

PAGEFLEX®

Pageflex iWay

Print Service Provider User Guide

Version: 6.0

July 2012

Doc P/N: PSP-6.0-1-I

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Bitstream Inc.

500 Nickerson Road

Marlborough, Massachusetts 01752 USA

Bitstream Document Part Number: PSP-6.0-1-I



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Introduction

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Pageflex iWay

Pageflex iWay™ is a Business Flow Automation solution that allows you to create, customize, order, print, and deliver print jobs in one streamlined operation.

iWay enables you to respond to changing market conditions, as well as leverage new business opportunities by providing you with the following features:

- Personalized, on-demand, printing capabilities – integrate independent and data-based variable information to create variable data jobs and campaigns.
- Advanced reprint abilities – access jobs and templates for reprinting or updating print material.
- Advanced tracking abilities – you and your customers can track orders from the moment they enter your organization, until they arrive at their final destination.
- Simplified production and ordering process – generate jobs, receive automated pre-flighting, and create soft proofs prior to ordering. Make use of pre-press capabilities, output management, delivery, and billing abilities. The entire process is designed to reduce the number of interactions with your customers.
- An open system - communicate with your customers' system and with your own peripheral systems; you can receive orders from any environment including branded websites, emails, intranet, procurement systems, or print drivers, as well as interact with other systems that provide diverse services.

The Print Service Provider Guide

The Print Service Provider guide provides you with instructions for managing the administration and production workflows, with the purpose of:

- Introducing iWay software features.
- Entering and organizing data that is processed by iWay, allowing you to provide automatic price generation and enabling job production.
- Assisting your organization in configuring iWay printing, account, and system settings.
- Enabling quick implementation of iWay so you can improve and enhance your business.

Before working with the guide, we recommend that you complete the comprehensive Customer Driven Deployment Program (CDDP) and gain the implementation skills that will enable you to begin working with your customers.



iWay User Overview

In This Chapter

Accessing iWay	2
Frequently Used Terminology	3
Conventions Used in iWay	3
Using iWay Features	5

The iWay User Overview describes terminology, conventions, and features used in Pageflex iWay.

Accessing iWay

iWay runs on the Windows operating system. As a Print Service Provider user, you can access iWay either via the internet (World Wide Web), or on an intranet, by typing a Uniform Resource Locator (URL) into an Internet Explorer browser address field. Print Buyers can access the Print Buyer application site using either Internet Explorer, Mozilla Firefox, or Apple Safari browsers.

To access iWay in a browser

- 1 Open an Internet browser window.
- 2 Type the iWay URL into the browser address text field, for example:
`http://x.x.x.x/iWay/`
- 3 Press Enter on your keyboard; iWay is accessed.

NOTE: Disable your browser Pop-up Blocker to ensure that iWay's various windows and dialog boxes are able to appear.

Accessing iWay locally

Use the **iWAY TOOLBOX** to perform the following tasks:

- **Start iWay** – start running the Internet Information server and the iWay processes.
- **Stop iWay** – stop running the Internet Information server and the iWay processes.
- **Restart iWay** – stop and restart the Internet Information server and the iWay processes.
- **Log Window** – open the system feedback window. A full record of all past actions, and their execution times, available to facilitate application trouble shooting.
- **Task Manager** – open the Windows Task Manager.
- **Explorer** – open Windows Explorer.



Status Icons

The status icons, located on the Status Bar at the bottom-right corner of the desktop, indicate the operational modes of the system:

- – indicates the system is operating; both the Internet Information server and iWay are running.
- – indicates the system is in the process of becoming operational or shutting down.
- – indicates the system is not operating correctly; either the Internet Information server or iWay is down. The **CONNECTION FAILURE** prompt appears.

Frequently Used Terminology

The following list describes iWay Print Service Provider user interface terminology:

- **Screen** – refers to the entire monitor screen, including the operating system toolbars.
- **Window** – part of the screen; opens by clicking any of the Workflow or Administration tabs in the iWay taskbar.
- **Panel** – part of a window; can contain sub-panels.
- **Sub-panel** – part of a panel.
- **Pane** – a large box, usually located on the left side of the window.
- **Operation Button** – used for performing various operations; appears in a panel or a sub-panel, or below a pane.

Navigating iWay

After logging in to iWay, **do not use** the browser toolbar buttons. Click the selected menu to refresh the display, and use the menus, ribbons, and ribbon menus to navigate within iWay. **PREVIOUS** and **NEXT** buttons appear when the option to return to a previous window or to move to a following window exists.

If you want the application open in more than one browser window, **do not open** another browser tab; open another browser window instead.

Logging Out of iWay

Use iWay's log out link and not the window's  **CLOSE** control, or browser **FILE** menu, to log out of the application.

Conventions Used in iWay

iWay uses several interface conventions. These conventions are documented below, and are referred to throughout the documentation.



Managing Queues

Queues are used in iWay to display the current status of jobs. You can view and edit jobs in each queue by clicking icons in the queue columns, or in the Job Details pane.

All queues have the following features and tools:

- Search Filter – a dropdown list containing an alphabetically ordered list of search criteria.
- Value Definition Filters – a dropdown list containing definitions to filter the search as follows:


Filter	Definition
<	Less than
>	Greater than
<=	Less than or equal to
>=	Greater than or equal to
<>	Not equal to
=	Equal to
Like	Similar to

- Column selection
- Job sorting according to column
- Job repositioning
- Job details viewing and editing

Displaying and Hiding Queue Columns

Queues show job information according to the columns that are displayed. You can select which columns to display or hide.

To display and hide queue columns:

- 1 Click  **Column Selection**; the **COLUMN SELECTION** dialog box appears, and the number of selected check boxes corresponds with the number of columns displayed in the queue.
- 2 Select or clear check boxes to display or hide columns.
- 3 Click **OK**.

NOTE:

- Adding more than ten columns can distort the view of the individual columns.
- When the **PAYMENT METHOD** column is selected, the payment method appears as PO, CC, or EDD. For more information, refer to [Defining Pricing Settings](#) (on page 51).
- **PROCESS** indicates that the processing of the job(s) has not yet been completed.

Sorting Jobs


You can sort information in queues according to columns. Click a column heading to arrange queue information in alphabetical, ascending or descending order; an arrow appears in the column header, indicating the directional order in the column.



Repositioning Jobs

When a job enters a queue, the job is positioned according to the system-assigned job number. You can reposition the job within the queue.



To move jobs up or down one row:

- 1 Select one or more job rows and click  or .

NOTE: To select more than one job, press the Ctrl key and select each job or press the Shift key and select the first and the last of a group of jobs.

- 2 Repeat Step 1 until the job is queued as you want it.

To move a job to the top or to the bottom of the queue:

- Select the job and click ; the job moves to the bottom of the queue.
- Select the job and click ; the job moves to the top of the queue.

To restore the queue to the original status:

Click **Default Sort**; the jobs appear in the original queue positions (lowest number at the top and the highest number at the bottom).

To update the queue with new jobs:

Click the  **Refresh** button; new jobs entered to the system appear in the queue.

Using iWay Features

You can use several features within iWay to store or modify information, all of which can be accessed from various locations within the application.

Managing Attachments

You can upload files to jobs and download attached files to any folder in your system.

Uploading Files

Click **Upload Files** or **Upload Images**; the **UPLOAD FILE** dialog box appears.

- To upload a single file, click the **Upload a single file** radio button, and complete the instructions in the **UPLOAD FILE** dialog box.
- To upload multiple files, click the **Upload multiple files, using FTP Multi-file Upload** radio button, and complete the instructions in the **UPLOAD FILE** dialog box.

NOTE: To work with the **FTP Multi-file Upload** option, you must enable and activate the FTP functionality on your server. To enable FTP Upload, navigate to **SYSTEM SETUP -> BASIC -> GENERAL -> FILE UPLOAD**. For more information, refer to [Allowing FTP Uploads](#) (on page 11).

Downloading Files

- 1 Select a target file and click  **Attachment**; the **DOWNLOAD FILE** dialog box appears.
- 2 Complete the instructions in the **DOWNLOAD FILE** dialog box.
- 3 Click **Close**.




Importing and Exporting Database Files

You can use database files when you need to create variable data jobs containing many parameters, or when you populate lists of users, addresses, stock, and other database elements.

IMPORT – import an Excel file from within or outside the system.

EXPORT – create an Excel file of the data contained in an associated list.

To import a database list:

- 1 Click  **Import**; the **IMPORT** dialog box appears.
- 2 Browse to the target file and choose one of the following options:
 - **Select File Format** – select the file type and encoding values in the dropdown lists.
 - **Upload, Using a Custom Scheme** – select a customer scheme option in the dropdown list.
- 3 Click **Start Uploading**; the **IMPORT DATABASE** dialog box appears.

To prevent the first row of data appearing in the printed job, select the **First Row Contains Field Names** checkbox.

To map fields:


Choose one of the following options in the **SCHEME** dropdown list:

- **New Scheme** – define a new field mapping scheme.
- **Last Used** – map according to the scheme that was last used.

To define a new mapping scheme:

- 1 Select **New Scheme** from the dropdown list.
- 2 Map the names with valid field names in the dropdown lists.
- 3 Click **Next**; the **IMPORT FINISHED** dialog box appears.

NOTE:


- Problematic names, for example Login Name, where a login name already exists, appear with the  icon, and the **MESSAGE** column contains an explanation.
- The **Link to Import Report File** link accesses an Excel file worksheet containing the imported names. You can edit the Excel file.

- 4 Click **Close**.

To create a new database mapping scheme:

- 1 Click the **Scheme** link; the **SCHEME MANAGEMENT** dialog box appears.
- 2 Select **New Scheme** and click **Save As**; the **SAVE AS** dialog box appears.
- 3 Type a new scheme name and click **OK**; the new scheme name appears in the list.
- 4 Click **Close**.

To export an internal system list:

- 1 Click  **Export**; the **EXPORT** dialog box appears.
- 2 Select the file type and encoding in the dropdown lists, and click **Export**; the **DOWNLOAD FILE** dialog box appears.
- 3 Complete the instructions in the dialog box, and save the file in a folder.



Multiple Language Support

Multiple language support is a new feature that has been added to iWay to allow Print Service Providers to support Print Buyers logging in to iWay in their own language. This allows Print Service Providers to provide better service to their Print Buyers and correspond with their customers in their preferred language.

Multiple language support is currently supported as follows:

- [Localized Customized Fields](#) (on page 7)
- [Localized Ordering Sequence](#) (on page 7)
- [Localized Online Payment Display Name](#) (on page 8)
- [Outgoing Emails Localized per User](#) (on page 8)

Localized Customized Fields

Any changes to the default values of Customized Fields can also be localized.

Workflow:

- 1 Print Service Provider **Enables** Customized Fields (**SYSTEM SETUP -> ADVANCED -> CUSTOMIZED FIELDS**) and then makes changes to the various Field Captions and/or Field Types.

NOTE:

Only make changes to System Customized Fields when logged in with the Default System language.

- 2 The Print Service Provider **Exports the Translation Files** (**SYSTEM SETUP -> BASIC -> REGION AND LANGUAGES**). A zip file is created containing an Excel file for each enabled language. The Excel files contain the name, default value and current translation of each Customized Field. One file per language is created no matter how many Regions are enabled that use that language.
- 3 The files are translated as needed by the Print Service Provider into the target language(s) and saved (only the last column in each excel file is editable).
- 4 The Print Service Provider creates a zip file archive with all the updated translated Excel files.
- 5 The Print Service Provider **Imports the Translation Files** (**SYSTEM SETUP -> BASIC -> REGION AND LANGUAGES**). The files are checked for errors (such as empty translated fields) and then imported into iWay. If an error is detected in **any** of the Excel files then **none** of the files are imported.

Customized Fields can also be localized per **ACCOUNT**. The workflow is identical to the above, except:

NOTE:

- The Account level Customized Fields are located at **ACCOUNTS -> ACCOUNT SETUP -> CUSTOMIZED FIELDS**.
- The **Export** and **Import** links are located at **ACCOUNTS -> ACCOUNT SETUP -> PREFERENCES**.

Localized Ordering Sequence

Any changes to the default values of the Ordering Sequence names and the text messages in the Print Buyer Ordering Sequence wizard can also be localized. The Ordering Sequence wizard consists of up to 6 steps:

- Upload File
- Job Specification
- File Report



- Preview
- Summary
- Job Details

The Ordering Sequence names are defined at the system level for Job Types (**PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE LIBRARY**) and at the account level for Templates (**ACCOUNTS -> STORE SETUP -> TEMPLATES**).

Workflow:

The workflow is identical to the workflow for [Localized Customized Fields](#) (on page 7) and uses the same exported Excel file, except that 8 fields are added to the exported Excel file per Job Type / Template as follows:

- The 6 Order Sequence field names.
- File Report Message (default text: I want the Print Provider to resolve these problems).
- Preview Message (default text: I have reviewed the proof and accept it).

NOTE:

- All 8 fields are added **PER** Job Type / Template. For example, if there are currently 10 Job Types defined in the system, the exported Excel file will contain an additional 80 fields - 8 fields for each Job Type.
- The Job Type / Template name is added to the field names in the exported Excel file for reference. For example, Brochure - Upload File, Brochure - File Report, etc.

Localized Online Payment Display Name

Any changes to the default values of the Online Payment vendor names can now also be localized. The text entered in the Caption field is displayed to the Print Buyer as the payment option at checkout.

To configure Online Payment vendors with a **Caption**, navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.

NOTE: This feature requires the iWay Online Payment license.

Workflow:

The workflow is identical to the workflow for [Localized Customized Fields](#) (on page 7) and uses the same exported Excel file, with the addition of:

- The Caption field for each payment option.
- The *PO (Purchase Order)* field (localization of this field is only implemented on the Print Buyer side).

Outgoing Emails Localized per User

Outgoing Emails can now be localized on a per user basis instead of always being sent in the system default language.

- Users created in the system (**ACCOUNTS -> ACCOUNT SETUP -> USERS**) have an extra field in their contact information called **Preferred Language**. Any Emails sent to this user will use this language setting.
- If Guest Workflow is enabled (**ACCOUNTS -> ACCOUNT SETUP -> PREFERENCES**) the anonymous users logging in to iWay will receive Emails in the same language as they placed their order in.



- Email events can be individually enabled and the **CONTACTS:** properties can be edited for each event. Emails are sent according to the User's Preferred Language setting, and the **OTHER EMAIL** property now has a **Preferred Language** field also. The **CONTACTS:** properties apply to the Email events in the following locations:
 - **ACCOUNTS -> ACCOUNT SETUP -> EMAIL**
 - **SYSTEM SETUP -> ADVANCED -> EMAIL**
- The *Administrator's Email* field (**ACCOUNTS -> ACCOUNT SETUP -> COST CENTERS**) has a **Preferred Language** field also.

NOTE: Only system enabled languages (**SYSTEM SETUP -> BASIC -> REGION AND LANGUAGES**) appear as options when selecting a Preferred Language.


Generating and Editing Job Tickets

The Job Ticket is a document containing information detailing job production, finishing, delivery, and pricing. The Job Ticket can be printed out and completed by the various people in the print production process.

A **JOB TICKET** can be generated, viewed, and edited from either the **PRODUCTION** or **PRINTING** windows, or from any active Job Tracking status window.

-
- NOTE:**
- The Job Ticket is created as either an MS Word document or a concise HTML document. This setting is configured on the system level (**SYSTEM SETUP -> INTEGRATIONS -> EXTENSION MODULES**)
 - For Job Tickets in MS Word format: ensure that no job information data links are deleted from within the MS Word document.
 - Job Ticket notes that are internal, or those that are either from, or for the Print Buyer, are entered manually.
-

To create a Job Ticket:

- 1 Select a job, and click either the **Create Job Ticket**  icon or the **Job Ticket** button (depending on the location within the GUI); the **JOB TICKET CREATION** dialog box appears.
- 2 For MS Word documents (only), select one or more of the following data options to include in the Job Ticket:
 - **Production**
 - **Finishing**
 - **Delivery**
 - **Pricing Information**
- 3 Click **OK** and:
 - (For HTML Job Tickets) the HTML page opens in a new browser window.
 - (For MS Word Job Tickets) the **DOWNLOAD FILE** window appears. Complete the instructions for downloading the Job Ticket to a suitable location.



System Setup

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This chapter describes how you configure the application system settings when initiating Pageflex iWay for the first time, and periodically, as the need arises. Some system settings are configured as system defaults on a global level, such as the system language, and company contact data, whereas other settings can be adjusted at the account level after the system has been configured, such as Print Buyer account email settings.

Basic

Contact Details

You can define your iWay site Contact Us information, such as telephone numbers and email addresses. The information you define provides a choice of options your Print Buyers can use to correspond directly with your organization.

To define contact information:

- 1 Select **SYSTEM SETUP -> BASIC -> CONTACT DETAILS**; the **CONTACT INFORMATION** window appears.
- 2 Insert the information details in the fields.
- 3 Click **Save**.

General

You configure General properties when you initiate the application for the first time, or when you perform periodic application system maintenance. These settings are the default system parameters suited to your organization's daily operational business needs.

To define the system properties in the **SYSTEM PROPERTIES** window, select **SYSTEM SETUP -> BASIC -> GENERAL**; the **SYSTEM PROPERTIES** window appears, and includes the following parameter settings:

- **SERVER ADDRESS** (on page 11) – the DNS name (URL) of your server.
- **CONNECTIONS** (on page 11) – whether to use a Secure Connection (SSL).
- **FILE UPLOAD** (on page 11) – allowing FTP for multiple file uploads.



- **REMOTE SUPPORT** (on page 12) – whether the iWay Support Department has access to your server system options to assist with system complications and service difficulties.
- **CALENDAR OPTIONS** (on page 12) – your company’s working days and hours.
- **PDF PREVIEW** (on page 12) – whether to include footers or watermarks in your Print Buyer’s PDF preview.
- **MAXIMUM PASSWORD AGE** (on page 12) – whether passwords ever expire and after how long.

Server Address

- 1 Enter the DNS name of the iWay server in the **Server Address** field of the **SYSTEM PROPERTIES** window.
- 2 Click **Save**.

Connections

You can enable Secure Sockets Layer (SSL) server security features on your iWay server, which enables server security features that verify incoming Print Buyer identity and content integrity, and provides network transmission encryption to accommodate Print Buyers with content-sensitive print jobs on your ‘certified as secure’ site (SSL certification is required to enable SSL.).

To set up SSL:

- 1 Acquire and install a valid server certificate to establish SSL communications on your system.

NOTE: Only one server certificate can be attached to a web site.

- 2 Ensure the **Use Secure Connection** check box is selected (**CONNECTIONS** sub-panel, in the **SYSTEM PROPERTIES** window) to enable the server on which you want to use SSL to be assigned to port 443 (the default port for secure communications).
- 3 Ensure that port 443 is open for both inbound and outbound connections in case a Firewall is configured on a local network.
- 4 Click **Save**.

File Upload

You can determine whether or not to allow users to upload multiple files with File Transfer Protocol (FTP) and define the FTP port. You can also determine whether or not those Print Buyers require authentication if FTP upload is allowed.

To allow FTP uploads:

- 1 On the **FILE UPLOAD** sub-panel, in the **SYSTEM PROPERTIES** window, select the **Allow FTP Upload** option.
- 2 Type a valid FTP port value in the **FTP PORT VALUE** field (the default port is 21).
- 3 (Optional) Select the **Requires Authentication** check box and type the user name and password needed in the respective fields (this must be a valid user name and password of an existing user on the iWay server itself).
- 4 Click **Save**.



Remote Support

You can authorize and enable Pageflex iWay Support to access your server system options remotely for assistance with any system complications and service difficulties.

To enable remote iWay support:

- 1 On the **REMOTE SUPPORT** sub-panel, in the **SYSTEM PROPERTIES** window, select the **Allow Remote Support** option.
- 2 Enter the **Remote IP** and **Password** of the iWay server in fields.
- 3 Click **Save**.

Calendar Options

You can specify your company's operational hours and days for providing print production and services.

To define calendar and work hours:

- 1 On the **CALENDAR OPTIONS** sub-panel in the **SYSTEM PROPERTIES** window, use the dropdown lists to define your company's **Work Start Time** and **Work End Time**.
- 2 Select the appropriate **Weekend Days** when your print services are unavailable.
- 3 Click **Save**.

PDF Preview

PDF Previews provide both you and your Print Buyers the ability to view the job before it is actually produced, which is useful for verifying the accuracy of the job. Footers and watermarks appear in the PDF preview, which are especially provided to prevent Print Buyers from using the preview as a means of printing the job on printers other than those in your system or organization.

- 1 On the **PDF PREVIEW** sub-panel, click the **Footer File** dropdown box and choose one of the following options:
 - **None** - if you do not want to add a footer to the PDF preview.
 - **SampleFooter.pdf** - a sample footer option.Click the **Footer File** link to add additional footer file options to the dropdown menu.
- 2 Select the **Enable Watermark** check box to add a watermark to the PDF:
 - a Type a value in the **Watermark Text** field.
 - b Define the **Font** settings for the text.

NOTE:

When you clear the Watermark check box, the system-defined watermark cannot be used at the Account level.

- 3 Click **Save**.

Maximum Password Age

Select the **MAXIMUM PASSWORD AGE** for all passwords used in the system:

- Passwords Never Expire
- OR**
- Passwords Expire after a specified number of days (default 30).



Time Zone

- 1 Select **SYSTEM SETUP -> BASIC -> TIME ZONE**.
- 2 Select the **local time zone** of your business from the dropdown list.
- 3 (Optional) Enable **Daylight Saving** if applicable.
- 4 Click **Save**.

Region and Languages

Define your iWay default language and the languages available to Print Buyers when they access the iWay home page. The Print Service Provider also defines the default language and region for iWay and sets the other languages and regions that are also available to Print Buyers to choose from.

To define languages:

- 1 Select **SYSTEM SETUP -> BASIC -> REGION AND LANGUAGES**.
- 2 In the **DEFAULT LANGUAGES** dropdown list, select the default language and region for iWay.
- 3 On the **LANGUAGES AVAILABLE ON CUSTOMER INTERFACE** panel, enable the languages and regions you want to support. Only enabled languages and regions are available for the user to select before log in.
- 4 Click **Save**.

Each region can be individually enabled and has the following predefined regional settings:

- NOTE:**
- Language
 - Measurement Units
 - Date Format
 - Time Format
 - Price Format
-

Editable Settings

The following settings can only be edited for the default region and are then automatically assigned to the other regions as read-only:

- System Currency
- Price Decimal Places
- Products Price Rounding rules

Terms and Conditions

You can define the Terms and Conditions for your Print Buyers to accept before they place their job orders.

- NOTE:** Use HTML conventions when applying character and paragraph formatting to Terms and Conditions text. Text is saved in HTML format.
-

To define Terms and Conditions:

- 1 Select **SYSTEM SETUP -> BASIC -> TERMS AND CONDITIONS**.
- 2 In the **LANGUAGE** list, select a language.
- 3 Type the valid text within the **TEXT** pane.



- 4 Click **Save**.
- 5 Repeat steps 2 through 4 to define the terms and conditions in other languages.

Home Page Customization

You can customize home page elements, including the GUI link settings, home page text, and images. The home page serves as the login page.

To customize home page elements, select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION**; the **HOME PAGE CUSTOMIZATION** window appears, and includes the following customizable settings:

- The [Customize Link](#) (on page 14)
- The [Logout Link](#) (on page 15)
- The [FAQ Link](#) (on page 15)
- The [Help Link](#) (on page 15)
- The [Contact Us Link](#) (on page 16)
- [Home Page Text](#) (on page 16)
- [Home Page Images](#) (on page 17)

The Customize Link

You can create a button link to a customized window containing text and images designed for your Print Buyers' use. Alternatively, you can define the button to direct Print Buyers to an external 'Customize' Page option to enable your Print Buyers access to an external web page.

To define the Customize link:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION -> CUSTOMIZE**; the **CUSTOMIZE LINK** dialog box appears.
- 2 In the **CUSTOMIZE LINK** dialog box, select one of the following option buttons:
 - **Do not use Customize Page** – to not display the **CUSTOMIZE PAGE** link on the home page.
 - **Use System 'Customize' Page** – to display the **CUSTOMIZE PAGE** link and connect it to a customized page.
 - i From the **LANGUAGE** list, select a language.
 - ii In the **TITLE** field, type a name for the customized window and button.
 - iii In the **TEXT** field, type a message (such as Terms and Conditions) and click **OK**.
 - **Use External 'Customize' Page** – to link your Print Buyers to an external web page.
 - i From the **LANGUAGE** list, select a language.
 - ii In the **TITLE** field, type a name for the customized window and button.
 - iii In the **URL** field, enter the external web page's URL address and click **OK**.
- 3 In the **HOME PAGE CUSTOMIZATION** window, click **Save**.

NOTE: Select **Always on top** to make sure the **CUSTOMIZED PAGE** window, when open, remains open over the **HOME PAGE** window.



The Logout Link

You can define whether your Print Buyers, after logging out, are automatically redirected back to your **LOGIN** window, or to a different web site.

NOTE: By default, Print Buyers are automatically redirected back to your **LOGIN** window.

To define the Logout link:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION -> LOGOUT**; the **EXTERNAL HOME PAGE LINKS** dialog box appears.
- 2 Select the **Use External URL** check box to direct your Print Buyers to an external website.
- 3 Define the **Login** and **Logout URLs**
- 4 Click **OK**.

The FAQ Link

The FAQ button accesses the iWay FAQ (Frequently Asked Questions) page, which contains a collection of commonly asked questions about iWay, and the respective answers. You can provide your Print Buyers access to the iWay FAQ page(s) or any other page(s), and present the page(s) either within your iWay home page (as a panel) or as an independent, floating window.

NOTE: Only page files located externally to the iWay server can be displayed within an independent floating window.

To access the FAQ link:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION -> FAQ**; the **FAQ PAGE** dialog box appears.
- 2 In the **FAQ PAGE** dialog box, select one of the following option buttons:
 - **Do not use FAQ page** if you do not want the FAQ Page link to be displayed on the home page.
 - **Use System FAQ Page** for your Print Buyers to access the iWay FAQ pages.
 - **Use External FAQ Page** to link your Print Buyers to an external web page; insert the target URL in the field.
- 3 Click **OK**.

NOTE: Click **Always on top** to make sure the **FAQ PAGE** window, when open, remains open over the **HOME PAGE** window.

The Help Link

You can customize your iWay online Help. You can provide your Print Buyers with access to the iWay online Help files that are located within the application, or to an external Help system on the Internet. Additionally, you can configure the Help to appear either within your iWay home page (as a panel) or as an independent, floating window. Alternatively, you can 'hide' the Help button altogether, effectively disabling Help access.

NOTE: Only web pages that are located on the iWay server can be placed inside the iWay window.



To customize Help:

- 1 Select **SYSTEM SETUP - BASIC -> HOME PAGE CUSTOMIZATION -> HELP**; the **HELP** dialog box appears.
- 2 In the **HELP** dialog box, select one of the following option buttons:
 - **Do not use Help** if you do not want the Help button to be displayed on the home page, or
 - **Show System Help** for your Print Buyers to access the iWay Help pages, or
 - **Use External Help** to link your Print Buyers to external Help pages; insert the target URL in the field
- 3 Click **OK**.

NOTE: Click **Always on top** to make sure the **HELP** window, when open, remains open over the iWay window.

The Contact Us Link

You can define the target of the **CONTACT US** link. Generally used to access iWay's **CONTACT US** site information page, you can define the **CONTACT US** link to target a different URL address on the internet, such as your own organization's web site.

To define the Contact Us link:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION -> CONTACT US**; the **CONTACT US PAGE** dialog box appears.
- 2 In the **CONTACT US PAGE** dialog box, select one of the following option buttons:
 - **Do not use Contact Us Page** – do not display the Contact Us link on the home page.
 - **Use System Contact Us Page** – use the system Contact Us page.
 - **Use External Contact Us Page** – enter the target URL in the field.
- 3 Click **OK**.

NOTE: Click **Always on top** to make sure the **CONTACT US PAGE** window, when open, remains open over the iWay window.

Home Page Text

You can define and edit home page text, including the language, main title, subtitle and body text.

To define Home Page text:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION**, and in the **SELECT LANGUAGE TO EDIT** dropdown list, select the home page text language.
- 2 In the **MAIN TITLE** field, type the text you want to appear as the title for the home page.
- 3 Type the text that you want to appear as the subtitle and body of the home page, in their respective fields, and click **Save**.

NOTE: You can have more languages added to the **SELECT LANGUAGE TO EDIT** list. For more information regarding languages, refer to your local distributor.



Home Page Images

You can define two separate home page image areas; the Print Service Provider logo and the home page image. Make sure images to be used are located in the system **IMAGES LIBRARY**. For further information about uploading images, refer to [Managing Attachments](#) (on page 5).

To define Home Page images:

- 1 Select **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION**, and in the **CUSTOMIZATION** dialog box, click one of the three image areas; the **IMAGE CUSTOMIZATION** folder appears.
- 2 Upload the image required and select it.
- 3 Click **Save**.

Users

Managing Print Service Provider Users

You can define which members of your company are authorized to be operators of your iWay system and create a user account for each employee, giving them their respective user privileges.

To define system users, select **SYSTEM SETUP -> USERS**; the **PRINT SERVICE PROVIDER USERS** window appears, listing the current users.

To define a new User:

- 1 In the **PRINT SERVICE PROVIDER USERS** window, click **Add**.
- 2 Insert the **FIRST NAME** and **LAST NAME** field values.
- 3 In the **LOGIN NAME** field, accept the default, or insert a login name.
- 4 In the **PASSWORD** field, insert a password.
- 5 In **USER TYPE** dropdown list, select one of the following User Type options:
 - **System Admin**
 - **Operator**
 - **Manager**
 - **Manager Advanced** (iWay Sales Manager only)

For more information regarding Print Service Provider user types and their system privileges, refer to [Print Service Provider User Privileges](#) (on page 18).

- 6 (This step is only for *Manager* and *Manager Advanced* user types): Assign the user to an **Account Group**. The user will only have privileges to accounts that are members of this Account Group. See [Account Groups](#) (on page 25) for more information.
- 7 (Optional) Enter an **IP Filter** to restrict access for this user. The user will only be able to log on from a computer with this IP address. Use an asterisk where the number can be anything (for example, entering 123.23.43.* will allow login from any IP address that begins with 123.23.43).
- 8 Enter the user's **Email** address.
- 9 Select a **Preferred Language** for all automated Email iWay communication with this user.
- 10 Enter a **Phone** number.



11 Click **Save**.

To delete a User:

- 1 Select the user and click **Delete**.
- 2 Click **Yes** in the confirmation dialog box.

To search for a User:

- 1 Type a name in the search field.
- 2 Click **Search**.

To reset the list to display all Users:

Click **Reset**.

To reset the list to only displaying saved information:

Click **Revert**.

Print Service Provider User Privileges

The default user types defined in the system are:

User Type	Description
System Administrator	Responsible for the administration of the Print Service Provider side of iWay and the general system settings.
Operator	Responsible for operating iWay's workflow.
Manager	Has the ability to view Task and Management parameters. Can create new JOB TYPES and can modify templates and pricing.
Manager Advanced*	Provides the same privileges as Manager but also allows the user to create and edit credit notes, and cancel receipts.

* Only available with the iWay Sales Manager license.

User privileges are set by default by the system, according to assigned user type. The following table shows the default user type privileges.

Feature	Privilege Level			
	System Admin	Operator	Manager	Manager Advanced*
System Administration	✓			
Track Jobs	✓	✓	✓	✓
Production	✓	✓	✓	✓
Deliveries	✓	✓	✓	✓
Pricing	✓		✓	✓
Templates	✓		✓	✓
Job Ticket Library	✓		✓	✓
Accounts	✓		✓	✓



Feature	Privilege Level			
	System Admin	Operator	Manager	Manager Advanced*
Create/edit Credit Notes*	✓			✓
Cancel Receipts*	✓			✓

* Only available with the iWay Sales Manager license.

Advanced

CRM

NOTE: This feature requires the iWay Sales Manager license.

Use the CRM window to modify the follow-up and validity time periods for quotes and orders, and to modify the email attachment format.

To modify the Follow-up and Validity periods:

Set the follow-up and validity time periods for quotes (and orders):

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.
- 2 In the **DEFAULT FOLLOW UP** field, type the default time period by which follow-up is expected. The default is 3 days.
- 3 In the **DEFAULT VALID UNTIL** field, type the time period after which the quote is no longer considered valid. The default is 30 days.
- 4 Click **Save**.

NOTE: The date for a specific quote can be changed on the General page of the quote details. When the quote is converted to an order, the order dates are reset regardless of what was set in the quote.

To modify the Email Attachment Format:

It is optional to convert the Word documents into PDF format when quotes/orders/billing documents are sent by email to a customer. The documents will still be displayed to the CSR as Word documents that the CSR can modify, and the conversion to PDF will take place when the CSR sends the documents to the customer. To enable Word document conversion to PDF format, perform the following steps:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.
- 2 Under the Email attachment format, select **Send attached documents as PDF (applies to Quote, Order and Billing documents)** checkbox.

Numbering

NOTE: Fully enabling this feature requires the iWay Sales Manager license. Without iWay Sales Manager, only the **ORDER Prefix** and *Starting Number* fields can be modified.

All quote, order and billing documents are uniquely numbered. These numbers are used to identify the objects in the system and the documents that are sent to the



customers at different stages of the sales process. Each document number has an alphabetic prefix that indicates the document type (for example, QUO for quotes) and different document types are numbered independently of each other. The prefixes and the starting number of each counter can be customized and the same counter can be used for several objects, according to the system limitations.

To customize document numbering:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> NUMBERING**.
- 2 Modify the prefixes in each of the prefix fields as required.
- 3 Change the starting numbers for each of the objects in the **STARTING NUMBER** fields as required.
- 4 To separate the prefix and numbering of web-submitted orders, select the **Use separate numbering definitions for online and offline orders** check box; the **ONLINE ORDER NUMBER** prefix and starting number fields are then enabled.
- 5 To combine the prefix and counter of receipts and deposits, select the **Use Receipt numbering definitions for Deposit** check box; the **DEPOSIT NUMBER** prefix and starting number fields are then disabled.
- 6 To combine the prefix and counter of the invoices and credit notes, select the **Use Invoice numbering for Credit Notes** check box; the **CREDIT NOTES** prefix and starting number fields are then disabled.

NOTE:

- The numbering of existing quotes, orders and billing documents is not influenced by changes in numbering.
- Numbering prefixes are NOT case sensitive (e.g. INV is the same as inv). Changing only the case of a prefix and then resetting the numbering could result in errors.

Document Type	Default Prefix	Other Options
Quotes	QUO	
Orders	OSR	
Online orders	OSR	Use a separate counter, with a default OWB prefix.
Invoices	INV	
Receipts	RCT	
Deposits	DEP	Use the same counter and prefix as receipts.
Credit notes	CDT	Use the same counter and prefix as invoices.

Email

You can direct job notification emails to one or several users in Print Buyers organization as well as service provider users in your own organization. Notification emails are an effective, automated method of notifying of a specific job's general status which may require a 'warning'. Notification categories such as 'Job Arrived at the Pre-Press Queue' or 'Job Price Changed', or 'Job Arrived at the Print Buyer Approval Queue' are sent.

NOTE:

You can set system email settings as a default for all your Print Buyers in the **EMAIL** window, as described in this section. Alternatively, email settings defined in the **ACCOUNTS CUSTOMERS** window are for specific Print Buyers.



To set up an email account for notification:

- 1 Select **SYSTEM SETUP -> ADVANCED -> EMAIL**; the **EMAIL** window appears.
- 2 In the **EMAIL ACCOUNT** panel, define the following field values:
 - a **SMTP Server** – The name of your SMTP server.
 - b (Optional) Enable the **My Server requires authentication** checkbox and enter the **ACCOUNT NAME** and **PASSWORD** necessary for authentication.
 - c (Optional) Enter an **Email Address for Testing** the account and click **Send Test Email**.
- 3 Select which events should trigger email notification. You can direct email notification for the following specific job events:
 - **PRICE FAILURE** – Notifies that the system is not configured correctly to generate a price, due to several possible reasons. For example, an output device wrongly configured, or a parameter missing from the job description.
 - **JOB ARRIVED AT THE ARTWORK QUEUE** – Notifies that the job is at the artwork queue.
 - **JOB ARRIVED AT THE PRODUCTION QUEUE** – Notifies that the job is at the production queue.
 - **ORDER CONFIRMATION** – Notifies that an order has been placed.
 - **JOB PRICE CHANGED** – Notifies that a quoted price has been changed.
 - **JOB SHIPPED** – Notifies that a job has been shipped.
 - **INVENTORY BELOW MINIMUM LEVEL** – Notifies that the number of copies of an item in the inventory has dropped below the minimum set level.
 - **PREORDER JOB EXPIRATION** – Notifies that a job remains in the Saved Jobs, Approval Queue, or Shopping Cart for longer than the allotted time, and is about to expire.
 - **SHIPPED JOB EXPIRATION** – Notifies that a shipped job remains in the shipped status for longer than the allotted time, and is about to expire.
 - **JOB ARRIVED AT THE PRINT BUYER APPROVAL QUEUE** – Notifies that a job has arrived at the Print Buyer Approval queue.
 - **JOB APPROVED / REJECTED AT THE PRINT BUYER APPROVAL QUEUE** – Notifies that a job has been approved or rejected at the Print Buyer Approval queue.
- 4 For each event enabled, click the **Contacts** link to configure the email options. In the dialog box that opens, configure that event as follows:
 - a Select a **SENDER** option; or select **Other Email** and enter the sender's email address.
 - b Select the target **RECIPIENTS** and/or manually enter an email address in the **Other Email** text box and select the **Preferred Language** for sending emails to that address.
 - c Click **OK**; all settings are saved, and the dialog box closes.
- 5 In the **EMAIL** window, click **Save**.

Fonts

You can verify the fonts and font parameters supported by iWay.

Font parameters include:

- **FONT NAME** – Specifies the font name.
- **FONT FAMILY** – Specifies the font family type.



- **FONT TYPE** – Specifies if a 'true' or 'open' font type.
- **FILE NAME** – Specifies the name of the font file.
- **COMMENTS** – Notifies of administrator comments defined for the font.

To access the **FONT** window, select **SYSTEM SETUP -> ADVANCED -> FONT**s; the **FONT** window appears, containing the following elements:

- **AVAILABLE FONT** table – Lists the fonts supported in the iWay system.
- **REFRESH** button – Scans the system and updates the **AVAILABLE FONT** list with new font additions.
- **IMPOSITION MARKS FONT** dropdown list – Lists fonts used for imposition marks.

NOTE:

The system supports both True Type and Open Type fonts. If Open Type fonts are chosen and the job has a font that does not support the Open Type format, the system embeds the True Type font.

User Types

Only a Print Service Provider user with System Admin privileges can set the default Print Buyer user privileges.

To change Print Buyer user privileges:

- 1 Select **SYSTEM SETUP -> ADVANCED -> USER TYPES**.
- 2 Clear or select the check boxes to assign or remove privileges. See [Print Buyer User Privileges](#) (on page 22) for more information.
 - To restore the privilege defaults, click **Reset Defaults**.
 - To revert back to the last saved configuration, click **Revert**.
- 3 Click **Save**.

Print Buyer User Privileges

The default user types defined in the system are:

User Type	Description
Administrator	Full user abilities, including account administration. The Administrator can design jobs, send jobs to the SHOPPING CART , and place orders. In addition, the Administrator is responsible for determining the user privileges of all members of the Print Buyer organization.
Supervisor	Full user abilities except access to account administration. The Supervisor can design jobs, send jobs to the SHOPPING CART , and place orders.
Designer	Responsible for designing simple jobs and jobs based on variable data and variable data fields.
Super User	Creates jobs using templates, IFORM EDITOR , and variable data. Can order jobs.
User	Creates jobs using templates, IFORM EDITOR , and variable data. Cannot order jobs.
Guest	New or occasional users who can create jobs based on PRINT ACCOUNT catalogs.
Custom	As a default, creates jobs using templates, IFORM EDITOR , and variable data. Cannot order jobs. Custom allows the Print Buyer to create an additional user type with specific abilities.



User privileges are set by default by the system, according to assigned user type. The following table shows the default user type privileges.

Feature	Privilege Level						
	Administrator	Supervisor	Designer	Super User	User	Guest	Custom
User Administration	✓						
Account Administration	✓						
Manage Template Library	✓	✓	✓				
View Jobs of other Users*	✓	✓	✓				
Place an Order/Get Quote	✓	✓		✓			
Upload Job Content	✓	✓	✓				
Edit Job Properties	✓	✓	✓				
Use iForm Editor	✓	✓	✓				
Use Variable Data	✓	✓	✓	✓	✓	✓	✓
Use Variable Data Archive	✓	✓	✓	✓	✓	✓	✓
Send MailToPrint	✓	✓	✓				
Download Plugins	✓	✓	✓				
View Address Book	✓	✓	✓	✓	✓	✓	✓
Edit Contact Details	✓	✓	✓	✓	✓	✓	✓

*other users from the same Account.

Job Expiration

You can define time periods for automatic job expiration, at which point jobs are automatically deleted from the system, to prevent the accumulation of jobs that are no longer required. This option removes jobs from the queue that are no longer valid, or have lapsed due to Print Buyer indecision. This function serves to reduce system 'cluttering', and maximizes iWay's ability to perform at top speed.



You can apply these definitions to jobs in any of the following statuses:

- Jobs not yet ordered:
 - Design
 - Print buyer Approval
 - Shopping Cart
- Jobs already ordered:
 - Shipped
 - Received

To define expiration dates:

- 1 Select **SYSTEM SETUP -> ADVANCED -> JOB EXPIRATION**; the **JOB EXPIRATION SETTINGS** window appears.
- 2 In the **PRE-ORDER JOBS EXPIRATION** and **SHIPPED JOBS EXPIRATION** dropdown lists, select how many days a job remains in the system prior to being deleted, and the number of days a warning appears prior to the deletion.
- 3 Click **Save**.

Customized Fields

You can customize fields used for Print Buyer contact information, address information, account information, and order forms throughout the system. You can also change the order in which fields appear in the various views, deem them as 'mandatory' fields, assign dialog boxes, choose whether they are to be 'free text', or 'dropdown' list boxes, and choose the panels where these items are to appear.

To customize fields:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> CUSTOMIZED FIELDS**; the **CUSTOMIZE FIELDS** window appears.
- 2 In the **CUSTOMIZE FIELDS** window, select **Enable Customize Fields**.
- 3 Select one of the following tabs:
 - **Contact Information** – customize Print Buyer user Contact Information fields located throughout the system.
 - **Address** – customize Print Buyer user address fields located throughout the system.
 - **Account Information** – customize the Print Buyer user Account Information fields located on the Accounts **GENERAL INFO** panel.
 - **Order** – customize the fields on the Print Buyer Order forms located throughout the system.
- 4 Select a field row, and do one or more of the following:
 - Click **Move Up** or **Move Down** to edit the field's panel location.
 - Select the **VISIBLE** check box to define that a field will be visible in the system.
 - Select the **MANDATORY** check box to define that a field is marked as mandatory for data entry.
 - In the **FIELD CAPTION** column, customize the field name.
 - In the **FIELD TYPE** column, choose **Free Text** or **Dropdown List**. If you choose the dropdown list option, edit the list:
 - i Click **Edit List**; the **CUSTOM FIELD OPTIONS** dialog box appears.



- ii Click the **Add new Custom Field Option** link, and type a value in the resulting field.
 - iii Click **Add**; the newly added value is listed in the dialog box.
 - iv Repeat Steps 2 and 3 for additional field options, and click **Done**.
- 5 Click **Save**.

For information regarding customizing fields at the account level, refer to [Customizing Order Fields at the Account Level](#) (on page 59).

Account Groups

NOTE: This feature requires the iWay Sales Manager license.

The Account Groups feature provides the Print Service Provider with an additional option for managing accounts and categorizing them into different group types for different purposes such as billing, reports and activities. The Print Service Provider also assigns CSRs to an Account Group that only contains the accounts that CSR will handle, thus isolating the CSR from accounts handled by other CSRs and limiting the CSRs ability to modify other account information.

To manage account groups, navigate to **SYSTEM SETUP -> ADVANCED -> ACCOUNT GROUPS**.

NOTE:

- Create an Account Group for each CSR that you plan on adding as a system user.
- Accounts can be included in more than one Account Group if necessary.

To add a new account group:

- 1 Click the **New** button.
- 2 Enter a **Group Name** and **Description**.
- 3 Select one or more accounts in the **NOT A MEMBER:** list box and click the **Add** arrow. The accounts are moved to the **MEMBER:** list box.

NOTE: To select more than one account, press the Ctrl key while selecting an additional account.

- 4 Click **Save**.

To delete an account group:

- 1 Select the Account Group in the list and click the **Delete** button.
- 2 Click **Yes** in the confirmation dialog box that opens.

To duplicate an existing account group:

- 1 Select the Account Group in the list and click the **Duplicate** button. A new group is created with the same description and group members.
- 2 Enter a **Group Name** and update the **Description** if necessary.
- 3 Update the group membership if necessary by selecting accounts in one of the list boxes and clicking the **Add** or **Remove** arrow as appropriate.
- 4 Click **Save**.

To edit an existing account group:

- 1 Select the Account Group in the list.
- 2 Update the **Group Name** and **Description** if necessary.



- 3 Update the group membership if necessary by selecting accounts in one of the list boxes and clicking the **Add** or **Remove** arrow as appropriate.
- 4 Click **Save**.

Billing

NOTE: This feature requires the iWay Sales Manager license.

Use the Billing window to modify invoice settings and define the list of banks from which you will accept checks.

To Define Invoice Settings:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.
- 2 To enable the automatic creation of invoices and receipts for all the online orders made using online payment, select the **Create an Invoice and Receipt for Web created orders with online payment** check box .
- 3 To issue the invoices to a parent account instead of to the account that generated the order, select the **Allow issuing invoice for parent account** check box.
- 4 Click **Save**.

To Define the Banks List:

Define the list of banks from which you accept checks. This list is used to select the name of the bank when a payment is made.

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.
- 2 Click the **Add** button under the Banks list. In the empty row that is added to the list, type in the banks name.
- 3 To remove a bank, select the bank and click **Remove**.
- 4 Click **Save**.

NOTE: To enable the Bank Check payment option for an account, at least one bank must be defined in the Bank list, otherwise the Billing documents cannot be confirmed.

Integrations

Online Payment Integration

The Pageflex iWay Online Payment module enables Print Buyers to pay for the Print Service Provider's services through the use of an online payment vendor.

NOTE: The Online Payment feature is only available with the iWay Online Payment license.

Currently, Pageflex iWay supports Online Payments through the following payment services:

- Authorize.Net (www.authorize.net)
- PayPal (www.paypal.com)
- SaferPay (www.saferpay.com)
- DebiTech (www.dibspayment.com)
- Moneris (www.moneris.com)



- ePDQ (www.barclaycard.co.uk)
- Atos (www.atosworldline.com <http://www.atosworldline.com/>)
- ChinaBank (www.chinabank.com.cn)

You can enable Print Buyers to pay for your services through a credit card service. Online Payment is available depending on licensing authorization.

NOTE: Before configuring iWay, you must have opened an account with one or more of the supported Online Payment vendors.

To integrate with a Online Payment vendor:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATION -> ONLINE PAYMENT**; the **ONLINE PAYMENT** window appears.
- 2 Select a payment vendor, click on the **Enabled** checkbox.
- 3 Update the **Caption** field if necessary and fill in the account information and then click **Save**.

NOTE:

- The Caption field is the vendor name displayed to the Print Buyer during checkout.
- Any changes to the default value of the Caption field can also be localized. See [Localized Online Payment Display Name](#) (on page 8) for more information.

For more information on integrating with a Online Payment vendor, see the *Pageflex iWay Integration Guide*.

HTML or Word Documents

Print Service Providers can now select between Word and HTML for generating the following documents:

- Job Tickets
- Quotes and Orders

The Word option produces a Word document including all the relevant information (as in previous versions of iWay), while the HTML option produces an HTML page with the relevant information. The HTML documents can also be customized.

To configure which option to use in iWay:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> EXTENSION MODULES**.
- 2 In the **DOCUMENT EXTENSIONS** frame, select either **Word** or **HTML** for Job Tickets and then for Quotes / Orders.
- 3 Click **Save**.

