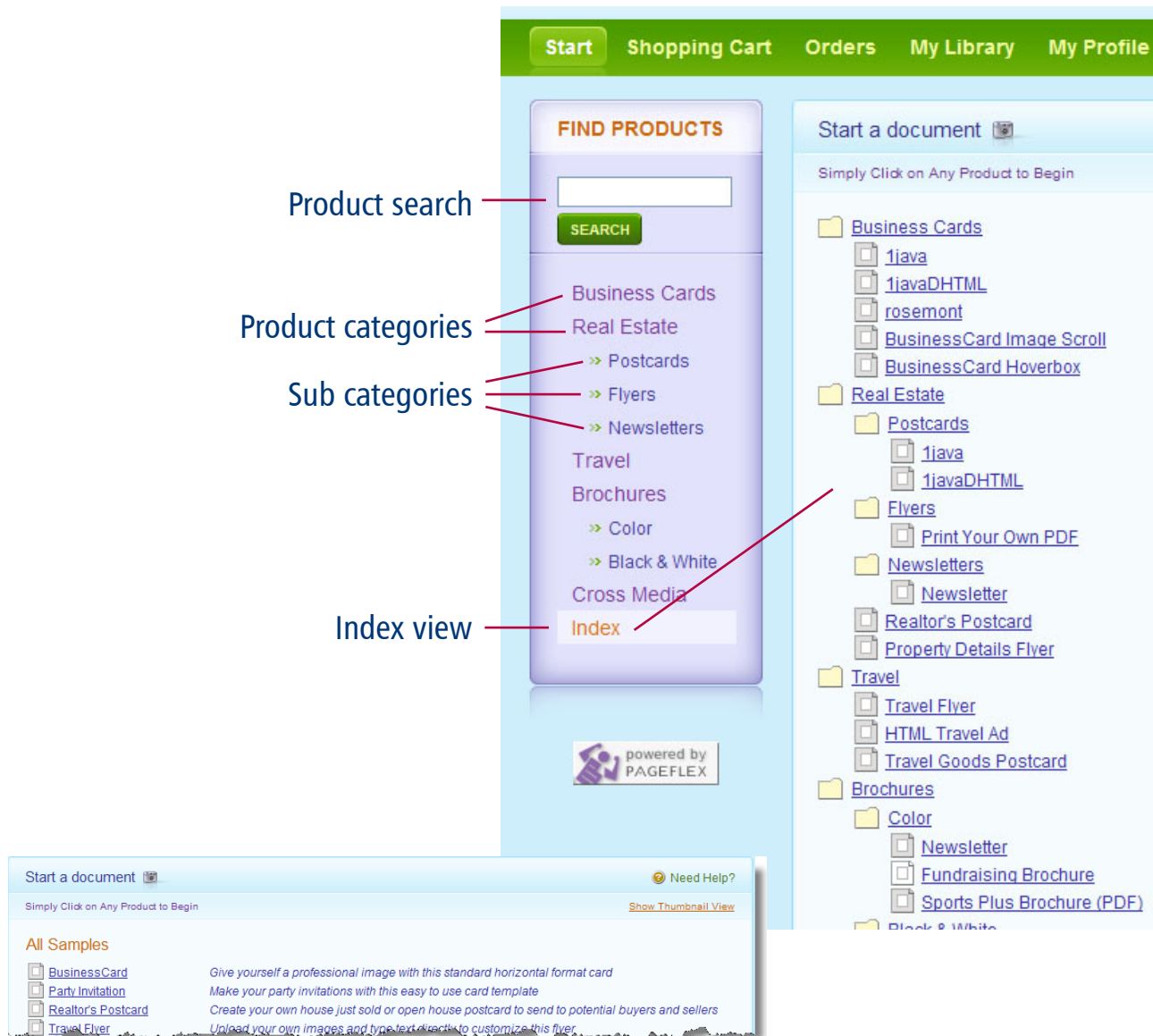
Product categories

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.



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:
Fred

Last Name:
Marketeer

E-mail Address:
fred@sample.com

Address 1:
1 Sample St.

Address 2:

City:
Sample City

State/Province:
Alabama

Postal Code:
12345

Country:
United States

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...