Defining iWay Business Links

You can integrate your iWay system with peripheral systems within your organization specifically designed and dedicated to perform tasks which enhance your services, such as accounting or estimation software systems. An XML file with job or order data can be transferred through the iWay server to the other systems when the following events occur in iWay:

- **GET QUOTE** – a Print Buyer has clicked **Get Quote** in the iWay **SHOPPING CART**.
- **JOB ORDER** – a Print Buyer has placed an order.
- **EDIT IMPOSITION** – a Print Service Provider operator has clicked **Edit Imposition** in the **PRODUCTION QUEUE**.
- **JOB SHIPPED** – a Print Service Provider operator has clicked **Approve Delivery** in



the **DELIVERY QUEUE**.

- **CONFIRM BILLING DOCUMENT** - a Print Service Provider operator has clicked the **Confirm** button in the iWay GUI. This link is only available with the iWay Sales Manager license, and applies to all billing documents: receipts, invoices, credit notes and deposits.
- **JOB APPROVED** - a Print Service Provider operator has clicked **Approve** in the **PRODUCTION QUEUE**.

You define the integration with external systems in the iWay **LINKS** window. To access the iWay **LINKS** window, select **SYSTEM SETUP > INTEGRATION**; the iWay **LINKS** window appears.

To enable a link:

- In the iWay **LINKS** window, select the **ENABLE** check box adjacent to the system link to be enabled.
- In the **FOLDER PATH** field, define a path to a folder in which to store the XML file.
- Click **Save**.

Integrating iWay with Other Systems

You can integrate your iWay application to with other systems located within your overall system.

To integrate with another system:

- Select **SYSTEM SETUP -> INTEGRATION -> EXTERNAL SYSTEMS**; the **EXTERNAL SYSTEMS** window appears.
- In the **SYSTEMS** list, select a system; the right panel shows either an **Enable** check box or data fields.
- Select the **Enable** check box (when provided) and type the valid data received from the external system organization into the fields and click **OK**.

See the *Pageflex iWay Integration Guide* for more details.



Print Settings

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This chapter describes how you define your print settings and service provision parameters. Options and defaults presented here include print output methods available, stock, setup and imposition options, finishing options and shipping alternatives.

Defining Production Parameters

You can define the level at which iWay issues a warning for problems with image resolution and the size of uploaded files.

Setting Image Resolution Warning

The default image resolution DPI value is the minimum image resolution a Print Buyer is required to use, when uploading a file to the system. When an uploaded file contains images with a resolution lower than the value set in the system, iWay issues a warning message.

To set the minimum acceptable DPI:

- 1 Navigate to **PRINT SETTINGS -> PRODUCTION -> PARAMETERS**.
- 2 In the **FILE UPLOAD** panel, type the minimum acceptable DPI threshold in the **Warn User when image resolution is below:** field.
- 3 Click **Save**.

Setting Size Difference

You can set the maximum possible size difference between a job type's properties and the job ticket. When a Print Buyer orders a job, the job type, subtype, and job size are defined. If an uploaded file's dimensions differ from those defined in the system's job subtype (by exceeding the percentage value set in the system), the job subtype changes from **DEFINED** to **CUSTOM**, and iWay issues a warning message.



To set the size difference:

- 1 Select **PRINT SETTINGS -> PRODUCTION -> PARAMETERS**.
- 2 In the **FILE UPLOAD** panel, type the maximum acceptable size difference between job type properties and the properties of uploaded files.
- 3 Click **Save**.

Output Devices

You can define the output devices that are used in the system. Assign names for the output devices logically, either relating the device(s) to a folder to which jobs are transferred and stored (for later processing), or relating to an output device especially configured to receive and print jobs automatically.

Managing Output Devices

You define output devices by first accessing the **OUTPUT DEVICES** window. To access the **OUTPUT DEVICES** window, select **PRINT SETTINGS -> PRODUCTION -> OUTPUT DEVICES**.

The **OUTPUT DEVICES** list shows all of the output devices currently defined in your system. In the **OUTPUT DEVICES** list, you can perform the following actions:

- **Add** devices
- **Delete** devices
- **Rename** devices

Adding Output Devices

You can add output devices to the system.

To add an output device:

- 1 In the **OUTPUT DEVICES** window, click **Add**; the **ADD DEVICE** dialog box appears.
- 2 Type a name and select the device group to which the device will be added.
- 3 In the **DEVICE GROUP** dropdown list, select **Copier**, **Digital**, or **Offset**.
If you select **Digital**, in the **MACHINE TYPE** dropdown list, select one of the preset device options, or **Custom**.
- 4 Click **OK**.

General Tab

To define general output device parameters:

- 1 In the **OUTPUT DEVICES** window, select a device in the **OUTPUT DEVICES** list.
- 2 In the General view, in the **DEVICE DESCRIPTION** field, type a name for the device.
- 3 In the **QUALITY** dropdown list, choose either **Cost Effective** or **Highest Quality**.
- 4 (Optional) Select **Automatically approve all Jobs for Printing** to approve all jobs for automated printing. When selected, jobs sent to production arrive at the **PRODUCTION QUEUE** and are automatically approved and sent to the **PRINTING QUEUE**.



- 5 In the **PRESS SHEET SIZES** sub-panel, select the sheet sizes supported by the output device.
- 6 In the **COLORS** sub-panel, select which color options the output device supports. The options are:
 - **B/W** – black and white
 - **Process** – cyan, magenta, yellow and black
 - **Spot** – special colors (such as PMS colors)
- 7 In the **COLOR UNITS** dropdown list, select the maximum number of color units supported by the output device.
- 8 Click **OK**.

Defining Output Device Channels

You can define the format and the transmission protocol of data transferred by Pageflex iWay. You can print job files directly to an output device or to a 'storage' folder for later processing.

The system output device channel options include:

- **PDF SPOOL** – specifies the output is a PostScript file
- **FOLDER BALANCE** – specifies the output is a PDF file
- **PPML** (Personalized Print Markup Language) – specifies the output is XML-based printer language for variable data printing (defined by PODi)
- **VDX** – specifies the output is variable data format for KODAK devices
- **VPS** – specifies the output is variable data format for Creo devices
- **JMF OVER HTTP** – specifies the output is a PDF document sent using HTTP protocol

To transfer a job in PostScript format:

- 1 In the **OUTPUT DEVICES** window, click the **Output Channels** tab.
- 2 Select an output device, and in the right panel, select **PDF Spool (using Acrobat Reader)**.
- 3 In the **DEVICE NAME** dropdown list, select a device.
- 4 In the **PRINT METHOD** dropdown list, select a PostScript level.
- 5 (Optional) Click **Print Test Page** to send a test page to print.
- 6 Click **OK**.

To transfer a job in PDF format:

- 1 In the **OUTPUT DEVICES** window, click the **Output Channels** tab.
- 2 Select an output device, and in the right panel, select **Folder Balance**.
- 3 (Optional) In the **PRODUCE JDF OUTPUT** dropdown list, select a job definition format option.
- 4 Select the **Send Production file with JDF** option and in the **LOCAL FOLDER PATH** field, and define the path.
- 5 Select or clear the **Device supports multi-queue system** option. You can add, edit, and delete queues by clicking the **Device supports multi-queue system** link.
- 6 To transfer jobs to Macintosh computer platforms, select the **Macintosh Target** option; the system compresses the job name to less than 30 characters.



- 7 In the **FOLDER TYPE** dropdown list, select one of the following methods to store jobs:
 - **Local** – specifies an absolute folder path within the local server.
 - **FTP** – specify the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-service-provider.com) and enter, User name, and password values
 - **Network** – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ ...).

NOTE: You can define computer IP address, User name, and password values for the **FTP** or **Network** option, when either is selected.

- 8 In the **FOLDER PATH** field, define a full folder path (according to the *folder type* method chosen).
- 9 Click **Send a Test File** and confirm the subsequent confirmation messages.
- 10 Click **OK**.

To transfer a variable data format job:

- 1 In the **OUTPUT DEVICES** window, click the **Output Channels** tab.
- 2 Select an output device, and in the right panel, select one of the following variable data formats:
 - **PPML**
 - **VDX**
 - **VPS**
- 3 To transfer jobs to Macintosh computer platforms, select the **Macintosh Target** option; the system compresses the job name to less than 30 characters.
- 4 In the **FOLDER TYPE** dropdown list, select one of the following methods to store jobs:
 - **Local** – specifies an absolute folder path within the local server.
 - **FTP** – specifies the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-service-provider.com).
 - **Network** – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ ...).

NOTE: You can define computer IP address, User name, and password values for the **FTP** or **Network** option, when either is selected.

- 5 In the **FOLDER PATH** field, define a full folder path (according to the folder type method chosen).
 - For **PPML**: In the **RESOURCES PATH** field, define the full resources path.
 - For **VPS**:
 - i In the **RESOURCES PATH** field, define the full resources path.
 - ii In the **IMPOSITION** dropdown list, define the imposition parameters.
- 6 (Optional) Click **Send a Test File**.
- 7 Click **OK**.

To transfer a job in PDF format over the HTTP protocol:

- 1 In the **OUTPUT DEVICES** window, click the **Output Channels** tab.
- 2 Select an output device, and in the right panel, select **JMF over HTTP**.



- 3 Select or clear the **Device supports multi-queue system** option.

NOTE:

You can add, edit, and delete queues by clicking the **Device supports multi-queue system** link.

- 4 Define **IP ADDRESS** and **PORT** field values.
- 5 In the **PRODUCE JDF OUTPUT** dropdown list, select an output device.
- 6 Click **OK**.

Removing Output Devices

You can remove output devices using the following:

- 1 In the **OUTPUT DEVICES** window, select the output device to remove.
- 2 Click **Delete** and **Yes**; the device is removed from the list.

Defining Print Imposition

You can define print imposition orientation and optimization, depending on the selected output device. The system automatically imposes job pages into signatures (a unit of job arrangement within the imposition). You can impose jobs manually if the job is not defined to be automatically imposed by the system. Choose whether to use a color bar, determine both margin and color bar positioning, and the dimensions for each sheet size.

To define print imposition:

- 1 In the **OUTPUT DEVICE** window, click **Imposition**.
- 2 In the **IMPOSITION PREFERENCES** dropdown list, choose **Impose all Jobs**.
- 3 If you want the jobs arriving at this device to be un-imposed, choose **Do not impose**.
- 4 Click **Imposition Settings**; the **EDIT IMPOSITION** dialog box appears showing the selected output device, the press sheet size, and the following imposition option fields:
 - **IMPOSITION METHOD** – sets if the job is printed Same-Up or Multiple-Up
 - **WORK STYLE** – defines if the job is printed on one side of the press sheet, or both sides, and how the front of the press sheet relates to the back
 - **PAGE ORDER** – the page order in which the job is imposed
 - **PAGE ROTATION** – the rotation of pages on the print sheet
 - **ALIGNMENT** – the alignment of the printed area to the center or edges of the press sheet
 - **FILL POLICY** – the option of using entire sheet or the exact amount of items to print per sheet

NOTE:

A graphic representation of a print sheet appears next to each imposition option field in the **EDIT IMPOSITION** dialog box. When you select an imposition option, the graphic representation updates, displaying how the imposition option impacts on the printing..

- 5 In the **IMPOSITION METHOD** dropdown list, choose one of the following methods:
 - **Same-Up** – the printing of data on the same side of a sheet.
 - **Multiple-Up** – the printing of two or more pages of data on the same side of a sheet, for example, 2-up, 3-up or 4 up.

The print sheet graphic representation updates to reflect the chosen imposition



method option.

- 6 In the **WORK STYLE** dropdown list, select one of the following styles:
- **Simplex** – printing on one side of the sheet only.
 - **Perfecting** – printing both sides of a sheet of paper in the same pass through the press.
 - **Work and Tumble** – different pages are assembled so that they are on one plate. One side is printed and the sheet is turned from front to rear so that you are using the opposite edge as the gripper edge and then the second side is printed. The product is then cut apart to make two finished items.
 - **Work and Back** – printing one side of a sheet with one set of plates, then the other side of the sheet with a set of different plates.
 - **Work and Turn** – different pages are assembled so that they are on one plate. One side is printed and then the sheet is turned over so that you are using the same gripper edge and then the second side is printed. The product is then cut apart to make two finished items

The print sheet graphic representation updates to the selected work style option.

- 7 In the **PAGE ORDER** dropdown list, select one of the following options:
- **Not Specified** – no specification to page order.
 - **Cut & Stack** – sheets are cut to specification, then stacked one on top of the other.
 - **Saddle-stitched** – binds the pages of a section where the folded pages are stitched through the fold from the outside, using a wire staple.
 - **Perfect Bound** – sheets ground or trimmed at the spine and are held to the cover by glue. This creates a squared off back.

The print sheet graphic representation updates to reflect the selected page order option.

- 8 In the **PAGE ROTATION** dropdown list, select one of the following options:
- **Do Not Rotate**
 - **Rotate 90°**
 - **Best Fit**

The print sheet graphic representation updates to reflect the selected page rotation option.

- 9 In the **ALIGNMENT** dropdown list, select a print alignment option.
- 10 In the **FILL POLICY** dropdown list, choose one of the following options:
- **Full** – fills the entire print sheet.
 - **Exact** – prints the sheet with the exact of specified print, saving printer-usage costs and ink.

The print sheet graphic representation updates to reflect the chosen fill policy option.

To set the press sheet margins and gutters:

In the **MARGINS AND GUTTERS** tab:

- 1 Enter values for the 4 **Margin** fields.
- 2 Enter values in the **Horizontal Gutters** and **Vertical Gutters** fields.

NOTE:

You can override the values which appear on this tab which are inherited from the system default (set in the **PRODUCTION PROPERTIES** window).



To set the press sheet bleeds:

If a file is uploaded without bleeds defined, iWay can set the bleeds automatically. To let iWay automatically set the bleeds:

- 1 Enable the **If Bleeds are not defined in the file** checkbox.
- 2 Type values in the four **BLEED** fields.
- 3 Select which option to use for the bleeds:
 - Locate bleeds inside job page size
 - Scale up job page size by the defined amounts

To add labels and marks to the press sheet:

On the **LABELS AND MARKS** tab, select one or more of the following options:

- **Job Info** – displays the job number, Print Buyer name, date of production, and other valid job data.
- **Crop Marks and Folding Info** – displays crop marks, indicated by solid lines, fold marks, indicated by a dashed line at the location of each fold. 'In' or 'Out' above the dashed line refers to the fold direction and a number under the line reflects the fold order.
- **Registration Marks** – by default, displays four registration marks located on each edge of the press sheet.
- **Gutters, Job Width and Height** – displays the gutters, job width, and height values.
- **Color Bar and Separation Names** – displays CMYK and gray scale color bars and separation names that appear according to the separation color.

To set custom color bar elements:

- 1 On the **CUSTOM COLOR BAR** tab, in the **COLOR BAR FILE** dropdown list, select a color bar option.

To add additional color bar files to the dropdown list:

- Click the **Color Bar File** link; the **COLOR BAR FILES** dialog box appears.
- Upload files to your iWay system.

For more information about uploading files, refer to [Uploading Files](#).

- 2 Select the **Alignment** for the color bar.
- 3 Type the color bar dimensions **Dimensions** fields.

To set an ICC profile:

On the **ICC PROFILE** tab, in the **CONVERT RGB TO CMYK VIA ICC PROFILE** dropdown list, select an ICC profile for converting RGB to CMYK. Alternatively, select **None**.

NOTE: You can upload ICC Profile files by clicking the **Convert RGB to CMYK via ICC Profile** link.

Click **OK** to save the print imposition settings and close the **EDIT IMPOSITION** dialog box.

Defining Third-party Imposition Jobs

You can define jobs to be imposed by a third-party application.



To define a job to be imposed by a third-party device:

- 1 In the **OUTPUT DEVICES** list, select **Manual_Impose**; the **MANUAL IMPOSE** panel appears.
- 2 Click the **Output Channels** tab.
- 3 (Optional) In the **PRODUCE JDF OUTPUT** dropdown list, select a job definition format option; the **SEND PRODUCTION FILE WITH JDF** checkbox is active; select the **Send Production file with JDF** option and in the **LOCAL FOLDER PATH** field, define the path.
- 4 Select or clear the **Device supports multi-queue system** option.

NOTE: You can add, edit, and delete queues by clicking the **Device supports multi-queue system** link.

- 5 To transfer jobs to Macintosh computer platforms, select the **Macintosh Target** option; the system compresses the job name to less than 30 characters.
- 6 In the **FOLDER TYPE** dropdown list, select one of the following methods to store jobs:
 - **Local** – specifies an absolute folder path within the local server.
 - **FTP** – specifies the full ftp path for transferring jobs via the Internet to any remote computer (i.e. format: ftp://www.print-provider.com).
 - **Network** – specifies the transfer of jobs to any computer within the local network (the network server directory must be specified as the following: \ ...).

NOTE: You can define computer IP address, User name, and password values for the **FTP** or **Network** option, when either is selected.

- 7 In the **FOLDER PATH** field, define a full folder path (according to the folder type method chosen).
- 8 Click **Send a Test File** and confirm the subsequent confirmation messages.
- 9 Click **OK**.

Defining Press Setup Parameters for Pricing Calculation

You can define Setup Time, Pass Setup Time, and Print Head Setup Time configurations.

NOTE: These settings are required for calculating pricing based on production costs. If you plan to calculate pricing based on price lists, these settings are not required.

To define press setup

- 1 In the **OUTPUT DEVICE** window, click **Press Setup**.
- 2 In the **SETUP TIME** field, define the minutes needed for the initial output device setup.
- 3 In the **PASS SETUP TIME** field, define the minutes needed for setting up one pass through the device.
- 4 For offset devices, define the minutes needed to set up each print head per pass in the **PRINT HEAD SETUP TIME** box, and click **OK**.

Setting Speed and Waste

You can configure speed and waste definitions according to whether the device is offset, digital, or copier.



To set speed and waste parameters for offset devices:

- 1 In the **OUTPUT DEVICE** window, click **Speed and Waste**.
- 2 In the **OUTPUT DEVICE** list, select the offset output device.
- 3 In the **RUN LENGTH** field, define the number of copies required.
- 4 In the **SPEED** field, define the amount of sheets to run per hour.
- 5 In the **WASTE** field, define the approximate percentage of run sheet waste (derived from output device adjustments, run sheet examination, or other waste factors).
- 6 Click **Add** for additional job runs; define the parameters in the resulting fields.
- 7 In the **PRODUCTION FACTORS** sub-panel, define speed and waste factors in the **PROCESS COLOR**, **SPOT COLOR**, and **PAPER WEIGHT** fields.
(Optional) Click **Add** for additional weights to be added to the job; define the parameters in the resulting fields.
- 8 Click **OK**.

To define speed and waste parameters for digital devices or copiers:

- 1 In the **OUTPUT DEVICE** window, click **Speed and Waste**.
- 2 Select the digital output device from the **OUTPUT DEVICE** list.
- 3 In the **PAPER WEIGHT** and **SPEED** by **PAPER SIZE** fields, define the required parameters.
- 4 (Optional) Click **Add** to add more runs to the job; define the parameters in the resulting fields.
- 5 In the **PRODUCTION FACTORS** sub-panel, define the **Process Color**, **Spot Color**, and **Duplex Mode** speed factors.
- 6 Click **OK**.

Defining Labor Charges

You can define labor and mark-up charges used to calculate the production cost of a job.

To define a digital labor charge:

- 1 In the **OUTPUT DEVICES** window, click **Labor Charge**.
- 2 In the **OUTPUT DEVICE** list, select the digital output device.
- 3 In the panel fields, define the following values:
 - **Mark-up percentage**
 - **Labor expenses per hour**
 - **Minimum labor charge per minute**
- 4 Click **OK**.

To define an offset labor charge:

- 1 In the **OUTPUT DEVICES** window, click **Labor Charge**.
- 2 In the **OUTPUT DEVICE** list, select the offset output device.
- 3 In the panel fields, define the following values:
 - **Mark-up percentage**
 - **Plate fee**
 - **Labor expenses per hour**



- **Minimum labor charge per minutes**
 - **Process wash-up cost (in monetary terms)**
 - **Spot wash-up costs (in monetary terms)**
- 4 Click **OK**.

Defining Click Charges

You can use external devices for digital print jobs, and calculate the cost per click in the production costs.

To define a click charge:

- 1 In the **OUTPUT DEVICES** window, select a digital output device in the **OUTPUT DEVICES** list.
- 2 Click the **Click Charge** tab.
- 3 In the panel fields, define the following values:
 - **Mark-up percentage**
 - **Color page 'click' costs**
 - **Black and white page 'click' costs**
- 4 Click **OK**.

Managing the Stock Library

You can list here the paper stock used for printing and non-paper products that you sell, such as mugs or pens. Use the **STOCK LIBRARY** to do the following:

- Import and export stock
- Search for **STOCK LIBRARY** items
- Add, duplicate, edit, or delete **STOCK LIBRARY** items

You define stock by first accessing the **STOCK LIBRARY** window.

To access the **STOCK LIBRARY** window, select **PRINT SETTINGS -> PRODUCTION -> STOCK LIBRARY**; the **STOCK LIBRARY** window appears listing the available stock items.

Importing and Exporting Stock

You can import your stock list from a text or comma separated value (CSV) file. In addition, you can export your stock list to a file.

To import a file of stock item:

- 1 In the **STOCK LIBRARY** window, click **Import Stock**.
- 2 In the **STOCK IMPORT** dialog box, define the file path, or browse to the file to be imported.
- 3 Select the file type and encoding, and click **Start Uploading**; the **IMPORT DATABASE** window appears.
 - To erase the current information and use only the data from the imported file, select **Overwrite database**.
 - To keep the current information and add the data from the imported file, select **Add to existing database**.
- 4 Map the stock item names to the provided fields, and click **Next** and **OK**.



To export a file of stock item:

- 1 In the **STOCK LIBRARY** window, click **Export Stock**.
- 2 In the **EXPORT STOCK** dialog box, select the file type and encoding.
- 3 Click **Export**; in the **DOWNLOAD FILE** dialog box, click the link to be exported.
- 4 Save the file in the required location.

Searching the Stock Library

You can define search filters to populate the **STOCK LIBRARY** list. The **STOCK LIBRARY** is organized in columns according to categories.

Stock Library Categories	
Categories	Definition
Catalog ID	Catalog identification number.
Stock Item Name	Name of the stock item.
Type	General material type.
Vendor	Vendor name.
Front Coating	Front coating method.
Back Coating	Back coating method.
Texture	Finishing texture.
Color	Stock color.
Weight (gsm)	Stock weight in grams per square meter.
Size	Stock size.
In Stock	Stock availability.
Type Details	Specific stock material definition.
Media Set Count	Information on the number of sheets in a set. For example for tabs.
Cost	Print Service Provider's expenses per pre-defined range.
Price	Print Buyer's expenses per pre-defined range.
Price Units	Price of a single unit of measurement type for providing pricing calculation basis. For example, a unit of weight, such as a kilogram.
Multi Price	Indicates whether there is more than one range of pricing per stock item.

To search a Stock Library item:

- 1 In the **STOCK LIBRARY** window, select the stock type in the **SEARCH** list; the value definition filter box (located to the right of the **SEARCH** list) updates, listing the relevant filters.
- 2 In the value definition filter dropdown list, select a value definition filter.
- 3 In the text field, define the relevant search information.
- 4 Click **Search**; the search results are displayed.

**To add a new Stock Library item:**

- 1 In the **STOCK LIBRARY** window, click **New**.
- 2 In the **NEW PAPER** dialog box, define the new stock properties, and click **OK**.

NOTE: You can use the **Edit List** link to edit properties from the drop-down list.

To duplicate a Stock Library item:

- 1 In the **STOCK LIBRARY** window, select the library stock item to duplicate.
- 2 Click **Duplicate**; the selected item is duplicated and added to the bottom of the list.

To edit a Stock Library item:

- 1 In the **STOCK LIBRARY** window, select the item to edit.
- 2 Click **Edit**, edit the stock properties in the **EDIT ITEM** dialog box, and click **OK**.

To delete a Stock Library item:

- 1 In the **STOCK LIBRARY** window, select the item to delete.
- 2 Click **Delete** and **Yes**; the selected item is deleted.

Setting Paper Sizes

You can define parent and run sheet sizes, sizes for job stock, and create custom sheet sizes or modify existing sizes. You define paper sizes by first accessing the **PAPER SIZE** window.

To access the **PAPER SIZE** window, select **PRINT SETTINGS > PRODUCTION > PAPER SIZES**; the **PAPER SIZE** window appears listing the available stock items.

To modify paper size:

- 1 In the **PAPER SIZE** window, select the paper size; the size name, width, and height appear in the **CUSTOM PAPER SIZE** fields.

NOTE: Paper size width and height are in metric or imperial standard measurements, depending on the user language selected.

- 2 In the **WIDTH** and **HEIGHT** fields, define new size parameters.
- 3 Click **OK**.

To define a custom size:

- 1 In the **PAPER SIZE** window, click **New Size**;
- 2 In the **CUSTOM PAPER SIZE** fields, define a name and the size parameters, and click **OK**.

To delete paper size:

- 1 In the **PAPER SIZE** window, select the paper size to delete.
- 2 Click **Delete**; after confirming the paper is not being used in any job, click **Yes**.

NOTE: Avoid deleting paper sizes used in output devices, **STOCK LIBRARY** definitions, and the **JOB TICKET LIBRARY**. When used paper sizes in these locations have been deleted, an error message indicating the paper size no longer exists appears upon attempted use. Existing paper stock of the deleted size is not utilized and remains in stock.



Defining Shipping

You can coordinate transport and delivery of goods to Print Buyers as you complete print jobs.

Defining Carriers

Upon completion of a job's production process, you can configure whether the job is to be collected by the Print Buyer or his agent, or you can select an international or local carrier to ship the job.

To define carriers

- 1 Select **PRINT SETTINGS > SHIPPING**; the **CARRIERS** window appears.
- 2 Select the carrier(s) available in your system, and click **OK**.

Defining Shipping Methods


You can integrate with local and international carriers, set your shipping prices, and enable the reception of online shipping costs.

To define a new shipping method:

- 1 Select **PRINT SETTINGS > SHIPPING > SHIPPING METHODS**; the **SHIPPING METHODS** window appears.
- 2 Click **Add**; a new **NEW SHIPPING METHOD** name entry appears in the left panel.
- 3 In the **SHIPPING METHOD DESCRIPTION** field, type the shipping method name.
- 4 In the **CARRIER** dropdown list, select a carrier, or choose one of the following options:
 - **Pick-up by Customer** – no carrier is assigned; you can choose to enable or disable pricing.
 - **Custom** – a previously assigned carrier will ship the job.
- 5 In the **PRICING MODULE** dropdown list, select a pricing module; the panel below the list updates with fields or tabs.
 - **Weight/Volume** – shipment pricing is based on weight or volume.
 - **Online** – shipment pricing is based on an online quotation from the carrier. (Only available for the participating carriers.)
 - **Direct Mail** – shipment pricing is based on the number of copies being shipped.

Setting the Weight/Volume pricing module:


For pricing set by weight:

- 1 On the **BY WEIGHT** tab, select the **Enabled** check box; define the **DESCRIPTION** field value, and in the **UNIT** dropdown list, select the units of weight.
- 2 (Optional):
 - To add a location zone, click the **Add Zone From Library** link; the **ZONE LIBRARY** appears. Select the zone and define the **DETAILS** field values. Click **Add**.
 - To add extra location fields, click .
- 3 To define specific shipping locations, type field values in the **From** and **To** fields. To cover all locations, select **Everywhere**.



- 4 Click the **Tax** tab; the **SELECT TAX PACKAGE** dropdown list appears.
- 5 Assign a tax package suited to the carrier and the shipping region, as defined in **PRINT SETTING > PRICING > TAX LIBRARY**. For information about defining tax packages in the **TAX LIBRARY**, refer to [Tax Package](#) (on page 120).

For pricing set by volume:

- 1 On the **BY VOLUME** tab, select the **Enabled** check box; edit the **DESCRIPTION** field as required.
- 2 (Optional):
 - To add a location zone, click the **Add Zone From Library** link; the **ZONE LIBRARY** appears. Select the zone and define the **DETAILS** field values. Click **Add**.
 - To add extra location fields, click .
- 3 To define specific shipping locations, type field values in the **From** and **To** fields. To cover all locations, select **Everywhere**.
- 4 Click the **Tax** tab; the **SELECT TAX PACKAGE** dropdown list appears.
- 5 Assign to the shipping method a tax package suited to the carrier and the shipping region, as defined in **PRINT SETTING > PRICING > TAX LIBRARY**. For information about defining tax packages in the **TAX LIBRARY**, refer to [Tax Package](#) (on page 120).


NOTE:

When you set (enable) pricing by both weight and volume, the system always defaults to the method with the highest fee.

Setting the Online pricing module:

- 1 Select the **Enabled** check box; define the **Description** field value, and in the **DELIVERY METHOD** dropdown list, select delivery method.
- 2 (Optional) Type a markup percentage and a handling fee value in the fields provided.
- 3 Verify the user parameters for the following fields:
 - **Key, Password, Account** and **Meter Number** (FedEx)
 - **Account (shipper) number, Access key, Username** and **Password** (UPS)
- 4 In the **SELECT TAX PACKAGE** dropdown list, assign a package suited to the carrier and the shipping region, as defined in **PRINT SETTING > PRICING > TAX LIBRARY**. For information about defining tax packages in the **TAX LIBRARY**, refer to [Tax Package](#) (on page 120).

Setting the Direct Mail pricing module:


- 1 Select the **Enabled** check box; edit the **DESCRIPTION** field as required.
- 2 To add a markup, select the **Use Mark-up** check box; type a markup percentage and define the fields.
- 3 (Optional) To add a new range, click ; define the fields in the new range.
- 4 In the **SELECT TAX PACKAGE** dropdown list, assign to the shipping method a tax package suited to the carrier and the shipping region, as defined in **PRINT SETTING > PRICING > TAX LIBRARY**. For information about defining tax packages in the **TAX LIBRARY**, refer to [Tax Package](#) (on page 120).
- 5 Click **Save**.



Defining Shipping Method Groups

Define specific shipping method groups for locality and convenience, to be made available for your Print Buyers during the job ordering procedure. After shipping method groups are defined, the options chosen appear in the **ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO -> DEFAULT SHIPPING METHOD** dropdown list, available for selection. For information on shipping methods on the **ACCOUNT** level, refer to [Selecting Shipping Method Groups for the Account](#) (on page 54).

To define a new Shipping Method Group:

- 1 Select **PRINT SETTINGS -> SHIPPING -> SHIPPING METHOD GROUPS**; the **SHIPPING METHODS GROUPS** window appears.
- 2 Click **Add**; a list of shipping methods and associated carriers appears in the center pane.
- 3 Select a shipping method and carrier, and click ; the shipping method and carrier is moved to the **Group Shipping Methods** pane.
- 4 Repeat the previous Step for each additional shipping method and carrier.
- 5 Click **OK**.



Account Setup

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When you start working with a Print Buyer, one of your first tasks is setting up an account for this buyer. You can also modify the account for an existing Print Buyer. Various account settings affect the look and feel of the iWay Graphic User Interface (GUI). In addition, some Print Buyer's work environments and ordering workflows require certain account settings.

Account Setup Overview

This section describes the Account Setup window and how to use it.


To access and use the Account Setup Window:

- 1 Navigate to **ACCOUNTS -> ACCOUNT SETUP**. By default, **GENERAL INFO** is selected on the **ACCOUNT SETUP** ribbon, and the **ACCOUNT SETUP - GENERAL INFO** window is displayed. The window includes the **ACCOUNTS** pane (left side of the window), and the **GENERAL INFO** window (right side of the window).
- 2 You create new accounts from window. For more information, see [Creating a New Account](#) (on page 45).
- 3 You manage accounts from this window. To do so, select the **ACCOUNT SETUP** ribbon option that is appropriate to the action that you want to perform, and from the **ACCOUNTS** pane, select the relevant account. For more information on managing accounts, see [Managing Accounts](#) (on page 47).



NOTE: The order in which you perform the two tasks in Step 3 is insignificant. That is, you can first select an account or you can first select a ribbon option.

Using the Accounts Pane

In the **ACCOUNTS** pane, you can perform the following activities:

- Search for accounts:
 - a Type the name of the account that you want to search for in the **NAME** field and click **Search**. The **ACCOUNTS SETUP - GENERAL INFO** window displays the requested account information. The title of the Account pane changes to **ACCOUNTS (FILTERED)**.
 - b Click **Reset** to restore the **ACCOUNTS** pane to list all accounts.
- Import accounts: You can import accounts into the **ACCOUNT SETUP** window. Click  and in the **IMPORT** dialog box that appears, select the file that contains the accounts that you want to import. For more information on uploading files, see [Uploading Files](#).



- Export accounts: You can export the accounts listed in the **ACCOUNTS** pane to a database file.
 - a Click ; the **EXPORT ACCOUNT** dialog box appears.
 - b Select the **Users** check box to include information on the account users in the exported file.
 - c To define the file format: select the **FILE TYPE** and the **ENCODING** from the respective dropdown lists.
 - d Click **Export**; the system creates the account according to your settings. A zip file is also created.
 - e In the **DOWNLOAD FILE** window, save the account files.
- Delete an account: Select the account that you want to delete and click . A confirmation message appears and you are requested to confirm the delete.
- Select an account to view additional account details, and/or modify account settings. You can view general account settings in the **ACCOUNT SETUP - GENERAL INFO** window, and you can view and modify additional account settings by selecting one of the **ACCOUNT SETUP** ribbon options. For more information, see [Managing Accounts](#) (on page 47).
- Create a new account by clicking **Add**. For more information, see [Creating a New Account](#) (on page 45).

Creating a New Account

Before you start working with a new Print Buyer, you need to create an account for this buyer, and define basic settings:

- [Defining General Settings for a New Account](#) (on page 45).
- [Defining Users for a New Account](#) (on page 46).
- [Defining the Account Checkout Process](#) (on page 47).

Additional account settings are either optional or required for certain ordering workflows and work environments. For information of these options, see [Managing Accounts](#) (on page 47).

Defining General Settings for a New Account

To define general information for a new account:

- 1 Navigate to **ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO**; the **ACCOUNT SETUP - GENERAL INFO** window is displayed. The window includes the **ACCOUNTS** pane (left side of the window), and the **GENERAL INFO** pane (right side of the window).
- 2 In the **ACCOUNTS** pane, click **Add**; **New Account #** is added to the **ACCOUNTS** pane, where # is the account ID number that is automatically assigned by the system.
- 3 In the **GENERAL INFO** window, fill in mandatory Print Buyer information:
 - a Type a customer name in the **Account Name** field (mandatory step); this name replaces the default system name **New Account #** that was automatically entered by the system.
 - b If relevant, from the **PARENT ACCOUNT** dropdown list, select one of the following options:
 - **None**—(default) if the Parent Account feature is not necessary.
 - **This Account is Parent**—assign this account as a parent of other accounts.



- 4 To allow account access to the system, make sure the **Disable Account** check box is clear. (By default, all new accounts are enabled.)
- 5 Define general contact information on the **CONTACT INFORMATION** tab:
 - a Fill in the mandatory first name, last name and email fields.
 - b Fill in the other contact fields.
 - c To add the account address:
 - i Click **Edit Address**; the **EDIT ADDRESS** dialog box appears.
 - ii Fill in the address fields and click **OK**; the address appears beneath the **EDIT ADDRESS** link and in the **ADDRESS BOOK**.
- 6 Click the **ACCOUNT INFORMATION** tab, and fill in the following account information fields—Address, City, Telephone number.
- 7 On the **SHIPPING AND BILLING** tab, define the default shipping and billing information for this account.
 - o If you entered an address in the **CONTACT INFORMATION** tab (Step 5 in this procedure), the account name and address are automatically entered into the **SHIPPING AND BILLING** tab. However, you can define another name and address that will be used as the shipping and/or billing information for this account.
 - o If you did not enter an address in the **CONTACT INFORMATION** tab, or if you want to define other shipping and billing addresses, perform the following steps:
 - To define the shipping address, click **Shipping Address**; the **ADDRESS BOOK** appears. Fill in the shipping contact and address details, and click **Save**.
 - To define the billing address, click **Billing Address**; the **ADDRESS BOOK** appears. Fill in the billing contact and address details, and click **Save**.
- 8 On the **SHIPPING AND BILLING** tab, select the default shipping method.
- 9 Click **OK** to save the settings.

Defining Users for a New Account

To define users for a new account:

- 1 In the **ACCOUNTS > ACCOUNT SETUP** ribbon, select **Users**.
- 2 On the **USERS** pane, click **Add** to create a user.

To define an Admin user for the account:

- 1 Fill in the Login Name, User Type (Admin) and Password.
- 2 Fill in the Contact Information.
- 3 Select a **Preferred Language** for sending emails to this user.
- 4 Click **Save**.

To define additional users:

- 1 Fill in the Login Name, User Type and Password.
- 2 Fill in the Contact Information.
- 3 Select a **Preferred Language** for sending emails to this user.
- 4 Click **Save**.





See [User Privileges](#) (on page 22) for the default privileges available to each type of user (select **SYSTEM SETUP -> ADVANCED -> USER TYPES** to display these user types and their privileges.)

When you define additional users, it is important that you consider the following factors:

NOTE:

- By default, only those users defined as Administrator, Supervisor or Designer user types have Upload File privileges.
- It is highly recommended that you not change the default privileges for each user type; making such changes will impact those user types for all Print Buyer accounts.
- A Supervisor is a Print Buyer with privileges to order and approve jobs and create new templates. The only thing that a Supervisor cannot do is manage users.

To add users more efficiently, you can import a CSV file containing the users' details, as follows:

- 1 Click  (Export Users) under the User's area to export a CSV file to your desktop. Select the CSV file type and click **Export**. Using this file will ensure that you provide correctly structured information.
- 2 Edit the file and fill in the details of the users. Mandatory fields are customer, login, password and privilege. It can also contain other information such as cost center and department. You can copy and paste information into this CSV file from an existing Excel sheet of users, if one exists.
- 3 Click  (Import Users) to import the final CSV file and view the user's details.

You can define additional user information. For information, see [Managing Users](#) (on page 55).

Defining the Account Checkout Process

Defining the checkout process is one of the basic steps that you need to perform when you create a Print Buyer account. The checkout process consists of the steps that the Print Buyer follows after clicking **CHECKOUT** in the **SHOPPING CART** and until the end of the ordering process. The process covers information that will be presented to the Print Buyer concerning shipping, billing, payment and confirmation requirements.

To define the checkout process:

- 1 Navigate to **ACCOUNTS -> ACCOUNT SETUP -> CHECKOUT**. The **ACCOUNTS CHECKOUT** window appears.
- 2 By default, all the items in the Checkout window are selected. Clear the check boxes of items that should not be presented to the Print Buyer in the Shipping Details, Order Details, and Confirmation checkout steps.
- 3 Click **Save** when done.

Managing Accounts

You can start working with the account after defining the basic account settings (for details on basic account settings, see [Creating a New Account](#) (on page 45)). However, there are additional account settings that you can modify. These include accounts preferences, which have default settings that are used if you do not change them, and additional account settings that you might have to change, depending on your work environment, and the ordering workflows that you use.




This section includes the following procedures:

- [Managing Account Access](#) (on page 48).
- [Modifying Account Preferences](#) (on page 48).
- [Selecting Shipping Method Groups for the Account](#) (on page 54).
- [Managing Users](#) (on page 55).
- [Defining User Groups Settings](#) (on page 56).
- [Managing the Account Departments](#) (on page 57).
- [Defining the Account Cost Centers](#) (on page 58).
- [Defining Email Notification Settings](#) (on page 59).
- [Customizing Order Fields at the Account Level](#) (on page 59).

Managing Account Access

To manage account access to the system:

Select **ACCOUNTS -> ACCOUNT SETUP**. The **GENERAL INFO** ribbon option is selected by default and the **ACCOUNT SETUP - GENERAL INFO** window appears.

- To allow access to the system, make sure the **Disable Account** check box is clear. (By default, all new accounts are enabled.)
- To temporarily deny access to the system, select the **Disable Account** check box. To restore access, clear the **Disable Account** check box.
- To delete an account from the system, select the account and click  (Delete icon). A customer delete confirmation message appears, requesting that you confirm that you want to delete this Print Buyer from the system.

Modifying Account Preferences

You can use the predefined system account preferences, or you can modify preferences to meet your specific account and workflow needs. Some preferences are account-related, and some preferences are workflow-related. If you want to use a specific ordering workflow, you may be instructed to make necessary preference adjustments.

To modify the account preferences:

- 1 Navigate to **ACCOUNTS > ACCOUNT SETUP -> PREFERENCES**. The **ACCOUNT SETUP - PREFERENCES** window appears.
- 2 Modify the preferences as needed. You can define the following account preferences:
 - [Defining Account Utilities](#) (on page 48)
 - [Defining the PDF Preview](#) (on page 12).
 - [Defining Self Registration Details](#) (on page 50).
 - [Defining Pricing Settings](#) (on page 51).
 - [Setting the Account Job-ordering Windows](#) (on page 53).
 - [Defining Account Branding](#) (on page 53).

Defining Account Utilities

This section describes the **UTILITIES** panel of the **PREFERENCES** window, where you define workflow-related parameters.



To enable the account with the Print Driver and Selective Upload:

In the **UTILITIES** panel of the **ACCOUNT SETUP - PREFERENCES** window, do the following:

- 1 To allow the Print Buyer to create variable (personalized and/or VDP database) templates, select **Enable Selective Upload** in the **UTILITIES** panel.

NOTE:

SELECTIVE UPLOAD allows you to define text strings and images as personalized information, to be displayed with a different value every time a job is ordered. If you do not select this option, the Print Buyer can still order personalized or variable database jobs; however, the Print Buyer will be prevented from creating these templates.

- 2 To allow the Print Buyer to print jobs using a local print driver, select **Enable Print Driver** in the **UTILITIES** panel.
- 3 To determine from which job types the Print Buyer can select when the Print Buyer clicks **Print Document from My Computer** in the launch pad and from the print driver, select a group of job types in the **JOB TYPE GROUP** field in the **UTILITIES** panel.

To define the account userflow:

In the **UTILITIES** panel of the **ACCOUNT SETUP - PREFERENCES** window, do the following:

- 1 Select **Force Terms and Conditions confirmation before ordering** if you want account users to select the confirm terms and conditions check box before the ordering process can be completed.
- 2 Select **Enable sharing of typed data in identical template field** to allow account users to modify multiple items in VI templates, using the same data that was entered for the first template.
- 3 Select **Allow Ordering Jobs Without Content** to allow account users to order jobs without attaching a content file.
- 4 Select **Allow file attachment** to allow account users to attach missing files or additional files to a job before the job is sent to production.

When the **Allow file attachment** check box is selected, a content file can be attached to the job:

NOTE:

- From the **JOB PROPERTIES** window, before the job is sent by the account user to the **SHOPPING CART**.
- From the **JOB PROPERTIES** window that you and the account user can access from the **TRACK JOBS** window.

If a content file was not included with the order, the account user can forward the file separately, and you can attach the file during the production stage.

- 5 From the **Default Shipping/Billing Address** dropdown list, choose one of the following options:
 - **Use Account Default**—the default address is used, as defined in the **ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO -> SHIPPING AND BILLING** tab.
 - **As entered by User**—the address is defined by the account user during the job-ordering procedure.

To set authentication parameters:

In the **UTILITIES** panel of the **ACCOUNT SETUP - PREFERENCES** window, do the following:

- 1 To require accounts to change their passwords on a regular basis, select the **Maximum Password Age: Days** option button and fill in the **DAYS** field. (Default is that password never expires.)



- 2 To require accounts to use a complex password, select the **Force Complex Password Security** check box; your account must create a password that complies with the following rules:
 - The password must be at least seven characters long.
 - The password must contain characters from three of the following four categories:
 - English uppercase characters (A through Z).
 - English lowercase characters (a through z).
 - Digits (0 through 9).
 - Special characters (e.g., !, \$, #, %).
 - The account user password is stored in encrypted form in the database.

PDF Preview

PDF Previews provide both you and your Print Buyers the ability to view the job before it is actually produced, which is useful for verifying the accuracy of the job. Footers and watermarks appear in the PDF preview, which are especially provided to prevent Print Buyers from using the preview as a means of printing the job on printers other than those in your system or organization.

- 1 On the **PDF PREVIEW** sub-panel, click the **Footer File** dropdown box and choose one of the following options:

- **None** - if you do not want to add a footer to the PDF preview.
- **SampleFooter.pdf** - a sample footer option.

Click the **Footer File** link to add additional footer file options to the dropdown menu.

- 2 Select the **Enable Watermark** check box to add a watermark to the PDF:
 - a Type a value in the **Watermark Text** field.
 - b Define the **Font** settings for the text.

NOTE:

When you clear the Watermark check box, the system-defined watermark cannot be used at the Account level.

- 3 Click **Save**.

Defining Self Registration Details

The **SELF REGISTRATION** feature is useful for new and occasional user situations. This feature allows users that access your home page to enter the site without a user name and password, and perform activities that you have defined for such users. This "guest" is required to register during the checkout process, and complete the order through the **ONLINE PAYMENT** service.

To enable a workflow for a guest user (occasional user):

- 1 In the **SELF REGISTRATION** panel of the **ACCOUNT SETUP - PREFERENCES** window, select **Enable Guest Workflow** to allow a guest user to access the system; the **GUEST ACCESS PATH** field appears.
- 2 Type the URL that directs the guest user to the system home page.



- 3 When you want supervisor approval each time a guest enters the system, select the **Approval Required** checkbox.

NOTE:

SEND AN EMAIL MESSAGE EACH TIME A USER HAS REGISTERED is automatically selected if you select **APPROVAL REQUIRED**.

- a Click the **Contacts** link; the **APPROVAL EMAIL CONTACT** dialog box appears.
 - b Type the email address of the person in your organization who oversees guest usage of the system; an email message is sent to this address, and the approver can approve or decline each new guest user that registers into the system.
- 4 When you do not require supervisor approval but want to receive an email each time a user registers, select the **Send an email message each time a user has registered** check box, and clear the **Approval Required** check box.
 - a Click the **Contacts** link; the **APPROVAL EMAIL CONTACT** dialog box appears.
 - b Type the email address of the person in your organization who oversees guest usage of the system; an email message is sent to this address informing that a guest user has registered into the system.

Defining Pricing Settings

In the **PRICING** panel of the **ACCOUNT SETUP - PREFERENCES** window, you define various pricing settings for each account.

To define the account pricing mode:

You can define specific pricing for an account. From the **Account Pricing Model** dropdown list, select one of the following options:

- **Not defined at this level**—you do not want to activate a different pricing model for this account, and want the system to scan to the next pricing model in the pricing hierarchy for activation.
- **Excel**—to activate a specific pricing model, and base the pricing on an Excel-based data sheet (see below).
- **Excel, including Set Jobs**—to activate a specific pricing model, and base the pricing on an Excel-based data sheet that includes Set job pricing (see below).

To work with one of the Excel pricing options:

- 1 After selecting one of the Excel options in the **ACCOUNT PRICING MODEL** dropdown list, an **EXCEL FILE** link and dropdown box appear.
- 2 Select an Excel file from the **Excel File** dropdown list. To add Excel files to the **Excel File** dropdown list:
 - a Click the **Excel File** link; the **FILE UPLOAD** dialog box appears with a list of currently uploaded Excel files.
 - b Click the **Upload Files** button, upload one or more valid XLS files, and click **Continue**: the new files appear in the **FILE UPLOAD** dialog box. See [Uploading Files](#) (on page 5) for more information.
 - c Select the new file and click the **Select File** button; the new file appears in the **EXCEL FILE** dropdown list.
- 3 Click **Save**.



To define pricing options:

You can set the pricing options that the account user encounters during the job-ordering process:

- **Hide Price from User**—prevent the user that is ordering jobs from seeing the price after requesting a quote.
- **Allow Ordering Unpriced Jobs**—enable job-ordering, even when there is a problem with the system-generated pricing.
- **Disable Shipping Price**—you and the account users will not see the shipping price. The system ignores the shipping price; the shipping price and taxes are not added to the total price, and are not included when the cost is exported to an Excel file.
- **Force Cost Center**—require the user that is ordering jobs to include a cost center name during the job-ordering procedure.
- **Force Reference Code**—require the user that is ordering jobs to include a reference code during the job-ordering procedure.

To define shipping and account taxes:

Taxes are defined at the system level. When your account users have specific tax-definition needs, you can select a tax for each account, at the account level. For more information about defining taxes, refer to the [Pricing Process Overview](#) (on page 120).

Select an option from the **ACCOUNT TAX** dropdown list.

To define payment methods:

In the ordering process, account users select the payment method that is most suitable to their business from among the payments systems that you support. You can provide your account users with one or all of the following payment methods:

- **PURCHASE ORDER (PO)** is the standard payment method:
 - a Select **PO (Purchase Order)**; the **Force PO Number** option is activated, and **PO (PURCHASE ORDER)** is added to the **Default Payment Method** dropdown list.
 - b To require account users to type the job's PO number during the ordering process, select **Force PO Number**.
- Various [**ONLINE PAYMENT VENDOR**] checkboxes can be enabled to allow account users to pay for your services through a Online Payment vendor. Only integrated Online Payment vendors are displayed as checkbox options (**SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**). For further information, refer to the *Pageflex iWay Integration Guide*.

Select one or more Online Payment vendors which are then activated as a payment option and added to the **Default Payment Method** dropdown list.

NOTE: The Online Payment options are only available with the Pageflex iWay Online Payment license.

To define the default payment method:

You can define a default payment method that will be used for all the account's ordering processes, unless another method is selected. The various ordering processes include **SHOPPING CART**, **CATALOG**, **MAILTOPRINT**, and **PRINT DRIVER**.

- When only one option is listed in the **Default Payment Method** dropdown, this



option is automatically the default payment method.

- When there is more than one option in the **Default Payment Method** dropdown list, you need to select the default payment method.

To define an account discount:

You can define a permanent discount for this account that will automatically be applied when calculating quotes. In the **DISCOUNT** field, type the discount value.

Setting the Account Job-ordering Windows

In the **GUI** panel of the **ACCOUNT SETUP - PREFERENCES** window you define the windows that appear when the account users order jobs.

To define the windows that the account accesses when creating a job:

- 1 From the **Default Order Jobs Page** dropdown list, choose the job page option that will appear when the account user enters the system.
 - **Launch Pad**—provide the account user with direct access to the job-ordering and job tracking functions.
 - **Template View**—provide the account user with a list of template options for job-ordering.
- 2 From the **Default Template View** dropdown list, select one of the default template views. This view will appear when an account user wants to initiate a job based on a template. For more information see [Catalog Overview](#) (on page 61).
 - **Root Folder**—set the top folder in the template library as the folder that the account user accesses when creating a job from a template.
 - **Specific Folder**—the **Folder** link appears, allowing you to access the **CHOOSE FOLDER** dialog box. Select the folder that the account user accesses when creating a job based on a template.
 - **Catalog**—select a specific catalog in the template library as the catalog that the account user accesses when creating a job from a template. Select a catalog from the **CATALOG** dropdown list.

Defining Account Branding

In the **BRANDING** panel of the **ACCOUNT SETUP - PREFERENCES** window you define the appearance of the account pages.

To define branding options:

- 1 In the **BRANDING** panel, select an option from the **Customer Logos** dropdown list:
 - **Use System Default**—use the **PRINT PROVIDER LOGO** as defined in **SYSTEM SETUP -> BASIC -> HOME PAGE CUSTOMIZATION**. For more information see [Customizing the Home Page](#) (on page 14).
 - Select one of the listed logos.

NOTE: **CUSTOMER LOGOS** allow you to add a unique account logo to the top left corner of the account window. This is advantageous when a specific account decides that the standard iWay look-and-feel is adequate, and the addition of the account's logo is sufficient.

To add logos to the **CUSTOMER LOGOS** dropdown list, click the **Customer Logos** link and download additional images.



- 2 From the **Browser Title** dropdown list, choose one of the following options:
 - **Print Service Provider Name**
 - **Customer Name**

The value that you set in **Browser Title** determines the name that appears in the following locations:

- The tooltip that appears over the **APPLICATION** icon in the notification area located on the bottom-right of the screen.
 - Browser name that appears in the title bar.
- 3 From the **Skin** dropdown list, select one of the **SKIN** options:
 - **Default**—the system default skin as defined in **STORE ASSETS -> SKINS**. For more information, refer to [Editing the Final Design](#) (on page 163).
 - **System Standard**—the iWay skin.
 - **Skin**—select a personalized skin for the account application.
 - 4 Type a URL for the branded **HOME PAGE**.

Selecting Shipping Method Groups for the Account

You can select groups of shipping methods from among the available shipping method groups that are defined in the system. These groups are then available to the account users during the job ordering process, and the account user can select the shipping method to be used for a specific job order. For more information on shipping method groups, refer to [Defining Carriers](#) (on page 41).

To enable shipping methods selection:

- 1 Select **ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO**, and click **Shipping Method Groups**; the **SHIPPING METHOD GROUPS** panel appears.
- 2 Do one of the following:

To select *all* shipping methods:

 - a Select the **All Shipping Methods** check box; all the shipping methods are available to account users.
 - b From the **Default Shipping Method** dropdown list, select a default shipping method. This method will be used whenever a shipping method is not selected for a particular job order.

NOTE: If you do not select a default shipping method, the system uses the system default method.

To select a shipping group:

- c Clear the **All Shipping Methods** check box.
 - d In the **Default Shipping Method** field, select a shipping method.
 - e The available shipping groups become active. Select the shipping method groups that you want to make available to the account.
 - f From the **Default Shipping Method** dropdown list, select a default shipping method.
- 3 Click **OK** to save the settings.



Managing Users

This section describes additional settings that you can define for your account users, in addition to the basic user settings that you defined when you created the account. For information on defining users for a new account, see [Defining Users for a New Account](#) (on page 46).

Managing users includes the following activities:

- Adding, disabling and deleting users.
- Modifying basic user settings.
- Assigning users to account cost centers.
- Assigning users to account departments.
- Customizing the user's job-ordering windows.

To manage users:

- 1 Select **ACCOUNTS > ACCOUNT SETUP > USERS**; the **USERS** window appears..
- 2 To add a new users, click **Add** on the **USERS** pane.
- 3 To modify basic user settings for an existing user, select the user from the **USERS** pane, and make the necessary changes.

NOTE:

For information on user types and other basic user settings, see [Defining Users for a New Account](#) (on page 46).

- 4 Select the **Disable User Account** check box to temporarily disable this user from accessing the account.
- 5 To delete a use from the account, select the user and click the **DELETE** icon.
- 6 Click **Save** to changes, or define additional user information.

To define additional user information:

- 1 By default, when you define the account users, the user address is defined as the account address. However, you can modify the user's address:
 - a Click the **Edit Address** link in the **CONTACT INFORMATION** panel; the **EDIT ADDRESS** window appears.
 - b Modify the fields, as needed.
 - c Click **Save**.
- 2 Click the Cost Center **Assign** link to assign the user to a cost center; the **COST CENTER ASSIGNMENT** dialog box appears.

Cost centers are defined in **ACCOUNTS > ACCOUNT SETUP > COST CENTERS**. For more information on cost centers, see [Defining the Account Cost Centers](#) (on page 58). You can assign an account user to one or more cost centers. During the ordering process, the price order is deducted from the assigned cost center. If the user has more than one cost center, the user selects the cost center to be used for this order. The selected **COST CENTER** budget is updated accordingly.

To assign cost center(s):

- a In the **ACCOUNT'S COST CENTERS** list, select a cost center or several cost centers from among the cost centers that are defined for this account. To assign all cost centers, select the **All cost Centers** check box.
- b Use the **Add** or **Add All** button to assign selected cost center(s); the cost center(s) appear in the **USER ASSIGNED COST CENTERS** list.



- c Use the **Remove** or **Remove All** button to remove selected cost center(s) from the **USER ASSIGNED COST CENTERS** list.
- d Click **Close** to save the settings and close the dialog box.
- 3 Type an IP address in the **IP FILTER** field to allow the user to access the system *only* from a specific computer.
- 4 From the **Order Jobs Page** dropdown list, select one of the following options:
 - o **Use Customer Default**—the account user accesses the default **ORDER JOBS** page, as defined in account **PREFERENCES**. For more information, see [Setting the Account Job-ordering Windows](#) (on page 53).
 - o **Launch Pad**—the account user accesses the Launch Pad when logging into the system.
 - o **Template**—the account user accesses the template view when logging into the system.
- 5 From the **Template View** dropdown list, select one of the following options:
 - o **Use Customer Default**—the account user accesses the default **TEMPLATE** view, as defined in **PREFERENCES**, when logging into the system.
 - o **Root Folder**—the top folder in the **TEMPLATE** list is the folder that the account user accesses when initiating a job from the template library.
 - o **Specific Folder**—select a specific folder in the **TEMPLATE** list as the folder that the account user accesses when initiating a job from the template library. When **SPECIFIC FOLDER** is selected, a **FOLDER** link appears, enabling you to access the **CHOOSE FOLDER** dialog box.
 - o **Catalog**—select a specific catalog from the **TEMPLATE** list as the catalog that the account user accesses when initiating a job from the template library. When **CATALOG** is selected, the **USER CATALOG** dropdown list appears and you can select a catalog.
- 6 To assign the user to account department(s), select an options from the **Department** dropdown list:
 - o **None**— if you do not want to assign the user to a department.
 - o Choose one of the listed departments. You can add departments to the **Department** dropdown list. For more information on departments, see [Managing the Account Departments](#) (on page 57).
- 7 Click **Save** to save modified user settings, or **Revert** to cancel your changes.

Defining User Groups Settings

You can create groups of users within the account organization. A user can belong to more than one user group.

To manage user groups:

- 1 Select **Accounts > Account Setup > User Groups**; the **ACCOUNT SETUP - USER GROUPS** window appears.
- 2 To add a user group:
 - a In the **USER GROUPS** pane, click **Add**; **NEW GROUP #** appears in the **USER GROUPS** list and in the **GROUP NAME** field on the **GENERAL** tab.
 - b On the **GENERAL** tab, type a name in the **GROUP NAME** field.
 - c If necessary, type a description.



- 3 To remove a user group:
 - a Select a user group.
 - b Click **Delete**; the user group is removed from the list.

To manage the users of a user group:

- 1 Select a user group.
- 2 Click the **USERS** tab; the **USERS** view appears and is populated with all the users in the account.
- 3 To add a user from the users list to the **GROUP USERS** list, double-click the user name, or select a user name and click **Add**; the user name is transferred to the **GROUP USERS** list.
- 4 To remove a user from the **GROUP USERS** list, double-click the user name, or select the user name and click **Remove**; the user name is removed from the **GROUP USERS** list.
- 5 Click **OK** to save the settings.

Managing the Account Departments

You can define departments in your account organization, and assign users to each department. Departments are intended for internal use of the account users and have no consequence in regards to your print business.

To manage departments:

- 1 For the account for which you want to define departments, select **ACCOUNTS -> ACCOUNT SETUP -> DEPARTMENTS**; the **DEPARTMENTS** window appears. The window lists the departments and the number of users assigned to each department.
- 2 To add a new department, type its name in the **DEPARTMENT NAME** field, and click **Add**; the new department is added to the **DEPARTMENTS NAME** list.

NOTE: You can import and export lists of departments into the **DEPARTMENTS** window, using the **Import** and **Export** links. For more information on importing and exporting databases, see [Importing and Exporting Database Files](#) (on page 6).

- 3 To delete a department, select the department and click **Delete**; the department is deleted from the **DEPARTMENTS NAME** list.
- 4 To change a department name, select the department and type its new name in the **DEPARTMENT NAME** field and click **Update**. The updated department name appears in the **DEPARTMENT NAME** list.

To assign account users to departments:

- 1 For the account for which you want to assign users, select **ACCOUNTS -> ACCOUNT SETUP -> USERS**; the **USERS** window appears.
- 2 On the **GENERAL** tab of the **USERS** window:
 - a On the **USERS** pane, select the user that you want to assign.
 - b Select a department from the **Department** dropdown list.
 - c Click **OK** to save.
- 3 Repeat Step 2 for each account user that you want to assign to account departments.



Defining the Account Cost Centers

You can create and manage cost centers, and you can charge orders to specific cost centers by assigning a budget. When you create a cost center:

- The price of all the orders charged to the cost center is deducted from the cost center's budget.
- An administrator is notified by email when the budget reaches a predefined minimum level.
- The application prevents users from charging orders that will exceed the cost center's remaining budget. In such cases, the user either has to postpone the order until the budget is updated, charge the order to another cost center, or pay with a credit card.

NOTE: Using cost centers allows account users to define an economic framework through which groups of users can order jobs. Therefore, cost centers are intended for the internal use of your account users, and have no consequence regarding your business.

To add a cost center to an account:

- 1 Select **ACCOUNTS -> ACCOUNT SETUP -> COST CENTERS**; the **COST CENTERS** window appears.
- 2 In the **COST CENTERS** pane, click **Add**; the **ADD COST CENTER** dialog box appears.
- 3 Type a cost center name and a cost center code; click **OK**. The new cost center name and code appear in the **COST CENTERS** pane, and in the **COST CENTER NAME** and **COST CENTER CODE** fields of the **COST CENTERS** window.
- 4 In the **ADMINISTRATOR'S EMAIL** field, type the email address of the Print Service Provider who receives notification concerning the specific cost center.
- 5 (Optional). Fill in additional information about the cost center in the **DESCRIPTION** field.
- 6 Additional cost center fields refer to its budget (see To enable a cost center budget below).
- 7 Click **Save** to save the cost center.

To enable a cost center budget:

- 1 Select the account and cost center.
- 2 By default the **Enable Budget** check box is selected. If it is not selected, select it; the **SET BUDGET** button appears.
- 3 Type a budget name.
- 4 Click **Set Budget**; the **SET COST CENTER BUDGET** dialog box appears.
- 5 Type an amount in the **TOTAL BUDGET** field and click **OK**; the sum appears as the **TOTAL**. The **USED BUDGET** and **REMAINING BUDGET** amounts are automatically updated.
- 6 Type an amount in the **COST CENTER MINIMUM BUDGET** field.
- 7 Click **Save** to save the settings.

To manage cost centers:

- 1 Select an account in the **ACCOUNTS** pane, and then select a cost center in the **COST CENTERS** pane.
- 2 To delete the cost center:
 - a Click **Delete**; the **DELETE COST CENTER** dialog box appears.



- b Click **Yes** to confirm.
- 3 Modify cost center information, as needed.

Defining Email Notification Settings

You can send email notifications from a specific source in your organization to one or more sources in the account organization. This section describes how to define email notifications at the account level.

NOTE: You can set the email notification settings as a default for all your accounts in **SYSTEM SETUP -> ADVANCED -> EMAIL**.

You can send email notifications when the following application events occur:

- Order Confirmation—informing that you have received the order.
- Job Price Changed—informing that you changed the quoted price.
- Job Shipped—informing the account that you shipped the specific job.
- Inventory Below Minimum Level—informing your organization and the account organization that the number of copies of a specific item in the inventory has dropped below the minimum set level.
- Preorder Jobs Expiration—informing that the specific pre-ordered order has overstayed the allotted queue time and has been automatically deleted.
- Shipped Job Expiration—informing that the specific shipped order has overstayed the allotted queue time and has been automatically deleted.
- Job Arrived at the Print Buyer Approval Queue—informing that the job has arrived at the account **APPROVAL** queue.

To define the account email notifications:

- 1 Select **ACCOUNTS > ACCOUNT SETUP -> EMAIL**; the **EMAIL** dialog box appears.

NOTE: Default email notifications settings are set at the system level in **SYSTEM SETUP -> ADVANCED -> EMAIL**. To use these defaults for the selected account, select the **Use System Default Email Settings** check box in the **EMAIL** window. When you create a new account, this check box is selected by default,

- 2 Select the check box of the event for which you want to send out a notification, and click its **Contacts** link; the **EMAIL** dialog box appears.
- 3 In the **SENDER** panel, select a **Sender** option button or click **Other Email** and type a valid email address.
- 4 In the **RECIPIENTS** panel, select the recipients of the email message and/or type an email address into the **OTHER EMAIL** field.
- 5 Repeat Step 2 to Step 4 for each notification event.
- 6 Click **OK** to save all settings and close the **EMAIL** dialog box.
- 7 In the **EMAIL** window, click **OK** to save the settings.

Customizing Order Fields at the Account Level

The iWay system allows you to customize order information fields at the account level.

NOTE: You can customize fields at the account level *only* if you enabled this option at the system level.

At the system level, you can:

- Enable customizing fields at the account level.
- Define the default customized fields for all accounts.



To customize fields at the system level:

- 1 Select **System Setup > Advanced > Customized Fields**.
- 2 Select the **Enable Custom Fields** check box,
- 3 Define default account fields, and define which fields are mandatory. For more information on customizing fields at the system level, see [Customized Fields](#) (on page 24).

After you enabled customizing fields at the system level, you can customize order information fields for each of your accounts. At the account level, you can select the **USE SYSTEM DEFAULT SETTINGS FOR ORDER INFORMATION** check box and use the default settings that were defined at the system level, or you can customize fields for a specific account.

To customize the order information fields:

- 1 Select **ACCOUNTS -> ACCOUNT SETUP -> CUSTOMIZED FIELDS**; the **CUSTOMIZE FIELDS - ORDER INFORMATION** window appears. If selected, clear the **Use System Default Settings for Order Information** check box, and perform the following tasks in the window:

NOTE: If you defined order fields at the system level (**SYSTEM SETUP -> ADVANCED -> CUSTOMIZED FIELDS**), they appear in the **CUSTOMIZE FIELDS - ORDER INFORMATION** window at the account level. However, you can edit the fields.

- To edit a field caption, type the new caption in the **FIELD CAPTION** field.
 - To change the order of fields, select the field that you want to move, and click **Move Up** or **Move Down** until the field is located at the new destination.
 - To hide a field from the account user's view, clear the field's **Visible** check box. To add a field to the user's view, select the check box.
 - To make a field a mandatory field, select the field's **Mandatory** check box. To make the field a non-mandatory field, clear the check box.
 - To define a field as a dropdown list field:
 - i From the **Field Type** dropdown list, choose **DROPDOWN MENU**; the **Edit List** button appears.
 - ii To add options to the menu: click **Edit List**. The **CUSTOM FIELD OPTIONS** window appears.
 - iii Click **Add New Custom Field Option**, and add an option name into the field.
 - iv Click **Add**; the option name is added to the **CUSTOM FIELD OPTIONS** list.
 - v Continue adding options, as needed.
 - vi Click **Done** to save the menu options and return to the **CUSTOMIZE FIELDS - ORDER INFORMATION** window.
 - To define a field as a free text field, from the **Field Type** dropdown list, choose **FREE TEXT**.
- 2 Click **Save** to save all settings.
 - 3 To reset the settings, click **Revert**.
 - 4 To restore the default settings, click **Revert**.

NOTE: Any changes to the default values of Customized Fields can also be localized. See [Localized Customized Fields](#) (on page 7) for more information.



Store Setup

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Pageflex iWay provides you with the capability to set-up an online store front for your customers to browse and use for ordering print products. This chapter describes how to set-up store fronts for your Print Buyers.

- [Catalog Overview](#) (on page 61) – an overview of the types of catalogs supported by iWay and their characteristics.
- [Creating and Managing Superstore Catalogs](#) (on page 65) – define Superstore catalogs.
- [Creating and Managing HTML Catalogs](#) (on page 73) – define and manage HTML catalogs.
- [Managing the Cross Sales Library](#) (on page 77) - promote the sales volume by connecting offers of related products to product categories.
- [Managing the Image Library](#) (on page 78) - manage a library of image assets for variable information jobs.
- [Managing the Database Library](#) (on page 80) - manage a library of variable information database files.

For information regarding managing the template library, refer to [Job Business Flow](#) (on page 82).

Catalog Overview

One of the main objectives of Pageflex iWay is to enable Print Buyers to place orders online. For this purpose you create catalogs. A catalog is an organized collection of products that is used by the print buyer to locate and order print.

iWay includes two types of catalogs:

- **SUPERSTORE** - displayed to the Print Buyer after logging into the application. The Superstore catalog can be organized into hierarchical categories and enables ordering jobs from templates or by uploading the Print Buyers' designs. The Superstore provides powerful navigation tools and a customizable look and feel. When ordering from a Superstore the print buyer places the products in a shopping cart and then checks out the contents of the shopping cart to place the order.
- **HTML** - a flat collection of templates that can be displayed to the Print Buyer after logging into the application, sent in an email, or embedded in a web site. When



ordering through an HTML catalog, the print buyer orders one job at a time without using the shopping cart.

You can define different catalogs for different Print Buyer accounts and for different users.

NOTE:

When you add a template to a catalog, the application creates a link to the template and places it in the catalog. Therefore, the same template can be used several times in different catalogs, without duplicating it.

Superstore Catalogs

The Superstore catalog provides the capability to create a large variety of store fronts with different look and feel, hierarchy and functionality.

The Superstore catalog has the following features:

- Enables ordering from templates and by uploading files.
- Customizable look and feel, including the catalog grid, backgrounds and text display.
- Hierarchical category structure – you have full control over the structure of a Superstore. You can place the templates into a flat list or you can organize the catalog into categories that will assist the print buyer navigation and enhance the ordering experience. Think of the Superstore as a supermarket and the categories as aisles and shelves on which the products are organized.
- Enhanced navigation tools – a display of "bread crumbs" showing the Print Buyer through which hierarchy he arrived at the current category, and an optional navigation pane that can be used either for direct links to categories, or for filtering long lists of products.
- Capability to display messages that can be used for marketing promotion, seasons greetings, or instructional information.
- Capability to display and manage a list of items on hold prior to placing them in the shopping cart.
- Capability to promote sale of products related to the category that the Print Buyer is browsing.

Superstore Look and Feel

The look and feel of a Superstore or its categories is defined by using a layout theme. The application contains a library of layout themes that you can use or modify, or you can create a layout theme from scratch. The same theme can be applied to all the categories of a Superstore, or you can have a different theme for each and every category. When a new Superstore is created a default layout theme is applied to the Superstore and all of its categories.

A layout theme controls the following aspects of a Superstore design:

- Panel layout – the items that the panel contains and the relationships between them.
- List structure – the grid structure of the categories, products and cross sale items.
- Background – the background of the categories, products and cross sale items.
- Item display formats – the format of the individual categories, products and cross sale items boxes.



Panel Layout

The application arrives with a number of predefined panel layouts. The layouts are color coded and a legend is provided.

The panel layout comprises a combination of the items listed below. Only the items area is mandatory and appears in all the layouts.

- Navigation pane – this section will be used by the Print Buyer to navigate within the catalog you are preparing.
- Message – you can use this area to add marketing messages and announcements to promote a specific campaign.
- Shopping Cart – a summary of the shopping cart that accompanies the Print Buyer when ordering a printed job.
- Items Area – this section displays the products your offer to the Print Buyer. You can divide it to few sub-categories to accommodate different users' requirements or different templates and job types that you offer the Print Buyer.
- Cross Sale – you can use this section to promote products related the to category that the Print Buyer is browsing.

NOTE: The grid structure of the Items area and the Cross Sale area in the thumbnail images, is only an indication of possibilities. This structure can be modified in the wizard.

List Structure

You can define the grid structure (number of rows and columns) of:

- Categories
- Products
- Cross Sale

For each of the areas, you can control the following attributes:

- The number of items in a row (number of columns).
- Item Height – the item height is pre-determined, according to one of three predefined sizes: small, medium, and large. Select the Custom option, if you want to type a customized height value.
- The number of rows.

You have to define the structure for the categories, and apply this structure to the products and cross sale areas.

When defining the number of rows of categories and number of rows of products, consider the following points to ensure that you allow enough rows:

- The number of category and product rows actually displayed in the Superstore might be automatically adjusted to keep the total balanced. For example, if two rows are defined for categories and two rows for products, but the Superstore display requires only one subcategory row instead of two, an extra (third) product row will be displayed.

NOTE: If a catalog has many sub-categories in some of its categories, and if the number of categories and products exceeds the number of allocated cells in the layout, the Superstore will generate an additional page to display the categories and products that did not appear on the first page. These will be seen by the Print Buyer only if the Print Buyer advances to the next page.

To reduce the chances of subcategories moving to a second page, allocate a larger number of rows to the subcategories. This way, if a category requires more subcategory rows, they will be available; and if not, the rows will be used by products.



Item Background

You can assign different backgrounds to the categories, products and cross sale items. The application arrives with a number of backgrounds and you can upload your own background images.

If you are preparing backgrounds with no specific layout in mind, we recommend image width of 500 pixels and image height of 200 pixels. This is a generic size that would provide good results.

If you are preparing backgrounds for a specific layout, it is best to create backgrounds in the exact required size. The height of the background image should be 60, 120, or 240, unless you plan a custom height. The width of the background is variable and depends on the number of items in one row.

The item area width is 610 pixels and the gap between the items is 10 pixels, if N is the number of items in a row:

$$\text{Item width} = (610 - 10 \times (N-1)) / N$$

Therefore:

Number of items	Background width
2	300 pixels
3	197 pixels
4	145 pixels
5	114 pixels
6	94 pixels

Items Layout and Details

You can define the layout of each category, product and cross sale item. The layout controls the position of the following items:

- Item title – a title style text string that can display an attribute of the category or product according to your selection.
- Item description – a description style text string that can display one or two attributes of the category or product according to your selection.
- Thumbnail – the category or product thumbnail.
- Upload File and Select buttons.

For each of the item types you can also define the following parameters:

- Thumbnail size – selected out of a list of three predefined sizes or defined as a custom size.
- Title – the attribute that is displayed in the Title field.
- Text field 1 – the first attribute that is displayed in the Description field.
- Text field 2 – the second attribute that is displayed in the Description field.
- Links to sub-categories – a parameter that appears for the category items and controls whether and how many links to sub-categories are displayed in the category item.



HTML Catalogs

An HTML catalog is a collection of templates that can be saved in HTML format. HTML catalogs are flat (have no hierarchy) and enable ordering jobs one at a time, without using a shopping cart.

HTML catalogs can be created and managed by you or by the Print Buyer and can be used in the following ways:

- You can define that a Print Buyer will see the HTML catalog as the ordering page, after logging into the application.
- You can embed an HTML catalog into another website, such as the corporate website of the Print Buyer.
- You can send an HTML catalog in an email message.

The main benefits of using HTML catalogs are:

- The ability to initiate an order from outside the application, with or without the need to log-in.
- The simple ordering flow (without using the shopping cart) makes it especially suitable for occasional users, who don't need to order more than one job at a time.
- The HTML catalog, when used outside the application without a login, provides a fully anonymous ordering flow. I.e., a Print Buyer can order a job from the HTML catalog and pay with a credit card, without registration or logging in.

Creating and Managing Superstore Catalogs

The following sections describe how to create and define a Superstore catalog:



- [Managing Superstores](#) (on page 65)
- [Creating a Superstore](#) (on page 66)
- [Adding Products to a Superstore](#) (on page 67)
- [Applying a Layout Theme to a Superstore](#) (on page 68)

Managing Superstores

You can rename, delete, copy, and move Superstores and categories. To simplify the explanation the tasks below address categories, but they can be applied to a Superstore as well, unless indicated otherwise.



NOTE: If you are copying or moving a Superstore or category between accounts, the only thing that will be moved is the structure and the layout, without the products or queries.

Moving a Category


- 1 Select a category.
- 2 Click  (Cut).
- 3 Find the Superstore or category into which you want to move the selected category and click  (Paste); the category is moved from the original location to the new one.




Copying a Category

- 1 Select a category.
- 2 Click  (Copy).
- 3 Find the Superstore or category into which you want to copy the selected category and click  (Paste); a copy of the original category is created in the new location.

Renaming a Category


- 1 Select a category.
- 2 Click  (Rename); the **RENAME CATALOG** dialog box appears.
- 3 Type the new name.
- 4 Click **OK**; the dialog box closes and the category is renamed.

Deleting a Category

- 1 Select a category.
- 2 Click  (Delete); a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the category is deleted.

Creating a Superstore

You start by creating a new Superstore. In most cases you would then create categories, and then populate the Superstore and its categories with products - templates and job types. When the Superstore structure is complete you can define its layout, look and feel. This sequence is not mandatory - you can start with the layout and then move to create and populate categories.

- 1 Select **ACCOUNTS -> STORE SETUP**; the **CATALOGS** view is displayed.
- 2 In the accounts list on the right side of the title bar, select an account.
- 3 In the **CATALOGS** pane, click **New Catalog**; the **ADD CATALOG** dialog box appears.
- 4 Type a catalog name and in the **CATALOG LAYOUT** list, make sure that **Superstore** is selected.
- 5 Click **OK**; the new Superstore appears in the **CATALOGS** list and the **GENERAL INFORMATION** dialog box appears.
- 6 Complete the **GENERAL INFORMATION** fields and click **OK**. The Internal Title appears as the Superstore name to the Print Buyer.
- 7 Create a category:
 - a Select the catalog or category to which you want to add categories and click  (New Category); the **GENERAL INFORMATION** dialog box appears.
 - b Type the category name, internal title and description.
 - c Click **Change** to add a category thumbnail; the **CATEGORIES** image bank appears.
 - d Select an image or upload a new one. For more information about uploading images, refer to [Uploading Images](#) (on page 80).
 - e Click **Add**; the category is added to the Superstore.
- 8 Add more categories as required.

NOTE: There is no limit to the number of categories you can add, or to the number of hierarchy levels.



Adding Products to a Superstore

You add job types and templates to the Superstore and its categories. The Print Buyers can order print jobs based on the templates, or upload their own designs when ordering from job types.

You have the following two options for adding job types and templates to Superstores:

- Add Products - manually select the job types and templates that you want to place into a specific Superstore or category.
- Add Query - automatically populate a Superstore or category with templates. The query can either add to a Superstore all the templates located in a specific folder, or find all the templates that fulfill certain criteria and add them to a Superstore.

Defining Superstore Content Using the Add Products Option

To populate the Superstore with job types or templates:

- 1 Select a Superstore or category in the **CATALOGS** list.
- 2 Click the **Content** tab; the **CONTENT** view appears.
- 3 Click **Add Products**; the **ADD PRODUCTS** dialog box appears.
- 4 Add job types:
 - a Select the **Job Type** radio button; all the enabled job types appear in the products list.
 - b Select one or more job types and click **>**; the job types appear in the **PRODUCTS IN** list.
- 5 Add templates:
 - a Select the **Templates** radio button; all the templates of the account appear in the products list.
 - b Select one or more templates and click **>**; the templates appear in the **PRODUCTS IN** list.
- 6 Click **OK** to save the settings and close the dialog box; the job type and templates appear in the **CONTENT** list.

Defining Superstore Content Using the Add Queries Option

When Print Buyers navigate a Superstore, the system can automatically populate the Superstore with templates. To dynamically populate a Superstore with templates:

- 1 Select a Superstore or category in the **CATALOGS** list; the **CONTENT** view appears.
- 2 Click **Add Query**; the **QUERY DETAILS** dialog box appears.
- 3 Create a folder content query:
 - a Type a query label into the **LABEL** field.
 - b Leave **My Account** selected in the **ACCOUNT** list.

NOTE:

Use the **Parent Account** option if you want the query to use templates of all the accounts in the same parent account.

- c Select an option in the **FOLDER** list.
 - i **All** - when selected indicates that the query will be defined by criteria.
 - ii **Root Folder** - the templates are collected from the root folder and all the folders in it.
 - iii Any of the customer's template folders.



- d Click **OK**; the query appears in the **CONTENT** list.
- 4 Define a search by criteria query:
 - a Type a query label into the **LABEL** field.
 - b Leave **My Account** selected in the **ACCOUNT** list.
 - c Leave **All** selected in the **FOLDER** list.
 - d Create an explicit search criteria:
 - i Select a field name in the **FIELD** list. The values of this field will be compared to the search criteria.
 - ii Select an operator in the **THAT** list. This operator defines which values will be fulfil the criteria.
 - iii Select **EXPLICIT** in the **TYPE** list. This indicates that the criteria is based on an explicit value.
 - iv Type the value in the **VALUE** field. This is the value to which the field values are compared.

To find all the templates which have "marketing" as a keyword, the following search should be defined:

EXAMPLE:

- Field: Keywords
- That: Like
- Type: Explicit
- Value: marketing

-
- e Create a user driven search criteria:
 - i Select a field name in the **FIELD** list.
 - ii Select an operator in the **THAT** list.
 - iii Select **User Driven** in the **TYPE** list; the Value text box becomes a list with the attributes of a user. This indicates that the criteria is based on the data of the Print Buyer user that navigates the Superstore.
 - iv Select one of the attributes in the **VALUE** list.

To find all the templates which were authored by the logged-in Print Buyer user, the following search should be defined:

EXAMPLE:

- Field: Author
- That: Like
- Type: User Driven
- Value: Last Name

-
- f Click **OK**; the query appears in the **CONTENT** list.

Removing Items from the Content List

Select an item in the **CONTENT** list and click **Remove**; the item is removed from the list.

Applying a Layout Theme to a Superstore

A Superstore can have a single layout theme applied to it and all of its categories, or a different layout theme applied to each category. The layout themes can be selected from a number of predefined layout themes, modified or created according to need.



Applying a Pre-defined Layout Theme to a Superstore

- 1 Select a Superstore or category in the **CATALOG** list.
- 2 Click the **Layout** tab; the **LAYOUT** view appears with an image of the default layout.
- 3 Click **Select**; the **SELECT LAYOUT THEME** dialog box appears.
- 4 Select a layout theme and click **Select**; the layout theme image appears in the **LAYOUT** view.

Managing Layouts

- 1 Select a Superstore or category in the **CATALOG** list.
- 2 Click the **Layout** tab; the **LAYOUT** view appears with an image of the default layout.
- 3 To edit a layout:
 - a Select the theme to edit and click **Edit**; the **LAYOUT WIZARD** appears.
 - b To work with the **LAYOUT WIZARD**, see [Using the Edit Layout Theme Wizard](#) (on page 69).

When editing layouts, note the following:

- NOTE:**
- You cannot edit the default layout.
 - The layout you are editing may be assigned to several Superstores, editing it will affect all these Superstores. If you are not sure about the effect of the change, it might be better to create another layout based on this layout and change the new layout.
-

- 4 To create a layout based on an existing layout:
 - a Select the layout to serve as a base and click **Copy and Edit**; the **LAYOUT WIZARD** appears.
 - b To work with the **LAYOUT WIZARD**, see [Using the Edit Layout Theme Wizard](#) (on page 69).
- 5 To delete a layout, select a layout and click **Delete**; the layout is deleted.

Using the Edit Layout Theme Wizard

You can use the **LAYOUT WIZARD** to design the layout for a Superstore. The wizard has five steps and concludes with the **THEME SUMMARY**. If any of the steps are not completed, the wizard returns you to the incomplete step before you exit the wizard.

- 1 Access the Layout management screen:
 - a Select a Superstore or category in the **CATALOG** list.
 - b Click the **Layout** tab; the **LAYOUT** view appears with an image of the default layout.
 - c Click **Select**; the **SELECT LAYOUT** dialog box appears.
- 2 Click **New**; the **CREATE NEW LAYOUT** dialog box appears in the **STEP 1: SELECT PANEL LAYOUT** view.
- 3 Select a panel layout:
 - a Select a layout.
 - b Click **Next**; **STEP 2: DEFINE LIST STRUCTURE** view appears.
- 4 Define the list structure:
 - a For the categories area structure, define the number of items in row, item size and number of rows.
 - b For the products area structure, select the **Use Categories area structure** check box, or define the number of items in row, item size and number of rows.



- c For the cross sale area structure, select the **Use Categories area structure** check box, or define the number of items in row, item size and number of rows.
 - d Click **Next**; **STEP 3: SELECT ITEMS BACKGROUND** view appears.
- 5 Select the items background:
- a Upload more images, if required. For more information about uploading images, refer to [Uploading Images](#) (on page 80).
 - b Select a background image and click > adjacent to **CATEGORY ITEMS**; the image appears in the **CATEGORY ITEMS** pane.
 - c Select a background image and click > adjacent to **PRODUCT ITEMS**; the image appears in the **PRODUCT ITEMS** pane.
 - d Select a background image and click > adjacent to **CROSS SALE ITEMS**; the image appears in the **CROSS SALE ITEMS** pane.
 - e Click **Next**; **STEP 4: SELECT ITEM LAYOUT** view appears.
- 6 Select a layout for the items:
- a Select an **ITEM LAYOUT** image and click the > button adjacent to **CATEGORY ITEMS**; the image appears in the **CATEGORY ITEMS** pane.
 - b Select an **ITEM LAYOUT** image and click the > button adjacent to **PRODUCT ITEMS**; the image appears in the **PRODUCT ITEMS** pane.
 - c Select an **ITEM LAYOUT** image and click the > button adjacent to **CROSS SALE ITEMS**; the image appears in the **CROSS SALE ITEMS** pane.
 - d Click **Next**; **STEP 5: DEFINE ITEMS DETAILS** view appears.
- 7 Define the detailed contents of the items:
- a Define the category items:
 - i Make sure that the check box of the image is selected, if you want it displayed. Select the image size, and type the height and width if you selected a custom size.
 - ii Make sure that the check box of the title is selected, if you want it displayed. Choose the field to display in the title, usually it would be the category **NAME**.
 - iii Make sure that the check box of the first text field is selected, if you want it displayed. Choose the field to display in the title, usually it would be the category **DESCRIPTION**.
 - iv Select the check box of the second text field, if you want it displayed. Choose the field to display in the title.
 - v Select the **Include links to sub categories** check box. Select the number of links to display.
 - b Repeat the process for product items, with the exception of the **INCLUDE LINKS**.
 - c Repeat the process for cross sale items (if relevant for this layout), with the exception of the **INCLUDE LINKS**.
 - d Click **Next**; **LAYOUT SUMMARY** view appears.
- 8 Define layout summary:
- a Click **Change... PANEL LAYOUT** to upload a thumbnail image of the newly created layout theme. This image will help you identify this layout in the future. For more information about uploading images, refer to [Uploading Images](#) (on page 80).
 - b Type a name for the new layout theme.
 - c Type a description for the new layout theme.
 - d Type the keywords that identify the new layout theme.



- 9 Click **Finish**; the dialog box closes, the new layout is added to the list.

NOTE: If a step was not completed, the wizard returns you to that step before allowing you to complete the procedure.

Defining the Items Area

You can define the titles that introduce each item list area, including the category, template, and job type lists. A category can inherit the settings of its parent category or Superstore, in which case you have to select the **Use Parent category setting** check box.

- 1 Click the **Items Area** tab; the **ITEMS AREA** view appears.
- 2 Clear the **Use parent category setting** check box.
- 3 Type a title for the categories section of the items area.
- 4 Type a title for the templates section of the items area.
- 5 Type a title for the job types section of the items area.

NOTE: If the category contains job types (enabling the Print Buyers to upload their own designs), you can decide to let the user initiate the upload process from the category item, without selecting the category. The **ADD UPLOAD BUTTON** check box controls this behavior.

- 6 Select **Add Upload button at category level** check box and type the button caption.
- 7 Click **Save**

Defining the Cross Sale Area

You can define the content of the category cross sale area, and add cross sale items to a category. Cross Sale items are stored in folders located in the **CROSS SALE** library. For more information on the **CROSS SALES LIBRARY**, see [Managing the Cross Sales Library](#) (on page 77).

- 1 Click the **Cross Sale** tab; the **CROSS SALE** view appears.
- 2 Clear the **Use parent category settings** check box.
- 3 Type a cross sale title.
- 4 Click **Select**; the **CROSS SALE LIBRARY** dialog box appears displaying the cross sale folders of this account.

NOTE: You can access the **CROSS SALES LIBRARY**, and create additional cross sale folders. You can also edit cross sale folders or create new ones, directly from this dialog box. For more information on managing cross sales, see [Managing the Cross Sales Library](#) (on page 77).

- 5 Select a cross sale folder containing suitable items; on the right hand side of the dialog box you can see the contents of the selected cross sale.
- 6 Verify that the correct cross sale is selected and click **Select**; the dialog box closes and the cross sale appears in the **CROSS SALE** view.
- 7 Click **Save**.

To remove the cross sale items from the **CROSS SALE** list, click **Remove**.

Defining the Navigation Pane

You can define the format and content of the navigation pane.

- 1 Click the **Navigation** tab; the **NAVIGATION** view appears.



- 2 Clear the **Use parent category settings** check box.
- 3 Select one of the following options:
 - Select **Hide Pane**, if you don't want to display the **NAVIGATION** pane to the Print Buyer.
 - Select **Category Panel**, if you want to display the **NAVIGATION** pane with direct links to categories.
 - Select 'Narrow By' Panel, if you want to display the Navigation pane with filters that enable narrowing down the list of displayed products.
- 4 If you selected **CATEGORY PANEL**, select the links to be displayed out of the following options:
 - Select **Root level categories**, if you want to display links to the first level of categories in the Superstore.
 - Select **Current level categories**, if you want to display links to all the categories that are at the same level as the category that the Print Buyer is viewing.
 - Select **All categories and sub categories**, if you want to display links to all the categories in the Superstore.
- 5 If you selected '**NARROW BY** PANEL, select the options that you want to provide to your customer for filtering. The possible options are filtering by:
 - Author
 - Keywords
 - Reference Code
 - Subject

Adding Messages

You can select a single message to be displayed to the Print Buyers, or a number of messages that are displayed in rotation. The messages can be in image (JPEG, GIF, animated GIF, PNG) or HTML format.

- 1 Click the **Message** tab; the **MESSAGE** view appears.
- 2 Clear the **Use parent category setting** check box.
- 3 Click **Select**; the **SELECT MESSAGE** dialog box appears and displays a message list.
- 4 To add messages to the list, if not required, continue to Step 5:
 - a Click **New**; the **NEW MESSAGE** dialog box appears.
 - b To add an image:
 - i Select the **Image** option and click **OK**; the **MARKETING** dialog box appears.
 - ii Upload message images to the **MARKETING** dialog box. For more information about uploading images, refer to [Uploading Images](#) (on page 80).
 - iii Click **Select Image**; the image is added to the **SELECT MESSAGE** message list.

NOTE:

The width of messages that appear in the items area should be 610 pixels.

The width of messages that appear on the right, below the shopping cart panel, should be 190 pixels.

There is no height limitation, but the recommended height is 100-200 pixels, both for messages that appear in the items area and those that appear on the right.

- c To add an html message:



- i Select the **URL** option and click **OK**; the **NEW URL** dialog box appears.
 - ii Type a message **NAME** and **URL**.
 - iii Click **OK**; the dialog box closes and an HTML message is added to the list.
 - 5 To select from the existing list of messages:
 - a Select one or more **Select** check boxes of messages that you want to appear in the message pane.
 - b Click **Select**; the dialog box is closed and the messages selected.

Previewing the Superstore or Category

You can preview the created catalog, to check its structure, layout and contents.

- 1 Click the **Preview** link; the **PREVIEW** dialog box appears.
- 2 Check the Superstore by navigating the categories.
- 3 Click **Close** to close the window.

Creating and Managing HTML Catalogs

The following sections describe how to create and define a Superstore catalog:

- [Managing HTML Catalogs](#) (on page 73)
- [Creating an HTML Catalog](#) (on page 74)
- [Exporting an HTML Catalog](#) (on page 76)
- [Sending an HTML Catalog by Email](#) (on page 76)


NOTE:

The instructions in this section presume that you are creating an HTML catalog, adding templates, setting-up its properties, and exporting it, in a sequence. If you are performing one of the stages on a previously created HTML catalog, make sure to select the appropriate catalog before referring to the instructions in the stage.


Managing HTML Catalogs

You can rename or delete an HTML catalog.

Renaming a Catalog

- 1 Select an HTML catalog.
- 2 Click  (Rename); the **RENAME CATALOG** dialog box appears.
- 3 Type the new name.
- 4 Click **OK**; the dialog box closes and the catalog is renamed.

Deleting a Catalog

- 1 Select an HTML catalog.
- 2 Click  (Delete); a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the catalog is deleted.



Creating an HTML Catalog

- 1 Select **ACCOUNTS -> STORE SETUP**; the **CATALOGS** view is displayed.
- 2 In the accounts list on the right side of the title bar, select an account.
- 3 Click **New Catalog**; the **ADD CATALOG** dialog box appears.
- 4 Type a catalog name and in the **CATALOG LAYOUT** list, select **HTML Catalog**.
- 5 Click **OK**; the new catalog appears in the catalogs list.

Adding Templates to an HTML Catalog

- 1 Click **Add Templates**; the **CHOOSE TEMPLATE** dialog box appears, displaying the templates of the selected account.
- 2 Navigate to a template and click **Select**; the template appears in the **CATALOG NAME** panel.
- 3 Repeat Step 2 for each additional template and click **Close**.

To delete a template from an HTML catalog, select the template and click **Remove Template**.

Setting HTML Catalog Template Parameters

The panel on the right hand side of the catalog list displays the HTML catalog preview. This panel displays the templates contained in the catalog and their properties, as they will be displayed in the exported HTML catalog. The preview does not display the price as will be displayed in the HTML catalog, if defined.

- 1 Click the **Edit** link that appears under each HTML catalog template; the template setup dialog box appears.
- 2 Select the **Max number of copies allowed per order**, to limit the number of copies that a user can order from this template when using the catalog.

NOTE: The selection of maximum number of copies in the HTML catalog does not affect the number of copies that can be ordered from the template outside the HTML catalog.

- 3 To display the **FORMAT** field, select the **Format** check box. The default information that appears in this field is the name of the job type on which the template is based.
 - a To change the text that appears in the **FORMAT** field, type a different text string.
 - b To revert back to the default text, click the format **Default** button.
- 4 To display the template size that appear in the **SIZE** field, select the **Size** check box.
 - a To change the text that appears in the **SIZE** field, type a different text string.

NOTE: The text in the size field does not change the size of the template.

- b To revert back to the default size details, click the size **Default** button.
- 5 The template description field displays, by default, the template name. To change the default text that appears in the **DESCRIPTION** field, type a different text string.
 - 6 Click **OK** to save the changes; the new parameters appear in the catalog template details.



Defining a Catalog's Properties

You can control the job-ordering workflow of the HTML catalog by defining the catalog's properties:

- 1 Click **Properties**; the **CATALOG PROPERTIES** window appears.
- 2 Define the **DISPLAY PARAMETERS**.
 - a Define the thumbnail size and the number of items in one row.
 - b Type a message that will appear at the top of the HTML catalog.
- 3 Define the **WORKFLOW PARAMETERS**:
 - a Select an **APPROVAL** option:
 - i To have the job sent to be approved before an order is placed, select **The job requires supervisor approval...** radio button.

NOTE:

Each template can have **SUPERVISOR APPROVAL BY-PASS** rules specified in the **WORKFLOW POLICY** settings. If these rules have been set, they will override the supervisor approval setting of the HTML catalog. For more information about setting **WORKFLOW POLICY**, refer to [Managing the Workflow Policy of a Template](#) (on page 105).

- ii Type the approver's email address or click the **Address Book** link, and select an address from the **ADDRESS BOOK**.
- b Define the login settings:
 - i To require users of this HTML catalog to log-in when using the HTML catalog outside the application, select the **Ask for User Login** check box.

NOTE:

When the **Ask for User Login** check box is clear, any user with access to the HTML catalog can order a job. The application, however, requires every job to be connected to a specific user, therefore, you must select a default login profile, which will be connected to all the jobs ordered from this HTML catalog.

- ii If you want the users to order from this catalog without log-in (anonymously), clear the **Ask for User Login** check box, and select a default login profile from the **DEFAULT LOGIN PROFILE** list. The **DEFAULT LOGIN PROFILE** list features all of the account users, displaying their user type, login name, and first and last names.
- c Define the variable information settings:

This option defines the default data populating the templates, and is intended to save the user time in filling the data, reducing the chances to make mistakes. Select the appropriate option in the **IFORM EDITOR DEFAULT VALUES** list:

 - **The last entry** – the variable data templates will be automatically populated by the variable data that was entered when the variable data templates were last used.
 - **The recent entries** – the application collects the variable data entered into each template, when it was ordered from the HTML catalog. When ordering the Print Buyer can select out of these records, or type other data.
 - **The original design** – the default text in the variable data fields will be the same text that was entered into the templates in the design stage.
- d Define the order parameters:
 - i To allow the Print Buyer to change the system-generated name of a job, select the **Allow Job Name Modification** check box.
 - ii To display the **REFERENCE CODE** input field during the job-ordering procedure, select the **Show the Reference Code Input Field** check box.