Hide
Rename
Download

House1.jpg




Hide
Rename
Download

House2.jpg




Hide
Rename
Download

House3.jpg




Hide
Rename
Download

RealtorLogo.pdf



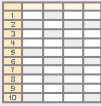
Hide
Rename
Download

RealtorPicture.tif



Hide
Rename
View

one-sheet.pdf



Hide
Rename
Download

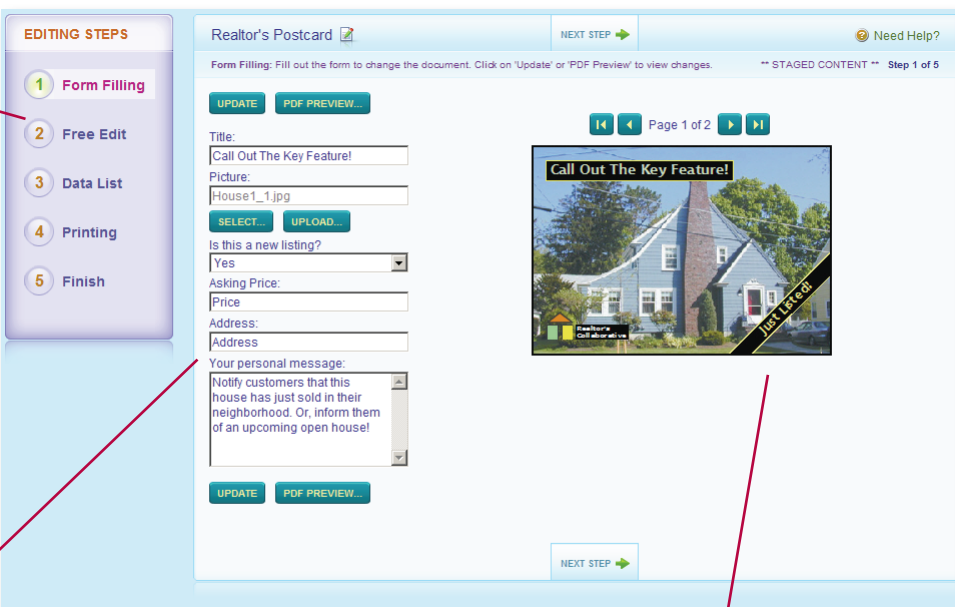
PostCardData.csv

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

Realtor's Postcard

Form Filling: Fill out the form to change the document. Click on 'Update' or 'PDF Preview' to view changes. ** STAGED CONTENT ** Step 1 of 5

1 Form Filling

2 Free Edit

3 Data List

4 Printing

5 Finish

UPDATE PDF PREVIEW...

Page 1 of 2

Title: Call Out The Key Feature!

Picture: House1_1.jpg

SELECT... UPLOAD...

Is this a new listing?

Yes

Asking Price:

Price:

Address:

Address:

Your personal message:

Notify customers that this house has just sold in their neighborhood. Or, inform them of an upcoming open house!

UPDATE PDF PREVIEW...

Call Out The Key Feature!

Just Listed!