- iii Type a **Default Reference Code**, if required.
- iv To display the **COST CENTER** input field during the job-ordering procedure, select the **Show Cost Center** check box.

NOTE: In **ORDER PARAMETERS**, you can select to display the reference code and cost center input fields. However, you enforce the use of these fields in **ACCOUNTS -> ACCOUNTS SETUP -> PREFERENCES -> PRICING**. For more information, refer to [Defining Pricing Settings](#) (on page 51).

- e Define the **DELIVERY** parameters:
 - i To allow the Print Buyer request a shipping date other than the default, select the **Allow Shipping Date Modification** check box.
 - ii Select the default number of days from order confirmation to order shipping.
 - iii To allow the Print Buyer to change the default shipping address, select the **Allow Shipping Address Modification** check box.

When the Allow Shipping Address Modification option is selected, two more options are enabled for selection:

- **ALWAYS APPROVE SHIPPING ADDRESS** – select this option if you want the Print Buyer to verify and confirm the shipping address.
- **DISABLE ADDRESS BOOK ACCESS** – select this option to prevent the Print Buyer from choosing the shipping address from the address book.

NOTE: It is strongly recommended to disable address book access when using the HTML catalog for B2C (business to consumer) applications.

- f To enable template Print Buyers to view a job price during the ordering procedure, select the **Show Price to the User** check box.
- g To send the catalogs to Print Buyers by email, type the email addresses or select the addresses from the address book. For more information, refer to [Sending an HTML Catalog by Email](#) (on page 76).
- h Click **OK** to save the settings.

Exporting an HTML Catalog

- 1 Select an HTML catalog in the catalogs list.
- 2 Click **Export HTML**; the **EXPORT HTML PROPERTIES** dialog box appears.
- 3 Define the properties, if required. For more information about HTML catalog properties, refer to [Defining a Catalog's Properties](#) (on page 75).
- 4 Click **Export HTML**; the **EXPORT CATALOG HTML** dialog box appears.
 - a Right-click the catalog link; a pop-up menu appears.
 - b Select the **Save Target As...** option; the Save As dialog box appears.
 - c Browse to a location to save the catalog and type a catalog name.
 - d Click **Save**; the catalog is saved to the required location and the dialog box closes.
- 5 Click **Close** in the **EXPORT CATALOG HTML** dialog box.

You can use the HTML catalog for embedding in the Print Buyer's or other website.

Sending an HTML Catalog by Email

- 1 Select a catalog in the catalog list.
- 2 Click **Send MailToPrint**; the **SEND MAILTOPRINT PROPERTIES** window appears.



- 3 Define the properties, if required. For more information about HTML catalog properties, refer to [Defining a Catalog's Properties](#) (on page 75).
- 4 Type the email addresses into the **RECIPIENT EMAIL** field, or select from address book.
- 5 Click **Send MailToPrint**; the catalog is mailed to all of the email recipients.

To initiate the order from the email message, the recipients select a template and click the **Start Order** link located beneath the template.

Managing the Cross Sales Library

You can add a **CROSS SALE** panel to your customer's catalog. The **CROSS SALE** panel displays products that you want to promote and have a relationship to products that appear in the **ITEM TEMPLATES** panel.

To access the image library, select **ACCOUNTS -> STORE SETUP**, select the required account and click **Cross Sales**.

Managing Cross Sales

You can delete and duplicate cross sales.

Duplicating a Cross Sale

- 1 Select a cross sale.
- 2 Click **Duplicate**; the cross sale is duplicated with an automatically generated name, and a dialog box confirming the duplication appears.
- 3 Click **OK**; the dialog box closes.
- 4 To rename the duplicated cross sale:
 - a Click the **General** tab.
 - b Type a new name in the **CROSS SALE NAME** box.
 - c Click **Save**.

Deleting a Cross Sale

- 1 Select a cross sale.
- 2 Click **Delete**; a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the cross sale is deleted.

Creating and Populating Cross Sales

- 1 Click **New...**; the **EDIT CROSS SALE** dialog box appears.
- 2 Click the **General** tab; the **GENERAL** view appears.
- 3 Type a cross sale name, description and additional information as required.
- 4 Click the **Content** tab; the **CONTENT** view appears.
- 5 Populate the cross sale with products, using Add Products and Add Query options. For more information about adding products, refer to [Defining Superstore Content Using the Add Products Option](#) (on page 67). For more information about adding queries, refer to [Defining Superstore Content Using the Add Queries Option](#) (on page 67).



- 6 Click **OK** to save the settings and close the dialog box; the products appear in the **CROSS SALE** content list.

Removing a Product from a Cross Sale

- 1 Select a cross sale; the cross sale **CONTENT** view is displayed.
- 2 Select a product in the products list and click **Remove**; the item is removed from the list.

Managing the Image Library

The image library is used for storing image files to be used in variable data templates and jobs. In addition, the image library can be used for providing images to be used as folder icons.


The supported image formats are: JPG, JPEG, PDF, TIF, TIFF, EPS, and PS.

To access the image library, select **ACCOUNTS -> STORE SETUP**, select the required account and click **Image Library**.


Managing Folders

When you create a new account, the system automatically generates a General folder in the account. You can create more folders in the image library to keep the images organized. There is only one level of folders in the image library.


Creating a New Folder

- 1 Click  (New Folder); the **NEW FOLDER** dialog box appears.
- 2 Type the folder name.
- 3 Click **OK**; the dialog box closes and a new folder is created and added to the list of folders.

Renaming a Folder

- 1 Select a folder.
- 2 Click  (Rename); the **RENAME FOLDER** dialog box appears.
- 3 Type the new name.
- 4 Click **OK**; the dialog box closes and the folder is renamed.

Deleting a Folder

- 1 Select a folder.
- 2 Click  (Delete); a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the folder is deleted.

Managing Images

You can copy, move, delete and rename images. Most of the operations in the image library can be performed on several images at once. To select several images use the Shift or Ctrl keys on your keyboard.



Changing the Image Display Mode

You can display the images as a list or as thumbnails.

- To display a thumbnail view, click (View thumbnails); the view is changed to thumbnails.
- To display a list view, click (View list); the view is changed to list.

Moving One or More Images Between Folders

- 1 Select one or more images.
- 2 Click (Cut); the (Paste) button is enabled.
- 3 Find the folder into which you want to move the image and click (Paste); the images are moved from the original location to the new one.

Creating a Copy of One or More Images in Another Folder

- 1 Select one or more images.
- 2 Click (Copy); the (Paste) button is enabled.
- 3 Find the folder into which you want to copy the image and click (Paste); a copy of the original images is created in the new location.

Renaming an Image

- 1 Select an image.
- 2 Click (Rename); the **RENAME IMAGE** dialog box appears.
- 3 Type the new name.
- 4 Click **OK**; the dialog box closes and the image is renamed.

Deleting One or More Images

- 1 Select one or more images.
- 2 Click (Delete); a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the images are deleted.

Downloading One or More Images

- 1 Select one or more images.
- 2 Click (Download image(s)); a **DOWNLOAD FILE** dialog box appears.

NOTE:

When only one image is selected, the dialog box contains two links – one to download the file in its original format, and one to download the file as a ZIP file. When more than one image is selected, the dialog box contains only one link for downloading the images as a ZIP file.

- 3 Right-click on the appropriate link; a pop-up menu appears.
- 4 Click **Save Target As**; a **SAVE AS** dialog box appears.
- 5 Browse to the location where you want to save the images and click **Save.**; the image (or the ZIP file) is saved to the disk.
- 6 Click **Close** to close the **DOWNLOAD FILE** dialog box.



Uploading Images

- 1 Select the folder to which you want to upload the images.
- 2 Click **Upload Images**; the **UPLOAD FILE** dialog box opens.
- 3 To upload a *single* file:
 - a Click **Browse** and select the image to upload.
 - b Click **Continue**; the image is uploaded.
 - c Click **Close**, to close the upload dialog box; the image is added to the image library.
- 4 To upload *multiple* files:
 - a Select the **Upload multiple files** option.
 - b Click **Continue**; the FTP Upload dialog box opens.
 - c Click Page and select Open FTP Site in Windows Explorer; the Windows Explorer opens.
 - d Drag and drop the images to be uploaded to the FTP window.
 - e Close the Windows Explorer and the FTP Upload dialog boxes.

Managing the Database Library

You can store variable data files of CSV and TXT format in the database library. You can connect these uploaded files to several variable data templates as an archive. When you update a database, the archive of all the connected templates is automatically updated. For more information about using a stored database in a template, refer to [Job Business Flow](#) (on page 82).

To access the image library, select **ACCOUNTS -> STORE SETUP**, select the required account and click **Databases**.

Adding a Database to the Library

- 1 Click **New**; the **UPLOAD ASSET** dialog box appears.
- 2 Browse to a valid file, select the file format, and click **OK**; the file appears in the list.
- 3 Change the database name, if required.
- 4 Type a description.
- 5 Modify the database scheme, if required:
 - a If the first row of the database contains the field names, select **First Row Contains Field Names** check box. This indicates to the application not to treat the first row as a record in the database.
 - b If you need to change the title of any of the fields, type a new name for the field in the **CAPTION** column.
- 6 Click **Save**; the changes are saved.

Checking a Database

You can check which templates are linked to a database.

- 1 Select a database.
- 2 Click **Linked Templates**; the list of linked templates appears.
- 3 Select one of the templates; the attributes of the template appear on the right.



Deleting a Database

- 1 Select a database.
- 2 Click **Delete**; a confirmation dialog box appears.
- 3 Click **Yes**; the dialog box closes and the database is deleted.

Updating a Database

To update a database you upload a new database to replace it. It is important to make sure that you upload a database with the same number and format of fields.

- 1 Select a database.
- 2 Click **Edit**; the **UPLOAD ASSET** dialog box appears.
- 3 Browse to a valid file, select the file format, and click **OK**; a message confirming the successful upload appears.
- 4 Click **OK**; the database is replaced and updated in all the connected templates.



Job Business Flow

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This chapter describes the Job Business Flow infrastructure of Pageflex iWay. This infrastructure enables you to define joblets, job types, job type groups, and templates.

This chapter is composed of the following sections:

- [General Overview](#) (on page 82) – provides an overview of the Job Business Flow concept and entities.
- [Joblets](#) (on page 83) – provides an overview of joblets and detailed instructions on joblet management.
- [Job Types](#) (on page 88) – provides an overview of job types and job type groups, detailed instructions on job type management and creation, and instructions on job type groups management.
- [Templates](#) (on page 99) – provides an overview of templates and detailed instructions on template creation and management.
- [Creating Variable Data Templates](#) (on page 108) – provides an overview and detailed instructions on creation of variable data templates, use of the Selective Upload tool and the iForm Editor.

General Overview

Your Print Buyers use iWay to order print jobs. To help them order jobs in an effective and convenient way, you have to define:

- The types of jobs that you, as a Print Service Provider, can produce.
- The possible printing and finishing options for these jobs.
- The time frame for producing these jobs.
- The allowed ordering quantities.
- The job pricing.

You begin by defining which joblets and joblet options you support, either in your printing facility or by outsourcing to other facilities. A joblet is an entity that specifies the options related to a specific printing or finishing feature. For example, print colors, page size or folding. Using the joblets, you control which options are made available to the Print Buyer when ordering a specific job type.

Once the joblets are set-up, you can define job types. A job type defines a set of characteristics for a job type that your facility provides, such as business cards,



brochures, or postcards. Job types help the Print Buyer to define what he needs to order, without having to make too many decisions. They also enable you to define response times, quantities, and pricing, and most importantly the production flow on the back-end.

Print Buyers supply content (upload files) and use the job types to define the properties of the job to be printed with this content.

A template is created by uploading content (a file) and attaching a job type to it. Templates are useful when repeated orders of the same content are expected. By creating a template, you can limit the printing option selections to what is required for this specific template, further simplifying the ordering process for the Print Buyer. For example, if Print Buyers need to repeatedly order a the same brochure, they can use one of the following options:

- Every time they need to order the brochure, they would upload the brochure and select all the appropriate printing options.
- Order the brochure once, and then every time they need it again, track the previously ordered job and re-order it.
- Create a template of the brochure. The template can be added to the catalog of items for ordering and every time they need it, they can order it from the catalog without having to upload the content again or to specify printing options.

You use the Job Type Groups if you wish to limit the Print Buyer's access to specific job types. For further information on job type groups, refer to [Job Type Groups](#) (on page 98).

Joblets

The system arrives with a number of predefined joblets, on top of which you can define more joblets as required. Each joblet is responsible for a specific printing attribute or finishing process, and for each you can define specific options and customize names and icons.

You need to disable (or remove) joblets that are not pertinent for your business, add missing joblets, and for each joblet specify all the possible options. For example, if you print only black & white and process color jobs, make sure you have only black & white and process color options specified. If, in addition, you print jobs using black with one spot color, add this option as well.

You can customize the name and icon of the joblet options as it is displayed to the Print Buyer. Furthermore, you can decide to have the same option twice with different names and icons. For example, you can have two options for process color, one called "CMYK" and used in job types intended for professional audiences, and another called "Full color" and used in business cards.

It is possible to customize the description of each joblet - this description becomes the default option explanation to be displayed to the Print Buyer during ordering.

When you define the job types, you will select which joblets and joblet options are appropriate for each job type.

Joblet Name	Description	Mandatory
Lamination	Defines the sides and lamination type options. For more information, refer to Lamination (on page 86).	
Number of Pages	Determines the minimum and maximum number of pages in a job. For more information, refer to Number of Pages (on page 86).	Yes



Joblet Name	Description	Mandatory
Paper	Determines the paper types that are available to a job type. For more information, refer to Paper (on page 87).	Yes
Folding	Determines the folding options. For more information, refer to Folding (on page 87).	
Binding	Determines the type of binding and binding options. For more information, refer to Binding (on page 87).	
Page size	Determines the job page size. For more information, refer to Page Size (on page 87).	Yes
Colors	Determines whether a job is single or double sided and the printing colors. For more information, refer to Colors (on page 87).	Yes
Collating	Determines whether collating is active or not active. For more information, refer to Collating (on page 88).	
Drilling	Determines the drilling parameters, such as the number, position, and size of the holes. For more information, refer to Drilling (on page 88).	
Numbering	Determines numbering parameters such as the type of numbering and where the numbers appear. For more information, refer to Numbering (on page 88).	
Printing Quality	Determines the printing quality, which can also affect the type of printing device chosen for a job. For more information, refer to Printing Quality .	

Managing Joblets

To access the Joblets library, select **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOBLET LIBRARY**; the Joblets library appears. Use this library to manage joblets.

Renaming a Joblet

- 1 In the **JOBLET** library, select a joblet.
- 2 Click **Rename**; a **RENAME JOBLET** dialog box opens.
- 3 Type the new name and click **OK**; the joblet is renamed.

Deleting a Joblet

You can only delete joblets that you have added (marked as Generic in the Type column).

- 1 In the **JOBLET** library, select a generic joblet.
- 2 Click **Delete**; a **REMOVE JOBLET** dialog box opens. If the joblet is in use in job types and templates, a list of job types and templates and a checkbox for permanently removing the joblet from these entities appears.
- 3 Select the **Permanently remove** check box.
- 4 Click **Yes**; the joblet is deleted and removed from all the job types and templates using it.



Disabling a Joblet

- 1 Clear the enable checkbox of the joblet; a **DISABLE JOBLET** dialog box opens. If the joblet is in use in job types and templates, a list of job types and templates and a checkbox for temporarily disabling the joblet in these entities appears.
- 2 Select the **Temporarily disable** checkbox.
- 3 Click **Yes**; the joblet is disabled in the library and hidden in all the job types and templates using it.

Creating a New Joblet

- 1 In the **JOBLET** library, click **New**; the **CREATE GENERIC JOBLET** dialog box appears.
- 2 Type the joblet name and click **OK**; the dialog box closes, a new joblet is created and opened.

Editing a Joblet

- 1 In the **JOBLET** library, select a joblet.
- 2 Click **Edit**; the joblet editing window is displayed with the **OPTIONS** tab selected.

Changing a Joblet Description

- 1 Click **Description**; the **DESCRIPTION** tab is displayed.
- 2 Type a description text.
- 3 Click **Save** to save the changes.

Adding a Joblet Option

- 1 Click **Options**; the **OPTIONS** tab is displayed.
- 2 Click **Add**; a new option is added to the bottom of the list.
- 3 Type a name for the option.
- 4 Type or select the appropriate values.
- 5 Click **Change Thumbnail** to add an icon to the option; the **THUMBNAILS** dialog box opens.
- 6 Select an image or upload a new image.
- 7 Click **Save** to save the changes.

Enabling a Joblet Option

- 1 Select the check box of the option; the option is enabled in all the job types and templates using it.
- 2 Click **Save** to save the changes.

Disabling a Joblet Option

- 1 Clear the check box of the option; a confirmation dialog box opens.
- 2 Click **Yes** to confirm; the option is disabled and hidden in all the job types and templates using it.
- 3 Click **Save** to save the changes.



Deleting a Joblet Option

- 1 Select an option.
- 2 Click **Delete**; a confirmation dialog box opens.
- 3 Click **Yes** to confirm; the option is removed from the joblet and from all the job types and templates using it.

Changing the Sequence of Joblet Options

- 1 Select an option.
- 2 Click **Move Up** or **Move Down**; the option is moved up or down in the list.
- 3 Click **Save** to save the changes.

Joblet Types

The following section lists the joblets in the system and their descriptions.

Lamination

The Lamination joblet determines the type of lamination and whether the lamination is applied to one or both sides of the print job. You can change the name of the option sides and type options as they are displayed to the Print Buyer.

Lamination sides options

Option	Description
Sides	On what sides of the print job is the lamination applied. Valid values are: <ul style="list-style-type: none"> • Front • Back • Both

Lamination type options

Option	Description
Texture	The texture of the applied lamination film. The system is supplied with a list of popular lamination textures.
Temperature	The manner in which the lamination is applied to the print job. Valid values are: <ul style="list-style-type: none"> • Hot • Cold
Thickness	The thickness of the lamination film.

Number of Pages

The Number of Pages joblet determines the minimum and maximum number of pages for a print job. Number of pages is a mandatory joblet.



Paper

The Paper joblet determines the paper types that are available when defining a job type or template. The list of paper from which you can choose is derived from the paper defined in the print house settings and therefore has no options of its own. Paper is a mandatory joblet.

Folding

The Folding joblet determines the page folding options that you make available in the system. The joblet comes with a large selection of standard folds.

Binding

The Binding joblet determines the type of binding to apply to the print job, as well as the options to apply to the selected binding method. Meaning, once you select the binding method, you need to choose which options within the binding method, you want to use.

Option	Description
Stapling	Use stapling to bind the print job. Stapling options include: <ul style="list-style-type: none"> Type Number Position
Comb Binding	Binding by inserting the teeth of a flexible plastic comb through holes punched along the edge of a stack of paper. Comb Binding options include: <ul style="list-style-type: none"> Type Thickness Color Position
Perfect Binding	Binding sheets that have been ground at the spine and are held to the cover by glue. Perfect Binding options include: <ul style="list-style-type: none"> Type Position
Binder	Binding papers using ring folders. Binder options include: <ul style="list-style-type: none"> Size Color
Thermal Binding	Binding papers heat-fusing a strip of tape to the spine. Binder options include: <ul style="list-style-type: none"> Color

Page Size

The Page Size joblet determines the dimensions of the flat page size, meaning the size of the page before folding is applied. Page Size is a mandatory joblet.

Colors

The Colors joblet determines the colors that are available for each side of the print job. Colors is a mandatory joblet.



Option	Description
Side	The side to which the color definitions apply. Valid values are: <ul style="list-style-type: none"> • Front • Back • Both
Color	The colors that are available for each side. Valid values are: <ul style="list-style-type: none"> • Black and White (B&W) • Color • Spot Colors

Collating

Determines whether collating is active or not active. The Collating joblet has no other options.

Drilling

Determines whether or not drilling is supported in the job and if so, which parameters are used.

Option	Description
Number of holes	
Drill radius	
Position	The location where the holes are drilled. Valid values are: <ul style="list-style-type: none"> • Top • Left • Bottom • Right

Numbering

Determines numbering parameters such as the type of numbering and where the numbers appear.

Job Types

You create job types to define a set of characteristics for typical jobs that your facility provides and to specify the production flow of these types of jobs after they are ordered and arrive at the print house. The Print Buyers use the job types to define what they need to order, without having to make too many decisions.

In the job type library you can manage two classes of job types for simple and non-paper jobs.

- Simple job type class – intended for single component and single file jobs, such as letterheads, business cards, postcards, etc.
- Non-paper job type class – intended for items such as pens or mugs, that can be either with or without print.



There is also an add-on module (Set) for handling multi-component job types. Set is managed in a separate screen and discussed in a separate chapter. For more information about Set, refer to [Set](#) (on page 184).

The main benefits of using job types are:

- A simplified and streamlined print buying experience.
- The ability to automate the business flow and provide business oriented pricing.

To summarize, job types are presets of job attributes both for the Print Buyer and for your back-end. The following examples help explain the concept of job types and their importance.

How Many Job Types to Create?

At the minimum, you need to create a job type for every standard job that your business provides, such as business cards, brochures or postcards. In some cases, you might want to create two (or more) job types for the same type of job. For example, you might want to create two job types for postcards. One type would be for a marketing communications department where the Print Buyer is a professional designer. For this kind of user you would want to provide a large spectrum of options and you would use professional terminology such as CMYK or Process color, provide a list of actual paper stock items, etc. The second postcard job type would be for a B2C application where the Print Buyer has limited or no knowledge of printing terms and options. For this job type you would provide much more limited options, use simple terms like 'full color', and provide 2-3 paper options which you might call "thick, glossy paper" or "cream-colored recycled paper".

Managing Job Types

To access the Job Type library, select **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE LIBRARY**; the Job Type library appears. Use this library to manage Job Types.

Renaming a Job Type

- 1 In the Job Type library, select a job type.
- 2 Click **Edit**; the job type editing opens with the **GENERAL PROPERTIES** tab selected.
- 3 Type the new name in the **JOB TYPE NAME** text box and click **Save**; the job type is renamed.
- 4 Click **Back to Job Type Library** to return to the job type library screen.

Deleting a Job Type

- 1 In the **JOB TYPE** library, select a job type.
- 2 Click **Delete**; a **REMOVE JOB TYPE** dialog box opens. If the job type is in use in templates, a list of templates and a checkbox for permanently removing the job type and the templates appears.
- 3 Select the **PERMANENTLY REMOVE** check box.
- 4 Click **Yes**; the job type and all the connected templates are deleted.

Disabling a Job Type

- 1 Select the disable check box of the job type; a confirmation dialog box opens.
- 2 Click **Yes**; the job type is disabled and removed from all the Superstore catalogs.



Duplicating a Job Type

Duplicating job types is useful for quickly creating job types that are similar to existing job types.

- 1 In the Job Type library, select a job type.
- 2 Click **Duplicate**; a duplicate of the job type is created and added to the bottom of the list.

NOTE: The name of the new job type is based on the original job type with a number extension.

Editing a Job Type

- 1 In the **JOB TYPE** library, select a job type.
- 2 Click **Edit**; the job type editing window opens.

Refer to the [Creating a Simple Job Type](#) (on page 90) for detailed information.

Creating a Simple Job Type

- 1 In the **JOB TYPE** library, click **New**; the **CREATE JOB TYPE** dialog box appears.
- 2 Type the job type name.
- 3 Select the **Simple (single component Job Type)** and click **OK**; the dialog box closes, a new job type is created and opened in the editing window.

NOTE:

For creating non-paper job types follow the same process. The only difference is that non-paper job types have no mandatory joblets, and the only joblets available for adding to the intent are colors – in case printing is required, paper – for selecting a stock item, and any of the joblets that you created.

Adding General Information to a Job Type

Use the General Properties tab to add general information to the job type.

- 1 Click the **General Properties** tab.
- 2 Click **Change Thumbnail** to add an icon to the job type; the **THUMBNAILS** dialog box opens.
- 3 Select an image or upload a new image.
- 4 Type a description (helps identify the job type during job ordering and template creation).
- 5 Type a subject and a reference code, if required.
- 6 Type keywords.
- 7 Type the notes (the production and finishing notes will appear in the job ticket of jobs based on this job type).

Intent

This section defines the intent options for the print job - i.e. which colors it is printed with, on which paper, what the page size is, and how many pages it contains. In addition, it describes folding, lamination, binding, numbering, etc. All these intent options are specified using the joblets.



A standard print job must always have a color, paper, page size and number of pages specification. Therefore, the intent of a simple job type is automatically populated by these joblets. Other joblets are optional and have to be selected manually. For each of the joblets you must specify the default option and you can add other options for the Print Buyer to choose from.

The joblets in the intent section appear to the Print Buyer during ordering as a wizard stage called Job Specification. Job Specification comprises steps with options to choose from, hence the joblets are called here "steps". The Job Specification stage can be customized by controlling the intent section in the following way:

- The name and instruction text of each step can be modified.
- The sequence of the steps can be changed.
- The steps can be broken into several wizard pages by adding tabs (the name of each tab can be modified as well).
- The individual steps can be made invisible to the Print Buyer. A step can be made invisible only if it has a default option. When a step is invisible, the Print Buyer cannot change the default selection.

To define intent

Click the **Intent** tab or click **Continue** in the **GENERAL PROPERTIES** tab.

Adding Joblets

If more joblets are required perform the following:

- 1 Click **Add Joblet**; the **ADD JOBLETS** dialog box opens.
The **ADD JOBLETS** dialog box displays a list of all the joblets in the system. Joblets that are already in the intent list of the job type appear grayed out.
- 2 Select the check boxes of the joblets that you want to enable for this job type.
- 3 Click **OK**; the dialog box closes and the joblets are added to the intent list.

Choosing the Printing Sides and Colors

Use this joblet to define whether the job will be printed on one side of the paper or both, and which colors it will be printed with.

- 1 Select the **Colors** joblet and click **Edit**; the **EDIT JOBLET PROPERTY** dialog box opens.
- 2 Type a step name and description if you want them to differ from the joblet default.
- 3 Select the check boxes of those printing side options that are appropriate for your product.
- 4 Select the option that you consider standard for the product and click **Set as Default**.
- 5 Select the check boxes of those printing color options that are appropriate for your product.
- 6 Select the option that you consider standard for the product and click **Set as Default**.
- 7 Click **Save**; the dialog box closes. The default and additional options appear in the intent list.

Selecting the Printing Stock

Use this joblet to define a list of papers for the Print Buyer to choose from.

- 1 Select the **Select Stock** joblet and click **Edit**.



- 2 Edit the **Step Name** and **Description** if you want them to differ from the default.
- 3 Click **Add Paper**; the **PAPER** dialog box opens.
- 4 Select the paper for the product and click **OK**; the dialog box closes and the paper is added to the list.
- 5 Update the **DISPLAY NAME** for the paper. The Display name is what the Print Buyer will see instead of the more "technical" name of the paper.
- 6 Repeat steps 4 and 5 for more paper options as needed.
- 7 If more than one paper has been added, choose one to be the default paper. Select one of the papers and click **Set as Default**.
- 8 Click **OK**; the dialog box closes. The default and additional options appear in the intent list.

Choosing the Page Sizes

Use this joblet to define which page sizes are appropriate for the job.

- 1 Select the **Page Size** joblet and click **Edit**; the **EDIT JOBLET PROPERTY** dialog box opens.
- 2 Type a step name and description if you want them to differ from the joblet default.
- 3 Select the check boxes of the page size options that are appropriate for your product.
- 4 Select the option that you consider standard for the product and click **Set as Default**.
- 5 Click **Save**; the dialog box closes. The default and additional options appear in the intent list.

Choosing the Number of Pages

Use this joblet to define the number of pages that is appropriate for the job. This property can be defined as a range.

- 1 Select the **Number of Pages** joblet and click **Edit**; the **EDIT JOBLET PROPERTY** dialog box opens.
- 2 Type a step name and description if you want them to differ from the joblet default.
- 3 Type the number of minimum and maximum pages allowed for this job type.
- 4 Click **Save**; the dialog box closes.

Choosing the Options in Additional Joblets

If you have added more joblets to the intent, perform the following procedure for each.

- 1 Select the joblet and click **Edit**; the **EDIT JOBLET PROPERTY** dialog box opens.
- 2 Type a step name and description if you want them to differ from the joblet default.
- 3 Select the check boxes of the options that are appropriate for your product.
- 4 Select the option that you consider standard for the product and click **Set as Default**.
- 5 Click **Save**; the dialog box closes.

Adding Tabs

If you want to break the **JOB SPECIFICATION** stage into several wizard pages perform the following:

- 1 Select the joblet above which you want the tab added.
- 2 Click **Add Tab**; the **CREATE INTENT TAB** dialog box opens.



- 3 Type a tab name and description.
- 4 Click **OK**; the dialog box closes and the tab is added to the intent list.

Changing the Sequence of Intent Steps

- 1 Select a joblet or a tab.
- 2 Click **Move Up** or **Move Down**; the joblet or tab is moved up or down in the list.

Making Intent Steps Invisible

You can decide not to show a certain joblet to the Print Buyer during ordering. This is useful when the user doesn't have to choose out of several options. For example, if you print posters on one paper type only, you can make the paper joblet invisible. You cannot make a joblet invisible if it has no default option selected for it.

- 1 Select a joblet.
- 2 Clear the visibility check box; if the joblet has more than one option selected, a confirmation message will appear.
- 3 Click **OK**.

Removing Intent Steps

You can only remove tabs or non-mandatory joblets.

- 1 Select a joblet or a tab.
- 2 Click **Remove**; the joblet or tab is removed from the list.

Ordering Sequence

This section of the job type specification defines the sequence and properties of the Print Buyer ordering wizard. The system has 6 wizard stages, 3 of which are mandatory and 3 optional. The stages are:

Stage	Mandatory	Additional Options	Comments
Upload File	Yes	Summary	
Job Specification	Yes	Preview and summary	Reflects the intent settings
File Report	Yes	Preview and summary	Performs a preflight check of the file and its compatibility to the intent specification. Enables property modification.
Preview		Summary	Enables property modification.
Summary		Preview	Provides a summary of the job's intent and a price calculation
Job Details		Preview and summary	Enables the Print Buyer to modify the automatically created job name, enter cost center information and reference code information. Enables properties modification.

The ordering sequence section provides you with the tools to control the Print Buyer's experience and to create highly customized applications for special markets or Print Buyers. You have the following customization options:



- The name of each stage can be modified. Any changes from the default names can also be localized - for more information, see [Localized Ordering Sequence](#) (on page 7).
- The optional stages can be enabled.
- Some of the stage properties can be modified.
- A preview and/or a summary can be displayed in-line with some of the stages.
- The sequence of the stages can be modified with the following limitation - the Upload File and Job Specification must precede the File Report stage.

NOTE:

While it is possible to place a Preview before a file has been uploaded, it is not recommended, since the Print Buyer will see an empty rectangle where a preview is supposed to be.

File Report

The File Report stage cannot be disabled, but it can be modified and even hidden from the Print Buyer. It provides you with the following options:

- Specify the resolution threshold. If the job contains images with resolution lower than the specified threshold, a warning will be issued.
- Specify whether RGB images will trigger a warning.
- Specify whether missing fonts will trigger a warning.
- Specify whether the File Report will be displayed.
- Specify whether the user will be allowed to continue if problems are encountered, and if yes, the phrasing of the warning message that the user will have to confirm in order to continue.

Preview

The Preview stage enables you to specify whether the displayed preview will be in JPG or PDF format and whether the user will be required to confirm the preview in order to continue.

Job Details

The Job Details stage enables you to specify if the user will have the option to modify the job name, whether to display the cost center and reference code fields and whether these fields are mandatory.

Quote before Upload Scenario

You can utilize the Ordering Sequence to create different scenarios. The following example for a quote before upload scenario is provided to give you some understanding of how to harness this feature to the needs of your Print Buyers.

To create a Quote then Upload scenario do the following:

Stage	Enable	Additional Options
Job Specification	Yes	Summary
Upload File	Yes	
File Report	Yes	
Preview	Optional	
Summary	Optional	
Job Details	Optional	

The Print Buyer will be able to define the intent and immediately check the price. If the price is satisfactory the Print Buyer can upload the file and continue the ordering process.



To define the ordering sequence

- 1 Click the **Ordering Sequence** tab or click **Continue** in the **INTENT** tab.
- 2 Select the check boxes of the stages you want to enable.
- 3 Change the sequence of the stages by using the **Move Up** and **Move Down** buttons.
- 4 Select the **Preview** and **Summary** check boxes for each stage where they are required.

NOTE: Make sure that the Preview, as a separate stage or as a part of one of the stages, does not appear before the Upload File stage.

Adjusting the File Report Parameters

- 1 Select the **File Report** stage and click **Edit**; the **FILE REPORT** dialog box opens.
- 2 Type a stage name if you want it to differ from the default.
- 3 Define the minimum acceptable image resolution.
- 4 Define whether to warn the user when the file contains RGB images.
- 5 Define whether to warn the user when fonts are missing.
- 6 Define whether to display the File Report to the Print Buyer.
- 7 Define whether to enable the Print Buyer to continue ordering when problems are encountered.
- 8 Modify the phrasing of the message that the user has to confirm if allowed to continue ordering a job with problems.
- 9 Click **OK**; the dialog box closes.

Adjusting the Preview Parameters

Perform the following procedure if a preview stage is required.

- 1 Select the **Preview** stage and click **Edit**; the **PREVIEW** dialog box opens.
- 2 Type a stage name and description if you want them to differ from the default.
- 3 Select the type of preview to display, JPG or PDF.
- 4 Define whether to force the Print Buyer to confirm the preview before continuing to order.
- 5 Modify the phrasing of the confirmation message.
- 6 Click **OK**; the dialog box closes.

Adjusting the Job Details Parameters

Perform the following procedure if the Job Details stage is required.

- 1 Select the **Job Details** stage and click **Edit**; the **JOB DETAILS** dialog box opens.
- 2 Update the **Step Name** if you want it to differ from the default.
- 3 Select the display **Job Name** check box if you want to let the Print Buyer modify the automatically generated job name.
- 4 Select the display **Cost Center** check box if the Print Buyer has to select a cost center and select the mandatory checkbox if necessary.
- 5 Select the display **Reference Code** check box if the Print Buyer has to provide a reference code and select the mandatory checkbox if necessary.
- 6 Click **OK**; the dialog box closes.



Settings

The Setting section deals with the back-end aspects of the job type:

- Quantity
- Pricing
- Tax
- Urgency

Ordering Quantity

The system enables you to control the quantities ordered by the Print Buyer. There are two options to specify quantity:

- Provide the Print Buyer with an option to enter any number within a range (text box).
- Have the Print Buyer select the quantity from a predefined list of options (drop-down list).

In both cases you can define the default quantity.

To define ordering quantity

- 1 Click the **Quantity** tab or click **Continue** in the **ORDERING SEQUENCE** tab.
- 2 Select the type of control that will be presented to the Print Buyer, text box or drop-down list.
If you selected text box perform the following steps:
 - a Type the minimum and maximum quantities for ordering.
 - b Type the default quantity.
 If you selected drop-down perform the following steps:
 - c Type the **From**, **To** and **Step** values to define a range of quantities.
 - d If more ranges are required, click **Add** and repeat the step above.
- 3 Click the 🔄 (refresh) button; the **DEFAULT QUANTITY** and **VERIFICATION** areas are updated. The **DEFAULT QUANTITY** is automatically set to the lowest value.
- 4 Select another default quantity if required.
- 5 Click **Save**.

Example for drop-down list setting:

You want to enable the Print Buyer to order postcards in the following quantities:

- Not less than 250.
- Multiples of 250 up to 1000.
- Multiples of 1000 after that.
- Not more than 10,000.

To achieve this you will create two ranges as follows:

Range	From	To	Step
1	250	1000	250
2	1000	10000	1000

The resulting list will include the following options: 250, 500, 750, 1000, 2000, 3000, 4000, 5000, 6000, 7000, 8000, 9000, 10000.



Pricing

The system enables you to define how the job will be priced and on which device it will be printed. There are two pricing models that can be used on a job type level:

- Intent pricing – calculates the job price based on intent related price lists, according to the specific intent selections made by the Print Buyer during ordering. This method enables you to price according to market prices or according to value as you estimate it.
- Manual – does not calculate the price. When ordering the Print Buyer will see N/A (not available).

For more information about pricing, refer to [Pricing](#) (on page 118).

Print Time Settings

iWay provides an option to define standard production times for different job types. Jobs that are ordered to be printed in the standard time frame are priced as defined in the pricing section. There is also an option for the Print Buyer to request a job to be printed earlier in which case you can charge premium prices. You can define two levels of urgency - Express and Urgent, define the time frame for each urgency level and the surcharge percentage. You can also decide to inherit the default system level settings.

For more information about urgency, refer to [Defining Print Settings](#) (on page 29).

To define print time settings

- 1 To access the print time settings click the **Tax and Urgency** tab or click **Continue** in the **PRICING** tab.
- 2 To define specific settings, select **Define print time settings** radio button.
- 3 Select up to how many days and hours is the urgent printing time and type the surcharge in percent.
- 4 Select up to how many days and hours is the express printing time and type the surcharge in percent.
- 5 Select up to how many days and hours is the regular printing time.
- 6 Click **Save**.

Example:

You have 12 hour work days, from 8 a.m. to 8 p.m. You have set-up the following print times for printing restaurant menus:

- Urgent - 5 hours, surcharge 50%
- Express - 1 day, surcharge 25%
- Regular - 2 days

Let's see what happens to the pricing of 1000 menus ordered on Monday 6p.m. The regular printing price for this job is 100\$.

- The user requested the order to be ready for Wednesday 8 a.m. Since the requested printing time is more than 1 day (which is the specification for urgent) it is a regular job and will be charged 100\$.
- The user requested the order to be ready for Tuesday 4 p.m. This is more than 5 hours (urgent) and less than 1 day (express), therefore it is considered an express job and will be charged 125\$(100\$+ 25% surcharge).
- The user requested the order to be ready for Tuesday 10 a.m. This is less than 5 hours (urgent) and will be charged 150\$(100\$+ 50% surcharge).



Define Tax Settings

The system enables you to define a tax per job type. The requirement to define a job type specific tax is particular to some countries. In most countries you would want to use the default system tax settings.

For more information about taxes, refer to [Set-up Tax Packages](#) (on page 122).

The job type can inherit the system level tax settings or you can define a specific tax for this job type.

- 1 To access the tax settings click the **Tax and Urgency** tab or click **Continue** in the **PRICING** tab.
- 2 To define specific settings, select **Define tax settings** radio button.
- 3 Select the appropriate tax package.
- 4 Click **Save**.
- 5 Click Back to Job Type Library.

NOTE: When the job type is ready to be used, don't forget to clear the disable check box of the job type in the job type library.

Job Type Groups

In some cases, you might want to limit the users of a Print Buyer account to the use of some job types (especially if you are creating account-specific applications). This is accomplished by creating groups of job types and assigning these groups to Print Buyer accounts.

If you don't use the Job Type Groups option, the Print Buyers of an account will be able to see and use all of the job types in the system.

To create job type groups

- 1 Select **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE GROUPS**; the **JOB TYPE GROUPS** window opens.
- 2 Click **New Group**; the **NEW GROUP** dialog box opens.
- 3 Type a group name and click **OK**; the dialog box is closed and the group is added to the list. The new group is automatically selected.
- 4 Add job types to the group:
 - a Select one or more job types from the **JOB TYPES** list.

NOTE: Use the Shift and Ctrl keys on the keyboard for multiple selection.

- b Click **Add**; the selected job types are added to the selected group and displayed in the list on the right.
- 5 Remove job types from the group:
 - a Select one or more job types from the **JOB TYPES** list.
 - b Click **Remove**; the selected job types are removed from the selected group.



Templates

The most common use of iWay is for ordering repeat work and variable information work. This is achieved by using job templates. The template is similar to a job that is kept in a repository for the Print Buyer to order from. Unlike a job, a template has no quantity attached to it and no shipping information.

Templates are account related, so each Print Buyer account has its own template repository.

Template Types

Templates generally fall into one of the following templates types:

- **Static**—these are templates that have non-changing print information. They produce documents that look the same every time. For example, letterhead stationery and brochure templates are generally static type template.
- **Personalized**—these templates are generally used where a single set of variable values is needed. For example, this template is useful when individuals order their own business cards. In the business card example, the file that is provided by the Print Buyer to build the template would include the business card design, and the fields (name, title, contact info, and so on). The Print Buyer user would provide the individual values when placing an order.
- **VDP (variable data printing)**—in contrast to personalized templates that use a single set of variable data, VDP templates utilize multiple sets of variable data that is provided in a variable data file during ordering. For example, such a template would enable a user to place a single job order for business cards for an entire department.
- **Archive**—are VDP templates with a variable data file permanently connected to them. When the Print Buyer orders such a template, the list of variable data records is displayed and the user can choose which of the records to print.
- **Set**—templates based on composite Set job types. For more information, refer to [Set](#) (on page 184).
- **Inventory**—static templates that have been marked as inventory. For more information about inventory templates, refer to [Enabling a Template for Inventory](#) (on page 106).

Template Creation

You, as the Print Service Provider, can create templates for your Print Buyers. You can also allow your Print Buyers to create templates. When the Print Buyer creates a template, the options to define ordering sequence, quantity, pricing and tax are hidden.

NOTE: For templates created by the Print Buyer to be added to Superstore catalogs, the Superstore must use dynamic category population by queries, and the Print Buyer should place the templates into predefined folders.

There are two ways to create templates:

- Create a new template in the template repository.
- Save an existing job as template.



Template Structure

A template has similar properties to a job type - you can define intent, ordering sequence, quantity, pricing, tax and urgency for a template in much the same way as a job. A template has several sections that do not exist in a job type - content, file report and variable information.

Content

To create a template you must upload a content file.

Intent

When creating a template you start from the intent options of the job type and limit the printing option selections to what is required for this specific template, further simplifying the ordering process for the Print Buyer.

NOTE: The intent of a template is always a subset of the intent of the job type it is based on. A template cannot contain a joblet or a joblet option that does not exist in the job type.

File Report

The application runs a preflight process on the content file and compares it to the intent. It provides a report of the problems found in the file and any mismatch between the file and job type.

Creating a New Template

- 1 In the **TEMPLATE** repository, click **Create a new Template**; the **CHOOSE JOB TYPE** dialog box appears.
- 2 Select the job type on which the template will be based and click **Select**; the dialog box closes, a new template is created and opened in the editing window.

NOTE: The template is created in the same template repository folder that was selected when **CREATE A NEW TEMPLATE** was clicked.

Adding General Information to a Template

Use the **GENERAL PROPERTIES** tab to add general information to the template.

- 1 Click the **General Properties** tab.
- 2 Click **Change Thumbnail** to add an icon to the template; the **THUMBNAILS** dialog box opens.
- 3 Select an image or upload a new image.
- 4 Type a description (helps identify the template in the Superstore catalog).
- 5 Type a subject, ISBN number, author name and reference code, if required.
- 6 Type keywords (can be used for Superstore queries).
- 7 Type the notes (the production and finishing notes will appear in the job ticket of jobs based on this job type).
- 8 Click **Save & Continue**.



Upload File

At this point you have to upload the content of the template.

- 1 Click the **Browse...** button; the **CHOOSE FILE** dialog box opens.
- 2 Navigate to the file to be uploaded, select it and click **Open**.
- 3 Click **Save & Continue**; if the file format requires it (e.g. if you uploaded a file format other than PDF), the **PRINTING OPTIONS** tab might be displayed.

NOTE: If you encounter problems while uploading Microsoft Word or PowerPoint files, refer to the Troubleshooting guide for additional information.

- 4 If necessary, choose the appropriate printing options for your file.
- 5 Click **Save & Continue**; the **INTENT** tab is displayed.

Specifying the Intent

Use the **INTENT** tab to specify the job intent options of the template and the additional options for the Print Buyer to choose from.

Note the following points:

- The intent tab is based on the intent of the job type on which the template is based. You cannot add to the template joblets or options that do not exist in the job type.
- All the template intent joblets are automatically invisible - this means that the default options are selected for the Print Buyer automatically and cannot be changed. If you want to open specific options for the Print Buyer to choose from - make these joblets visible.
- The colors, page size and number of pages are usually based on the template content. Verify that the correct options are selected as default. It is recommended to leave these joblets invisible.

For additional information regarding the intent tab refer to [Specifying the Intent](#) (on page 101) in the Job Type section.

When you finish specifying the template intent click **Save & Continue**; the **FILE REPORT** tab appears.

Using the File Report

If the system encounters preflight or mismatch problems the **FILE REPORT** screen will be displayed. If the **FILE REPORT** is not displayed, continue on to the next section - [Variable Information](#) (on page 102).

- 1 Click the [Click here to review these problems](#) link; the detailed file report appears.
- 2 View the file report and look for the warning icons.
- 3 Handle the warnings as described below.
- 4 When you are done click **Save & Continue**.

Size Mismatch

If you encountered a size mismatch, the reason could be:

- For some reason the size was not identified by the system: go back to the intent and choose the correct size as default.
- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.



- The uploaded file has the correct information but the external dimensions are wrong due to orientation, crop or bleed problems: use the Crop & Bleed button to indicate the correct data.
- A size is missing in the job type definition: fix the job type and start again.

You also have the options to keep the file properties and ignore the job type intent specification or to keep the job intent and ignore the file properties. Both options are not recommended when building templates.

Color Mismatch

If you encountered a color mismatch the reason could be:

- For some reason the color was not identified by the system: go back to the intent and choose the correct color as default.
- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.
- A color is missing in the job type definition: fix the job type and start again.

You have the option to keep the file properties and ignore the job type intent specification, this is not recommended when building templates.

There is also a case where you might want to keep the job intent and ignore the file properties. For example, if you uploaded a process color file and the template color intent is black only. You might decide to create a black only template out of a color file. Practically it is a valid option, but it might be confusing to your Print Buyers, since the preview shows the actual file content and not the intent, so the Print Buyers will always see a color preview while printing a black only job.

Number of Pages Mismatch

If you encountered a number of pages mismatch, the reason could be:

- You chose the wrong job type: create the template again using the correct job type.
- You uploaded the wrong file: upload another file.
- The number of pages in the job type definition was not defined correctly: fix the job type and start again.

Non-embedded Fonts

If the fonts are not embedded in the file, it is best to create the file again with embedded fonts and upload it again. If you proceed with non-embedded fonts, the system will try to find the appropriate fonts on the server and if it doesn't find them it will substitute them with the most appropriate font.

Low Resolution Images

If you continue with low resolution images, the printed job will have quality problems. The only way to address this is to fix the file and upload again.

RGB Images

If you continue with RGB images, the system will convert the RGB images to CMYK according to its built-in algorithm and ICC profile. The printed job might have quality problems compared to the expectations of the Print Buyer. The only way to address this is to fix the file and upload again.

Variable Information

You can define whether the template is static, personalized or VDP.

For personalized and VDP templates you will create the variable data fields by using the



Selective Upload feature and then define the properties of these fields and the relationship between them by using the iForm Editor.

- 1 If you are creating a static template, select **Static** (if it isn't selected).
- 2 Click **Save & Continue** to continue to the **ORDERING SEQUENCE** stage.

If you want to create a variable data template refer to [Creating Variable Data Templates](#) (on page 108).

Defining the Ordering Sequence

The ordering sequence of a template is not displayed to the Print Buyer during template creation. This section is similar to the job type with the following changes:

- There is no File Upload stage.
- There is a Variable Information stage.
- No stages are mandatory.
- The File Report stage exists, but it is always disabled.

Template Ordering Sequence

Stage		Additional Options	Comments
Job Specification	Optional	Preview and summary	
File Report	Always disabled		
Variable Information	Optional	Preview and summary	
Preview	Optional	Summary	Enables properties modification.
Summary	Optional	Preview	Provides a summary of the job's intent and a price calculation
Job Details	Optional	Preview and summary	Enables the Print Buyer to modify the automatically created job name, enter cost center information and reference code information. Enables properties modification.