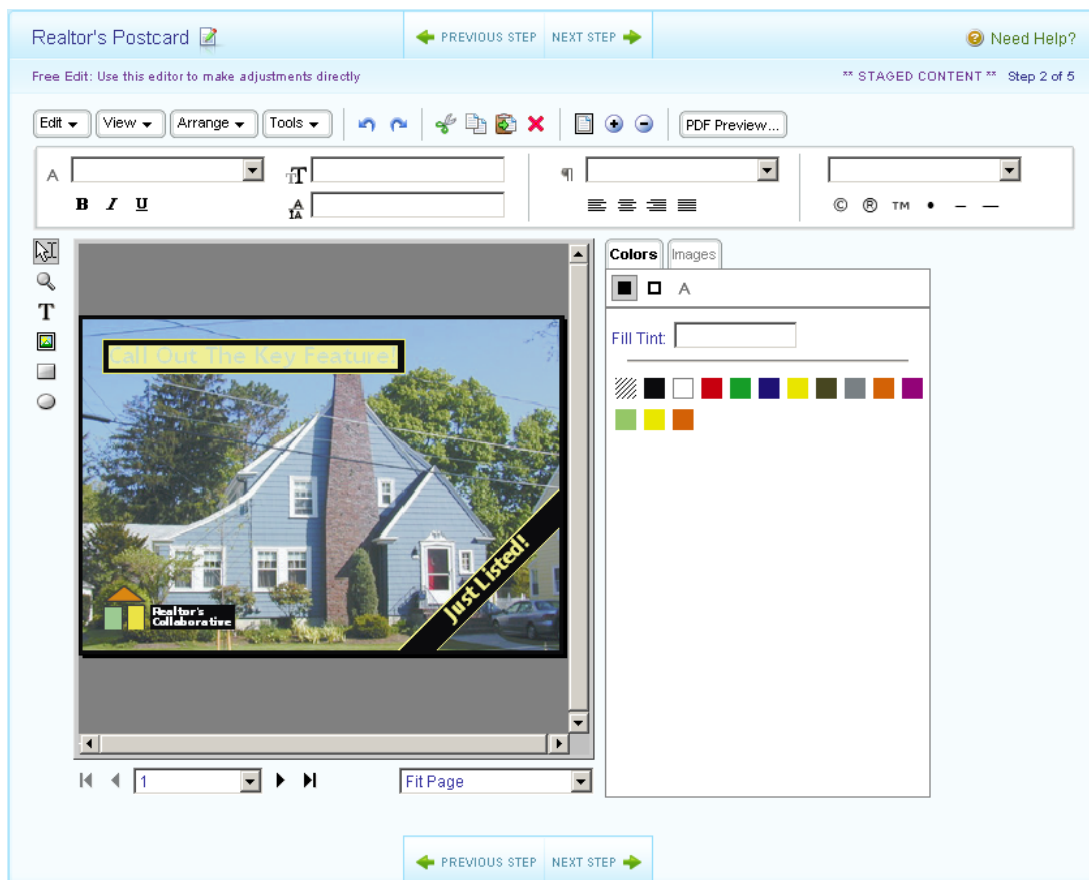
Need Help?

NEXT STEP

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.



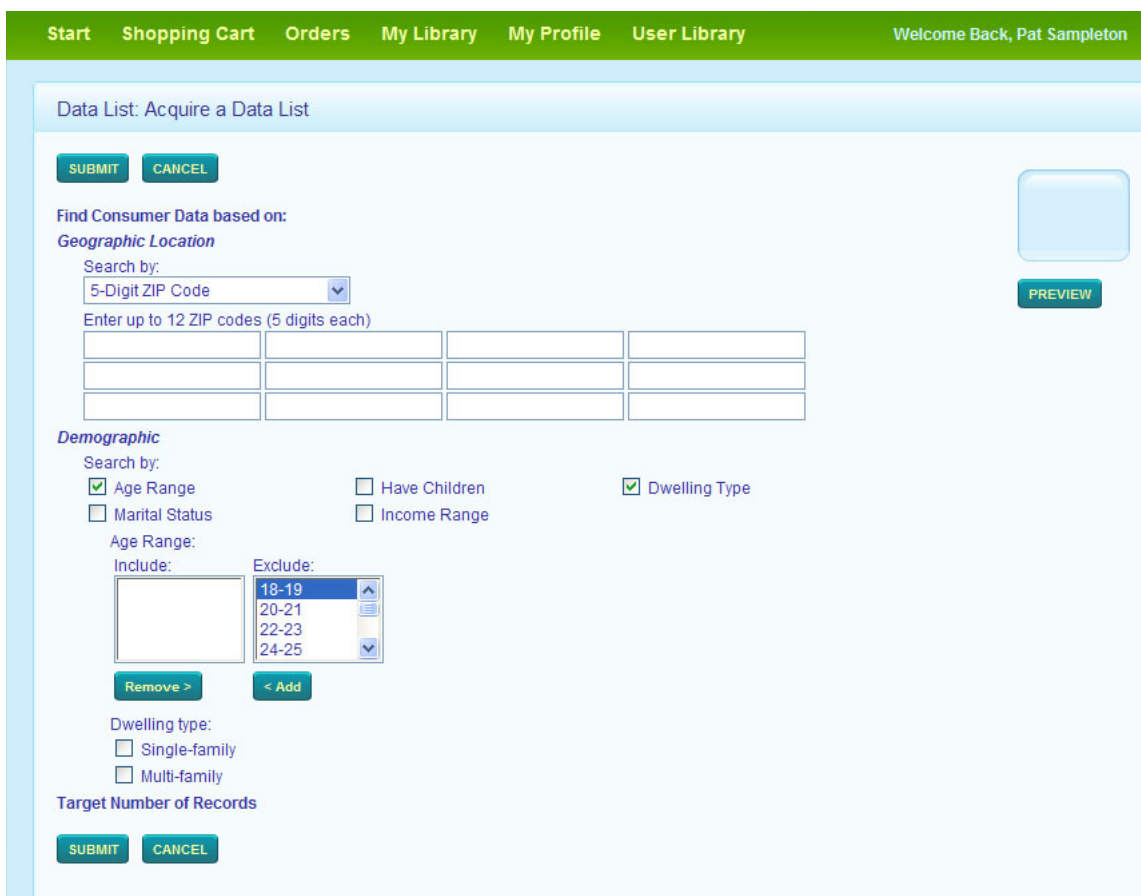
Free Edit can be configured to use Java, Flash or DHTML.