To define the ordering sequence

- 1 To access the **ORDERING SEQUENCE** tab click the **Ordering Sequence** tab or click **Save & Continue** in the **VARIABLE INFORMATION** tab.
- 2 For additional information refer to [Ordering Sequence](#) (on page 93).

Defining the Settings

The settings (quantity, pricing, tax and urgency) are the same as in the job type and inherit the settings of the job type. The Settings section is not displayed to the Print Buyers during template creation.


For additional information refer to [Ordering Sequence](#) (on page 93) in the Job Type section.




Managing Templates

- 1 To access the **TEMPLATE** repository of an account, select **ACCOUNTS -> STORE SETUP -> TEMPLATES**; the **TEMPLATES** library appears.
- 2 Select the required account.

Renaming a Template




- 1 In the **TEMPLATE** repository, select a template.
- 2 Click  (rename); the **RENAME** dialog box opens.
- 3 Type the new name and click **OK**; the dialog box closes and the template is renamed.

Deleting a Template

- 1 In the **TEMPLATE** repository, select a template.
- 2 Click  (delete); a confirmation dialog box appears.
- 3 Click **Yes**; the template is deleted.

Copying a Template




Templates can be duplicated in the same account or copied to another account. When the template is copied to the same account its name must be changed.

- 1 Select one or more templates (using the Shift and Ctrl keys on your keyboard).
- 2 Click  (copy); the templates are copied to the clipboard and the  (paste) button is enabled.
- 3 Navigate to the account or folder in which you want to place the templates and click  (paste); a duplicate copy of the templates is created in the new location.

NOTE: If the template was copied to the same account, the name of the new template is based on the original template with a number extension.

Moving a Template

Templates can be moved to another folder in the same account or to another account.

- 1 Select one or more templates (using the Shift and Ctrl keys on your keyboard).
- 2 Click  (cut) the templates are copied to the clipboard and the  (paste) button is enabled.
- 3 Navigate to the account or folder in which you want to place the copy the templates and click  (paste); the templates are moved to the new location.

Editing a Template

- 1 In the **TEMPLATE** repository, select a template.
- 2 Click **Edit Properties**; the template editing window opens.

For detailed information refer to the [Creating a New Template](#) (on page 100).



Adding an Archive to a Template

- 1 In the **TEMPLATE** repository, select a template.
- 2 Click **Edit Properties** and select the **Variable Information** tab.
- 3 Click **Manage Archive**; the **MANAGE TEMPLATE ARCHIVE** dialog box opens.
- 4 To manually create a database:
 - a Click **New**; a record is added.
 - b Type the text data in the text fields and select or upload images in the image fields.
 - c Repeat for all the records.
- 5 To import a database:
 - a Click **Import Database**; the **UPLOAD VARIABLE DATA DATABASE** dialog box appears. If a warning regarding an existing database appears, select **Overwrite Database** or **Add to Database**.
 - b Find the database (CSV format) on your disk and click **Open**.
 - c Click **Next**.
 - d If the database contains a first row with the fields names, select the check box indicating so.
 - e Map the fields of the database to the fields of the template.
 - f Click **Next**; the database is imported and the records appear in the **MANAGE TEMPLATE ARCHIVE** dialog box.
- 6 Click **Save**; the dialog box closes, the database archive is attached to the template.

Managing the Workflow Policy of a Template

By default, the user goes directly to the Shopping Cart when ordering a Set job. To require the user to enter additional information, or to review (and approve) a preview of the job do the following:

- 1 In the template repository, select a template.
- 2 Click **Workflow Policy**; the **WORKFLOW POLICY** dialog box opens.
- 3 To require a preview of the job during ordering, enable the **Require Preview** checkbox and select the type of preview, **JPG** or **PDF**. You can also require the user to accept the preview in order to continue by enabling the specified checkbox.
- 4 To require a **REFERENCE CODE** during ordering, enable the **Force Reference Code** checkbox.
- 5 To require additional **INPUT FIELDS** during ordering, enable one or more of the relevant checkboxes: **Job Name**, **Reference Code** and/or **Cost Center**.

Managing the Access Rights of a Template

- 1 In the **TEMPLATE** repository, select a template.
- 2 Click **User Access**; the **USER ACCESS** dialog box opens with the **GROUPS** tab selected.
- 3 To manage the access rights per group:
 - a Select the **GROUPS** tab (if it is not selected).
 - b Select a group name in the list on the left.



- c Click **Assign (No Access)** if the users of this group are not to be allowed to order this template from the template repository view or to manage it in the repository.
 - d Click **Assign (Order only)** if the users of this group will be allowed to order this template from the template repository view but not to manage it in the repository.
 - 4 To manage the access rights per user:
 - a Select the **Users** tab.
 - b Select a user name in the list on the left.
 - c Click **Assign (No Access)** if the users of this group are not to be allowed to order this template from the template repository view or to manage it in the repository.
 - d Click **Assign (Order only)** if the users of this group will be allowed to order this template from the template repository view but not to manage it in the repository.

Sending a Template as MailToPrint

- 1 In the **TEMPLATE** repository, select a template.
- 2 Click **MailToPrint**; the Send **MAILTOPRINT PROPERTIES** dialog box opens.
- 3 Define the MailToPrint properties:
 - a Define whether the job needs to be approved by a supervisor or if it is created after the customer approves the job - in this case, you can also select whether the price is shown or not.
 - b Select whether to show the reference code input field.
 - c Select whether to require the user to login.
 - d Define how many times the email message can be used for ordering.
 - e Select the maximum number of copies to be ordered via the email message.
 - f Type the message subject.
 - g Type the recipient email, or choose from the address book.
 - h Select the default login profile.
 - i Type the default reference code.
 - j Type the message header.
- 4 Click **Send MailToPrint**; a confirmation message is displayed and an email is sent to the specified email address.
- 5 Click **OK** to close the confirmation message.
- 6 Click **Close** to close the **SEND MAILTOPRINT PROPERTIES** dialog box.

Enabling a Template for Inventory

By enabling a template for inventory, you enable a Print Buyer to print jobs for storage rather than immediately delivery. By working with the inventory templates, you can produce larger numbers of job copies than are immediately needed and therefore reduce production costs while maintaining the ability to ship jobs immediately, when the need arises.

NOTE: Only static and Set templates can be inventory-enabled.



To create an inventory template:

- 1 In the **TEMPLATE** repository, select a template.
 - For Set templates: Select the **Enable Inventory for this template** check box; the **INVENTORY INFORMATION** link appears
 - For Static templates: Click Edit Properties -> Variable Information tab and select the **Enable Inventory for this template** check box; the **INVENTORY INFORMATION** link appears.
- 2 Click the **Inventory Information** link; the **INVENTORY INFORMATION** dialog box appears.

NOTE:

At this stage, you can define the physical location of the inventory in your warehouse. If, however, you have an inventory of this template already in storage, you can adjust the settings to reflect the current status.

- 3 Complete the fields with valid data.
- 4 Click **OK** to save the settings and to close the dialog box.

Managing Inventory Information

In the Inventory Information dialog box you can define:

- Number of copies in Customer Inventory – this field keeps track of the current number of copies in the inventory, based on the ordering to and from inventory by the Print Buyer. This number is updated automatically, but you can initialize it to reflect the starting situation of your inventory.
- Number of copies in Risk Inventory – you have the flexibility to print more copies to inventory than ordered by the Print Buyer and collect the money for printing these copies when the Print Buyer orders prints for inventory and you move these copies from the risk inventory to the Print Buyer's inventory without printing. The Print Buyer does not see this quantity in the inventory.
- The total number of copies – provides you with the real inventory information. This data is not displayed to the Print Buyer.
- The inventory location.
- The minimum number of copies in inventory – when the customer inventory level reaches this number an automatic notification message is issued to the Print Buyer.

Creating a New Template from an Existing Job

The simplest way to create a new template, is by saving an existing job as template. This feature is especially useful for your Print Buyers.

- 1 Navigate to **TASKS -> TRACK JOBS**; the **SEARCH** window appears.
- 2 Find the required job using the search or open one of the status specific queues.
- 3 Click **Save as Template**; the **SAVE AS TEMPLATE** dialog box opens.
- 4 Type the template attributes.
- 5 Select the folder in which you want the template to be saved, you can create a folder at this point, if required.
- 6 Click **OK**; a template is created and saved in the selected location.

You can now open this template and modify any of its parameters. For detailed information refer to [Creating a New Template](#) (on page 100).

NOTE:

The created template belongs to the same Print Buyer account which was used to order the job.



Creating Variable Data Templates

- 1 Select an existing static template or create a new one.
- 2 Select the **Variable Information** tab.
- 3 Select **Personalize** or **VDP** template type; the **SELECTIVE UPLOAD** and **IFORM EDITOR** buttons are enabled.

Select Variable Data Fields


To create a variable data template in iWay, you start with a high quality file which is uploaded to the application and converted into PDF format. You use the Selective Upload feature to identify all of the text strings and images that are to be converted into variable data fields.

- 1 Click **Selective Upload**; a warning message is displayed.
- 2 Click **Yes**; a **MODIFY PDF** dialog box opens.
- 3 Select the variable fields.
- 4 For creating text fields follow the procedure [Selecting Variable Text Fields](#) (on page 108).
- 5 For creating image fields follow the procedure [Selecting Variable Image Fields](#) (on page 108).
- 6 Click **OK** in the **MODIFY PDF** window; the **SELECTIVE UPLOAD FONT REPORT** window is displayed.
- 7 Ensure the correct fonts are chosen.
- 8 Click **OK** in the **SELECTIVE UPLOAD** window; the **SELECTIVE UPLOAD** window closes and the **IFORM EDITOR** opens.


NOTE:

Each time you use Selective Upload in a template, the specifications you previously defined for the template in the iForm Editor are lost. Therefore, when you use iForm Editor on a relatively small file, it is recommended that you define every single field, so that later on, you do not need to use Selective Upload again to make changes.

Selecting Variable Text Fields

- 1 In the **MODIFY PDF** dialog, select  (Select Text area) from the field selection list.
- 2 In the PDF display, select the text string that will become a single variable data field. It is important to decide in advance how to break down the fields (for example, whether to define a single, full name field, or to define two separate fields for first name and last name).
- 3 In the **SELECTED FIELDS** dialog box, specify the field name. For example, in the PDF select *John Smith*, and in the Selected Fields window, specify *Full Name* as the name of the field.

Selecting Variable Image Fields

- 1 In the **MODIFY PDF** window, select  (Select Graphic/Image area) from the text selection tool.
- 2 In the PDF display, select the image that will become a variable data field.
- 3 In the **SELECTED FIELDS** dialog box, specify the field name.



Defining Variable Data Field Properties

Use the iForm Editor to specify:

- Text alignment and boundaries properties.
- Font properties.
- Properties that govern the behavior of fields during ordering.
- Properties that control the display of fields in the printed job.

To define the basic field properties

- 1 In the **DEFINE FIELDS** tab of the **VARIABLE INFORMATION** window, click the **iForm Editor** button (if it didn't open automatically); the **IFORM EDITOR** window opens, along with a **LAYOUT PREVIEW** dialog box.
- 2 For each field adjust the settings as necessary. Refer to the detailed tasks below.
- 3 If necessary access the **ADVANCE OPTIONS** area. Refer to the detailed tasks below.
- 4 Click **OK** in the **IFORM EDITOR**; the **IFORM EDITOR** is closed and the **DEFINE FIELDS** tab in the **VARIABLE INFORMATION** is displayed again.

Text Fields

iForm Editor enables to define text fields' input rules and behavior, alignment and boundaries, and font properties.

Defining Input Restrictions on Fields

You can define several input restrictions on fields:

- No restrictions.
- A field is mandatory.
- A field is mandatory and its value must differ from the default value.
- A field's value must be changed or be left empty.

To mark a field as mandatory

- 1 Select the field.
- 2 Select **Input Field text cannot be Blank** in the **FIELD INPUT** list.

To mark a field as mandatory and different from the default

- 1 Select the field.
- 2 Select **Input Field text must be changed and cannot be Blank** in the **FIELD INPUT** list.

To mark a field as must be changed or left empty

- 1 Select the field.
- 2 Select **Input Field text must be changed or empty** in the **FIELD INPUT** list.

Defining Non-Editable Fields

Non-editable fields are used for captions. The caption has to be made variable in order to be able to move it on the template according to values of other fields, but requires no input from the user during ordering.

- 1 Select the field.
- 2 Select the **Non-Editable** check box.



Defining Non-Printable Fields

Non-printable fields are used for data collection.

- 1 Select the field.
- 2 Select the **Do not print this field** check box.

Defining User Moveable Fields

User moveable fields can be interactively moved by the Print Buyer during ordering.

- 1 Select the field.
- 2 Select the **User moveable** check box.

Defining Pinned Fields

Pinned fields are useful in cases when a template contains some fields that are to be updated manually for a certain job, and other fields that will be uploaded from a database. You need to mark the manually updated fields as Pinned, the application will enable the Print Buyer to type the values of Pinned fields and will then enable to upload a variable database to the other fields.

- 1 Select the field.
- 2 Select the **Pinned** check box.

Defining the Target Audience of a Field

The target audience of a field enables to make a field visible or invisible according to the user type viewing the variable data form.

- 1 Select the field.
- 2 Select the appropriate option in the **VIEW BY** list.

Defining Field Format

Field format rules warn the user when the data entered is not formatted correctly, and in some cases corrects the typed data. The formats are:

- Special formats for phone numbers and zip codes.
- Special formats for emails.
- ALL UPPER CASE, all lower case, Sentence case or Initial Caps.
- Limit the acceptable characters.
- Other, custom, formats.

NOTE: The field format correction and warning is applied only to manual entry of data using the variable data form (job personalization).

- 1 Select the field.
- 2 Select the required format from the **FIELD FORMAT** list.
- 3 Or click **Field Format** link for more options.

Defining Drop-down Menu Fields

Drop-down lists are used to simplify the user's interaction with the application, to improve accuracy of data input and to reduce costly mistakes.

There are two types of drop-down lists – simple and complex.

NOTE: It is important to remember that while the drop-down lists have many benefits, changing them (adding, editing or removing values) requires editing the template. Therefore, it is preferable not to create drop-down lists for fields which values might need to be changed by users.



Simple drop-down lists are used to limit the number of options for a specific variable field, and at the same time to facilitate fast and accurate entry of data when creating the print Job. A common example would be to prepare a drop-down list of titles: Mr., Mrs., Dr., etc.

Complex drop-down lists are used in cases when the values of several fields are interdependent. In such a case you can create a drop-down list on one field (the leading field), and connect each value in drop-down list to a set of values in other fields. I.e. a change in one field will cause a pre-defined change in other fields as well. A common example of such a case would be a company with offices in several locations. When ordering a business card or letterhead, an employee has only to select a location and the appropriate address, city, fax, etc. will be filled in automatically.

To define a simple drop-down menu:

- 1 Select the field.
- 2 Select **Dropdown Menu** in the **FIELD TYPE** list; to the right of the **FIELD TYPE** appear a drop-down icon and two new buttons: **ADD LIST** and **LIST MANAGEMENT**.
- 3 Click **Add List**; the **ADD LIST** dialog box appears.
- 4 Enter several values, use comma as a separator between the values.
- 5 Click **OK** to save the list and close the window.

To define a complex drop-down menu:

To simplify this task it will be presented through an example. For the sake of the example we will assume that you have a leading field called Office Name and two fields connected to it: Office Address and Office Fax.

The instructions below are for creating the table manually. You can also import a table that you have created in Excel.

- 1 Select the field.
- 2 Select **Dropdown Menu** in the **FIELD TYPE** list; to the right of the **FIELD TYPE** appear a drop-down icon and two new buttons: **ADD LIST** and **LIST MANAGEMENT**.
- 3 Click **List Management**; the **LIST MANAGEMENT** dialog box appears.
- 4 Click **Add Table**; the **NEW TABLE** dialog box opens.
- 5 Type the table name (**Office**) and click **OK**.
- 6 Create the primary column:
 - a Select the name of the leading field (Office Name) in the list.

NOTE:

You will be creating several columns of values, each column connected to one field. Generally, you can create the columns in any sequence you wish, and then define which of these columns is the primary (leading) field. It is, however, more convenient to start with the leading field and then add the fields dependent on it.

- b Type the first value in the empty text field (**New York**).
 - c Click **Add Row**; another row is added to this column.
 - d Type another value (**London**), continue adding rows and values as necessary.
 - e Select the radio button above the Office Name column to indicate that this is the **PRIMARY COLUMN** (leading field).
- 7 Create connected fields:
 - a Click **Add Column**; another column is added to the table. The new column has the same number of rows as the primary column.
 - b Select the name of a field to be changed based on the value of the primary



column in the list (Office Address in our example), and type the values for this field for each of the values in the primary column.

- c Add a column for another connected field (Office Fax).

8 Click **OK** to save the table and close the window.

NOTE:

Look at the field names: the leading field has a drop-down list icon. All the connected fields are marked with a lock icon and have the same color rectangle marking that they belong to the same drop-down list group. Had the form contained more than one drop-down list field, each group would have been marked by a different color.

Defining Composite Fields

Composite fields are used when you have a paragraph that is not variable and inside it variable strings, the length of which affects the flow of text in the paragraph.

A good example would be a direct mail campaign for a supermarket, promoting a specific product in the supermarket according to the preferences of the recipient: "In our *fruit* department you will find fresh *pineapples* every day!"

The sentence in this example is the "composite" field, while the name of the department and the product are its children fields. Most of the standard field properties can be applied to the children fields.


- 1 Select the field.
- 2 Select **Composite** from the **FIELD TYPE** list; the **COMPOSITE** properties are displayed.
- 3 Select the children fields:
 - a Select the word or words you want to become one field and click  (Word Selection); the selected string is highlighted and a field is added to the list under the composite field.
 - b Repeat for additional strings.
- 4 Click **Save**.

Image Fields

iForm Editor enables to define image fields' input rules and behavior, and alignment and boundaries.

Defining Input Restrictions on Fields

You can define several input restrictions on image fields:

- No restrictions.
- A field is mandatory (an image must be selected).
- A field is mandatory and its value must differ from the default value (default image must be changed and an image must be selected).
- A field's value must be changed (default image must be changed).

To mark a field as mandatory

- 1 Select the field.
- 2 Select **An Image Must Be Selected** in the **FIELD INPUT** list.



To mark a field as mandatory and different from the default

- 1 Select the field.
- 2 Select **Default Image Must Be Changed and an Image Must Be Selected** in the **FIELD INPUT** list.

To mark a field as must be changed

- 1 Select the field.
- 2 Select **Default Image Must Be Changed** in the **FIELD INPUT** list.

Defining Non-Editable Fields

- 1 Select the field.
- 2 Select the **Non-Editable** check box.

Defining Non-Printable Fields

Non-printable fields are used for data collection.

- 1 Select the field.
- 2 Select the **Do not print this field** check box.

Defining User Moveable Fields

- 1 Select the field.
- 2 Select the **User moveable** check box.

Defining Pinned Fields

- 1 Select the field.
- 2 Select the **Pinned** check box.

Defining the Target Audience of a Field

- 1 Select the field.
- 2 Select the appropriate option in the **VIEW BY** list.

Controlling the Image Upload Policy

You can define several image upload options:

- Do not allow image upload – will force the user to select an image from the available selection.
- Allow upload to the job folder – the user will be able to upload the image, but it will be available only for this job.
- Allow upload to the personal folder – the user will be able to upload the image to a personal folder, hence only he will be able to use this image while ordering in the future.
- Allow upload to the selected folder – the user will be able to upload the image to a predefined folder in the public library.
- Use access to the public image library – the user will be able to upload the image to any folder in the public image library.

To define the policy

- 1 Select the field.
- 2 Select the required **IMAGE UPLOAD** option.



Controlling the Image Selection GUI

You can control whether the images for selection will be displayed during ordering as a drop-down list or as a slider control.

- 1 Select the field.
- 2 Select the required **IMAGE SELECTION GUI** option.

Enabling the Image Editor

When the Image Editor is enabled, the user after uploading an image can crop, scale or rotate it as needed using the interactive Image Editor tool.

- 1 Select the field.
- 2 Select the **Use Image Editor** check box.

Advanced Options

In many cases of generic designs for personalization, specific values used in the Job can affect the design. The iForm Editor Advanced options are designed to deal with these situations.

Advanced Properties Example

In this example each one of the employees for whom a business card should be printed, requires different data fields. One doesn't have a mobile phone, another doesn't have a mobile or email.

Name	Title	Tel	Mobile	Email
Janice Jones	President	444-555123	422-555345	janice@global.com
John Smith	Vice President	444-555125	422-555348	john@global.com
James Cook	Supervisor	444-555321		
Carol Donaldson	Project Manager	444-555327		carol@global.com

The options for dealing with this type of situation are:

- Create one design and leave gaps in it. This option is not valid in professional quality print jobs.
- Create several different designs. This is a valid and common solution but it requires maintaining different design versions and requires an extra decision by the user as to when to use each design.

The iForm Editor Advanced Options address this issue by defining flexible rules that deal with these changes ad-hoc:

- **Position Links** handle the vertical and horizontal position of fields relative to the position of other fields. This can be related to the size of a fields or to the absence of data in a field.
- **Suffix** enables you to specify a constant suffix in a field, so that the ordering user has to type only the changing information, a situation that is common to emails. This reduces the unnecessary typing of data and thus possible errors.
- **Group Centering** is used to balance "white space" resulting from such changes as vertically or horizontally modified position links, changes in the number of lines in a multiline field, or horizontal centering of fields with varying length.
- **Empty Fields** are used to remove labels and captions for fields that have been left blank.



- **Identical Input Fields** are used to specify several fields that use the same data, so that the ordering user has to enter the data only once and all the connected fields are populated automatically. This reduces unnecessary typing of data and thus possible errors.
- **Style Selection** is used for instances where a field's style (font, font size, and font color) might require adjustment.

To define advanced options

- 1 Click **Advanced Options**; the **ADVANCED OPTIONS** dialog box opens with the **POSITIONS LINKS** tab selected.
- 2 Click **OK** when you finish modifying the **ADVANCED OPTIONS**.

Defining Position Links

- 1 Select the field you would like to re-position (for example, City) and click **Add**; the field is added into the Moved **FIELD TEXT** box and a **LEADING FIELD** drop-down list appears.
- 2 Select the empty field (for example, Address 2) in the **LEADING FIELD** and select the **VERTICAL LINK** check box.
- 3 This ensures that the vertical location of the field being repositioned (City) will be affected by the vertical position (or the absence) of the other field (Address 2).
- 4 Leave the relative positioning radio button at its default selection.
- 5 A text message at the bottom of the window indicates the nature of the change (for example, "In case 'Address 2' is empty 'City' will be placed in 'Address 2' position").
- 6 Repeat the process for each field that needs repositioning.
- 7 Click **Apply**.

Defining a Suffix

- 1 In the **ADVANCED OPTIONS** window, click the **Suffix** tab.
- 2 Select the field where the suffix does not change (for example, Agent email) and click **Add**. The field is added to the **FIELDS WITH SUFFIX** area.
- 3 Fill in the suffix (for example, @royalcargo.com) in the Field Suffix field.
- 4 Click **Apply**.

Defining Advanced Group Centering

- 1 In the **ADVANCED OPTIONS** window, click the **Group Centering** tab.
- 2 Create a block of fields to act as a group by clicking **New Group** and entering a name for the group of fields (for example, Customer).
- 3 Indicate whether horizontal or vertical centering should be performed for the group.
- 4 For each field that will be in the group, select the field and click **Add**.
- 5 Click **Apply**.

The application calculates the enclosing rectangle for the fields in the group and the vertical or horizontal center of the rectangle. When a job is ordered, the application checks the existing fields in the order, recalculates the enclosing rectangle and aligns the new vertical or horizontal center to the original point. It then positions the text accordingly.



Handling Empty Fields

- 1 In the **ADVANCED OPTIONS** window, click the **Empty Fields** tab.
- 2 For each field whose label should be removed if the field is empty, select the field and click **Add**. The field is added to the **EMPTY FIELDS DEFINITIONS** area.
- 3 When done, click **Apply**.

Handling Identical Input Fields

- 1 In the **ADVANCED OPTIONS** window, click the **Identical Input Fields** tab.
- 2 Click **New Group** and enter a name for the field (for example, Customer Name).
- 3 For each field sharing identical information with another field, select the field and click **Add**.
- 4 When done, click on **Apply**.

Defining Advanced Style Selection

- 1 In the **ADVANCED OPTIONS** window, click the **Style Selection** tab.
- 2 To adjust a style item for a group of fields:
 - a Click **Add Group**. The **ADD GROUP** dialog box appears.
 - b Specify the **GROUP NAME** (for example, Customer).
 - c Select the type of item (Font, Font Size, or Color) in the **GROUP TYPE** drop down box. and click **OK** in the **ADD GROUP** dialog box.
 - d Add fields to the group by selecting each field and clicking **Add**.
 - e Select the allowable style item values (for example, select the allowable fonts if you selected Font from the drop down list) for the fields in the group.
 - f Repeat this for each group and style combination.

Arrange Fields

You have the option to change the sequence of the variable data fields and to break the variable data form that is filled by the Print Buyer during ordering (when dealing with personalized templates) into several wizard pages. The ability to break the form into several pages is important in the following circumstances:

- The form contains a large number of variable data fields.
- The template has several pages with variable data fields on each page.
- The variable data fields have different context. For example in a real estate direct mail postcard some fields are for the real estate agent, some fields for the advertised property, and some for the recipient.

The splitting of the form to several tabs can be done manually or in case of multi-page templates—automatically.

Changing the Sequence of Fields

- 1 Select the **Arrange Fields** tab or click **Save & Continue** in the **VARIABLE DATA** tab.
- 2 Use the **Move Up** and **Move Down** buttons to change the sequence of the variable information fields.
- 3 Click **Save & Continue** to continue to the Ordering Sequence stage.



Splitting Fields into Several Tabs

If you want to split the variable information form into several tabs, decide if the split will be logical or by pages.

To split manually:

- 1 Select the field which you want moved to the next tab and click **Add Tab**; the **CREATE VI TAB** dialog box opens.
- 2 Type the tab name and description and click **OK**; a tab line is added.

To split automatically:

Click **Split Steps by Pages**; the list of variable information fields is broken into several tabs according to the number of pages in the template. The sequence of steps is changed automatically, if required.



Pricing

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Introduction

This chapter describes the pricing and tax calculation features of iWay. It provides an overview, explanation of concepts and step-by-step instructions for performing all the pricing related tasks.

The chapter is composed of the following sections:

- [Pricing Overview](#) (on page 118) – a comprehensive overview of pricing concepts and options.
- [Setup](#) (on page 121) – describes how to define settings that enable the system to automatically generate a price and to display it online to the Print Buyer.
- [Price Management](#) (on page 129) – describes tools to manage the pricing data and to view and modify the pricing of jobs and orders.
- [Line Item Library](#) (on page 120) – provides an overview of the line item library and general library management tasks.

Pricing Overview

iWay provides a comprehensive feature for pricing jobs and orders. Whenever the Print Buyer is viewing the job summary or clicking Get Quote in the shopping cart, the pricing mechanism is activated to calculate the *job price*. Then, during the checkout process, after the shipping details are supplied, the pricing mechanism is activated again to calculate the *order price* which includes the urgency surcharges, discount, shipping price, and taxes.

Concepts

The pricing feature introduces some basic concepts. While understanding these concepts might not be critical for daily operation of the application, you may find them beneficial for getting the maximum benefit out of the pricing mechanism.



Calculation Model

A calculation model is an algorithm that calculates a job's pricing and production data. The calculation model contains a *planner component*, an *estimation model* and a *decision component*.

The system is supplied with the following job pricing calculation models:

- Intent
- Manual
- Excel (part of an optional module)

You select the job calculation model when defining job type and template pricing, or in case of Excel pricing, when setting up an account.

A separate calculation model is supplied for order pricing.

Intent Calculation Model

The intent calculation model plans the job's production and calculates the job's pricing based on the intent selections made by the Print Buyer.

Manual Calculation Model

The manual calculation model plans the job's production, but does not provide an automatic price. You will need to provide the price manually when a job is created.

Excel Calculation Model (Optional)

The Excel calculation model calculates the price according to an Excel spreadsheet that you provide. The Excel calculation model is part of the optional iWay Business Links module.

For more information, refer to [Excel Pricing](#) (on page 175).

Planner Component

The planner component is the first part of the job pricing calculation model. It is an algorithm that checks the job's intent and the output devices available to produce the job, filters only those devices that match the color, page size, and quality intent of the job, and generates several production plans for producing the job.

When you are defining the job type and template pricing, you can set-up parameters for the planner component. These parameters are the output devices and imposition parameters for printing the job type or template. This data will limit the planner component to check for possible production options only among predefined devices and imposition options, otherwise the planner will search all available devices and generate the production plans automatically.

Production Plan

A set of data generated by the planner component that includes imposition constraints and output device selection. In most cases several production plans are generated for each job.

Estimation Model

An algorithm that calculates the price of a job for each specific production plan, based on the calculation model used.

Result Matrix

A pricing table generated by the estimation model for each production plan. Comprises a list of result line items with their quantities, associated cost and price.



Decision Component

An algorithm that chooses the most appropriate production plan from the list of available plans. The decision is made according to the following parameters:

- Cheapest cost, if pricing by press sheets or area, otherwise...
- The first device and press sheet size in the list.

Line Item

A basic pricing unit in the system which is used to calculate all the prices in the system.

A line item includes:

- Pricing units.
- Base cost.
- Cost per number of units.
- Base price.
- Price per number of units.

The pricing units supported by the system, for intent pricing line items, are: copies, sheets, total pages, square inch, and square cm.

In addition the application manages line items for taxes, shipping, etc. These line items have other units, such as per cent (%) and weight.

Result Line Item

A line item is generated by the estimation model, when creating the result matrix.

Line Item Library

The line item library stores all of the line items in the system. Working directly in the line item library is, therefore, very efficient and convenient. It is, however, also very risky, as you might, by accident, change the wrong line item, or change the right line item, but not realize the full extent of the resulting effect. Be sure you are well familiar with the line item library and the objects it affects, before you make modifications.

Tax Package

A component comprising one or more taxes that need to be applied to a job, an order or a shipping cost. When the tax package comprises more than one tax (for example in US or Canada), the tax package will also include information on how the individual taxes are calculated.

The individual taxes can be limited to geographical areas to accommodate local tax regulations.

Pricing Process Overview

The pricing process comprises the following stages:

- **Setup** (on page 121) – you set-up all the data and parameters required for pricing.
- **Job Pricing** (on page 121) – the application automatically calculates the price of jobs.
- **Order Pricing** (on page 121) – the application automatically calculates the price of orders.
- **Price Management** (on page 122) – you view and modify the line items, job and order prices as necessary.



Setup

The following section provides information on how to set-up taxes and job pricing.

Order Pricing Setup

The following settings have to be performed for the order pricing to function properly:

- Define the system-wide urgency surcharges in **PRINT SETTINGS -> PRICING -> BUSINESS**. For additional information, refer to [Managing Output Devices](#) (on page 30).
- Define all the applicable taxes in **PRINT SETTINGS -> PRICING -> TAX LIBRARY**.
- Define the shipping methods' pricing and tax (if shipping tax is required) in **PRINT SETTINGS -> SHIPPING -> SHIPPING METHODS**. For additional information, refer to [Defining Shipping Methods](#) (on page 41) .
- Define the tax and discount in **ACCOUNT -> ACCOUNT SETUP -> PREFERENCES**. An account can inherit the system default tax, or you can define an account level tax. For additional information, refer to [Modifying Account Preferences](#) (on page 48).
- Define the urgency and tax for job types that should not inherit the system settings. For additional information, refer to [Job Business Flow](#) (on page 82).
- Define the urgency and tax in templates that should not inherit the settings of the job type. For additional information, refer to [Job Business Flow](#) (on page 82).

Job Pricing Setup

The following settings have to be performed for the job pricing to function properly:

- Define the job type pricing – you can use either intent-based or manual *calculation model*.
- Define the template pricing – a template can inherit the pricing setup of the job type, or you can define for it specific pricing. This way you can provide different price lists for different accounts, based on your contractual agreements.
- Define an Excel based pricing model for an account (optional).

Job Pricing

The job pricing mechanism is activated whenever the Print Buyer views the job summary or clicks Get Quote in the shopping cart.

NOTE:

When a job is in the shopping cart, there are still no shipping details (date, method and address) attached to it. Therefore, the system cannot calculate shipping related data at this stage. I.e. it does not display taxes, shipping cost or urgency surcharges in the shopping cart.

The job pricing calculation is applied by the system hierarchically, as follows:

- 1 Use job level pricing (manual) if it has been defined, otherwise...
- 2 Use template pricing if it has been defined, otherwise...
- 3 Use Excel pricing if it has been defined for an account, otherwise...
- 4 Use job type pricing if it has been defined, otherwise...
- 5 Price Not Available is displayed.

Order Pricing

The order pricing mechanism is activated during the checkout process, after the shipping details are supplied. It calculates the final job price (in case urgency surcharge needs to be applied) and the order price which includes the discount, shipping price and taxes.



Order Tax Hierarchy

The tax calculation is applied hierarchically. The system checks if a tax was specified at the first level, if it was – the tax calculation is performed, if not it checks if a tax was specified at the next level, as follows:

- 1 Use job tax, if it has been defined, otherwise...
- 2 Use template tax, if it has been defined, otherwise...
- 3 Use job type tax, if it has been defined, otherwise...
- 4 Use account tax, if it has been defined, otherwise...
- 5 Use system tax.

Price Management

Price management is performed in several places:

- In the job tracking area you can view and modify the pricing data of jobs and orders (based on job status limitations).
- In the line items library you can view and modify the line items and result line items.
- In the production queue you can view and modify the pricing data of jobs

Setup

The following section provides information on how to set-up taxes and job pricing.

Set-up Tax Packages

In order to be able to assign taxes to specific objects such as job types, templates or accounts, you first need to create tax packages. In many cases you would need only one tax package, containing a single tax.

This section provides a tax overview and describes how to create:

- A single-tax package
- A multiple-tax package
- An area-independent tax
- An area-dependent tax

Area-dependent Taxes

You can define area-dependent taxes. There are two area dependency options:

- Dependent on Delivery Address is appropriate for situations when the tax is related to the shipping destination of an order.
- In some countries the tax is related to the primary business location of the Print Buyer, in which case Dependent on Billing Address should be selected.

The same area definition rules apply to both area-dependent taxes.



Multiple Tax Calculation

Usually when multiple taxes are applied to a product, each tax is calculated on the base product price and then added to the total.

Example:

Product selling price		\$100.00
Tax A	5%	\$5.00
Tax B	10%	\$10.00
Total Price		\$115.00

Sometimes the tax regulations require to apply one tax on top of the sub-total of the product selling price plus another tax. For example in the Quebec and Prince Edward Island provinces of Canada, the PST (Provincial Sale Tax) is charged based on the total of the selling price plus GST (Goods and Services Tax).

Example:

Product selling price		\$100.00
Tax GST	5%	\$5.00
Sub-total		\$105.00
PST	10%	\$10.50
Total Price		\$115.50

Managing the Tax Packages

Use the tax packages library to create, edit and delete tax packages.



Creating a Single-tax Package

- 1 Select **PRINT SETTINGS -> PRICING -> TAX PACKAGES**; the tax packages library appears.
- 2 Click **New** in the **TAX PACKAGE** list on the left; a new tax package is added to the list.
- 3 Type the tax package name and description.
- 4 Click **Save**; the tax package name is updated in the list on the left.
- 5 Click **Add Tax**; the **TAX LIBRARY** dialog box appears. You can choose an existing tax from the library or create a new one:
 - o To create a new tax refer to the [Creating a Simple Tax](#) (on page 124) task or [Creating an Area-dependent Tax](#) (on page 125) task.
 - o To add an existing tax select a tax name from the list and click **Add**.
- 6 Click **Save**.

Creating a Multiple-tax Package

- 1 Select **PRINT SETTINGS -> PRICING -> TAX LIBRARY**; the **TAX LIBRARY** appears.
- 2 Click **New** in the **TAX PACKAGE** list on the left; a new tax package is added to the list.
- 3 Type the tax package name and description.
- 4 Click **Save**; the tax package name is updated in the list on the left.



- 5 Click **Add Tax**; the **TAX LIBRARY** dialog box appears. You can choose an existing tax from the library or create a new one:
 - To create a new tax refer to the [Creating a Simple Tax](#) (on page 124) task or [Creating an Area-dependent Tax](#) (on page 125) task.
 - To add an existing tax select a tax name from the list and click **Add**.
- 6 Add more taxes.
- 7 If the sequence of applying the taxes is important, use the   buttons (move up and move down), to change the sequence of the taxes.
- 8 If there is a need to include one or more of the first taxes in the subtotal on top of which the next tax is calculated, select the **Include in sub total** checkbox for these taxes.
- 9 Click **Save**.


Setting a Default Tax Package

Every customer account and job type automatically uses the default tax package, unless you select a different tax package.

- 1 Select **PRINT SETTINGS -> PRICING -> TAX LIBRARY**; the tax packages library appears.
- 2 Select a tax package from the list on the left.
- 3 Click **Set as Default**; the selected package is marked as **SYSTEM DEFAULT**.


Duplicating a Tax Package

Duplicating a tax package is a fast way to create a new package that is similar in some aspects to an existing one.

- 1 Select **PRINT SETTINGS -> PRICING -> TAX LIBRARY**; the tax packages library appears.
- 2 Select a tax package from the list on the left.
- 3 Click  (duplicate); a copy of the selected package is created and added to the list.

Deleting a Tax Package

Duplicating a tax package is a fast way to create a new package that is similar in some aspects to an existing one.

- 1 Select **PRINT SETTINGS -> PRICING -> TAX LIBRARY**; the tax packages library appears.
- 2 Select a tax package from the list on the left.
- 3 Click  (delete); a confirmation message is displayed.
- 4 Click **Yes**; the tax package is deleted.

Managing Taxes

Creating a Simple Tax

- 1 Select a tax package or create a new one and click **Add Tax** to open the **TAX LIBRARY** dialog box.
- 2 Click **New** in the **TAX LIBRARY** dialog box; a **NEW TAX** dialog box appears.
- 3 Type the tax name and description.



- 4 Type the tax percentage.
- 5 Click **OK**; the dialog box is closed and the tax is added to the package you created.

Creating a dependent Tax

- 1 Select a tax package or create a new one and click **Add Tax** to open the **TAX LIBRARY** dialog box.
- 2 Click **New** in the **TAX LIBRARY**; a **NEW TAX** dialog box appears.
- 3 Type the tax name and description.
- 4 Type the tax percentage.
- 5 Enable the **Apply Rule** checkbox.
- 6 Select the **Include** option for the created tax to be applied when certain conditions are met, or the **Exclude** option for the created tax to be applied when certain conditions are not met.
- 7 Fill in the **Field Name** for iWay to check, and the **Field Value** that must be met.
- 8 Click **OK**; the dialog box is closed and the tax is added to the package you created.

Removing a Tax from a Package

- 1 Select a tax package.
- 2 Select a tax in the package.
- 3 Click **Remove**; a confirmation message appears.
- 4 Click **Yes**; the tax is removed from the list.

Editing a Tax

- 1 Select a tax package.
- 2 Select a tax in the package.
- 3 Click **Edit Tax**; a confirmation message appears.
- 4 Click **Yes**; the **EDIT TAX** dialog box opens.
- 5 Modify the tax as required.
- 6 Click **OK**; the dialog box closes.

Deleting a Tax

- 1 Select a tax package.
- 2 Click **Add Tax**; the **TAX LIBRARY** dialog box opens.
- 3 Select a tax from the list.
- 4 Click **Delete**; a confirmation dialog box opens.
- 5 Click **Yes**; the tax is deleted from the library and from all the tax packages containing it.
- 6 Click **Cancel**; the dialog box closes.

Duplicating a Tax

- 1 Select a tax package.
- 2 Click **Add Tax**; the **TAX LIBRARY** dialog box opens.
- 3 Select a tax from the list.
- 4 Click **Duplicate**; a duplicate of the tax is created.
- 5 Click **Cancel**; the dialog box closes.



Set-up Job Type Pricing

This section provides information on the following subjects:

- Setting-up intent-based pricing for a job type or template.
- Setting-up manual pricing for a job type or template.

Selecting a Job Type

- 1 Select **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE LIBRARY**; the **JOB TYPE LIBRARY** appears.
- 2 In the **JOB TYPE LIBRARY**, select a job type.
- 3 Click **Edit**; the job type editing opens with the **GENERAL PROPERTIES** tab selected.

Selecting a Template

- 1 Select **ACCOUNTS -> STORE SETUP -> TEMPLATES**; the **TEMPLATES** repository appears.
- 2 Select an account and a template.
- 3 Click **Edit Properties**; the template editing opens with the **GENERAL PROPERTIES** tab selected.

Setting-up Intent Pricing

- 1 Select the **Settings** tab; the **SETTINGS** tab appears with the **QUANTITY** tab selected.
- 2 Select the **Pricing** tab; the **PRICING** tab appears.
- 3 Select the **Use New Settings** option.
- 4 Select **Intent Pricing** in the **CALCULATION MODEL** list; the system creates an empty price list (line item) for every single intent option of the job type.
- 5 Define production parameters
 - a Define quantity ranges:
 - i If you want to define different production parameters for different quantity ranges (for example a digital device for short runs and an offset device for long runs), click **Add Quantity**; another quantity range is added to the **PLANNER** area.
 - ii Type the values in the **FROM** and **TO** fields.
 - b Connect a device to a quantity range:
 - i In the **PLANNER** section, click **Choose Device(s)**; the **DEVICE AND IMPOSITION** dialog box opens.
 - ii Select the output device, press sheet size and imposition parameters.
 - iii Click **OK** to save the changes and close the dialog box.
 - iv Click **Add Device** to add more device options to this range.
- 6 Create a price list for the base product:
 - a Select the **Enabled** checkbox; the line item information to its right becomes enabled.
 - b Select the type of units for pricing (copies is the most common option).
 - c Add quantity ranges:



- i If you want to define different prices for different quantity ranges (the price per unit goes down when larger quantities are ordered), click **New Range**; another quantity range is added to the Planner area.
 - ii Type the values in the From and To fields.
 - d Define the pricing for each quantity range:
 - i Type the fixed cost for the base product.
 - ii Type the variable cost and the number of units to which it applies.
 - iii Type the fixed price for the base product.
 - iv Type the variable price for the number of units indicated above.
 - e Click **Save**; the line item is saved in the line item library and the line item number is updated.
- 7 Define price lists for each intent option that you want to price:
- a Click **+** to expand the option.
 - b Repeat all the sub-steps of creating a price list (Step 6 above).

You have finished setting-up intent-based pricing.

Intent Pricing Examples

To clarify the use of intent pricing, let's look at some examples.

Postcards Job Type

You want to offer postcard printing:

- Page Size: 8.5"x5.5" (default); 5"x7"
- Colors: Full color (default); Black & white
- Paper: 14 pt. Gloss Cover (default); 14 pt. Matte Cover
- Number of Pages: 2
- Folding: no folding (default); simple fold

Pricing considerations:

- There is no base price for the product.
- Page size does not affect pricing, the price for both sizes of postcards is the same.
- Full color printing is the base price for color postcards.
- Black & white printing is the base price for black & white postcards.
- Paper price is included in the base price.
- No folding is included in the base price.
- Simple fold has an additional pricing.

From	To	Fixed	Variable	Units
Base Price – disabled				
Page Size, 8.5" x 5.5" – disabled				
Page Size, 7" x 5" – disabled				
Colors, Full color				
1	1000	Cost: \$3	Cost:\$20	per 100
		Price:\$15	Price:\$50	
1001	10000	Cost: \$3	Cost:\$20	per 100
		Price:\$10	Price:\$40	



From	To	Fixed	Variable	Units
Colors, Black & white				
1	1000	Cost: \$3	Cost:\$10	per 100
		Price:\$10	Price:\$30	
1001	10000	Cost: \$3	Cost:\$10	per 100
		Price:\$5	Price:\$20	
Paper, 14 pt. Gloss Cover – disabled				
Paper, 14 pt. Matte Cover – disabled				
Folding, no folding – disabled				
Folding, Simple fold				
1	Infinity	Cost: \$10	Cost:\$5	per 100
		Price:\$20	Price:\$8	

Document Duplication Job Type

You want to offer document duplication:

- Page Size: 8.5"x11" (default); Legal
- Colors: Black & white (default); Full color
- Paper: 100# Hi-gloss coated stock (default); 100# uncoated text stock
- Number of Pages: 1-200
- Binding: corner stapling (default); binder; spiral binding; thermal binding

Pricing considerations:

- There is no base price for the product.
- Page size does not affect pricing.
- Full color printing is the base price for color documents, the pricing unit is clicks.
- Black & white printing is the base price for black & white documents, the pricing unit is clicks.
- Paper price is calculated separately.
- Corner stapling is included in the base price.
- Binder, spiral binding, and thermal binding are calculated separately per copy.

From	To	Fixed	Variable	Unit: Copies
Base Price – disabled				
Page Size, 8.5" x 5.5" – disabled				
Page Size, 7" x 5" – disabled				
Colors, Full color				
1	Infinity	Cost: \$0	Cost:\$0.05	per 1 click
		Price:\$10	Price:\$0.15	
Colors, Black & white				
1	Infinity	Cost: \$0	Cost:\$0.015	per 1 click
		Price:\$5	Price:\$0.10	
Paper, 100# Hi-gloss coated stock				



From	To	Fixed	Variable	Unit: Copies
1	Infinity	Cost: \$1	Cost:\$0.05	per 5 sheets
		Price:\$5	Price:\$0.08	
Paper, 100# uncoated text stock				
1	Infinity	Cost: \$1	Cost:\$0.04	per 5 sheets
		Price:\$5	Price:\$0.07	
Binding, corner stapling – disabled				
Binding, spiral binding				
1	100	Cost: \$4	Cost:\$5	per 10 copies
		Price:\$10	Price:\$8	
101	Infinity	Cost: \$3	Cost:\$4	per 10 copies
		Price:\$5	Price:\$7	
Binding, binder				
1	100	Cost: \$10	Cost:\$0.92	per 1 copy
		Price:\$20	Price:\$2	
101	Infinity	Cost: \$7.50	Cost:\$0.85	per 1 copy
		Price:\$15	Price:\$1.5	
Binding, thermal binding				
1	100	Cost: \$2	Cost:\$3	per 10 copies
		Price:\$5	Price:\$6	
101	Infinity	Cost: \$2	Cost:\$2	per 10 copies
		Price:\$4	Price:\$5	

Setting-up Manual Pricing

Manual pricing comprises two steps – setting-up a job type or template to be manually priced, and then the actual pricing of a job.

- 1 Select the **Settings** tab; the **SETTINGS** tab appears with the **QUANTITY** tab selected.
- 2 Select the **Pricing** tab; the **PRICING** tab appears.
- 3 Select **Manual** in the **CALCULATION MODEL** list.
- 4 Define production parameters as specified in Step 4 of the intent pricing procedure.
- 5 Click **Save**.

When a job will be ordered based on this job type or template, the user will receive a 'price not available' notification.

Price Management

This section provides detailed instructions on the following subjects:

- [Manually Pricing a Job](#) (on page 130)
- [Checking and Modifying Job Pricing](#) (on page 130)
- [Checking and Modifying Order Pricing](#) (on page 130)



Manually Pricing a Job

- 1 Select **TASKS -> TRACK JOBS**; the **TRACK JOBS** is displayed with the **SEARCH** option selected.
- 2 Find the required job using the **SEARCH** or by selecting the appropriate queue.
- 3 Select the job and click **Job Pricing**; the **JOB PRICING** dialog box opens.
- 4 Type the **COST** (if required) and **PRICE** of the job.
- 5 You might need to add line items to the base price:
 - a Click **Add Item**; the **SELECT LINE ITEM** dialog box is displayed.
 - b Find the required line item or create a new one. For more information about creating line items, refer to [Creating a New Line Item](#) (on page 132).
 - c Click **Add**; the dialog box closes and the line item is added to the job pricing result matrix.
 - d Type the quantity for the added line item.
 - e Click anywhere outside the **QUANTITY** box; the price is recalculated.
- 6 Click **Close**; the dialog box closes.

You have finished manually pricing the job.