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

SUBMIT CANCEL

Find Consumer Data based on:

Geographic Location

Search by:
5-Digit ZIP Code

Enter up to 12 ZIP codes (5 digits each)

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

Remove > < Add

Dwelling type:

☐ Single-family ☐ Multi-family

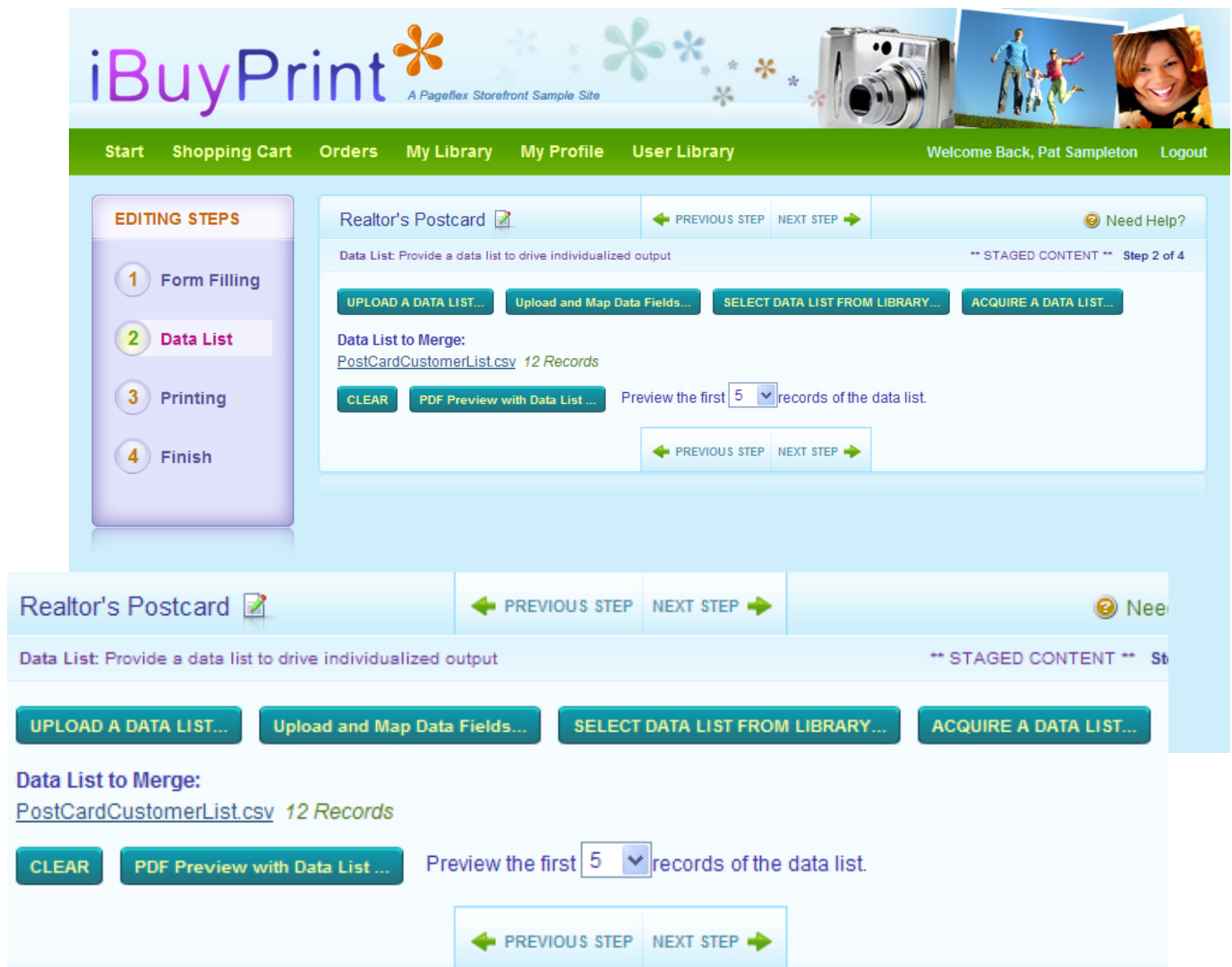
Target Number of Records

SUBMIT CANCEL

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.



The screenshot displays the iBuyPrint web interface. At the top, the header includes the iBuyPrint logo, navigation links (Start, Shopping Cart, Orders, My Library, My Profile, User Library), and a user greeting (Welcome Back, Pat Sampleton) with a Logout link. The main content area is titled 'Realtor's Postcard' and shows the 'Data List' step of a 4-step process (Form Filling, Data List, Printing, Finish). The 'Data List' step includes a section for 'Data List to Merge' showing 'PostCardCustomerList.csv' with '12 Records'. Below this, there are buttons for 'CLEAR', 'PDF Preview with Data List ...', and a dropdown menu to 'Preview the first 5 records of the data list'. Navigation buttons for 'PREVIOUS STEP' and 'NEXT STEP' are also present.

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.



EDITING STEPS

- 1 Form Filling
- 2 Free Edit
- 3 Data List
- 4 **Printing**
- 5 Finish

Realtor's Postcard 

← PREVIOUS STEP NEXT STEP →

Need Help?

Printing: Set printing options ** STAGED CONTENT ** Step 4 of 5

One card per database record will be produced

This document is only printed on glossy stock

Special Instructions:

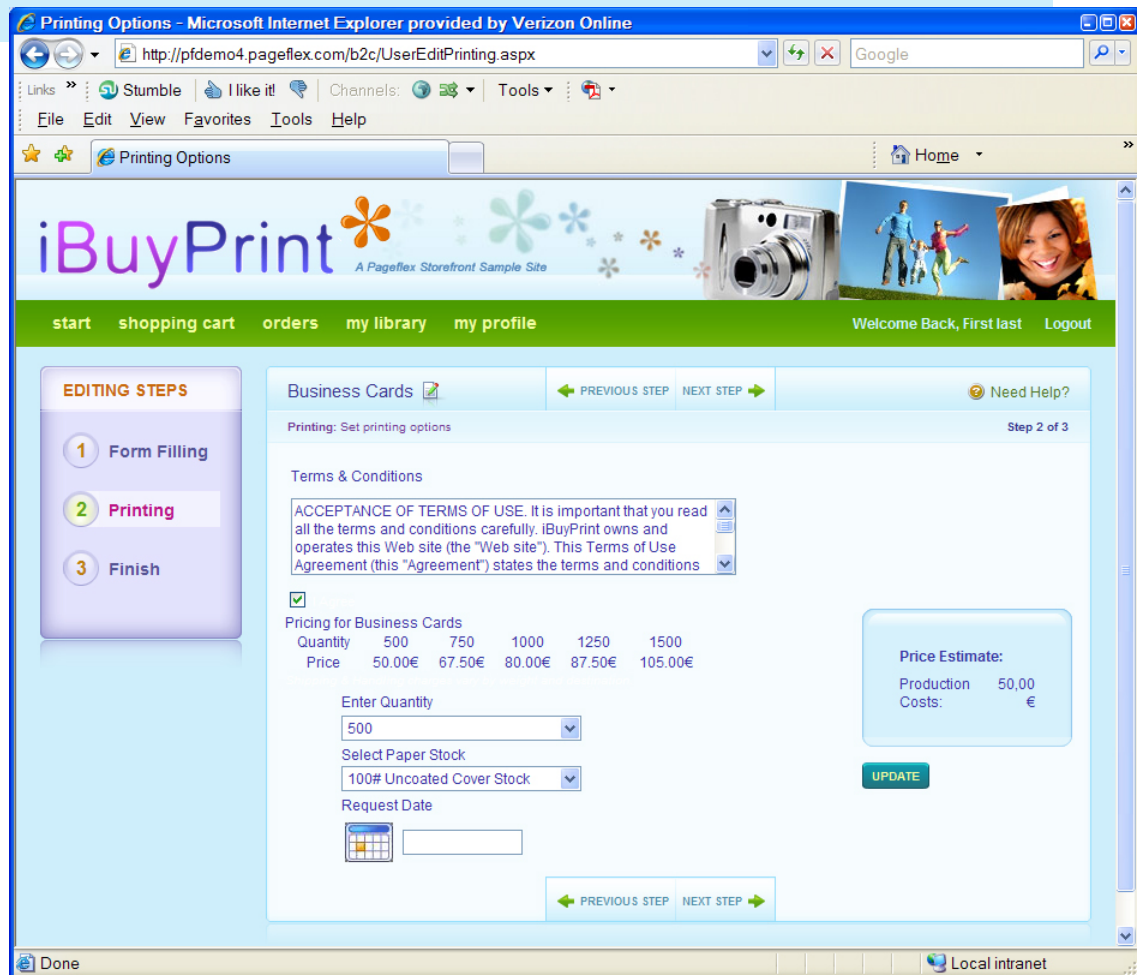
Rush order

Price Estimate:
Production Costs: \$6.12

UPDATE

← PREVIOUS STEP NEXT STEP →

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.



Printing Options - Microsoft Internet Explorer provided by Verizon Online

http://pfdemo4.pageflex.com/b2c/UserEditPrinting.aspx

Links: Stumble I like it Channels: Tools

File Edit View Favorites Tools Help


Printing Options

iBuyPrint A Pageflex Storefront Sample Site

start shopping cart orders my library my profile Welcome Back, First last Logout

EDITING STEPS

- 1 Form Filling
- 2 **Printing**
- 3 Finish

Business Cards 

← PREVIOUS STEP NEXT STEP →

Need Help?

Printing: Set printing options Step 2 of 3

Terms & Conditions

ACCEPTANCE OF TERMS OF USE. It is important that you read all the terms and conditions carefully. iBuyPrint owns and operates this Web site (the "Web site"). This Terms of Use Agreement (this "Agreement") states the terms and conditions


☒

Pricing for Business Cards

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

Enter Quantity: 500

Select Paper Stock: 100# Uncoated Cover Stock

Request Date: 

Price Estimate:
Production Costs: 50,00 €

UPDATE

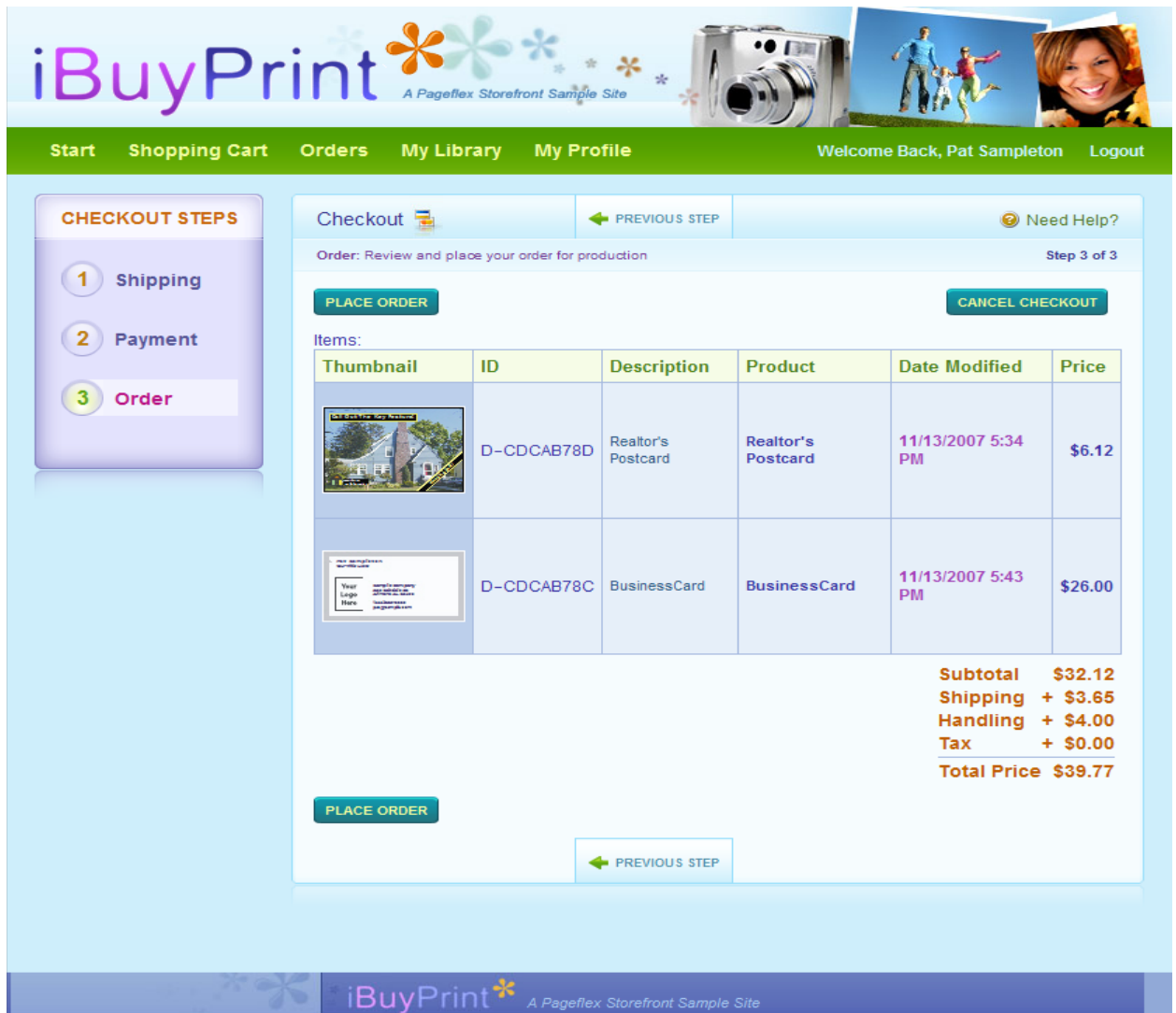
← PREVIOUS STEP NEXT STEP →

Done Local intranet



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: Start, Shopping Cart, Orders, My Library, My Profile, Welcome Back, Pat Sampleton, and Logout. The main content area is titled "Checkout" and includes a "PREVIOUS STEP" button. The order status is "Order: Review and place your order for production" and it is "Step 3 of 3". A "Need Help?" link is also present. The checkout process is divided into three steps: 1. Shipping, 2. Payment, and 3. Order. The "Order" step is currently active. The "Items" section displays a table with two items: a "Realtor's Postcard" and a "BusinessCard". The table includes columns for Thumbnail, ID, Description, Product, Date Modified, and Price. The "Realtor's Postcard" has ID D-CDCAB78D, a price of \$6.12, and was modified on 11/13/2007 at 5:34 PM. The "BusinessCard" has ID D-CDCAB78C, a price of \$26.00, and was modified on 11/13/2007 at 5:43 PM. The "Total Price" is \$39.77. A "PLACE ORDER" button is located at the bottom of the items table. A "PREVIOUS STEP" button is also present at the bottom of the checkout area.

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.