Checking and Modifying Job Pricing

- 1 Select **TASKS -> TRACK JOBS**; the **SEARCH** screen appears.
- 2 Find the required job using the **SEARCH** or by selecting the appropriate queue.
- 3 Select the job and click **Job Pricing**; the **JOB PRICING** dialog box opens.
- 4 Check the result matrix.
- 5 Changing a line item, if required:
 - a Click the number link for the line item that has to be changed; the **EDIT LINE ITEM** dialog box opens.
 - b Modify the line item as needed. For more information about creating line items, refer to [Editing JBF Option, Design and Custom Line Items](#) (on page 132).
 - c Click **Save**; the dialog box closes and the line item is updated.
- 6 You might need to add line items to the base price. For more information about adding a line item, refer to [Editing JBF Option, Design and Custom Line Items](#) (on page 132).
- 7 Click **Close**; the dialog box closes and the data is saved.

Checking and Modifying Order Pricing

- 1 Select **TASKS -> TRACK JOBS**; the **SEARCH** screen appears.
- 2 Find the required job using the **SEARCH** or by selecting the appropriate queue.
- 3 Select the job and click **Order Pricing**; the **ORDER PRICING** dialog box opens.
- 4 Check the result matrix.
- 5 Change a line item, if required:
 - a Click the number link for the line item that has to be changed; the **EDIT LINE ITEM** dialog box opens.
 - b Modify the line item as needed. For more information about adding a line item, refer to [Editing JBF Option, Design and Custom Line Items](#) (on page 132).



- c Click **Save**; the dialog box closes and the line item is updated.
- 6 You might need to add line items to the base price. For more information about adding a line item, refer to [Editing JBF Option, Design and Custom Line Items](#) (on page 132).
- 7 Click **Close**; the dialog box closes and the data is saved.

Line Item Library

The line item library stores all of the line items in the system. Working directly in the line item library is, therefore, very efficient and convenient. It is, however, also very risky, as you might, by accident, change the wrong line item, or change the right line item, but not realize the full extent of the resulting effect. Be sure you are well familiar with the line item library and the objects it affects, before you make modifications.

Types of Line Items

There are line items of several types, each with its particular characteristics.

Setup Line Items

Some of the line items are generated as part of the system and pricing setup process.

- **JBF Option** – a JBF Option line item is created for each intent pricing option of a job type or template pricing.
- **Tax** – a tax line item is created for each tax in the application.
- **Discount** – a discount line item is created for each account in the application.
- **Urgency** – two urgency line items are created for the system level setting, and for each job type and template that have specific urgency settings.
- **Delivery** – a delivery line item is created for every shipping method in the application.
- **Custom** – line items that you create for pricing additional services that are not intent related. For example, spelling.
- **Design** – line items that you create for additional design services, such as designer time or proofs.

Result Line Items

- **Calculated Job** – a calculated job line item is created for each job in the system.
- **Set Job** – the Set job line item is created for every Set job ordered.
- **Excel Price** – an Excel line item is created for every job that is priced using Excel.
- **Manual Price** – the Manual Price line item has no pricing data - it returns a Price N/A for every manually priced job.

Managing the Line Item Library

To access the line item library select **PRINT SETTINGS -> PRICING -> LINE ITEMS**.

Searching for a Line Item

You can search for line items by type and criteria.


- 1 Select line item **Type** if you want to search for line items of a specific type only.
- 2 Select the search criteria from the list.



- 3 Select the comparison operator.
- 4 Type the textual criterion in the text box.
- 5 Click **Search**; the system performs the search and shows the result in the list.
- 6 To reset the library to the full list:
 - a Select **All** in the **TYPE** list, **Line item #** and **All** in the comparison operator list.
 - b Click **Search**; the full list is displayed.

Creating a New Line Item

You can create line items of custom, design, and discount types.

- 1 Click  (Create New Line Item); the **EDIT LINE ITEM** dialog box opens.
- 2 To create a custom or design line item, select Custom or Design in the type list. For more information about editing line items, refer to [Editing JBF Option, Design and Custom Line Items](#) (on page 132).
- 3 To create a discount line item, select **Discount** from the **TYPE** list; the dialog box display is refreshed and changed. For more information about editing discount line items, refer to [Editing Discount Line Items](#) (on page 133).
- 4 Click **Save**; the line item is created and the dialog box closed.

Editing Line Items

Editing line items differs according to the type of line item. The following instructions are provided per line item type.

Editing JBF Option, Design and Custom Line Items

- 1 Find the line item to be changed and click **Edit**; the **EDIT LINE ITEM** dialog box opens.
- 2 Select the units from the **UNIT** list.
- 3 Add quantity ranges:
 - a If you want to define different prices for different quantity ranges (the price per unit goes down when larger quantities are ordered), click **New Range**; another quantity range is added to the **PLANNER** area.
 - b Type the values in the **FROM** and **TO** fields.
- 4 Define the pricing for each quantity range:
 - a Type the fixed cost for the base product.
 - b Type the variable cost and the number of units to which it applies.
 - c If you want to use markup for the price calculation, select the **Use markup** check box and type the percent; the price is automatically updated.
 - d If you didn't use markup, type the fixed and variable price for the base product.
- 5 Click **Save**; the line item is saved and the dialog box closed.

Editing Tax Line Items

- 1 Find the line item to be changed and click **Edit**.
- 2 Modify the tax description and level, if required.
- 3 Click **Save**; the line item is saved and the dialog box closed.



Editing Discount Line Items

- 1 Find the line item to be changed and click **Edit**.
- 2 Modify the discount description and level, if required.
- 3 Click **Save**; the line item is saved and the dialog box closed.

Editing Urgency Line Items

- 1 Find the line item to be changed and click **Edit**.
- 2 Modify the line item description and level, if required.
- 3 Click **Save**; the line item is saved and the dialog box closed.

Remember that if you are changing the system level urgency line items, the change will affect all the job types and templates that inherit these settings from the system.

NOTE: System level urgency settings are called 'Express Delivery Surcharge' and 'Urgent Delivery Surcharge', as opposed to specific job type or template line items that have names like 'Express Surcharge for Poster'.

Editing Delivery Line Items

Delivery type line items are associated with Fedex, US Postal Service, UPS and direct mailing line item types.

- 1 Find the line item to be changed and click **Edit**.
- 2 Modify the line item data. For more information about editing shipping method pricing, refer to [Defining Shipping Methods](#) (on page 41).
- 3 Click **Save**; the line item is saved and the dialog box closed.

Editing Calculated Job Line Items

- 1 Find the line item to be changed and click **Edit**.
- 2 To view the result matrix related to this job, click the **Detailed Pricing** link; the **JOB PRICING** dialog box opens.
 - a For more information about this screen, refer to [Checking and Modifying Job Pricing](#) (on page 130).
 - b Click **Close**.
- 3 Click **Save**; the line item is saved and the dialog box closed.



Production Management

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Your Print Buyers initiate print jobs on the Print Buyer side of the Pageflex iWay system. After the Print Buyer prints the job, and the job quote is ready, the job is transferred to the Print Service Provider side of the system and appears in your **PRODUCTION QUEUE** window. In the **PRODUCTION QUEUE** window, you can do various activities with the job, before approving the job for production. After the job is approved, it enters the **DELIVERY** window where you can view and edit shipping information, print shipping labels, and approve jobs for delivery.

This chapter is composed of the following sections:

- [Production Queue Overview](#) (on page 134)
- [Managing Jobs in the Production Queue](#) (on page 135)
- [Managing Notifications and Alerts](#) (on page 145)
- [Producing Jobs](#) (on page 146)
- [Delivery Queue](#) (on page 148)
- [Track Jobs](#) (on page 153)

Production Queue Overview

The **PRODUCTION QUEUE** window displays all the jobs that were ordered by Print Buyers, and that are waiting for your approval before routing to actual production. New jobs that enter the production queue are automatically placed at the end of the queue.

When you select a job in the production queue job list, its details are displayed in the job's details panel. From the job's details panel you can preview the job, and access various dialog boxes that allow you to perform needed tasks and adjustments. For example, examine and change imposition parameters, and reroute jobs to different output devices. One of the main tasks that you perform is creating the job ticket. The **PRODUCTION QUEUE** window, and the activities that you can perform are described in detail in the following sections.

When the job is ready to be printed, you send it to the output device. The approved job is removed from the production queue, enters the delivery queue and the printing queue.



To access the Production Queue window:

- 1 From the iWay menu, select **TASKS -> PRODUCTION**; the **PRODUCTION QUEUE** window appears. All the ordered jobs are listed in the production queue job list on the left side of the window. By default, the first job in the list is selected, and its information is displayed in the job's details panel on the right side of the window.
- 2 Click to select another job in the list; the job's details panel is updated accordingly. To quickly locate a job in the list, use the **Search** option. For details, see [Managing the Production Queue Job List](#) (on page 135).
- 3 Using the options in job's details panel, you can edit job parameters, and perform production-related activities, as explained in this chapter.

Managing Jobs in the Production Queue

Managing the Production Queue Job List

When a new job enters the production queue, it automatically enters the end of the production queue job list. The following information is displayed for each job in the list:

- A job thumbnail.
- The **JOB #**, **JOB NAME**, **COPIES**, **REQ. DATE** (if requested), **ACCOUNT** name, **OUTPUT DEVICE** (if defined).
- The VI Type column indicates if the job contains variable information.
- The **Mismatched** column indicates if the job contains mismatched information. An alert is created if there is a mismatch problem. For details, see Alerts in [Managing Notifications and Alerts](#) (on page 145).
- The Integration Type column indicates the type of integration that was utilized, if integration was used in the job.
- The Output Format column indicates the job output format. For example, PPML.
- The Pricing problem column indicates if there is a pricing problem with this job. An alert is created if there is a problem. For details, see Alerts in [Managing Notifications and Alerts](#) (on page 145).
- The Imposition status column indicates if there is an imposition problem with this job. An alert is created if there is a problem. For details, see Alerts in [Managing Notifications and Alerts](#) (on page 145).

You can perform the following activities in the production queue job list:

- Filter jobs in the queue, using the **SEARCH** option.
- Change the order of the jobs in the queue, using the up and down arrows. When the queue is viewed with the **DEFAULT SORT**, you can move jobs up and down the queue, and move jobs to the beginning or end of the queue.
- Refresh the queue to show newly added jobs.

The Job Details Panel





The job's details panel displays the details of the job that is selected in the production queue job list. Using the icons and buttons in the job's details panel, you access dialog boxes that allow you to view additional job parameters, and perform necessary changes. For example, edit imposition parameters, and create a job ticket.

Icons and buttons that appear at the top of the job's details panel allow you to perform job modification tasks:



- Job Properties icon. For details, see [Viewing and Editing Job Properties](#) (on page 156).
- Attach files icon. For details, see [Attaching Files to the Job](#) (on page 137).
- Queue selection icon. Enabled only when the selected output device has multiple queues. In this case, you can select another queue.
- Trim & Bleed Editor icon. For details, see [Viewing and Modifying a Job's Trim and Bleed Parameters](#) (on page 138).
- Device and Imposition icon. For details, see [Editing Job Imposition](#) (on page 138).
- Gang jobs using Layout Maker icon. For details, see [Ganging Jobs for Production](#) (on page 142).
- Edit Layout icon. For details, see [Layout Maker Overview](#) (on page 143).
- Split Composite job icon. Relevant if you used the gang jobs option. For details, see [Printing Set Jobs on More Than One Output Device](#) (on page 144).
- Open Job ticket icon. For details, see [Creating a Job Ticket](#) (on page 144).
- **Outsource** button. For details, see [Outsourcing Jobs to a Partner Print Service Provider](#) (on page 146).
- **Move to** button. For details, see [Changing the Status of a Job](#) (on page 147).
- **Approve** button. For details, see [Approving a Job for Printing](#) (on page 148).

The job's details panel contains additional job information, and allows you to perform administrative job tasks:

- The job # and description appear in the title.
- If there are problems with the job, an alert is created, and the alert icon appears below the title. For details, see [Managing Notifications and Alerts](#) (on page 145).
- **JOB DETAILS** information:
 - **COLORS**—the type of colors, as defined in the job order. For example, Process colors.
 - **PAPER**—the type of paper, as defined in the job order.
 - **PAGES**—the number of pages, as defined in the job order.
 - **QUANTITY**—the number of copies to be printed, as defined in the job order.
 - **REFERENCE CODE**—a job reference number that you can enter. The code can be useful for your records.
- Click  (PDF Preview icon) to see a preview of the job.
- Click  (Edit note icon) to open the **EDIT NOTE FOR JOB #** window. The note that is associated with the job, can contain information from the Print Buyer, which you can see; information for the Print Buyer that you enter in this window; and/or an internal note that cannot be viewed by the Print Buyer.
- Click  (Preflight icon) to open the **FILE UPLOAD REPORT** window, which displays preflight problems. For example, color, font or image problems. You can also preview the job from this window.
- Click  (Info message icon) to open the **JOB REPORT** window. The font and image report of the original file, and the imposition file are provided. Imposition problems are also listed.

NOTE:

When there is an imposition problem, the **INFO MESSAGE** icon appears as a red alert icon, and the **JOB REPORT** window reports the problem.

- **IMPOSITION**—job imposition and layout information, including a thumbnail of the imposition file, an Imposition icon to display the PDF of the imposed job, Device Queue icon (appears only if the device output has a queue).




- **ORDER**—job order information, including the Order # (and how many jobs in the order), Customer name, User name, Price, Order Date, and Shipping Date.
- **PRESS SHEETS PLANNED/ACTUAL**—shows the planned and actual number of press sheets in the job.

NOTE: When working with specific types of output devices, you can use the **DEVICE QUEUES** option to create workflows that direct jobs to hot folders that are associated with these devices.

Viewing and Editing Job Properties

To view and edit job properties:


- 1 Select the job that you want to view or edit in the production queue job list. The job's details panel is updated with the parameters of the selected job.
- 2 Click  (Job Properties icon) in the job's details panel. The Job properties dialog box appears.
- 3 The Job properties dialog box contains several tabs, depending on the type of job:
 - For an Upload File job, the following tabs appear: Job Details, Upload File, Job Specification, File Report, and Pricing.
 - For a Static Template job, the following tabs appear: Job Details, Job Specification, and Pricing.
 - For a VI Template job, the following tabs appear: Job Details, Job Specification, Variable Information, and Pricing.
- 4 In the Job Properties dialog box, you can change the default properties of a template or override Print Buyer property settings. That is, you can modify a problematic file or resolve a mismatch problem. For details on mismatch problems, refer to [Managing Notifications and Alerts](#) (on page 145).
- 5 You can view and edit job properties on these tabs. For more information on editing job properties, refer to [Defining Print Imposition](#) (on page 33).

Attaching Files to the Job

You can modify files that have been attached to the job. For example, you can download an attached variable information database, modify the file, and then upload the modified database. Or you can edit an original Adobe Photoshop file to correct something in the file, and upload the corrected file.

NOTE: You can also attach new files to the job, but this is not the main use of this option in the Production queue window. For information about attaching files, refer to [Managing Attachments](#) (on page 5).

To attach files to a job:

- 1 Select the job in the production queue job list. The job's details panel is updated with the job's details.
- 2 Click  (Attach files icon) in the job's details panel. The **ATTACHMENTS** dialog box appears.
- 3 The dialog box lists files that are attached to the job. Using the icons in this window, you can download the attachment that you want to modify, and you can rename or delete an attachment. From this window you can also open a folder for the files that you will download.




- 4 If you downloaded attachments, perform the necessary changes, and save the files.
- 5 To reattach the modified files to the job, click the **Upload Files** button. The **UPLOAD FILE** dialog box:
 - a Select **Upload a single file**; click **Browse** to select the file.
 - b Select **Upload multiple files using FTP Mutli-file Upload**; the FTP window appears. Upload the files in this window.
 - c Click **Continue**.

For information about attaching files, refer to [Uploading Files](#) (on page 5).

Viewing and Modifying a Job's Trim and Bleed Parameters

You can view job crop and bleed parameters, and perform necessary modifications. For example, if the job was prepared on an incorrect page size, you need to modify the crop marks, or if the bleed marks are inside the final job size, you need to scale the job size so that the bleed marks are outside the final job size.

To modify crop and bleed parameters:


- 1 Select the Job and click  (Trim & Bleed icon); the **EDIT TRIM AND BLEED** window appears.
- 2 Modify the trim and bleeds as needed, and click **OK** when you are done.

For more information on trim and bleed parameters, refer to [Defining Print Imposition](#) (on page 33).

Editing Job Imposition

You can edit the imposition of jobs in the production queue. The imposition parameters override any parameters set at the system level. For system level settings, refer to [Defining Print Imposition](#) (on page 33).

To edit general imposition parameters:

- 1 Click  (Device & Imposition icon); the **DEVICE AND IMPOSITION** dialog box appears.
- 2 From the **Output Device** dropdown list, select an output device (if one is not selected), or select another device instead of the one that was defined at the system level.
- 3 From the **Press Sheet** dropdown list, select a new press sheet size.
- 4 From the **Orientation** dropdown list, choose Landscape or Portrait.
- 5 Define Imposition parameters:
 - a From the **Imposition Method** dropdown list, choose Same-Up or Multiple-Up.
 - b From the **Work Style** dropdown list, select one of the options.
- 6 Define page layout and binding parameters:
 - a From the **Page Order** dropdown list, select one of the options.
 - b From the **Page Rotation** dropdown list, select one of the options.
 - c From the **Alignment** dropdown list, select one of the options.
 - d From the **Fill Policy** dropdown list, choose Exact or Fill to define how the page imposition on the press sheet.



- 7 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To set the press sheet margins and gutters:

In the **MARGINS AND GUTTERS** tab:

- 1 Enter values for the 4 **Margin** fields.
- 2 Enter values in the **Horizontal Gutters** and **Vertical Gutters** fields.

To set the press sheet bleeds:

If a file is uploaded without bleeds defined, iWay can set set the bleeds automatically. To let iWay automatically set the bleeds:

- 1 Enable the **If Bleeds are not defined in the file** checkbox.
- 2 Type values in the four **BLEED** fields.
- 3 Select which option to use for the bleeds:
 - Locate bleeds inside job page size
 - Scale up job page size by the defined amounts

To add labels and marks to the press sheet:

On the **LABELS AND MARKS** tab of the **EDIT IMPOSITION** dialog box, you define what labels and marks you want printed on the press sheet. Select the relevant check boxes:

- **Job Info**—for example, job number, account name, date of production.
- **Crop Marks and Folding Info**—crop marks are indicated by solid lines, and fold marks are indicated by dashed lines at the location of each fold. The word **IN** or **OUT** above the dashed line refers to the fold direction, and the number under the line is the fold order.
- **Registration Marks**—by default, there are four registration marks located on each corner of the press sheet.
- **Gutters, Job Width and Height**
- **Color Bar and Separation Names**

Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To edit custom color bar elements:

- 1 Click the **CUSTOM COLOR BAR** tab of the **EDIT IMPOSITION** dialog box.
- 2 From the **Color Bar File** dropdown list, select a color bar option.
- 3 iWay provides horizontal and vertical color bars for gray scale and CMYK colors, and you can add these files to the **COLOR BAR FILE** dropdown list:
 - a Click the **Color Bar File** link; the **COLOR BAR FILES** dialog box appears.
 - b Select the relevant TIFF file, and click **Upload Images**. For more information, refer to [Uploading Files](#) (on page 5).
- 4 To define the color bar position and dimensions, fill in the **ALIGNMENT** and **DIMENSIONS** fields.

NOTE: After editing the imposition in the **EDIT IMPOSITION** dialog box, the job is moves to the head of the production queue job list.


- 5 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.



To edit the ICC Profile:

- 1 Click the **ICC PROFILE** tab of the **EDIT IMPOSITION** dialog box.
- 2 From the **Convert RGB to CMYK via ICC Profile** dropdown file, select an ICC profile to be used when creating the imposed file. For more information, refer to [Adding ICC Profiles to the System](#).
- 3 To add ICC profiles to the dropdown list:
 - a Click the **Convert RGB to CMYK via ICC Profile** link; the **ICC PROFILES** dialog box appears.
 - b Upload ICC profiles into your iWay system. For information on uploading files, refer to [Uploading Files](#) (on page 5).
- 4 Click **OK** when done, or continue to edit other imposition parameters. Refer to the following procedures.

To view the imposed job:

- 1 Select the job in the production queue job list.
- 2 Click  (Imposition icon) in the **IMPOSITION** section of the job's details panel; a high-resolution PDF image of the imposed file appears.
- 3 On the PDF image of the imposed file, view the crop, registration and fold marks, job page dimensions, gutters, job information, and the embedded color bar, if they were selected on the **LABELS AND MARKS** tab of the **EDIT IMPOSITION** dialog box.

Manual Impose

MANUAL IMPOSE is used for saving the job as a non-imposed PDF, and the imposition is done by a third party imposition tool. **MANUAL IMPOSE** is also automatically selected when the PDF cannot be imposed by the system, in which case, the following icon appears instead of the **JOB INFO** thumbnail:



The **MANUAL IMPOSE** option is accessed from the **OUTPUT DEVICE** dropdown list in the **DEVICE AND IMPOSITION** dialog box.

After approval, a manually imposed job is transferred to a folder that the Print Service Provider has specified in the **OUTPUT DEVICES** window (for more information, refer to the [Defining Print Imposition](#) (on page 33)).

Imposition Schemes

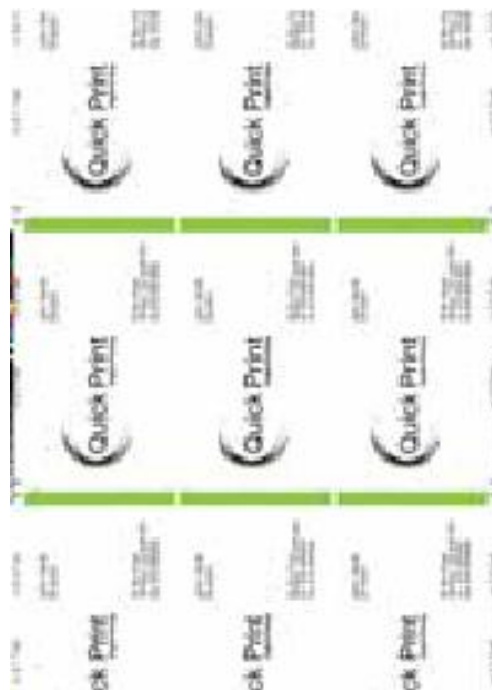
This section illustrates the different imposition schemes.



Vertical Orientation



Horizontal Orientation





Close Up View



NOTE: When **MANUAL IMPOSE** is selected, the **IMPOSITION PROOF** icon provides you with a high-resolution preview of one job page.

Ganging Jobs for Production

You can print more than one job on a single press sheet using with the **LAYOUT MAKER** option. The advantage of ganging jobs is to reduce production costs by considering the following two factors:

- Maximize the utilization of the press sheet.
- Minimize the amount of cutting and stacking.

To create a layout, you select a base job in the production queue, and select the **LAYOUT MAKER** option. The system automatically selects additional jobs from the production queue that can be candidates to be added to the layout job, according to the following criteria:

- The base job can have one or two pages (two pages are either two one-sided pages or a double-sided page).
- Jobs that are the same size as the base job.
- The number of pages in the additional jobs must be equal to, or smaller than, the base job.

From the list of jobs that are selected by the system, you select the jobs that you want to gang, as explained in this section.



Layout Maker Overview

The **LAYOUT MAKER** window is divided into two panels:

- Layout information panel—displays the layout information.
- Job information panel—displays the various jobs that are suitable to be included in the layout.


The **LAYOUT MAKER** window provides the following information, which is necessary for maximizing the effectiveness of this option:

- **PAPER SIZE**—size of the press sheet that is defined for the job. This size is used to calculate the additional jobs that can be printed on the sheet.
- **JOB SIZE**—size of the selected base job. Jobs that are added to the layout must be the same size.
- **UNITS ON PAGE**—total number of units, of the selected jobs, that can be printed on a press sheet.
- **NUMBER OF PRESS SHEETS**—number of press sheets required in this layout job.
- **UTILIZATION**—a percentage that indicates the utilization of the press sheet. The percentage changes according to the jobs that are selected for the layout.


NOTE: When selecting jobs to be included in the layout, it is recommended that you do not combine jobs with different bleed settings.

Printing Jobs Using the Layout Maker

To create a layout using Layout Maker:

- 1 Select a job in the production queue job list that can serve as the basis of the layout (the base job).
- 2 Click  (Gang jobs using Layout Maker icon) in the job's details panel; the **LAYOUT MAKER** window appears. The layout # in the window title is automatically updated by the system.
- 3 From the list of jobs, select the jobs that you want to gang; these are the jobs that will be included in the layout. When selecting jobs, consider the utilization factor because you want to add jobs that will provide the *greatest* page utilization.
- 4 In the **Layout name** box, type the layout name.
- 5 To preview the layout, click **Preview Layout**; a PDF preview of the layout appears.
- 6 To create a layout, click **Create Layout**; the jobs appear as a combined layout job in the production queue job list. The job's details panel is updated, and shows a composite job.

To edit a layout using Layout Maker:

- 1 If a job already has a layout, you can edit the layout. Select the job that contains a layout.
- 2 Click  (Edit Layout icon) in the job's details panel; the **LAYOUT MAKER** window appears.
- 3 Modify the layout, as needed. For example, you can add or remove jobs to/from the layout.

NOTE: When a layout is in the production queue, you cannot edit the job imposition.




Printing Set Jobs on More Than One Output Device

When jobs contain multiple files and components, you can produce the files and components on more than one output device, using the **SPLIT COMPOSITE JOB** option. In this option you can define exception impositions for different components of the book. For example, you might want the black and white pages to be printed on one printer, and the color pages on another.

NOTE: You can only use the Split Composite job option on Set jobs.


To print multiple files on different output devices:

- 1 Select a Set job.
- 2 Click  (Split composite job icon) in the job's details panel; the **SPLIT PDF** dialog box appears, showing the various composite job files.
- 3 Select the check box of the job component that you want to split: color pages, tab, cover and/or B/W pages.
- 4 Choose one of the two splitting color options, according to component type, color channels, or color content of the files:
 - **Split Colors (By Definition of the Print Provider according to the Color Channels)**—the system splits off color pages from all components for which you specified color channels in the component definition.
 - **Split Colors (By Content exclude B/W pages from Color component)**—the system splits the job according to the color content of the job pages. If the job contains color and B/W pages, it is split into two parts: color pages and B/W pages.
- 5 From the **Blank Pages** dropdown list, select the option that will define how blank pages are displayed in the split job.
- 6 Click **OK** to save the changes and close the dialog box.

Creating a Job Ticket

A job ticket is a file that contains detailed job information about production, finishing, delivery, and pricing. The job ticket file can be printed and used on the production floor. The **DATE** and **SIGNATURE** fields, in the printed job ticket pages are left empty, to be completed by the relevant personnel on the production floor.

To create a job ticket:

- 1 Select a job and click  (Create Job Ticket icon); the **JOB TICKET CREATION** dialog box appears.
- 2 For **Word** documents:
 - a Select the **Job Ticket Pages** check boxes of the pages that you want to include in the job ticket: **Production, Finishing, Delivery, Pricing Information**.
 - b Click **OK** in the **JOB TICKET CREATION** dialog box; the **DOWNLOAD FILE** panel appears.
 - c On the **DOWNLOAD FILE** panel, click the **JOBTICKET[JOB #].DOC** link to download the job ticket file, and then save the job ticket as a Microsoft Word file. Alternatively, click and save the zip file of the job ticket, and extract the file on your computer.
 - d After saving the job ticket file, you can print out copies.



- 3 For **HTML** Documents:
 - a Click **OK** in the **JOB TICKET CREATION** dialog box. The Job Ticket displays in a new browser window.
 - b Print or save the Job Ticket from the browser **FILE** menu (press the Alt key if the menu is not visible by default).

Managing Notifications and Alerts

NOTIFICATIONS and **ALERTS** are indicators that can appear in specific columns in the production queue job list. **NOTIFICATIONS** are viewed only when specific columns are present in the list, and they provide information that is not critical to the continuation of the job processing.

NOTE: For more information on managing columns in a queue, refer to [Displaying and Hiding Queue Columns](#) (on page 4).

ALERTS contain information that is critical to the continuation of the job processing. You need to view the alert, and address the problems that it raises. The alert information includes steps for processing the problem to which you are being alerted. To ensure that you view and process the **ALERTS**, **ALERTS** appear also in the job's details panel. After the **ALERT** is viewed and acknowledged, it is classified as a **HANDLED ALERT**.

Notification

Notification	Description
Job Thumbnail	Thumbnail image of the job's front page.
PDF Preview	Access a high-resolution PDF preview of the job. When the job is part of a combined job, access an imposition proof.
Hidden Price	The Print Buyer who ordered the job cannot see the job price.
Print Driver	The job was created using the Print Driver ordering workflow.
iForm	The job was created from an iForm.
Variable Data	The job contains variable data, as indicated in the VI column of the production queue job list.
Combined Job	The job has been imposed with one or more other jobs using LAYOUT MAKER . See details in Ganging Jobs for Production (on page 142).
Set	This is a Set job.
Blank Files	The job does not contain data.
Jobs to Inventory	The job will be printed and stored as inventory.
Job from Inventory	The job will be shipped from inventory.

Alerts

Alert	Description
Job Properties Mismatch	There is a disparity between the job properties and the uploaded file parameters. When you click a Mismatch icon, the MISMATCHING PARAMETERS dialog box appears. You can match the job properties with the uploaded file parameter. For more information, refer to Viewing and Editing Job Properties (on page 156)



Alert	Description
Price Problem	There are pricing problems. When you click the alert, the JOB PRICING dialog box appears, and you can modify the price, discount, express charges, and tax. The JOB PRICING dialog box also allows you to notify your Print Buyers of these modifications. For more information, refer to Pricing (on page 118).
No Production File	The job does not contain data.
File Preflight Problem	The following information is missing from the job: fonts, low res images, or RGB images.
View Print Buyer Note	An alert is created whenever there is a note from the Print Buyer. The note must be viewed and acted upon.
General Problem	There was a problem with the job during preflight or imposition, or when creating the low-res image.

Producing Jobs

When a job is ready for production, you can complete one of the following tasks:

- [Outsourcing Jobs to a Partner Print Service Provider](#) (on page 146).
- [Changing the Status of a Job](#) (on page 147).
- [Approving a Job for Printing](#) (on page 148).

Outsourcing Jobs to a Partner Print Service Provider

When the job will not be printed in your print house, you can still accept the responsibility for producing the job by forwarding it to another Print Service Provider. Working with the **OUTSOURCE** option, you can outsource a job from the iWay system, directly to a partner Print Service Provider, by sending an email message containing links to the imposed file and job ticket.


This section explains the workflow that the Print Service Provider does to outsource a job, and the workflow that the partner Print Service Provider does to print the outsourced job.

Print Service Provider Workflow

To outsource to a partner Print Service Provider:

- 1 Click the target job that you want to send to the partner Print Service Provider.
- 2 In the job's details panel, click **Outsource**; the **OUTSOURCE JOB** dialog box appears.
- 3 For a new partner Print Service Provider:
 - a Click **New Print Provider**; the **NEW PRINT PROVIDER DETAILS** dialog box appears.
 - b Type the partner Print Service Provider's details and click **OK**.
- 4 From the **Print Provider Name** dropdown list, select a partner Print Service Provider; the partner's details appear in the **SELECT PARTNER PRINT PROVIDER** panel.
- 5 In the **JOB SHIPPING** panel, choose where you want the partner Print Service Provider to send the job upon completion:
 - **Ship to Customer**—send the finished job directly to the Print Buyer.



- **Ship to me by date**—the completed job will be returned to you; click the **Select Date** link to set a time limit for returning the job to you.
- 6 Click **Outsource Job**; the **OUTSOURCE EMAIL SENT** message appears, informing that an **OUTSOURCE EMAIL SENT** message was sent to the partner Print Service Provider.
- 7 Click **OK**; the **PRODUCTION QUEUE** window appears.
- 8 The job is transferred to your **PRINTING QUEUE** window, and the  icon indicates that the job is waiting to be accepted by the partner Print Service Provider.
- 9 In the **TRACK JOBS** window, select the target job that has been outsourced.
- 10 Click the **Outsourcing Information** link; the **OUTSOURCING INFORMATION** dialog box appears. **OUTSOURCING INFORMATION** is an initial status report of the job that is sent to the partner Print Service Provider.
- 11 Click **OK** to close the dialog box.

NOTE: An **OUTSOURCE EMAIL** message is sent, and the partner Print Service Provider is requested to click **ACCEPT** to indicate that the job is accepted and will be produced. The partner Print Service Provider is also requested to click **SHIPPED** when the job is completed..

Partner Print Service Provider Workflow

After the **OUTSOURCE EMAIL** message is sent, you as the partner Print Service Provider, receive the email message with the job details. You can view the job's PDF, the imposition job PDF and the job ticket. Perform the following tasks:

- 1 To accept the job and start the printing process, click **Accept**. You and the Print Service Provider who sent the job receive an email message notifying that the job has been accepted, and that the printing process started. The job appears in the **JOBS FOR DELIVERY** list of the **DELIVERY** window.
- 2 Print the job, and then ship the job (either directly to the Print Buyer or back to the Print Service Provider that sent you the job).
- 3 Click the **Job Shipped** button in the email message that you received. The Print Service Provider receives a message notifying that the job has been shipped, and that the jobs status can be changed in the **DELIVERY** window.

Changing the Status of a Job

Sometimes there is a need to change the status of a job. For example, if the job status was changed outside the iWay system, or if a job in the **PRODUCTION QUEUE** window is a job that does need to be printed (that is, the final output of this job is not a *printed* item). In such cases, you need to change the job status within the iWay system, in the **PRODUCTION QUEUE** window.

- Click the **Move To** button; the **MOVE JOB** dialog box appears.
- Select **Delivery queue**. For information on the delivery queue, see [Delivery Queue](#) (on page 148).

NOTE: When you **APPROVE** a job within the **PRODUCTION QUEUE** window, there is no need to select the **DELIVERY QUEUE** option in the **MOVE JOB** dialog box.



Approving a Job for Printing

Before approving a job for production, it is recommended that you view the job imposition scheme, review the job ticket, re-impose the job if necessary and/or impose the job together with other jobs (refer to [Ganging Jobs for Production](#) (on page 142)). When the job is ready for production, and will not be outsourced to a partner Print Service Provider, you can approve the job for production.

To approve a job for production:

- 1 Select the target job in the production queue job list.
- 2 Click **Approve** in the job's details panel; the job is removed from the **PRODUCTION QUEUE** window.

The job is sent to the output device (or the hot folder of a specific output device), and moves from the **PRODUCTION QUEUE** window to the **PRINTING QUEUE** window. The job is also added to the **DELIVERY** window, where its status is automatically changed to **READY FOR DELIVERY**.

NOTE: If you **APPROVE** a job that is not ready for printing, a note appears to inform you which job parameter is not defined. You can either confirm that you want to approve the job, or cancel the approval.

- 3 After the job is approved and removed from the **PRODUCTION QUEUE** window, you can view the job in the **DELIVERY** window; for details, see [Delivery Queue \(on page 148\)](#).

NOTE: In some cases, it is preferable to view the job in the **DELIVERY window**, rather than the **PRINTING QUEUE** window.

- 4 If the job print is not managed by iWay, select **Move To...** and select the folder to which you want to move the job (for example, the **DELIVERY** window). After the job is printed and ready for delivery, continue to the delivery tasks. For details, see [Delivery Queue](#) (on page 148).

Delivery Queue

Delivery Queue Overview

After the job is approved for printing in the **PRODUCTION QUEUE** window, the job enters the **DELIVERY** window. For details on approving jobs, see [Approving a Job for Printing](#) (on page 148).

The **DELIVERY** window options allow you to process the delivery of your printed jobs. You can view and edit shipping information, print shipping labels, and approve jobs for delivery.

To access the Delivery window:

- 1 From the iWay menu, select **TASKS -> DELIVERY**; the **DELIVERY** window appears. All the jobs that were approved for printing are listed in the **JOBS FOR DELIVERY** panel on the left side of the window. By default, the first job in the list is selected, and its job information is displayed in the **BATCH ORDER** panel on the right side of the window.
- 2 Click to select another job in the **JOBS FOR DELIVERY** panel; the **BATCH ORDER** panel is updated accordingly. To quickly locate a job, use the **Search** option. For details, see [Managing the Jobs for Delivery Panel](#) (on page 149).



The **DELIVERY** window contains three panels:

- **Jobs for Delivery** panel—this is the main panel in the **DELIVERY** window; it lists jobs that have been printed and are waiting to be delivered. From here you select jobs that you want to approve for delivery.
- **Batch Order** panel—displays the job that is selected in the **JOBS FOR DELIVERY** panel, and the other jobs in the same order for the same Print Buyer. From here you can update shipping and carrier information, including shipping cost, and approve the printed job for shipping.

The other jobs that are also listed may have a different job status than the selected job. For example, the **BATCH ORDER** panel can include a job that has not yet entered the **DELIVERY** window, as indicated by its job status. Displaying the information on *all* the jobs in this order allows you to handle the shipment of the order more efficiently. For example, you can decide to approve delivery *only* when all the jobs are ready to be shipped.

- **Shipped Deliveries** panel—lists the shipped jobs for a selected period (last day, week, or month). An email notification is sent to the Print buyer, who can track the job in the Print Buyer's Shipping queue.

Managing the Jobs for Delivery Panel

The following parameters are displayed for each job in the **JOBS FOR DELIVERY** panel:

- A job thumbnail.
- Job #.
- Job name.
- Customer.
- Req.Date, if requested.

You can perform the following activities in the **JOBS FOR DELIVERY** panel:

- By default, the jobs are listed according to **JOB #**, in ascending order. However, you can sort the list according to the other parameters. Click the column of the parameter that you want to use for sorting the list.
- Determine which columns will appear in the list, using the **COLUMN SELECTION** option. In the **COLUMN SELECTION** dialog box, select or clear the check boxes of the column options, and click **OK**.
- Filter jobs in the list, using the **SEARCH** option.

NOTE: For details on using the **SEARCH** option, refer to [Managing Queues](#) (on page 4).

Managing Delivery in the Batch Order Panel

When a job is selected in the **JOBS FOR DELIVERY** panel, its information is displayed in the **BATCH ORDER** panel. The system automatically searches for other jobs that were ordered by the same Print Buyer, and displays these jobs in the **BATCH ORDER** panel.

The following parameters are displayed for each job in the **BATCH ORDER** panel:

- **JOB #, ORDER #, and COPIES.**
- Shipping information: **SHIPPING ADDRESS, SHIPPING DATE, PACKAGE NUMBER and DELIVERY LABEL.**
- Carrier information: **CARRIER, and TRACKING #** (a tracking # is provided by carriers that allow you to connect to their online tracking service).



- Status.

NOTE:

Because *all* the jobs that were ordered by this Print Buyer are listed, some jobs might have a status other than **READY FOR SHIPPING**.

In the **BATCH ORDER** panel, you can perform the following activities:

- Sort the jobs by clicking on the column that you want to use for sorting.
- View the status of all the jobs in this order: Printing, Ready for Shipping, or Delivered.
- Select the job(s) that you want to ship.
- Print shipping labels.
- Calculate shipping costs.

Creating a Delivery Package

From the **BATCH ORDER** panel, you can create a delivery package for the jobs that are delivered in this order.

To create a delivery package:

- 1 Select the job for which you want to create a delivery package. You can select multiple jobs to bundle together while holding down the CTRL key.

NOTE:

- All jobs selected must belong to the same Batch Order.
- The shipping method must be the same for all jobs selected.
- The shipping address must be the same for all jobs selected.


- 2 Click **Create Delivery Package**; the Create Delivery Package dialog box opens.
- 3 Modify the shipping address if necessary:
 - a Click the **Shipping Address** link; the **EDIT ADDRESS** dialog box appears.
 - b Type the appropriate information in the address fields.
 - c Click **OK** to save changes.
- 4 Modify the shipping method if necessary:
 - a Click the **Shipping Method** link; the **SELECT SHIPPING METHOD** dialog box appears.
 - b From the **Shipping Method** dropdown list, select a shipping method.
 - c Click **OK** to save changes.
- 5 Select the **LABEL OPTION**.
 - The 'Get a delivery label by placing a shipment request with an online carrier' option is only available for UPS or FedEx online Shipping Methods.
 - The 'Create a generic delivery label' - iWay creates a word document.
- 6 Use the shipping calculator to estimate the shipping cost based on the shipping method and the weight and size. Update the **WEIGHT** if necessary, enter the **CARTON SIZE** and then click **Estimate Price**.
- 7 (Optional) Override the Actual Cost by selecting the checkbox and entering the new cost in the text box.
- 8 Click **Create Delivery**.

The dialog box closes and a package number is automatically generated for the Tracking Number, and the job information is updated in the Delivery Queue.



Separating a Single Job into Multiple Packages

To separate a single job into multiple packages:

- 1 Select a Job.
- 2 Click the Job's **Edit** icon  to open the **DELIVERY INFORMATION** dialog box.
 - a Enable the **Override Tracking #** checkbox and manually enter the Tracking Numbers in the text box. Separate the numbers with a comma.
 - b Click **OK**.
- 3 The dialog box closes and a package number is automatically generated for each of the Tracking Numbers. The Job information is updated in the Delivery Queue with *View Package #* and *View Tracking #* links that open a dialog box to display the package and tracking information.

Approving Jobs for Delivery

After the job is printed and its shipping information has been verified, you can approve the job for delivery.

To approve a job for delivery:

- 1 In the **BATCH ORDER** panel you can see which job in the batch order can be approved for delivery, as indicated by its job status—**READY FOR SHIPPING**. If there are additional jobs in the order that are ready for delivery, press the <CTRL> key to select multiple jobs.

NOTE: If you want to deliver the jobs as a batch order, and not all the jobs are ready for shipping, wait until *all* the jobs are ready.

- 2 Click **Approve Selected Deliveries**; the selected job(s) moves from the **JOBS FOR DELIVERY** panel to the **SHIPPED DELIVERIES** panel.
-

NOTE: Jobs that are approved for delivery will also appear in the Print Buyer's **SHIPPING** window.

Viewing Carrier Tracking Status

Some carriers have an online tracking service that allows you to track your job using the job's **TRACKING #**, which was provided by the carrier. Using the **TRACKING #**, you can connect to the carrier's service from the **BATCH ORDER** panel, and view the job's shipping status.

To view carrier tracking status:

- 1 Click the **TRACKING #** of the job that you want to track; the carrier's **TRACK SHIPMENTS** window appears.
- 2 Navigate to the job and view the results. You can see whether the job is in the shipping process, or has already been delivered.

Managing the Shipped Deliveries Panel

The **SHIPPED DELIVERIES** panel lists jobs that were approved for delivery; these jobs are no longer listed in the **JOBS FOR DELIVERY** panel and in the **BATCH ORDER** panel. In the **SHIPPED DELIVERIES** panel, you can track shipped jobs. If there are other jobs in this order, you can view their status in the **BATCH ORDER** panel.



The following information is displayed in the **SHIPPED DELIVERIES** panel:

- **JOB #, ORDER #, and COPIES.**
- Shipping information: **SHIPPING ADDRESS**, and **SHIPPING DATE.**
- Carrier information: **CARRIER**, and **TRACKING #** (if provided).
- **ACCOUNT** name.

When a job is shipped by a carrier that provides online tracking service, you can click the **TRACKING #** to view the job's shipping status from within the carrier's system. For details, see [Managing the Jobs for Delivery Panel](#) (on page 149).

NOTE:

The Print Buyer can track the job in Print Buyer's Shipping queue after the shipping email notification is received. When the Print Buyer receives the job, the Print Buyer clicks **RECEIVED**. The job enters the Print Buyer's Received queue and the job status automatically changes to **RECEIVED**.

In the **SHIPPED DELIVERIES** panel, you can perform the following activities:

- List jobs according to different delivery periods, and different sorting options.
- Return a job for delivery approval.
- View delivery labels.

To list jobs according to delivery period and sorting options:

- Delivery period—the jobs listed in the **SHIPPED DELIVERIES** panel are according to the last delivery period that was selected. You can select another delivery period: From the **Shipped in the Last** dropdown list, select **DAY**, **WEEK** or **MONTH**. The list is updated accordingly.
- Sorting—you can sort the job list according to each of the job parameters. Click the column that you want to use for sorting the list.

To return a job for delivery approval:

Sometimes you want to return a job for delivery approval *after* it was approved for delivery. For example, if the job has not yet been delivered and you realize that additional jobs in this order have not been approved for delivery, and you want to deliver them as a batch.

- 1 In the **SHIPPED FOR DELIVERIES** panel, select the job that you want to return for delivery approval.
- 2 Click **Back to Approval**. The job is removed from the **SHIPPED FOR DELIVERIES** panel, and returns to the **JOBS FOR DELIVERY** panel and the **BATCH ORDER** panel.
- 3 Process the job delivery. For details, see [Managing Delivery in the Batch Order Panel](#) (on page 149).

To view delivery labels:

From the **SHIPPED FOR DELIVERIES** panel, you can view and print the job's delivery labels. You might want to do this if the job was ruined during packing, or if you want to verify the shipping address.

- 1 Click **View Label** of the job that you want to view; the **EDIT FILE** window appears.
- 2 Click the link of the delivery label file. The file is either saved as a Word document or an HTML document.
- 3 If needed, reprint the delivery label file.



Track Jobs

The status of a job in the iWay system is determined by specific actions performed by a Print Buyer or by the Print Service Provider. Using the various options in the iWay system, you can perform actions that are job-status specific. For example, after the job is printed, it enters the production queue. In the **PRODUCTION QUEUE** window, you can perform activities that are relevant to this job status, as described in [Managing Jobs in the Production Queue](#) (on page 135). However, sometimes you want to track jobs regardless of their status. The iWay job tracking feature makes it easy for you to track jobs. You can track a job even if you don't know its current status, and you can track a job that is not located in a specific queue.

In the **TRACK JOBS - SEARCH** window, you can display all the job queues in the system; starting from Design, through Ready to Order, Printing, Shipping and Received. For example, you might want to search for all the jobs that were shipped to a specific Print Buyer by a specific date. You can also display jobs that were deleted.

In addition, there are various job modifications that you can perform from the **TRACK JOBS** window. For example, create a job ticket, and modify the job and order pricing.

This section describes the activities that can be performed in the **TRACK JOBS** window:

- [Searching for Jobs](#) (on page 153).
- [Managing Tracked Jobs](#) (on page 155).

Searching for Jobs

This section explains how to search for jobs, and how to define what information is displayed for each job.

Defining Job Search Criteria

The iWay system allows you to define search criteria, and perform the search on all job statuses. Alternatively, you can select one of the predefined job statuses to only track jobs that have the selected job status (there no need to define a search criteria).

To track jobs using a search criteria:

On the iWay main menu, select **TASKS -> TRACK JOBS**; the **TRACK JOBS - SEARCH** window appears. In this window, you specify the criteria to be used for the search. The window displays four search fields (status, search field, operator, value) that are used to define the search criteria. You can perform a simple search or an advanced search.

To perform a simple search:

- 1 From the **STATUS** dropdown list, select the job status that you want to search for. By default **ALL** is selected.
- 2 From the **SEARCH** dropdown list, select the job field that will be the search criteria. The job fields are divided into categories, such as Job, Pricing, and Order, to make it easier to locate the various fields.
- 3 In the operator field, select the operator (for example, =, <=) to be used when comparing the search criteria to the value.
- 4 In the value field, type the value that will be compared to the search criteria, using the selected operator.



- 5 Click **Search**. The list of jobs that conform to your search definition is populated by the system and displayed in the Track Jobs - Job List window. To modify the information that is displayed for each job, see [Defining and Saving Job Search Information](#) (on page 154).

To perform an advanced search:

You can narrow down your search by using **ADVANCED SEARCH** to define sets of multiple criteria:

- 1 Click **Advanced search**; the **ADVANCED SEARCH** dialog box appears.
- 2 From the **STATUS** dropdown list, select the job status that you want to search for. By default **ALL** is selected.
- 3 You can specify up to three sets of search criteria. For each set of criteria, perform the same steps as those performed in the simple search.
The implied relationship between multiple sets of search criteria is **AND**.
- 4 Click **OK** in the **ADVANCED SEARCH** dialog box.
- 5 Click **Search** in the **TRACK JOBS - SEARCH** window. The list of jobs that conform to **ALL** your search criteria is populated by the system and displayed in the window. To modify the information that is displayed for each job, see [Defining and Saving Job Search Information](#) (on page 154).