Contacts	Company Contact Information			
	Company Name:		Company URL:	
	Primary Contact:		Company Phone:	
	Email:		Direct Phone:	
	Address:		Fax:	
	City, State ZIP		Mobile:	
	Contacts/Title	Email	Phone	Mobile
Notes	Notes			

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?	If Yes, what languages?
Will users be using <input type="radio"/> PC's <input type="radio"/> Mac's <input type="radio"/> Both	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?		
User Profiles	<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>					
	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					

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"/>	
		<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"/>	
		<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"/>	
		<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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		<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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		<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"/>	
		<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"/>	
		<div> <div>¹ Users can upload images to be placed in their documents.</div> <div>² Users can upload & order PDF documents.</div> <div>³ Users can upload data lists for mail merge.</div> <div>⁴ Users have a User Library for storing upload files.</div> <div>⁵ Approval is required for this group before the order is placed.</div> </div> <div> <div>⁶ Group can view & modify their profile information (note fields can be hidden for users).</div> <div>⁷ Payment step is included for members in this group.</div> <div>⁸ Shipping step is included for members in this group.</div> <div>⁹ Users can access all products in all categories.</div> <div>¹⁰ If the group requires approval when ordering, enter the Approval group name.</div> </div>									
Notes											

Products

Total estimated number of unique products for the site: _____

Products	Estimated Number of Products	Anticipated Order Volume	Average Order Quantity
	Enter the estimated number of products in this group	Enter the weekly anticipated number of combined orders for this product grouping	Enter the average quantity of each order
Static PDFs (Forms for example, no customization or personalization)			
User Uploaded PDFs (Users will be able to upload & order PDFs)			
Customized Templates (Products that the user will be able to customize in a form filling step)			
Data Merge (Direct mail for example, the user will be able to upload a data list to merge during output)			
Interactive Editing (Users will be able to perform "design" functions like cropping & resizing images, & moving objects in the document)			
Other Non-Print Items (Promotional items, DVDs, etc.)			

Product Categories

To help users find & quickly navigate through all the items, products are divided into categories. Categories can be further divided into sub categories. Products can also appear in multiple categories. Please List Categories for the site.

[illegible]

Notes

Shipping			
	FedEx	Display Name	Surcharge
Shipping	<input type="radio"/> FedEx Priority Overnight	FedEx Priority Overnight	
	<input type="radio"/> FedEx Standard Overnight	FedEx Standard Overnight	
	<input type="radio"/> FedEx First Overnight	FedEx First Overnight	
	<input type="radio"/> FedEx 2 Day	FedEx 2 Day	
	<input type="radio"/> FedEx Express Saver	FedEx Express Saver	
	<input type="radio"/> FedEx International Priority	FedEx International Priority	
	<input type="radio"/> FedEx International Economy	FedEx International Economy	
	<input type="radio"/> FedEx International First	FedEx International First	
	<input type="radio"/> FedEx 1 Day Freight	FedEx 1 Day Freight	
	<input type="radio"/> FedEx 2 Day Freight	FedEx 2 Day Freight	
	<input type="radio"/> FedEx 3 Day Freight	FedEx 3 Day Freight	
	<input type="radio"/> FedEx Ground	FedEx Ground	
	<input type="radio"/> FedEx Ground Home Delivery	FedEx Ground Home Delivery	
	<input type="radio"/> FedEx International Priority Freight	FedEx International Priority Freight	
	<input type="radio"/> FedEx International Economy Freight	FedEx International Economy Freight	
	<input type="radio"/> FedEx Europe First International Priority	FedEx Europe First International Priority	
Notes	Notes		

Product Information (to be used with each product)		
Product Information	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:	Approval Comments:	
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		
Notes	Notes	

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
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
						<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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.

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	Validation Required ⁸ Type ⁹	Affects Price ¹⁰
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>
							<input type="radio"/>	<input type="radio"/>

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

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
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

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

Notes

Notes

Product Customization - Interactive Editing - Text

List the elements the user will be able to edit interactively

Product name

Interactive Editing - Text

Element Name ¹	Page ²	Description ³	Edit Text	Change Size & Position	Change Text Style	Change Text Color	Rotate	Add New Textbox
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
			<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

¹ For reference, enter a name for the element.

² Enter the page the element is on in the document.

³ Optional

Notes

Notes

Product Printing Options

List the printing and finishing options that will the user will complete when ordering this product.

[illegible]

¹ Field Types include: Single line text, multi line text, list box, drop down list, checkbox, radio buttons, read only text.

² Required field - user must enter a value.

³ Validation Types include: Number, phone number, zip code, email, date.

⁴ Check this if the value of this field will change the price.

Print Options

List the field options and values for drop down lists or radio buttons

[illegible]

Print Options

List the field options and values for drop down lists or radio buttons

[illegible]