You can perform various job modifications, as described in [Managing Tracked Jobs](#) (on page 155).

To track jobs conforming to predefined status:

When you select **TASKS -> TRACK JOBS**, the **TRACK JOBS - SEARCH** window shows **ALL** in the **STATUS** field. However, you can display jobs that conform to a predefined status without defining search criteria.

- 1 On the iWay main menu, select **TASKS -> TRACK JOBS**.
- 2 On the **TRACK JOBS** ribbon, click the link of the type of jobs that you want to display (for example, **Saved Jobs**, **Ready to Order**, **Shipped**).
The list of jobs that conform to the selected type of job is populated by the system and displayed in the window.
- 3 After the jobs that you want to track are displayed in the window, you can modify the information that is displayed for each job. For more information, refer to [Defining and Saving Job Search Information](#) (on page 154). In addition, you can perform various job modifications, as described in [Managing Tracked Jobs](#) (on page 155).

Defining and Saving Job Search Information

After searching for the jobs that you want to track, you can modify the information that is displayed for each job, and save the tracked jobs in an Excel file.

The displayed information for each job depends on the information that was defined the last time that the **TRACK JOBS** window was displayed. The job information includes: **JOB #**, **STATUS**, **JOB TYPE**, **JOB NAME** and **CREATION DATE**. However, you can select other job fields.

To define the job information and save results:

- 1 To define what job information is displayed for each job:
 - a Click **Column selection**.



- 2 Select one of the four status options, and click **Commit Change**. By default, the **DO NOT CHANGE THE JOB STATUS** option is selected.

Deleting a Job

You can delete jobs from the **TRACK JOBS** window. For example, if the job was canceled, or the job has been shipped and delivered. Deleted jobs are saved within the iWay system, and can be displayed.

NOTE: To display deleted jobs: select **TASKS -> TRACK JOBS**, and on the **TRACK JOBS** ribbon, click **Deleted**.

- 1 Select the job that you want to delete in the **TRACK JOBS** window, and click **Delete job**; the **DELETE JOBS** confirmation message appears.
- 2 Click **Yes** to confirm the job deletion.

Viewing and Editing the Job Properties

You can view basic job properties, preview the job, and modify some of the job properties from the **TRACK JOBS** window.

To view and edit job properties:

- 1 Select the job in the **TRACK JOBS** window, and click **Edit Properties**; the **JOB PROPERTIES** dialog box appears.
- 2 Click on **PDF Preview** to preview the job.
- 3 You can view basic job properties, and modify properties, as needed. For more information on job properties, see [Viewing and Editing Job Properties](#) (on page 137).

Viewing and Editing the Job Pricing

You can view job pricing details, and if necessary, edit the details.

To view and edit job pricing:

- 1 Select the job in the **TRACK JOBS** window, and click **Job Pricing**; the **JOB PRICING** dialog box appears.
- 2 View the pricing details of the pricing plan that was defined for the job. If necessary, you can edit the pricing details, select another pricing plan or create a new plan. For more information on job pricing, see [Pricing Process Overview](#) (on page 120).

Viewing and Editing the Job Ticket

You can view the job ticket, and if necessary, edit the details.

To view and edit the job ticket:

- 1 Select the job in the **TRACK JOBS** window, and click **Job Ticket**; the **JOB TICKET CREATION** dialog box appears.
- 2 View the job ticket details. If necessary, you can edit the job ticket details. For more information on job tickets, see [Creating a Job Ticket](#) (on page 144).



Viewing and Editing the Order Pricing

You can view and edit the pricing of the order to which the job belongs.

To view and edit order pricing:

- 1 Select the job in the **TRACK JOBS** window, and click **Order Pricing**; the **ORDER PRICING** dialog box appears.
- 2 View the order pricing details. If necessary, you can edit the order pricing details. For example, add items that are part of the order. For more information on order pricing issues, see [Pricing](#) (on page 118).

Saving a Job as a Template

The **SAVE AS TEMPLATE** option allows you to save a job as a template, and then use the template when ordering a new job.

To save a job as a template:

- 1 Select the job in the **TRACK JOBS** window, and click **Save As Template**; the **SAVE AS TEMPLATE** dialog box appears.
- 2 Define the template properties. For more information on saving jobs as templates, see [Creating a New Template from an Existing Job](#) (on page 107).

Searching for an Order

The **SEARCH ORDER** option allows you to search for all the jobs that are contained in the same order as the selected job. This information might be useful if, for example, you want to know the status of other jobs in that order.

Select the job in the **TRACK JOBS** window, and click **Search Order**. The system creates an automatic filter according to the selected job's order number and runs the search. The Track Jobs - Job List window is populated with all the jobs in the selected order.



Managing MiWay

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This chapter describes how to create and edit Pageflex iWay skins. You can use the MiWay branding functionality to personalize the general web site layout, in addition to the look and feel of specific items.

Skin Structure

A branding skin comprises several components that define the look and feel of the launch pad, the login page, the site frame containing a top bar and a left bar, and banners for emails and catalogs. You have to define each component separately. In addition, iWay supports several levels of Print Buyer user privileges. It is possible to use the same site frame for the different user types, or to create a different site frame look and feel for the different privileges.

NOTE:

All settings described in this chapter define MiWay settings at the default level (true for all Print Buyers in your iWay system). However, you can adjust the settings per account. For more information about defining MiWay settings at the Account level, refer to [Defining Account Branding](#) (on page 53).

Types of Controls

The branding feature identifies buttons and links, Print Buyer logos, and tabs. Clicking a button or a link changes the iWay page content or opens a new dialog box. A matching control must be assigned to each of the buttons in order to keep the full functionality of the application.

This chapter includes the following sections:

- [Creating Skins](#) (on page 159)
- [Editing Skin Elements](#) (on page 162)
- [Uploading Designs](#) (on page 164)
- [Activating Page Elements](#) (on page 165)
- [Managing the Skin Library](#) (on page 168)



Creating Skins

You can customize and personalize the general web site layout, in addition to the look and feel of specific items with a skin. You achieve this by uploading designs and images, and adding text to the launch pad and the various frames and banners on the system site.

This section describes the following procedures:

- [Accessing The Skin Editor](#) (on page 159)
- [Customizing the Login Page](#) (on page 159)
- [Customizing the Site Frame](#) (on page 160)
- [Customizing the Launch Pad](#) (on page 160)
- [Customizing the Email Banner](#) (on page 161)
- [Customizing the Catalog Banner](#) (on page 161)
- [Saving and Previewing Views](#) (on page 162)

Accessing The Skin Editor

You can customize and edit iWay skins in the **SKIN EDITOR**.

To access the Skin Editor:

- 1 Select **STORE ASSETS -> SKINS**; the **SKIN LIBRARY** appears.
- 2 Select a skin and click **Skin Editor**; the **SKIN EDITOR** window appears.

Customizing the Login Page

Your Print Buyers use the login page to log in to the iWay application. You use the MiWay **LOGIN PAGE** window to brand a login page. Before customizing the login page, you must have a login page HTML design (*.mht format) with the following prerequisites:

- Two text boxes (for the User name and the Password).
- An image for the login button.

It is recommended that you have HTML files initially designed by an HTML designer with an understanding of your iWay application requirements.

To customize the login page:

- 1 In the **SKIN EDITOR**, click **Login Page**; the login page appears with the **EDIT** tab selected.
- 2 Click the **Upload Login HTML** link; a confirmation window appears.
- 3 Click **Yes**; the **FILE UPLOAD** window appears.
- 4 Browse to the specially designed login page .mht file to upload, and click **Next**; the design appears in the login page. For information on uploading designs, refer to [Uploading Designs](#) (on page 164).
- 5 Save and preview the login page. For information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).
- 6 Activate the login page elements. For more information about activating elements, refer to [Activating Page Elements](#) (on page 165).



Customizing the Site Frame

You can use the **SITE FRAME** tab to customize the top and left bars of the application and to define user privileges. The contents of site frame, composed of top and left frames and a main application frame, determine the look and feel of the main application window.

NOTE: For information on defining user privileges, refer to [Defining User Privilege Views](#) (on page 167).

You must have an HTML design (*.mht format) to customize the top bar and left bar.

- The top bar HTML design must contain a top bar with a table of four cells.
- The left bar HTML design must contain a table of seven cells (aligned vertically).

It is possible to have the sub menu of seven cells moved to the top bar, but the main menu cannot be moved to the left.

To customize the Site Frame:

- 1 In the **SKIN EDITOR**, click **Site Frame**; the **SITE FRAME** window appears, reflecting the Admin view.
- 2 Click the **Upload Top Bar** link.
- 3 Click **Yes** in the confirmation windows; the **TOP BAR: FILE UPLOAD** window appears.
- 4 Complete the File Upload instructions, browse to the target top bar file and click **Next**; the top bar appears in the **SITE FRAME** window.
- 5 Click the **Upload Left Bar** link.
- 6 Click **Yes** in the confirmation windows; the **FILE UPLOAD** window appears.
- 7 Complete the **LEFT BAR: FILE UPLOAD** instructions, browse to the target left bar file and click **Next**; the left bar appears in the **SITE FRAME** window.
- 8 Save and preview the site frame. For information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).
- 9 Activate elements in the site frame top and left bars. For information about activating the site frame top and left bars, refer to [Activating Page Elements](#) (on page 165).

Customizing the Launch Pad

Depending on the system preference settings, the starting point for initiating a job order can be the launch pad. You can use the **LAUNCH PAD** view to apply your branding to the launch pad. Alternatively, you may prefer to have the iWay default launch pad appear.

To use the default iWay Launch Pad:

- 1 In the **SKIN EDITOR**, click **Launch Pad**; the **LAUNCH PAD** view appears with the **EDIT** tab selected.
- 2 Select the **Preserve the Default Launch Pad Look** check box, located at the base of the **LAUNCH PAD** view.
- 3 Click **OK**.



To customize the Launch Pad:

- 1 In the **SKIN EDITOR**, click **Launch Pad**; the **LAUNCH PAD** view appears with the **EDIT** tab selected.
- 2 Click the **Upload Launch Pad HTML** link; the confirmation window appears.
- 3 Click **Yes**; the **FILE UPLOAD** window appears.
- 4 Browse to the designed launch pad .mht file to upload, and click **Next**; the design appears in the launch pad. For information on uploading designs, refer to [Uploading Designs](#) (on page 164).
- 5 Save and preview the launch pad. For more information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).

NOTE: You can edit the final design after saving and previewing your launch pad. For more information about design editing, refer to [Editing the Final Design](#) (on page 163).

- 6 Activate the launch pad elements. For more information about activating elements, refer to [Activating Page Elements](#) (on page 165).

Customizing the Email Banner

You can use the **EMAIL BANNER** window to customize the banner of email messages generated and sent through the iWay system. For more information about email messages sent throughout the iWay system, refer to [Defining Email Notification Settings](#) (on page 59).

To customize the Email Banner:

- 1 In the **SKIN EDITOR**, click **Email Banner**; the **EMAIL BANNER** window appears with the **EDIT** tab selected.
- 2 Click the **Upload Email Banner HTML** link; the confirmation window appears.
- 3 Click **Yes**; the **FILE UPLOAD** window appears.
- 4 Browse to the specially designed Email Banner .mht file to upload and click **Next**; the design appears in the **EMAIL BANNER** window. For information on uploading designs, refer to [Uploading Designs](#) (on page 164).
- 5 Save and preview the Email Banner. For information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).

NOTE: You can edit the final design after saving and previewing the email banner. For information about editing the design, refer to [Editing the Final Design](#) (on page 163).

- 6 Activate the **EMAIL BANNER** window elements. For information about activating elements, refer to [Activating Page Elements](#) (on page 165).

Customizing the Catalog Banner

You can use the **CATALOG BANNER** window to customize the banner of HTML catalogs. For information about HTML catalogs in the iWay system, refer to [Setting the Account Job-ordering Windows](#) (on page 53).

To customize the Catalog Banner:

- 1 In the **SKIN EDITOR**, click **Catalog Banner**; the catalog banner page appears with the **EDIT** tab selected.
- 2 Click the **Upload Catalog Banner HTML** link; the confirmation window appears.



- 3 Click **Yes**; the **FILE UPLOAD** window appears.
- 4 Browse to the specially designed catalog banner .mht file to upload and click **Next**; the design appears in the catalog banner page. For information on uploading designs, refer to [Uploading Designs](#) (on page 164).
- 5 Save and preview the catalog banner. For information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).

NOTE: You can edit the final design after saving and previewing your catalog banner. For information about editing the final design, refer to [Editing the Final Design](#).


- 6 Activate the catalog banner elements. For information about activating elements, refer to [Activating Page Elements](#) (on page 165).

Saving and Previewing Views

The **SAVE AND PREVIEW** tab displays a preview of the current skin item without grid lines. Toggle between the two views by clicking the tabs located at the base of the **SKIN EDITOR**.

To save and preview views, click the **Save and Preview** tab; changes are saved and a preview appears.

NOTE:

- Images missing from a preview are indicated by .
- Buttons are inactive on the **SAVE AND PREVIEW** tab.

Editing Skin Elements

This section describes editing skin elements, and the following procedures:

- [Uploading Images](#) (on page 80)
- [Editing the Final Design](#) (on page 163)

You can edit the following skin elements using the **STYLE SHEET** window:

- **Color Palette** – Edit the window colors.
- **Buttons** – Edit the standard application button images.
- **Side Panel** - Edit the Panel Title and Background.
- **Fonts** – Edit font type, style, size and color.
- **Arrows** - Edit the Arrow icons.
- **Wizard Progress** - Edit the progress images.
- **Tabs** - Edit the tab images.

Uploading Images

- 1 Select the folder to which you want to upload the images.
- 2 Click **Upload Images**; the **UPLOAD FILE** dialog box opens.
- 3 To upload a *single* file:
 - a Click **Browse** and select the image to upload.
 - b Click **Continue**; the image is uploaded.
 - c Click **Close**, to close the upload dialog box; the image is added to the image library.
- 4 To upload *multiple* files:



- a Select the **Upload multiple files** option.
- b Click **Continue**; the FTP Upload dialog box opens.
- c Click Page and select Open FTP Site in Windows Explorer; the Windows Explorer opens.
- d Drag and drop the images to be uploaded to the FTP window.
- e Close the Windows Explorer and the FTP Upload dialog boxes.

Editing the Final Design

After skins are uploaded, approved, and activated, you can edit the final design in the **SKIN EDITOR**.

To reposition objects:

- 1 In the **SKIN EDITOR**, click the object to reposition.
- 2 Drag and drop it to the new location.

To resize objects:

- 1 In the **SKIN EDITOR**, click the object to resize.
- 2 Drag the anchor points to the new location.

To add text:

- 1 In the **SKIN EDITOR**, click the area where text is to appear.
- 2 Type the text.

To edit text:

- 1 In the **SKIN EDITOR**, select the text to edit.
- 2 Edit the text. Text editing tools are located on the toolbar.

NOTE: Save and preview your work by clicking the **SAVE AND PREVIEW** tab.

Accessing the Style Sheet Window

To access the **STYLE SHEET** window, select a skin in the **SKIN LIBRARY** and select **SKIN EDITOR > STYLE SHEET**; the **STYLE SHEET** window appears.

NOTE: All Privilege levels use the Style Sheet.

To edit a window color:

- 1 In the **STYLE SHEET** window, click a color palette element; the **COLOR SELECTION** dialog box appears.
- 2 Select a color or type an RGB number; the new color appears in the **SELECTED COLOR** field.

NOTE: When using the RGB Editor, numbers cannot exceed 255.

- 3 Click **OK**; the new color appears on the **COLOR PALETTE** sub-panel.
- 4 Repeat Steps 1 through 3 to edit the color of other elements.



To edit a button:

- 1 Ensure the button image to be used (other than the existing button images) is uploaded to the Images folder. For information about uploading images, refer to [Uploading Images](#) (on page 80).
- 2 In the **STYLE SHEET** window, click a Button element; the **IMAGE FOLDER** dialog box appears showing the button name selected in the Name list, and the current button image displayed on the **IMAGE** pane.
- 3 Click the new image name and then click **Select Image**; the new image appears on the **BUTTONS** sub-panel.

NOTE:

- Text displayed on regular and dark buttons is independent of the background image.
 - The text is edited from the **FONT** sub-panel.
-

To edit a font:

- 1 In the **STYLE SHEET** window, click a font element; the **FONTS** dialog box appears.
- 2 Click a font type and style, and type a size.
- 3 Click **OK**.

To edit font colors:

- 1 In the **STYLE SHEET** window, click a font element; the **FONTS** dialog box appears.
- 2 Click the **Color** field; the **COLOR SELECTION** dialog box appears.
- 3 Click a color or type an RGB number; the new color appears in the **SELECTED COLOR** field.
- 4 Click **OK**; the new color appears on the **COLOR PALETTE** sub-panel.
- 5 Click **OK**.

NOTE:

To preview the changes on the **PREVIEW** pane, right-click in the **STYLE SHEET** window and from the shortcut menu, choose **Refresh**.

Uploading Designs

Before uploading a design, you must have a login page HTML design (*.mht format) for each of the pages to be customized.

It is recommended that you have HTML files initially designed by an HTML designer with an understanding of your iWay application requirements.

Initial application designs first appear as gray background (default) to serve as reference data for what is being replaced, which you can select and temporarily delete. The gray background disappears permanently after you upload an HTML file (*.mht format).

The varying dimensions for uploading MiWay files are outlined below.

Page Name	Width	Height
Login Page	1000px	700px
Site Frame	Left bar - 200px Top bar - 1000px	Left bar - 500px Top bar - 100px
Launch Pad	1000px	700px
Email Banner	1000px	unlimited
Catalog Banner	1000px	100px



Converting HTML Pages to .mht Files

You must convert the HTML page to a web archive (*.mht) file when uploading designs.

To convert an HTML page to an .mht file:

- 1 Open the web page in Microsoft Internet Explorer.
- 2 Select **FILE -> SAVE AS**; the **SAVE AS** window appears.
- 3 In the **SAVE AS TYPE** dropdown list, select **Web Archive, single file (*.mht)**.
- 4 Click **Save**.

Activating Page Elements

After you upload an .mht file, the associated page elements, such as links and buttons, remain inactive. In other words, they remain static and provide no functionality until they are 'activated', giving them functionality. Therefore, to activate those elements, you assign an action for each item.

Tabs are functionally very similar to buttons. There are tab controls in **TRACK JOBS**, **MANAGE TEMPLATES** and **MY MANAGE ACCOUNT** pages. You use these tabs to control the content of the window.


The main difference in behavior between the tabs and the buttons is that the tabs have two modes - a selected mode and an unselected mode. Activating tabs in the same way that buttons are activated makes skin creation very cumbersome. For this reason tabs are treated differently. A generic table is defined in the HTML page. This table can have 1 column with 4 rows, or 1 row with 4 columns. Having a total of 4 cells provides for all the possible tab controls. You then define the color of the selected and unselected tab and the font and color of the tab caption. From there the Branding feature takes the specifications for generating the various tabs in the various application environments.

Use the **ACTIVATION** window to activate buttons (links) and fields, such as on the login page, where you have a User and a Password field. Other pages have different items to activate.

This section describes activating page elements, and the following procedures:

- [Selecting Languages](#) (on page 166)
- [Specifying First Page After Login](#) (on page 167)
- [Defining User Privilege Views](#) (on page 167)

To activate page elements:

- 1 In the **SKIN EDITOR**, click ; the **ACTIVATION** window appears. The window is divided into the following three panes:
 - Left pane – Lists the activated objects (images or text).
 - Center pane – Displays the Editor instructions.
 - Right pane – Lists the required and optional buttons for activation.

NOTE:

When you select a left pane list object, the corresponding object in the design is automatically selected, visually linking the listed object and the design object.

- 2 Select an object in the **SKIN EDITOR** window and click **Add** in the **ACTIVATION** window left pane (or double-click the object); a newly activated object appears in the left pane list.
- 3 Type the default name.



- 4 In the center pane, click the **Element Type** dropdown list, and select the required element type; the right pane automatically updates to reflect the selection made.

NOTE:

The right pane includes two activation lists: 'Recommended' and 'Optional'. After clicking **OK** or **Save and Preview**, an *alert* message appears if you neglected to activate all the recommended list items.

To activate tabs in the Top and Left Bars:

- 1 In the **ACTIVATION** window, in the **ELEMENT TYPE** dropdown list, select **Tab-Main Menu** or **Tab-Sub Menu**.
- 2 For Unselected Mode and Selected Mode, define the fonts, text alignment, and background color.

NOTE:

If you select the **ALWAYS SHOW BACKGROUND** option, the top and left bar background design elements, including any inactive buttons and images, remain visible for all users—regardless of their user privilege level—in all views.

- 3 In the **TABS ALIGNMENT** list, select a valid tab alignment option and then click **OK**. See the options in the table below:

Both bars	Top bar	Left bar
Fit To Width	Right	Top
Center	Left	Bottom


Selecting Languages

You can define the language selection function, which appears in the login page. Language selection enables your users a selection of languages to view your site in.

NOTE:

- Language Selection functionality is optional; if you leave the Language Selection undefined, the default language remains that of the Print Service Provider.
- Verify that language icons exist in the uploaded login page HTML design to enable Language Selection.

To activate Language Selection buttons:


- 1 In the **SKIN EDITOR**, select a predefined language icon.
- 2 Click ; the **ACTIVATION** window appears.
 - a Click the **Add** button, and in the **ELEMENT TYPE** dropdown list, select **Button/Link**.
 - b In the **ACTIVATED FUNCTION** dropdown list, choose **Select Language**.
 - c In the **LANGUAGE** dropdown list, select the language you want.
 - d Repeat Steps 1 to 3 for each additional language selection button.
 - e Click **OK** to confirm the activation and close the **ACTIVATION** window.
- 3 Click **OK** to close the **SKIN EDITOR**; the Language Selection buttons are activated.



Specifying First Page After Login

You can specify the default page that users arrive at after logging in, according to their user privilege level. It is recommended that such default page settings are decided on together with your Print Buyers. You can use the **DEFAULT PAGE** tool, located on the site frame, to specify the first page after login for each privilege level. The default page can be any one of the iWay internal pages, or an external page.

To define an alternative Default page:

- 1 In the **SKIN EDITOR**, click  **Default Page** under the Site Frame tab, and in the **DEFAULT PAGE** dialog box, choose **Use External URL** or **Use Internal Page**.
 - If you choose **USE EXTERNAL URL**, type the target URL in the field.
 - If you choose **USE INTERNAL PAGE**, select the target internal page from the dropdown list.
- 2 Click **OK**.
- 3 Save and preview the page. For information about saving and previewing, refer to [Saving and Previewing Views](#) (on page 162).

Defining User Privilege Views

iWay operators authorized with Administrator user type have complete operational control. The Administrator view is the primary base design upon which a designer uses to create other user views. The branding applied to the **ADMINISTRATOR** window is automatically applied to the views displayed to the other user types.

For more information about defining system users, refer to [Defining Print Service Provider Users](#) (on page 17).

Defining and Editing for the Various User Types

You can use the Edit Privilege bar to define the seven different views of the iWay application. The **EDIT PRIVILEGE** windows are designed with the same layout, with the exception of different instructions in the instruction pane.

To define views for various user types:

- 1 In the **SKIN EDITOR**, click **Site Frame** and the required **EDIT PRIVILEGE** tab.
- 2 Select one of the following option buttons:
 - **Inherit From Administrator** – determines that the site frame is based on the user type design.
 - **Customized for this Privilege Level** – determines that the site frame is based on the user type design and the user has the ability to customize the design.

After the Administrator design is completed, it is advisable to edit the screens according to user abilities (as defined in **SYSTEM SETUP -> ADVANCED -> USER TYPES**).

Example edit: Remove the button accessing software downloads for the **USER** screen. You will need to upload the edited .mht file to the customized user privilege skin again.



Managing the Skin Library

This section describes managing the **SKIN LIBRARY**, and the following procedures:

- [Assigning Skins to Print Buyers](#) (on page 168)
- [Designating a Default Skin](#) (on page 168)

Use the **MIWAY LIBRARY** to manage your system skins. Designers can create, edit, or delete skins, as well as rename and define the default skin.

Assigning Skins to Print Buyers


When you select a skin in the **SKIN LIBRARY** to be used by one or more Print Buyers, the Print Buyer name, or names of Print Buyers currently assigned to the selected skin (if any) appear in the **ASSIGNED TO CUSTOMERS** list. You can reassign skins, or remove the skin assignment option for the Print Buyer altogether.

To assign a skin:

- 1 In the **SKINS** list, select a skin name and click **Assign to Customers**; the **ASSIGN TO CUSTOMERS** dialog box appears listing all Print Buyers and their respective assigned skins.
- 2 Select the check boxes corresponding to the respective Print Buyers and click **Assign**; the assigned Print Buyers are displayed in the **ASSIGNED TO CUSTOMERS** list.

Designating a Default Skin

The *System Standard* skin, located in the **SKINS** list, is automatically set as the default skin upon installation. You can select another skin as the default skin for your iWay site.

To make a default display skin; select a skin and click  **Set as Default**.

NOTE:

- You cannot have multiple default skins.
- The System Standard skin cannot be edited.

Accessing the Skin Library

To access the **SKINS LIBRARY**; select **STORE ASSETS > SKINS**; the **SKIN LIBRARY** appears.

To begin creating a skin:


- 1 In the **SKIN LIBRARY**, click **New Skin** and type a unique name in the **ENTER NEW NAME** field.
- 2 Click **OK**; the new skin name appears in the **SKINS** list.

You can now upload and assign design(s) and images to the skin, thus customizing it to serve as branding for your MiWay system. For information about how to edit skins and upload designs and images, refer to [Creating Skins](#) (on page 159) and [Editing Skin Elements](#) (on page 162).




Duplicating Skins


You can create multiple skins with the same look, containing different content or images, by using an existing skin. Duplicating skins is a simple, time-saving method of setting up a Multisite system.

To duplicate a skin, select a skin name and click  **Duplicate Skin**; the duplicate skin appears in the **SKINS** list.

To rename a skin:

- 1 In the **SKINS** list, select a skin.
- 2 Click  **Rename Skin** and type a unique name in the **SKIN NAME** field.
- 3 Click **OK**; the skin is renamed.

To delete a skin:

- 1 In the **SKINS** list, select a skin name and click  **Delete Skin**.
- 2 In the confirmation dialog box, click **Yes**; the skin is deleted. Print Buyer accounts assigned with the deleted skin are assigned the default skin.



Direct Marketing Links

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You can use Pageflex iWay Direct Marketing Links to enhance your Print Buyers' business opportunities with the ability to provide specialized services through the use of customized templates. These templates are created and then customized by integrating external application plug-ins. After purchasing a Pageflex iWay Direct Marketing Links license, the relative module adapters are provided to enable use of the modules described below.

This chapter contains information about the following Direct Marketing Links plug-ins:

- [DirectSmile Image Generator](#) (on page 170) – create personalized image layouts and designs, increase the impact of direct mail.
- [XMPie PersonalEffect Integration](#) (on page 172) – enables Print Buyers to effectively reach their customers via print, web, and email, within the framework of dynamic publishing campaigns.

DirectSmile Image Generator

You can use DirectSmile Image Generator to create personalized image layouts and benefit from almost unlimited design possibilities. You can increase the impact of direct mail and narrow the distance between your Print Buyers and their customers, using the DirectSmile Image Generator.

This section describes how to use DirectSmile Image Generator within iWay templates, and contains the following topics:

- [Creating a Template with a DirectSmile Image](#) (on page 170)
- [Ordering a Job from a Template with a DirectSmile Image.](#) (on page 172)

NOTE:

- You are required to purchase DirectSmile Image Generator .dset files (DirectSmile Image sets) and add them in the DirectSmile Image application.
- Ensure that all prerequisite software and components are properly installed and configured before beginning template creation. See the *Pageflex iWay Integration Guide* for more information.
- Both Print Services Providers and Print Buyers can create Templates **only** if they have Manage Template privileges.

Creating a Template with a DirectSmile Image

After creating a Pageflex iWay template, create a template with a DirectSmile Image.

- 1 Navigate to **ACCOUNTS -> STORE SETUP -> TEMPLATES**.
- 2 Click the **Create a new Template** link; the **CHOOSE JOB TYPE** dialog box appears.



- 3 Select a job type and click **Select**; the **GENERAL PROPERTIES** window appears.
- 4 Type a template name in the **TEMPLATE NAME** field.
- 5 (Optional) Click the **Change Thumbnail** link to change the thumbnail image.
- 6 Type valid template property information in the fields provided.

NOTE:

The information you provide in the **GENERAL PROPERTIES** window is made available for template search filters.

- 7 Click **Save & Continue**; the **FILE UPLOAD** window appears showing the **UPLOAD FILE** view.
- 8 Browse to the file and click **Save & Continue**; the **PREFLIGHT** view appears.
- 9 To view the **FILE REPORT**, click the **Click here to review these problems** link; the template properties are displayed as well as any preflight problems. Click the **What is** and **Click here** links to view preflight problem information. Edit as necessary.
- 10 Click **Save & Continue**; the **INTENT** view appears with the iWay **INTENT LIST**.
- 11 Use the iWay **INTENT LIST** controls to add tabs, edit properties, and edit the order of **INTENT LIST** elements:
 - Add Tab-- adds tab for the Print Buyer to define intent in separate pages
 - Edit-- accesses the Edit Joblet Property dialog box
 - Move Up-- moves the selected joblet up a position in the list
 - Move Down-- moves the selected joblet down a position in the list
 - Remove-- deletes the selected joblet from the list
- 12 Select the **Visible** column check box to specify a tab is made visible.
- 13 Click **Save & Continue**; the **VARIABLE INFORMATION** window appears, showing the **DEFINE FIELDS** view.

To create a variable data template:

- 1 In the **VARIABLE INFORMATION** window, select **VDP (data uploading/editing)** in the dropdown list; the **iForm Editor** button is active.
- 2 Click the **iForm Editor** button; the **IFORM EDITOR** appears.
- 3 Click **New**, and in the **NEW FIELD** dialog box select **Text** and then click **OK**; a **TEXT STEP** appears in the **FIELD NAME** list.

Alternatively, you can use the selective upload to define images, or you can upload images in the design template or elsewhere. For example SMS Designer, and have the field pre-defined.
- 4 Click **New** again, and in the **NEW FIELD** dialog box, select **Image** and click **OK**; an **IMAGE STEP** appears in the **FIELD NAME** list.
- 5 Click the **IMAGE FIELD** name and select the **Use Image Generator** check box; the **IMAGE GENERATOR** dropdown list and **SETTINGS** link appear.

To integrate the template with a DirectSmile Image:

- 1 In the **GENERATOR** dropdown list, select **DirectSmile Image Generator** and click the **SETTINGS** link; the **DIRECTSMILE PARAMETERS** dialog box appears.
- 2 Set the resolution and in the **TEMPLATE FILE** dropdown list, select a .dset (DirectSmile Image set).



- 3 In the **TEXT DROPDOWN** lists, choose how the text is to be applied:
 - **Embedded** – Text is permanent and appears on each template page (hidden from the user).
Type text in the **TEXT** field and click **Save**.
 - **Linked** – The text is linked in the existing template field (variable for the user).
- 4 Select the iForm Editor field name in the **TEXT** dropdown list and click **Save**.
- 5 Close the **LAYOUT PREVIEW** and then click the iForm Editor field name.
- 6 Type text into the **DEFAULT TEXT** field and click **OK**. (For the Preview only.)
- 7 Click **OK**; the **PREVIEW THE TEMPLATE** window reappears.
- 8 Click **Save & Continue**; the **SAVE AS TEMPLATE** window appears.
- 9 Type a name, include reference information, and select a filing folder.
- 10 Click **Finish**.

Ordering a Job from a Template with a DirectSmile Image.

- 1 You can create print jobs after the DirectSmile Image is integrated with the template.
- 2 On the Print Buyer side, in the **ORDER JOBS** window, select the template created in the above procedure.
- 3 Click **Save & Continue**; the **ENTER VARIABLE DATA** window appears.
- 4 Type data and click **Add to Cart** and **Checkout**; the **SHOPPING CART** window appears.
- 5 Complete the Print Buyer workflow process.

XMPie PersonalEffect

Pageflex iWay XMPie PersonalEffect enables Print Buyers to effectively reach their customers via print, web, and email, within the framework of dynamic publishing campaigns. By integrating XMPie PersonalEffect with iWay, Print Buyers can access the XMPie PersonalEffect application using the iWay workflow.

XMPie PersonalEffect with iWay facilitates the following:

- Print Buyers can access, customize, and order VI campaigns directly from iWay.
- Dynamic proofing and the generation of all VI output formats supported in PersonalEffect are available directly from iWay in a completely transparent way.
- An integrated, online solution that places a Print Service Provider at the center of all relevant media campaign information.

NOTE:

- A Direct Marketing Links license is required to enable XMPie.
 - An expert level of understanding of the XMPie PersonalEffect accounts, campaigns, and variable template creation is required to effectively present the templates for order by a Print Buyer.
-

The following topics describe the procedures involved in importing and using an XMPie PersonalEffect template in to the iWay system.

- [Importing an XMPie PersonalEffect Template to the iWay System](#) (on page 173)
 - [Ordering From a Template](#) (on page 173)
 - [Uploading a Database File](#) (on page 173)
 - [Restrictions and Known Limitations](#) (on page 174)
-

NOTE:


Ensure that all prerequisite software and components are properly installed and configured before beginning template creation. See the *iWay Integration Guide* for more information.



Importing an XMPie PersonalEffect Template to the iWay System

To import an XMPie PersonalEffect template for use within iWay:

- 1 Navigate to **ACCOUNTS -> STORE SETUP -> TEMPLATES**.
- 2 Click the **Synchronize with External Repository** link; the **Import Template Wizard** opens, displaying the **Choose Document Source** window.
- 3 Select the **XMPie** option and click **Start Import Wizard**; the **Choose Campaign** window appears.
- 4 In the dropdown lists, select an account and a campaign and click **Next**; the **Choose XMPie PersonalEffect Document** window appears.
- 5 Select a document (template) and click **Next**; the **Choose Job Type** window appears.
- 6 Select a job type and click **Next**; the **Edit Properties** window appears.
- 7 Define the job's properties and click **Next**; the **Choose Output Device** window appears.
- 8 In the dropdown lists, select an output format and an output device and click **Next**; the **Template Pricing window** appears.
- 9 Select the pricing model, type in template pricing values, select the pricing options, and click **Next**; the **Template Attributes** window appears.
- 10 Information entered into Template Attributes is used by the Template search engine for establishing the precise location of the template. Data entered is also sourced by the Template search engine to locate a template. Define the template attributes and click **Finish**; the XMPie template appears in the Templates list.

XMPie PersonalEffect templates are represented by the  icon.

Ordering From a Template

After you have uploaded an XMPie PersonalEffect template to iWay, the template is ready to use for creating new jobs. The workflow follows regular iWay template procedures.

To order a new job from an XMPie PersonalEffect template:

- 1 On the Print Buyer side, click **ORDER JOBS**; the **Order Jobs** window appears.
- 2 On the **Catalog** launch pad, click **START ORDER**; the **Choose a Template** window appears.
- 3 Select the target template and click **CONTINUE**; the **Enter the Variable Data** window appears.
- 4 To complete the job order, click **ADD TO CART** and **CHECKOUT**.
- 5 Proceed with the iWay workflow. For more information, refer to the **Pageflex iWay Print Buyer User Guide**.

Uploading a Database File

To upload a database file:

- 1 Click the **Add Records** link; the **Add Variable Data Records** window appears.
- 2 Browse to a target database and click **Continue**; the **Upload Variable Data Database** window appears.



- 3 Select a field name in each **Field Name** dropdown list and click **Continue**; the **Variable Data Express** window appears. You can view a PDF preview using the **Variable Data Express** window. All PDF previews in the XMPie workflow are automatically generated as low resolution images by the XMPie server.
- 4 Click **Add to Cart** to send the job to the **Shopping Cart**, or click **Add to Cart and Checkout** to complete the workflow.

Restrictions and Known Limitations

- The Auto Approve feature is not supported for XMPie Jobs.
- The Imposition feature cannot be used with the VDX format.
- In Track Jobs, when doing a PDF Preview, a "job in process" message is issued. To see the preview, you must click "abort process."
- iWay does not impose XMPie jobs. This is done in XMPie.
- iWay does not generate press sheet calculations in the imposition section in the Job Info panel in the Production queue.
- VI templates cannot download the Print Buyer's database that was uploaded in the order (there is no import/export database capability).
- XMPie VI fields behave like iForm Editor VI fields. Uploading a file that is unsupported through the iForm Editor will not work.
- When outsourcing an XMPie job, only the job ticket will be attached to the outsource email.
- VI Fields that do not apply to XMPie templates are not disabled in the iForm Editor. The table below lists the fields for which the XMPie template definitions you change using iForm Editor will apply, as well as fields for which the XMPie template changes that you make will not be applied. Fields that you want to define as Pinned must be defined as such in the XMPie template and not in iForm Editor.

Field Type	Definitions that are applied	Definitions that are not applied
Text	Field Type - Login Driven is the only valid value	Pinned
	Default Text	User moveable
	Field Input	Do not print this field
	View by	Text Alignment and Boundaries fields.
	Field Format	Font Properties fields Advanced Options.
Image	Use Image Generator	Pinned
	View By	User Moveable
	Image Upload	Non-Editable
	Image Selection GUI	Advanced Options
	Select Folder and Default Image	
Field Input		



Excel Pricing

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Excel Pricing has been developed for Print Providers who prefer a pricing solution other than that provided by Pageflex iWay. The reasons you might prefer an extraneous pricing system are two-fold:

- You have your own unique way of calculating the price and are not able to find a satisfactory way in which to define pricing within the iWay system
- You already have your own tool by which you can define a price list and calculate prices

Excel Pricing enables you to upload an Excel file that contains all pricing parameters and then assign the file to an intended customer.

NOTE:

- By working with an Excel file, all calculation methods are possible (i.e. any formula or any information that will generate the specific price can be employed).
- To activate Excel pricing, you must purchase the iWay Business Links module.

Working with an Excel File

To work with Excel Pricing, you must first create an Excel file (see [Excel Pricing File Format](#) (on page 176) for more information) and then upload the file to the Print Buyer account. When the Print Buyer clicks on Get Quote, all relevant information related to the job and customer, is exported from iWay to the Excel file.

The Excel file receives the new information and, according to the formulas that you provided, updates and calculates the price. The price and the output device information are automatically imported back to iWay, where it is displayed to the Print Buyer.

When working with Excel Pricing, you can price a multitude of additional parameters. A few examples are: B&W and color pages, click charges, job tickets, and paper types.

Settings in iWay

This section describes the interaction between iWay and the pricing file for a specific customer.

The following issues are covered in this section:

- How to assign an Excel pricing file to a Print Buyer
- How to download an Excel file that is assigned to a customer



Assigning Excel Pricing to a Print Buyer

To assign a pricing file to a Print Buyer, perform the following:

- 1 Log in to iWay and go to to **ACCOUNTS -> ACCOUNT SETUP -> PREFERENCES**.
- 2 In the **PRICING** sub panel, select **Excel** from the **ACCOUNT PRICING MODEL** dropdown menu; the Excel File link becomes enabled.
- 3 Select the Excel file to be assigned to the specific Account.

Importing/Exporting the Excel Pricing File

You can upload an unlimited number of Excel files for pricing, however, only one Excel file can be assigned to a customer.

To upload an Excel file:

- 1 Click on the **Excel File** link; the Excel File dialog box appears and displays a list of all of the Excel files that exist within iWay.

NOTE:

Sample Excel Pricing.xls and *Sample Excel Pricing with Set.xls* are the samples files provided by the system and demonstrate the general format that Excel Pricing sheets should follow. Do not delete these files since they will act as a basis for the Excel Pricing sheets. For more information about the Excel Pricing file format, refer to [Excel Pricing File Format](#) (on page 176).

- 2 Select the files that you want to upload and click **Upload Files**.

Excel Pricing File Format

iWay provides two Excel sample files:

- Sample Excel Pricing.xls
- Sample Excel Pricing with Set.xls

NOTE:

The Sample Excel Pricing with Set.xls file is only relevant if you have the <iWay_Set> module.

Excel file for pricing has a special format which can not be modified. In this section, a full description of the file format is provided to help you create your own pricing mechanisms using the Excel Pricing model. These descriptions are based on the content in the Sample Excel Pricing.xls file.

Understanding the File Format

The Sample Excel Pricing.xls file contains 2 sheets:

- Info
- Calculation

These sheets cannot be modified, removed, or deleted, and must be present when creating the Excel file. The Calculation sheet contains 4 columns:

- Column A - Fields names that are exported from iWay.
- Column B - Values of the field names exported from iWay.
- Column C - Fields names that are imported into iWay.
- Column D - Values of the field names that are imported into iWay.

You cannot make any modifications in Columns A, B or C. You need to generate values for Column D according to calculations inserted in each cell.



Column A

Column A contains field names related to job properties, shipping and print buyer information, which are exported from iWay.

Column A Fields

Fields Name	Explanation
JobID	Unique job# that the system generates
JobName	Job name as it appears in the Shopping cart
JobStatusID	Job status ID as it appears on the Database
JobStatusName	Job status
CustomerRefCode	Reference code that the customer entered
JobTypeID	Job type ID
JobTypeName	Job type name as defined in the job type library
JobSubTypeID	Job sub type ID
JobSubtypeName	Job sub type name as defined in the job type library
Copies	Number of copies of the job (if it is a VI job the number of copies is for one record)
FlatCount	Number of original pages of this job (for one copy) without folding
FlatWidth	Job original page width (without folding)
FlatHeight	Job original page height (without folding)
FlatSize	Job page size (without folding)
FlatOrientation	Job page orientation
FlatSides	Job sides
PageCount	Number of folded counts of this job (for one copy)
PageWidth	The job width after folding
PageHeight	The job Height after folding
PaperCategory	The paper category (on which the job will be printed) as was defined in the stock library
PaperTexture	The paper texture (on which the job will be printed) as was defined in the stock library
PaperBrand	The paper brand (on which the job will be printed) as was defined in the stock library
PaperColor	The paper color (on which the job will be printed) as was defined in the stock library
PaperWeight	The paper weight (on which the job will be printed) as was defined in the stock library
OutputDeviceID	Printer ID that was assigned automatically by the system
OutputDeviceName	Printer name that was assigned automatically by the system
PrintQualityID	Print quality ID as defined in the printer



Fields Name	Explanation
PrintQualityName	Print quality name as defined in the printer (cost effective, high quality)
ColorGroup	The job color details: process or B/W
BlackColorCount	If B/W according to the job properties
ProcessColorCount	Number of processes according to the job properties
SpotColorCount	Number of spot colors according to the job properties
RequiredDate	The delivery date
UrgencyID	Urgency ID according to the definition in the system
UrgencyRate	Urgency Rate according to the definition in the system
JobTaxRate	Tax rate for this job
PdfFlatCount	Number of pages of this job (for one copy) without folding, after converting to PDF
PdfFlatWidth	Job original page width (without folding) after converting to PDF
PdfFlatHeight	Job original page height (without folding) after converting to PDF
PdfBlackColorCount	If B/W after conversion to PDF
PdfProcessColorCount	Number of process colors after conversion to PDF
PdfSpotColorCount	Number of spot colors after conversion to PDF
PdfBlackAndWhitePageCount	Number of pages of the job that are B/W
PdfColorPageCount	Number of pages of the job that are process
VardataCount	Number of records (VI) for this job
HasForm	Is it an iForm Express job
CustomerID	Customer ID (generated by the system when a customer is created)
CostCenterID	Cost Center ID
CustomerName	Print Buyer name
CustomerDiscountRate	Print Buyer discount rate (as set in preferences)
CustomerTaxRate	Print Buyer tax rate (as set in preferences)
StaplingType	Stapling type (as defined for this job)
StaplingPosition	Stapling position (as defined for this job)
StapleCount	Staple count (as defined for this job)
CombBindingType	Comb binding type (as defined for this job)
CombBindingPosition	Comb binding position (as defined for this job)
CombThickness	Comb binding thickness (as defined for this job in Inches)
VardataCount	How many recodes are in a VI job
LaminatingTexture	Laminating texture
LaminatingSides	Laminating sides (one side or two sided)



Fields Name	Explanation
DrillingPosition	Drilling position (as defined for this job)
DrillingRadius	Drilling radius (as defined for this job in Inches)
DrillingHoleCount	Drilling hole counts (as defined for this job)
CollatingType	Collating (if defined for this job)
PerfectBindingType	Perfect binding type (as defined for this job)
PerfectBindingPosition	Perfect binding position (as defined for this job)
NumberingType	Numbering type (as defined for this job)
NumberingPosition	Numbering position (as defined for this job)
NumberingSides	Numbering sided
HasCustomFinishing	Does this job has custom finishing
CustomFinishingName	Custom finishing name
CustomFinishingDescription	Custom finishing description
FoldCount	Number of folding in the job (for 1 copy)
ShipToFirstName	First name as appears in the shipping address
ShipToLastName	Last name as appears in the shipping address
ShipToFullName	First name and Last name as appears in the shipping address
ShipToCompany	Company name as appears in the shipping address
ShipToDepartment	Department name as appears in the shipping address
ShipToStreet	Street name as appears in the shipping address
ShipToCity	City name as appears in the shipping address
ShipToState	State name as appears in the shipping address
ShipToZipCode	Zip code as appears in the shipping address
ShipToCountry	Country name as appears in the shipping address
ShipToPhone	Phone number as appears in the shipping address
ShipToMobile	Mobile number as appears in the shipping address
ShipToEmail	E-mail address as appears in the shipping address
ShipToAddressNotes	Address notes as appears in the shipping address
PricingLevel	Customer level is the relevant on Excel
SameJobTypeShoppingCartCopies	The total number of copies, from all the jobs based on the same job type, currently in the Shopping Cart.
SameTemplateShoppingCartCopies	The total number of copies, from all the jobs based on the same template, currently in the Shopping Cart.



Column B

When a Print Buyer clicks on the Get Quote button in the Shopping Cart, the values related to the job are exported to Column B. The following windows in iWay update the values in Column B:

- **GET QUOTE** - Data concerning the Job properties and customer details will be updated
- **CHOOSE SHIPPING ADDRESS** - Shipping Address information
- **CHOOSE YOUR SHIPPING OPTIONS** - Shipping date and urgency

NOTE:

- Values of measurement - All sizes that are exported to the Excel file are in inches, even if the default language is not English US. You need to convert these values to mm using an Excel formula. For example, to convert Cell B16 from inches to mm use **B16*25.4**.
- Fields Format -Excel provides an option for setting the cell format whereby the view is changed but not the value. In the Excel that arrived with the system, all cells are set to General. Cell format can be changed by right-clicking on the cell and selecting the format cell option from the menu. For example, Cell B37, which is the required date value with a number, can be changed to a date format (with any date format).

Column C

Column C contains field names of the pricing and output device information, which are imported into iWay.

Column C Fields

Field Names	Explanation
Cost	Cost for the Print Provider
Price	Customer price without tax and discount
AdjustedPrice	Customer price + the negative discount
CustomerPrice	Customer price + the positive discount
DiscountRate	Discount rate
Discount	Discount price
UrgencyRate	Urgency rate
UrgencyPrice	Urgency price
TaxRate	Tax rate
Tax	Tax price
TotalNoTax	The total price without the tax
Total	The total price + discount + urgency + taxes
PressSheetSize	The Run Size that will be used for printing this Job (not obligatory)
OutputDeviceID	The printer that the Job will be print on (not obligatory)



Column D

You should insert the values for Column D. These are the values imported back to iWay after the Print Buyer clicks **Get Quote**.

NOTE:

- N/A value - A Print Buyer, using the Excel Pricing model, may receive a pricing error (N/A) in place of the price, after clicking on Get Quote. This is an indication that there is an error in the Column D calculation. To resolve this problem, download the Excel file used for this customer and review the formula for values in Column D.
- Fields Format - In Excel, there are options for setting the cell format, which will change the view and not the value. In the file that came with the system, all cells are set to General. An option exists for changing the Excel default cell format by right-clicking on the cell and choosing the format cell option from the menu. For example, Cell D6 is the price that the customer will see in the Shopping Cart. You can set this cell format to be Currency according to your decision (this change will not effect the currency value that was set in iWay).
- Field Value - Column D, Cells D4-D15 can accept only numbers. If the cells contain text, an error will be generated when a Print Buyer clicks on the Get Quote button.
- Ensure that the Excel file used by the Print Buyer for the price calculation is closed prior to the customer ordering. If the file is open and a Print Buyer requests a quote, instead of the price, a Microsoft Excel message will appear on the server.

You can make other changes in the other columns (except A-D) of the Calculation sheet and you can add new sheets to the file. Linking between two Excel files may cause an error, so any information that exists in a different file can be copied to a new sheet in the file that will be used for the Print Buyer.

Excel Pricing with the Set Module

The file format, which can generate a quote for jobs ordered with the Set module and for simple jobs, is similar to the file format that was described in the previous section.

This section describes the fields and sheets that were added to the Sample Excel Pricing with Set.xls file:

- Additional Fields - In the Calculation sheet, there are 2 new fields which are exported from Pageflex iWay
- Binding - This field contains the binding style that was chosen for the Set Job.
- Material - The Material that was chosen for this Set Job. If there is no material for a Job, the value of this field will be set to 0
- Additional Sheet - Component sheet was added to the Sample Excel Pricing with Set.xls file. Columns A-F described the Set components and are exported from Pageflex iWay
- Column A: Component - describes the component type: Color Pages, B/W, Cover, Tag or any other type that the Print Provider will define
- Column B: Component Type -The type of the component that was defined in Column A
- Column C: Page Count - Number of pages for the current component
- Column D: Paper Type - Paper Type for the current component
- Column E: Finishing - Finishing for the current component
- Column F: PDF Colors - Number of PDF color pages that were originally uploaded for the current component
- The numbers of rows that are added depends on the number of components that were defined for a Set Job.



To import the updated Excel file with Set, perform the following:

- 1 Log in to iWay and go to to **ACCOUNTS -> ACCOUNT SETUP -> PREFERENCES**.
- 2 In the **PRICING** sub panel, select **Excel, including Set jobs** from the **CUSTOMER PRICING MODEL** dropdown menu; the Excel File link becomes enabled.
- 3 Select the Excel file to be assigned to the specific customer.

The **EXCEL FILE** dialog box displays the Last Output of-Sample Excel Pricing With Set.xls file. Last Output of-Sample Excel Pricing With Set.xls contains all the data that was imported and exported by iWay during the last use. This means that in this file, you can find all the information about the job being ordered by the Print Buyer when the Print Buyer clicked **Get Quote**.

Excel Programming and Useful Excel Functions

This section lists examples of several useful Excel formulas and functions.

IF Function

The Excel If function examines whether a certain condition is true or false. If the condition is true, the function will do one thing, if the condition is false, the function will do something else.

Sample IF Syntax

Using the IF function, we will select on which printer a job is processed.

If the job is B/W, the printer will be Printer1. If this is a process job, the printer will be Printer2.

```
=IF(Calculation!B33="process", "Printer2","Printer1")
```

Vlookup Function

The Vlookup function searches for a value in the first column of a table array and returns a value in the same row from another column in the table array.

Syntax: VLOOKUP (lookup_value, table_array, col_index_num, range_lookup)

- *lookup_value* - the value to search for in the first column of the table_array.
- *table_array* - two or more columns of data that are sorted in ascending order.
- *col_index_num* - the column number in table_array from which the matching value must be returned. The first column is 1.
- *range_lookup* - determines if you are looking for an exact match based on lookup_value. Enter FALSE to find an exact match. Enter TRUE to find an approximate match, which means that if an exact match is not found, then the VLOOKUP function will look for the next largest value that is less than value.

Example

Using the VLOOKUP function, we will define a discount according to number of copies. We set a table of discounts according number of copies. The first column displays the minimum number of copies required to receive the discount displayed in the second column.

The lookup_value must be in the first (left) column on the table_array which sometimes can have limits and the user will have to change their own database for this limitation. To solve this limitation, use the functions MATCH and INDEX.



MATCH

The Match function searches for a value in an array and returns the relative position of that item.

Syntax: MATCH (lookup_value, lookup_array, match_type)

- *lookup_value* - the value to search for in the lookup_array.
- *lookup_array* - a range of cells that contains the lookup_value that you are searching for.
- *match_type*:
 - FALSE or 0: exact match.
 - TRUE or 1: closest value (if the exact value is not found, the function will look for the closest value smaller than the lookup_value).

INDEX

The Index function returns a value or the reference to a value from within a table or range.

Syntax: INDEX (array, row_num, column_num)

- *array* - a range of cells or table.
- *row_num* - the row number in the array to use to return the value.
- *column_num* - the column number in the array to use to return the value.

DGET Function

One of the powerful functions which operates on databases is the DGET function. DGET function retrieves from a database a single record that matches a given criteria.

Syntax: DGET (database, field, criteria)

- *database* - the range of cells that you want to apply the criteria against.
- *field* - the column to retrieve.
- *criteria* - table that contains the criteria + column names.

VBA

With Excel, there is an option to write code with VBA. Using this option, you can create any function that you would like, especially for complex pricing calculations. It is important to remember that if you are using this functionality in one of the Excel files, there is a need to change the Macro security on Microsoft Excel that is installed on the server.

To change the Macro security, go to **MICROSOFT EXCEL -> FILE -> OPTIONS -> TRUST CENTER-> TRUST CENTER SETTINGS -> MACRO SETTINGS** and **Enable all Macros**.



Set

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Set enables you to determine those parameters necessary for a Print Buyer to create a multicomponent job. iWay Set jobs are comprised of an optional binding element such as a binder or a spiral, and components such as color pages, black and white pages, tabs, and blank pages.

A Set job type is identified by a binding style. Therefore the term binding style is used instead of Set job type.

Set Definitions

Set is comprised of several different pieces. This section describes the different parts that make up a book.

Binding Styles

The binding style identifies the job type. To create a binding style, you need to define basic parameters as the type of binding, the possible page sizes, additional materials, pricing, and available components.

The binding collects the components into one physical entity that can contain covers, pages, inserts, and tabs. The binding element can take the form of binders, saddle stitching, perfect binding, wire binding, thermal binding or any other similar means.

Components

Components are the elements comprising a Set. iWay comes supplied with four default components. You can modify these components, delete them and add as many other components as required.

The default components are:

- Cover - The Cover component is used when the cover has been designed as a separate file encompassing the front cover, spine and back cover of the Set.
- Tab - The Tab component is used for inserting tabs in a Set. It is possible to define the text to be printed on a tab and the text parameters. When the Tab component is used, the application takes into account the number of tabs that can fit along a page side and provides feedback if this number has been exceeded.
- Color Pages - A standard component type which can be one or two-sided.
- B/W Pages - A standard component type which can be one or two-sided.



Set Pricing

The price of Set jobs is calculated as follows:

Total Price of a Set = Base Price per unit + [Price per Unit + Price Per Materials + Price Per Components * Pages]

Defining a Set Job Type

You must first define the available components, their paper, color, finishing and pricing. When the components are ready, you must determine which binding styles are available and which components are available for each binding style.

NOTE: It is possible to continue and update components at any point. However, any change in component properties will affect EVERY Binding Style that includes the changed component.

To define Set job types, click **PRINT SETTINGS -> JOB BUSINESS FLOW -> SET**.

Defining Binding Properties

The **BINDING STYLES** list contains all the binding styles that are available to the Print Buyer. The following default binding styles are available:

- Binder
- Saddle Stitch
- Perfect Bind
- Double Wire-O
- Thermal Bind

After selecting the binding style, you should navigate through the various tabs and set values for the following properties:

- **General** - define the General Binding Style properties.
- **Page Size** - define the sizes available for each Binding Style.
- **Material** - define the different materials used for the Set job.
- **Splitting** - define the Splitting properties.
- **Pricing** - define the price for assembling each Set unit and define quantity discounts.

Setting General Properties

You can define Spine type and width for Binding Styles that do not have binding materials (such as saddle-stitching). When the binding style requires binding materials, the spine type and width are defined in the **MATERIALS** tab. If the spine is set from the **MATERIALS** tab, the **SPINE** and **WIDTH** boxes do not appear in the General view.

Select one of the following options from the **SPINE** drop down box:

- **Fixed** - define a binding spine that is not affected by the actual thickness of a job. Type **0** in the **Width** box to define that there is no spine.
- **Calculated** - used for binding styles in which the binding spine width results from the actual job thickness. Calculated Spine enables setting the maximum spine width to prevent the Print Buyer from creating a job that cannot be handled. With this setting, the system automatically calculates the spine width according to the total thickness of the files that the Print Buyer adds to the job.



Setting Page Size Properties

Select the page size for the Set job. Available options include:

- Fixed Sizes - select the sizes which are appropriate for this binding style. These sizes will be presented as a selection option to the Print Buyer during ordering. The sizes displayed are based on the paper sizes defined in your system.
- Custom Sizes - when required page sizes do not appear in the **FIXED SIZES** list, you can create any number of custom sizes.

Setting Material Properties

Binding styles can involve different materials for operator selection (i.e. ring binders, spiral binders, etc.). Each material can have a different price and a different preview.

When a Print Buyer orders a job and selects a binding style with a list of materials, these materials will be presented to him as selection options. For example: If the Print Buyer selects a binder job type, the next stage will be to select the appropriate binder.

Material **Properties** enables defining the **SPINE** type and width. You can also add front cover, back cover and pages spine images that will be superimposed on the PDF preview.

Setting Splitting Properties

Select any splitting options for the Binding Style and then click on the **Edit Imposition** icon next to the component in the **SUMMARY** pane. All components can be simultaneously configured by clicking on the **Edit Imposition** icon for **ALL**. For more information see [Editing Job Imposition](#) (on page 138).

NOTE:

- Bleeds can only be configured per Binding Style (click on the **Edit Imposition** icon for **ALL**).
- When editing the imposition for an individual component, the Bleeds options will be disabled and show the same parameters configured for All.
- If the uploaded file for the Set has bleeds defined, then the bleeds defined for the Binder Style will not be used and the bleeds will be taken from the file itself. This is relevant for all the pages in the file no matter how the file is split.

Setting Pricing Properties

You can determine the price for each unit of a Set job, as well as determine the range of discounts for the job.

Defining Component Properties

The **COMPONENT PROPERTIES** pane appears when you select a component, and it includes the following tabs:

- General
- Paper Selection
- Color Channels
- Finishing
- Pricing



General Properties

The General view enables you to determine the following:

- Specify whether the component is one- sided or two-sided (also known as simplex and duplex).
- Enter an internal note and a note for the print buyer for the specific component.

Paper Selection Properties

The **PAPER SELECTION** tab enables you to define the paper types on which the component can be printed and enables you to set the default paper category names. The Print Buyer can view these options in the **PAPER** box of the Set job properties window.

Paper Category

PAPER CATEGORY enables you to create name aliases for a specific paper and simplifies the ordering process for the Print Buyer. For each Paper Category, at least one valid Paper must be defined.

Paper List

The **PAPER LIST** contains a list of papers that are connected to a specific paper category. The color of the paper items in the list is significant. Black color signifies a paper item that is in stock; gray color signifies that the paper has been temporarily disabled in the stock library; and red color signifies that the paper has been removed from the stock library.

When there is more than one paper in the **PAPER LIST**, the first item in the list is the default. To set another paper as default, select the target paper and move it up until it is the first one in the list.

Color Channel Properties

Color Channels enables you to define whether the component will be printed in process colors or with black ink only.

The **COLOR CHANNELS** tab contains the following elements:

- Process - When selected, the component becomes a Full Color component and when it is assigned to Set pages, these pages will be priced and printed as color pages.
- Black & White - When selected, the component becomes a Black and White component and when it is assigned to Set pages, these pages will be printed with black ink and priced accordingly.

Finishing Properties

The **FINISHING** tab enables you to define whether the component will be laminated.

Pricing Properties

The **PRICING** tab enables you to set up the component pricing, and includes the following:



Price per Page

Price per Page enables defining a base price per page, for each page size that is possible for this component. Enter the price only for page sizes that you expect to be using in Set Jobs.

Pages Quantity Discount

Pages Quantity Discount enables define discount levels based on the total number of pages for this component type in a specific Set job.

- Min - Minimum number of pages ('1' by default)
- Max - Maximum number of pages ('Infinite' by default)
- Discount - Fixed discount, according to the number of printed pages
- Add Row - Click to add an empty row to the bottom of the table
- Delete Last Row - Click to delete the last row at the bottom of the table

Defining a Set Preview

Set preview enables the Print Buyer to receive a simulated view of the entire job, with all its various elements. The preview allows the Print Buyer operator to flip through and review the job during the creation process, functioning as a tool for avoiding design flaws and mistakes. For the preview to achieve its full potential, it has to be defined for each binding style and appropriate size.

Material Properties enables providing default settings for A4, A5, Letter, and Ledger page sizes. These settings can be changed according to need. In the default preview settings, the preview size appears larger than the default size in order to display the background.

NOTE:

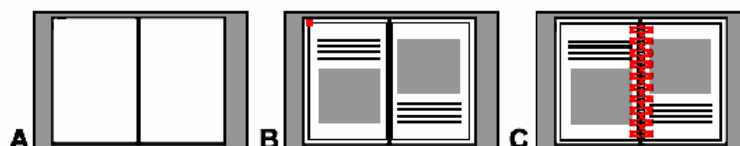
The system does not require preview information for a specific size in order to provide a preview. If preview information is missing from a size that is available to the Print Buyer, the system will search among the existing sizes with preview information and will choose the size that is closest to the size lacking the preview information. The chosen size is then automatically scaled to the size lacking the preview.

Preparation

Before you can start setting up the preview, you have to define the preview size, and then create appropriate images.

To create a realistic-looking preview, Set places the supplied background image (**A**), superimposes onto it the file content as uploaded by the Print Buyer (**B**), and places on the top an image simulating the appearance of the binding element (**C**).

Stages of a Set Preview



A	The view's image is placed in the background.
B	The uploaded file information is positioned over the background.
C	Any binding-related images (such as binder rings or a spiral) is positioned on top.



Optional Spine

Optional Spine enables providing the following settings only when the spine/cover and foreground are required in the style:

- External Spine Image; which will serve as the background image of the spine
- Spine Position (top-left corner)
- Spine Width; the size of the spine in the original image

NOTE:

The Binding Preview Spine Width is not the size of the spine that has been set for the binding style. Binding Preview Spine Width is a setting that is necessary for placement calculation. The size number must be entered (and should be greater than 0) if a file, under the External Spine Image, exists.

Establish the Preview Size

The width of the preview must be double that of the page size plus the width of the margins. If no margins are added, the background will not appear in the preview.

NOTE:

When setting height and width of the preview size to the same size as the page size dimensions, the background will not be displayed. This is suitable for graphically depicting binding types such as thermal binding. To view the background as well, the height and width of the preview size should be larger than two pages side by side. This is suitable for depicting binding types such as binder.

Prepare the following background files for the display:

- External Front Cover
- Internal Front Cover
- Pages
- Internal Back Cover
- External Back Cover

NOTE:

All the background files must be the same size.

If the binding has a prominent visual feature that can be seen when flipping through a real similar product (such as binder rings) you might wish to create appropriate foreground images for each of the following views:

- Internal Front Cover
- Pages
- Internal Back Cover

Establish the Left and Right Page Position

The left page position is defined by the position of its top-right corner relative to the top-left corner of the background image.

The right page position is defined by the position of its top-left corner relative to the top-left corner of the background image.

If these numbers are unknown, they can be found by using Acrobat. In order to locate this point, carry out the following steps:

Left Page

- 1 Open the image in Acrobat, on the local PC.
- 2 Click on the Crop Tool (**TOOLS -> ADVANCED EDITING -> CROP TOOL**) and outline the left page.



- 3 Double-click on the image; the Crop Pages dialog box appears; the Top-right corner is the composite of the top and right coordinates.

Right Page

- 1 Click on the Crop Tool and outline the right page.
- 2 Double-click on the image; the Crop Pages dialog box appears; the Top-left corner is the composite of the top and left coordinates.

Setting up a New Preview

To set up a new Preview, carry out the following steps:

- 1 To access the preview definition, select **PRINT SETTINGS -> JOB BUSINESS FLOW -> SET**.
- 2 Select a binding style and then click the **Page Size** tab.

Add/Edit Preview Link

Adjacent to each Page Size is a PDF icon and a Preview link which accesses the Binding Preview window. The system provides the following two Preview link options:

- Add Preview (with a gray PDF icon) - A preview does not exist but can be created by entering the appropriate information into the various Binding Preview data boxes
- Edit Preview (with a red PDF icon) - An editable preview already exists and can be edited by entering the appropriate information into the various Binding Preview data boxes

Click on Add Preview near a selected page size; the Binding Preview dialog box appears.

Setting up a Binding Preview

Binding Preview enables defining the background image on which the Set job created by the Print Buyer will appear, creating a full preview experience.

In addition, you must set the following:

- The Preview sizes
- Left and Right page positions

If a Spine is defined and there is a cover for the style, you must also set the position and width of the spine.

Producing a Set Job

To produce a Set job, perform the following:

- 1 Click **TASKS -> PRODUCTION**; the **PRODUCTION** window appears.
Set jobs waiting in the **APPROVAL** queue are marked by the Set icon.
- 2 Select a job.
The **FILES** tab displays a list of the files comprising the job. Since the job can contain multiple files and components, its production is often split between several devices.
- 3 Click **Split Files**; the **SPLIT PDF** dialog box appears.
- 4 Select the splitting options, component types, color channels, or color content of the files and click **OK**.
- 5 Click **Approve** to send the files to production.



Integration Guide

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Introduction

This guide provides detailed information on the various integration possibilities available with Pageflex iWay.

Who Should Use This Guide

This integration guide assumes that you are a network administrator or technician, and that you have prior knowledge of the following topics:

- Networking concepts and terminology.
- Network topologies.
- Distributed networks and IP routing.

The guide also assumes that you are familiar with the Pageflex iWay capabilities.

Overview

The information on integrating with Pageflex iWay is organized according to the various products. It is therefore only necessary to go to the section(s) that are relevant to the particular integration with iWay.

LDAP

[LDAP](#) (on page 192) gives information to Print Service Providers who want to connect iWay to an LDAP server and enable user authentication by way of a directory service. The chapter provides instructions for integrating iWay with an LDAP server enabling automated user synchronization and Single Sign On (SSO).



User Management

[User Management](#) (on page 195) contains information for Print Service Providers who manage their users in an IT system which is not LDAP/Novel and wish to automatically synchronize users between the systems. The chapter provides instructions for implementing an authentication server, interfacing between iWay and the IT system used to manage their users authentication and enabling automated user synchronization and Single Sign On (SSO).

iWay Business Links

[iWay Business Links](#) (on page 203) is an add-on module for Pageflex iWay that enables a Print Service Provider to implement data-transfer to the various peripheral systems existing in their organization. The chapter provides instructions on retrieving the data that iWay generates when a predefined event occurs.

XMPie PersonalEffect

[XMPie PersonalEffect](#) (on page 221) provides instructions on integrating the software with iWay, enabling Print Buyers to access, customize, and order XMPie PersonalEffect campaigns directly from within iWay.

DirectSmile

[DirectSmile](#) (on page 225) provides instructions on integrating the DirectSmile Image Generator tool with iWay, providing a variety of additional options for creating variable data and image personalization solutions.

Online Payment

[Online Payment](#) (on page 226) is an add-on module for Pageflex iWay that enables Print Buyers to pay for jobs ordered using an online payment vendor. The chapter provides instructions on integrating iWay with the Online Payment vendor.

LDAP

Overview

The Pageflex iWay Lightweight Directory Access Protocol (LDAP) Adapter enables user authentication when logging in to the iWay application by way of a directory service.

The LDAP Integration Guide is designed for Print Service Providers who want to connect iWay to an LDAP server. Integration of the LDAP system into iWay is intended for corporate Print Buyer accounts, and supports multiple LDAP directories for different customers.

Integration of the LDAP system into iWay enables users who are managed in an LDAP directory to work with the iWay system. The iWay account is a copy of the domain user account and is updated each time the user logs into iWay. The user is synchronized with the LDAP user including account status, required user details, and properties.

NOTE:

- The iWay LDAP Adapter is a separately licensed product and must be purchased in addition to the Direct Marketing Links license.
 - Microsoft Active Directory and Novell's eDirectory are currently supported by the iWay LDAP Adapter.
-



Prerequisites

Use of the Pageflex iWay LDAP Adapter requires the following:

- Appropriate Directory User Account(s) should be set up and made available.
- The iWay application should be configured to perform LDAP authentication.

LDAP Workflow

The following steps describe the LDAP workflow:

- 1 The user enters the login URL that will provide external (LDAP) authentication:
`http://localhost/iway/?IID=xxx`
where xxx is the authentication identifier as defined in the configuration file.
- 2 The user enters the domain login name and password in order to log in to the iWay application; according to configuration parameters. iWay performs user authentication on the LDAP server.
- 3 If authentication is successful, the user will be logged in to the system, and one of the following events will be performed:
 - If no corresponding iWay user account exists, the system will create an account using retrieved domain user details and properties.
 - If the corresponding iWay user account already exists, the system will update the account using retrieved domain user details and properties. If the corresponding iWay user account was disabled, the system will enable the account.

If authentication fails, the user will not be logged in to the system and the appropriate error message will appear. In this case:

NOTE:

- If the domain user account has been disabled or deleted, but the corresponding iWay user account still exists and is active, the system will disable the account.
 - For all other error states (wrong password, technical error, etc.) no other manipulations on the corresponding existing iWay user account will be performed.
-

LDAP Configuration

Within Pageflex iWay, you configure the LDAP Adapter in the **EXTERNAL SYSTEMS** window.

To access the External Systems window:

- 1 Login to iWay as a Print Service Provider.
- 2 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> EXTERNAL SYSTEMS**.
- 3 Select **LDAP** in the **SYSTEMS** list.

Configuring LDAP for iWay

Configuration settings are divided into two sections:

- [Configuring the Connection Settings](#) (on page 194)
- [Mapping LDAP - iWay Attributes](#) (on page 194)



Configuring the Connection Settings

Connection settings provide the parameters necessary to connect to the LDAP server (**SYSTEM SETUP -> INTEGRATIONS -> EXTERNAL SYSTEMS -> LDAP**).

Parameter	Description
Integration ID	If you have a number of LDAP integrations, select one for your current work session or select New .
Service	The directory service - Active Directory (Microsoft) or Novell.
Server DNS/IP	DNS server name or IP address where the active directory is located.
Port	Port number used by iWay to contact the domain (default 389). This port is employed to perform the query with the LDAP. If the LDAP server is external, this port must be opened within the firewall, in order to allow it to access the server and perform the query.
Administrator User Name and Password	Defines the Domain administrator credentials. Type in the user name and password of the administrator of the active directory. The login name and password of any user belonging to the 'Domain Admins' group can be used.
Domain	The local Domain Name System (DNS) name within the Company. This name is defined in the active directory.
Search Base	Defines where to start the search inside the domain [DC=domain controller]. The LDAP syntax requires that you include the following parameters: <ul style="list-style-type: none"> • DC=mydomain • DC=com
Default Customer	Defines the default iWay account into which the authenticated LDAP user will be logged.

Mapping LDAP - iWay Attributes

The attribute settings define the parameters that iWay extracts from the LDAP server and how they are translated by iWay. Mapping the attributes is divided into two sections:

- [Configuring the Attributes](#) (on page 194)
- [Configuring Privileges Parameters](#) (on page 195)

Configuring the Attributes

Attributes are the set of parameters - address, phone number, etc. - defined in the LDAP directory, and retrieved and updated in the iWay user account.



Configuring Privileges Parameters

The LDAP Adapter integration enables synchronization between members of LDAP groups and iWay privileges.

- 1 Map the active directory Privileges parameters to a iWay Privilege Level for each row as follows:
 - **MEMBER OF:** A defined user group within the active directory.
 - **PRIVILEGE LEVEL:** The Privilege Level within iWay for users that are members of the corresponding active directory group.
- 2 Click the **Add** button for additional group mappings, or remove a particular group mapping by selecting a checkbox and clicking the **Remove Selected** button.
- 3 Select the **DEFAULT PRIVILEGE LEVEL** for users that do not belong to any of the active directory groups.

NOTE: A user that is a member of multiple groups will be designated the Privilege Level of the group highest in the list. When mapping LDAP groups to iWay privileges, you should maintain a hierarchal order for the groups from highest to lowest Privilege Level.

Testing the New Configurations

To test the new configurations, login to the following URL:

```
http://server/iway/?iid=x.
```

Where:

- *server* is the server name (*localhost* can be used for tests on the iWay server itself).
- *x* is the Integration ID defined in the [Connection Settings](#) (on page 194).

Each buyer must login using this URL in order to receive authentication by LDAP.

User Management

General

The following topics provide instructions on how to interface between iWay and the IT system you use to manage your users authentication and provide auto login.

Overview

The User Authentication Interface module of the application enables you to authenticate Print Buyer users through an external system, instead of manually registering the users in the application administration modules.

Prerequisites

- 1 An Authentication Server - An external system that is capable of receiving http requests and responding with a standard XML reply. The authentication server queries the external user management system, and generates XML as required by iWay.
- 2 iWay Business Links license - Users can work with this integration only after acquiring and enabling the iWay Business Links license.



Integration Flow

The following procedure describes the basic workflow involved in the Automatic Login procedure.

- 1 The User Authentication procedure begins when a login request to the application is made from any internet or intranet website. To activate the User Authentication workflow, the login request must be made to the following webpage:

`http://[server]/NewsWay/Interfaces/AutoLogin/algin.asp?IID=[x]&PrintProviderID=[y]&firsturlselection=[page]&localizationsection=[lang]`

Where::

- server – name of the iWay server.
- x – number of the authentication server configuration node.
- y – ID of the print provider to which the account and user belong. In stand-alone installations, the PrintProviderID = 5.
- page – page that will be the first seen by the Print Buyer upon logging into the application. One of the following "punch-in options" can be chosen:
 - "firstpage" – default view (if blank or missing).
 - "shoppingcart"
 - "approval"
- lang – Language used by the system in the GUI interface after user login. The list of language codes is located in *[Application Drive]:\NewEdition\ControlPanel\Localization_nw_setup.txt*, where [Application Drive] is the drive on which the application is installed. Default (if blank or missing) = English (US).

For example:

`http://localhost/newsway/interfaces/autologin/algin.asp?PrintProviderID=5&IID=2&firsturlselection=shoppingcart&localizationsection=FrenchCA`

The call can include any POST or GET parameters and the sending method should be predefined in the application configuration files.

- 2 The application sends the request to a webpage on the server that handles the authentication, forwarding any parameters included in the original request. The webpage URL, to which the request is being forwarded, must be predefined in the application configuration files.
- 3 The authentication request is replied to via an XML file. The XML file supplies a unique ID to the Print Buyer as well as the specific Print Buyer user, provides additional optional information about the user and/or the Print Buyer (such as contact information), and states the action to be taken. Possible actions are:
 - Create new user: A new user is created with the given parameters. If needed, a new customer is created. If a user with the given unique ID already exists, an error occurs.
 - Update existing user: An existing user and/or customer with the given unique ID are updated with the given parameters. If the user/customer does not exist, an error occurs.
 - Create or Update: If a user and/or customer with the given unique ID exists, the ID is updated with the given parameters; otherwise the user/customer is created and assigned the given parameters.
 - Delete User: Delete the user with given unique ID.
 - Login: Log in - without updating user details.



If no action is stated, the user is denied access to the application server.

A sample XML reply is provided with the application installation and is located in *[Application Drive]:\NewEdition\IPanel\Db\AutoLogin\sample.xml*, where *[Application Drive]* is the drive on which the application is installed. The sample XML shows and explains all the optional parameters that the application accepts.

- 4 If the XML response is processed with no errors, the application takes the action that was stated in the XML. If the user is allowed to log in, the application redirects the web client that has made the original login request to the application logged-in Start Page. If the user is denied login, the application displays an error message.

Configuring the User Authentication Definition

To begin configuration of the User Authentication definition, do the following:

- 1 Open *[Application Drive]*:
NewEdition\IPanel\PP\5\Integration\ExternalMethods_nw_setup.xml, where *[Application Drive]* is the drive on which iWay is installed.
- 2 Go to the parameter ExternalIntegration IID = 2 which represents the "User Authentication" options and
 - a Change the parameters of authURL to the URL of your authentication server. e.g.: `http://localhost/newsway/test/autologin/xmlresponse.asp`
 - b Match the IID parameter to the IID that is passed from the external system into the application. You can change the IID to any IID that you want, if you are working with a number of Auto Logins for example.

Do not touch the following. They have been deprecated.

NOTE:

- UserDetailedSync
 - SingleSignOn
 - Parameter Method
-

Authentication server response structure

The parameter tables below list the required elements found in the standard xml which the application interprets when logging in using external authentication.

- A sample XML file can be found in: **[Application Drive]\NEWEDITION\IPANEL\DB\AUTOLOGIN\SAMPLE.XML**, where **[Application Drive]** is the drive on which iWay is installed.
- Missing tags in the xml will cause a crash — you can remove an existing tag in the xml by changing it to a comment (the syntax begins with `<!--` and ends with `-->`). e.g., instead of deleting `<city>New York City</city>` change it to `<!-- city>New York City</city -->`)
- "CustomerRefId" and "UserRefId" — id's used by the system that requests the login to identify the user and customer (like UserId, and CustomerId in iWay). They can never be changed for a user/customer; if new reference id's are sent, a new customer/user is created. The rest of the parameters can be updated by an "update" user action.
- Editing XML file — if you are changing the data in the sample.xml or providing your own xml file, make sure you save it as UTF-8 encoding.



Account management

Using the user management module, you can create, update, and delete accounts. This is a very powerful capability and we recommend you use it only once per account. If you need to change account properties with active users, use the application GUI (**ACCOUNTS -> ACCOUNT SETUP** - Some of the fields are located in the **GENERAL INFO** tab and some in the **PREFERENCES** tab.

NOTE:

- In previous versions of iWay, accounts were called customers. Therefore, accounts are referred to as customers in some places.
- A new account is created only when needed.
- The account is managed based on the external ref ID. IF you want to log into accounts that were created in the GUI, you need to add the external RefID in the Database customers table. Currently this cannot be done via the GUI.

Required Elements	Example	Description
customerRefId	1600066	Unique account ID in the external system
customer_name	Royal Cargo	Account name
street	143 5th Avenue	Account Address Information
city	New York City	
state	New York	
zip code	00147	
country	United States	
contact_name	John Smith	
first_name	John	
last_name	Smith	
jobTitle	VP Sales	
CompanyName	Royal Cargo	
email	info@royalcargo.com	
phone	+1 123 12345678	
mobile	+1 456 12345678	
fax	+1 123 87654321	
ExtendedAddress		
AddressField [1-5] ContactField[1-5]		Customized fields
status	1	Account status. Valid values are: 1 = Enabled 2 = Disabled Default (if blank or missing) = Enabled
discount_rate	0	Fixed discount rate (%)



Required Elements	Example	Description
skin		Name of the skin used for this customer (applicable only when using branded skins)
tax_rate		Tax rate for this customer (%). If blank or missing, the application system default is applicable.
price_visible	1	Whether price information is shown to users of this customer. Valid values are: 0 = no 1 = yes
required_date_visible	1	Whether required date information is shown to users of this customer. Valid values are: 0 = no 1 = yes
allow_purchase_orders	1	Whether purchase orders are allowed for users of this customer: Valid values are: 0 = no 1 = yes
allow_online_payment	1	Whether Online Payment is allowed for users of this customer: Valid values are: 0 = no 1 = yes
allow_credit_card	1	Whether Credit Card payment is allowed for users of this customer: Valid values are: 0 = no 1 = yes
allow_direct_debit	1	Whether Electronic Direct debit payments allowed for users of this customer: Valid values are: 0 = no 1 = yes Direct debit is relevant only with the "Paymaster" payment method. Turning it on for other online payment methods will cause the system to malfunction.
print_driver_enabled	1	Whether use of Print Driver is enabled for users of this customer: Valid values are: 0 = no 1 = yes
selective_upload_enabled	1	Whether use of Selective Upload is enabled for users of this customer: Valid values are: 0 = no 1 = yes
allow_order_unpriced	0	Whether users of this customer are allowed to order unpriced jobs: Valid values are: 0 = no 1 = yes



Required Elements	Example	Description
allow_order_no_content	1	Whether users of this customer are allowed to order jobs without content: Valid values are: 0 = no 1 = yes
allow_file_attachment	0	Whether users of this customer are allowed to attach files to jobs: Valid values are: 0 = no 1 = yes
default_catalog		Account's default application catalog. The catalog is attached to the customer only if it already exists.
logo_file_name		Account's logo file. The file name is attached to the customer only if the file was already uploaded to the application system.
access_path		Name of the access path used for this customer (applicable only when using branded skins.)

External User Management and Synchronization

The iWay User Management module is implemented so that the users are synchronized in a "lazy fashion". A user is created / updated at the time of login. Synchronization always happens before login, so that on login to iWay the details are up-to-date. However, at any point in time, full synchronization of the two user management systems is not guaranteed.

Required Elements	Example	Description
userRefId	1600066	Unique User ID in the external system
first_name	John	
last_name	Smith	
privilege	10	iWay privilege. Valid values are: 10 = Administrator 20 = Supervisor 30 = Designer 40 = User 50 = Super User Default (if blank or missing) = User
department	Sales	If the department does not exist in iWay, it is created
cost_center_name		If a cost center with the cost center code (and or) cost center name exists for this account, the cost center is correlated to the user. Cost center creation is not available.
cost_center_code		



Required Elements	Example	Description
street	143 5th Avenue	Address information. If the address element and its sub elements are missing, the users address is the customers default address.
city	New York City	
state	New York	
zipcode	00147	
country	United States	
jobTitle	VP Sales	
CompanyName	RoyalCargo	
email	john@royalcargo.com	
phone	+1 123 12345678	
mobile	+1 456 12345678	
fax	+1 123 87654321	
ExtendedAddress		
AddressNotes		
AddressField [1-5] ContactField[1-5]		
catalog		Users default application catalog. The catalog is attached to the user only if it already exists. If blank or missing, customers default catalog is used. If text is none, no catalog is used.
language		
ip_filter		The IP addresses from which the user is allowed to log in.
user_action	CreateOrUpdate	<p>What should the application system do with the information in the xml. Valid values are:</p> <ul style="list-style-type: none"> • Create = Create a new user with the given parameters. • Update = Update the user parameters, but do not create one if the user does not exist. • CreateOrUpdate = Same as update, but create user if it does not exist. • Delete = Permanently delete the user from iWay. • Login = Log in without updating the user details. <p>If no value is given, user login is denied.</p>



Multisite Compatibility

To support multisite compatibility:

- 1 Each site must have a different name. This limitation is not enforced by the GUI, since it is only relevant when using LDAP or auto login.
- 2 You must add `printproviderID=xxx` to the url parameters

For example: `http://uniquesitename/iway?IID=2&printproviderid=6`

Appendix

Using the Sample

The sample demonstrates SSO user and account creation and can be useful for demos and authentication server development kick-off. Using the sample triggers a sample authentication server.

To use the provided sample:

- 1 Log into: **HTTP://LOCALHOST/NEWSWAY/TEST/AUTOLOGIN/REQUESTLOGIN.ASP?**
- 2 Click **Use Get** or **Use Post** to run it. This will call a sample authentication server that will return this xml file:

```
\NewEdition\IPanel\Db\AutoLogin\sample.xml
```

Troubleshooting

Below is a list of troubleshooting concepts that may help if something does not work.

- Is your IIS working in debug mode (server side scripting checkbox)? If yes, then turn it off. The authentication server request is performed using multi-threading, and debug mode does not support this.
- Is the application server up?
- Are you running the sample from the same server as the application? If not, add the `machineName` parameter to the url. For example:
`http://rndprt002/newsway/test/autologin/requestlogin.asp?machineName=rndprt002`
- Is your configuration OK?
 - Did you configure the setup correctly? – is the authentication server URL correct?
 - Did you write the login URL correctly? IID ? printproviderID ?
 - Did you add the parameters that iWay is supposed to forward to the authentication server?
- Is your authentication server OK?
- Try simulating a call to your authentication server from the application
 - Did you get an XML in a browser? Do you see one in the logger?
 - Look at the XML – are any mandatory fields missing?



Q&A

Question: What operating system and hardware is required for the authentication server?

Answer: The authentication server is software that queries the Print Buyer user management system and returns an XML file based on an HTTP request. The authentication server can be developed on any independent web server platform.

Question: What change will the Print Service Provider need to make in the system to send the login request to iWay?

Answer: The Print Service Provider must add a link to the Print Buyer's web site. This website contains the user credentials (IID, printproviderid, and parameters for identifying the user) which are forwarded to the authentication server.

iWay Business Links

Introduction

Pageflex iWay iWay Business Links is an add-on module for iWay that implements the concept of the application as an open system which can be easily integrated with, and conveyed to the various peripheral systems existing in an organization (such as *Accounting* and *Mis*).

The activation of iWay Business Links is protected by the Print Service Provider's licensing option. If the licensing option is not set for iWay Business Links, the links will not be activated, even after the iWay Business Links module has been installed. Existing customers, who wish to add the iWay Business Links ability to iWay, should contact their distributor and request an activation file that will add the iWay Business Links license to their current licensing option.

This module implements data-transfer, whereby data is transferred at the time that a specific event occurs. There are 2 ways to retrieve the data the application generates when an event occurs:

- [Hot folder Configuration](#) (on page 203) involves listening on the configured folder and retrieving the XML file from it.
- [Writing a connector](#) (on page 219) which is plugged in to iWay's events system. The connector is triggered when an event occurs, and receives a dictionary with the same data as exported in the XML.

Hot Folder Configuration

In situations where special processing is not needed for the export of information, iWay provides a *Default Receptor* (our sample implementation of writing a connector) for each link. These *Receptors* write all of the information that was sent from the link to an XML file (a standard file format) and saves the file in a designated folder. These files can be accessed later and processed manually, or they can be processed by any software that supports the XML format.

E:\Temp has been set as the default folder for the XML file. However, the Print Service Provider can change this folder by entering any target folder into the *Folder Path* field box found in the iWay Business Links window (**SYSTEM SETUP -> INTEGRATIONS -> iWAY BUSINESS LINKS**).

NOTE:

Each of the links can be enabled or disabled independently. After installing iWay Business Links on the server, all links are disabled by default. To enable a link, select the associated checkbox.



The naming of the *XML* files, written by the default *Receptors*, uses the following convention:

```
linkName_documentID_uniqueID.xml
```

Where:

- **linkName** = getPrice, confirmOrder, jobShipped, jobApproved, confirmInvoice, confirmReceipt, confirmDeposit, or confirmCreditNote.
- **documentedID** = job id, order id, invoice id, receipt id, credit note id, or deposit id
- **uniqueID** is a random number given to the filename in order to prevent the file being overwritten.

The Existing Links

The following links are currently provided with the iWay Business Links module:

- [Get Quote Link](#) (on page 204)
- [Job Order Link](#) (on page 204)
- [Edit Imposition](#) (on page 204)
- [Job Shipped Link](#) (on page 204)
- [Confirm Billing Document](#) (on page 204)
- [Job Approved](#) (on page 204)

Get Quote Link

The Get Quote link is activated when clicking the **Get Quote** button in the *application Shopping Cart*. Some of the values in the created XML are not yet defined at the time that the XML for the quote is created, and these parameters are given default values. The actual values for these fields are provided during the place-order event.

Job Order Link

The Job Order link is activated by clicking on the **Place Your Order** button in the *Place the Order* screen.

Edit Imposition

The Edit Imposition link is activated when clicking on the **Edit Imposition** button in the *Place the Order* screen.

Job Shipped Link

The Job Shipped link is activated when approving Jobs for shipping in the *Delivery* queue by clicking on the **Approve Selected Deliveries** button.

Confirm Billing Document

The Confirm Billing Document link is activated when a billing document is confirmed. This happens by pressing the **Confirm** button in the iWay GUI.

- The link applies to all billing documents: invoice, receipt, credit note, and deposit.
- This link is available only to iWay Sales Manager users.
- The link is also activated in the case of automatic invoice and receipt creation when working with online payments.

Job Approved

The Job Approved link is activated when clicking on the **Approve** button in the *Production* queue.



Exported data description

This section describes the data sent in the application links. The data structure in all of them is similar. Below is a description of each of the included node properties.

Order Node

The Order node exists in the Job Order xml file.

XML Property Name	Type	Description / Comments
OrderID	int	Unique number of the order.
IP	string	IP of the computer placing the order.
InvoiceID	int	The id of the invoice of this order.
PaymentTransactionID	string	Online Payment transaction number. Only available for some Online Payment vendors.
PaymentTerms	string	Deprecated. No value presented.
IsPaid	boolean	True if already paid for by Online Payment.
OrderField[1-10]	string	Customized fields defined in System Setup -> Customized Fields -> Order tab.
AccountManager	string	iWay Sales Manager customized fields defined in System Setup -> Customized Fields -> Account Information tab.
SalesPerson	string	
AccountField[1-5]	string	
PrintProviderID	int	Unique Print Provider number.
PrintProviderName	string	The current print provider name defined in System Setup -> Contact Details -> Print Provider Name
DisplayCurrency	string	The currency of the user placing the order..
DisplayCurrencyRate	float	The rate of the selected currency defined in Print Settings -> Pricing -> Currency Rates.
price	double	Price of the order before tax.
urgency	double	Urgency factor for delivery time based on regular, express, or urgent values. This is defined in the Job type or template setting, tax & urgency, and calculated according to the required delivery date in the order checkout process.
tax	double	Cost of order tax.
total	double	Order total cost.
OrderDate	date	Deprecated. Duplicate of OrderDateISO.
OrderDateISO	date	The date the order was taken.
id	int	Deprecated. Duplicate of OrderID field.
RequestedDate	date	Deprecated. Duplicate of RequiredDateISO.
RequiredDateISO	date	Defined in ordering sequence.
taxRate	float	Deprecated. Values appears under job nodes.
PaymentMethod	String	The method of payment.
PaymentMethodCode	string	Payment method as defined in the ordering flow, for example "PO (Purchase Order)".



XML Property Name	Type	Description / Comments
PONumber	string	Purchase order number as defined in the ordering flow.
ExpirationDate	date	iWay Sales Manager field.
InternalNote	string	Defined per job type/template. Can be changed in Tasks-> Production Queue notes.
InternalReferenceCode	string	Reference code of the job – entered in the order wizard.
RefQuoteID	string	iWay Sales Manager field.
LastFollowUp	date	iWay Sales Manager field.
LostTo	string	iWay Sales Manager field.
LostToPrice	float	iWay Sales Manager field.
Name	string	Job name.
NextFollowUp	date	iWay Sales Manager field.
Numerator	string	Order counter defined in System Setup -> Numbering
ReceivedAs	string	iWay Sales Manager field.
CustomerID	int	Account unique identifier. Visible in Accounts -> General Info.
customerTaxPackage	float	The customer Tax Package as defined per account.
customername	string	Deprecated. Duplicate of CustomerName field.
customerDiscountRate	int	Defined in Accounts -> Account Setup -> Preferences -> Pricing
ExternalCustomerID	string	Defined in auto login module or when exporting accounts. Seen in GUI only when defined, and cannot be edited in the GUI.
CustomerName	string	Account name.
CustomerNote	string	Edited by the Print Buyer during job creation -> Job details -> note for print provider.
OrderIP	string	Deprecated. Duplicate of IP field.
LoginName, DepartmentName, FirstName, LastName , DepartmentID, Email, JobTitle, Phone, Mobile, Fax, CompanyName	string	Defined in user management.
UserID	int	Unique identifier of user. Not available in the GUI.
ExternalUserID	string	Defined in auto login module or when exporting accounts. Seen in GUI only when defined, and cannot be edited in the GUI.
CSRID	int	iWay Sales Manager field. Unique identifier of the CSR creating the order. Not available in the GUI.



userContactAddress Node

The userContactAddress node exists in the Get Quote, Job Order and Job Shipped xml files and contains the details of the order requesting user.

XML Property Name	Type	Description / Comments
AddressID	int	Unique address identifier.
CustomerID	int	Unique Account identifier. Visible in Accounts -> General Info.
UserID	int	Unique user identifier. Not available in the GUI.
ContactTypeID	int	1 - customer main contact 2 - user main contact
ContactGroupID	int	2 - public group 3 - user group
AddressID1	int	Deprecated. Duplicate of AddressID field.
CompanyName, DepartmentName, Street, City, State, ZipCode, Country, AddressNotes, FirstName,LastName, Phone, Mobile, Email, ExtendedAddress, JobTitle, Fax	string	Defined in Accounts -> Account Setup -> Users.
AddressName	string	Name of the address record as shown in the address book.
ContactField[1-5], AddressField[1-5]	string	Customized fields, configured in System Setup -> Advanced -> Customized Fields.
UserID1	int	Deprecated. Duplicate of UserID field.
LoginName	string	Defined in Accounts -> Account Setup -> Users.
Password	string	Encrypted user password
FirstName1	string	Deprecated. Duplicate of FirstName field.
LastName1	string	Deprecated. Duplicate of LastName field.
PrivilegeID	int	Privilege of user which ordered the job. 10 - Admin 20 - Supervisor 30 - Designer 40 - User 50 - SuperUser 55 - Guest 60 - Custom
CustomerID1	int	Deprecated. Duplicate of CustomerID field.
IpFilter	string	IP/s from which user can log in to the system. Defined in Accounts -> Account Setup -> Users.
Language	string	Not in use
ProfitCenter	string	Not in use



XML Property Name	Type	Description / Comments
DepartmentID	int	Unique department number
CostCenterID	int	Not in use
UserRefID	string	Not in use
ShippingAddressID	int	ID of Shipping Address of user
BillingAddressID	int	ID of Billing Address of user
CatalogID	int	ID of Account's catalog
PasswordExpirationDate	date	Defined in Accounts -> Account Setup -> Preferences.
TemplateViewTypeID	int	Defined in Accounts -> Account Setup -> Users. 1 - Root Folder 2 - Specific Folder 3 - Catalog
RootCategoryID	int	Defined in Accounts -> Account Setup -> Users.
StartPageTypeID	int	Defined in Accounts -> Account Setup -> Users. 3 - Template View 4 - Launch Pad
UserTypeID	int	User type: 0 - Regular 1 - Guest 2 - WaitingForApproval
UserStatusID	int	User account status: 1 - Enabled 2 - Disabled
PasswordModificationDate	Date	Last date when password was modified.
IID	int	External Authentication ID.
AllCostCenters	bool	Defined in Accounts -> Account Setup -> Users. True if all existing cost centers are assigned to user.
IsDeleted	bool	True if user is deleted
PreferredLocale	int	Defined in Accounts -> Account Setup -> Users.
IsDeleted1	int	Deprecated. Duplicate of IsDeleted field.
ISOCountry	string	ISO Country Code. According to Country, which is defined in Accounts -> Account Setup -> Users.

Job node

The Job node contains the details of the Job and its pricing parameters.

XML Property Name	Type	Description / Comments
isPriceNA	bool	True if the price is Not Applicable.
isCostNA	bool	True if the cost is Not Applicable.
cost	float	Defined when pricing is set up. The actual cost of the job/line



XML Property Name	Type	Description / Comments
		item to the print house.
price	float	Defined when pricing is set up. The cost of the job(s) to the print buyer (this property is called SubTotal in the Job Shipped xml).
adjustedPrice	float	If discount is positive: adjusted price = price. If discount is negative: adjusted price = price adjusted for discount.
discount	float	Defined in Accounts -> Account Setup -> Preferences -> Pricing.
customerPrice	float	If discount is positive: customer price = price adjusted for discount. If discount is negative: customer price = price.
urgencyRate	float	Job urgency rate, according to delivery date and job urgency definitions.
urgencyPrice	float	The portion of the price which is due to the urgency of the request.
totalNoTax	float	Total price before tax and before shipping.
taxRate	float	Tax percent represented as a fraction of 1 (e.g. 0.4 is 40%).
tax	float	Amount of tax for the job.
taxName	string	Name of the tax mechanism.
total	float	Price including tax but excluding shipping.
shippingPrice	float	Shipping price.
totalWithShipping	float	Price including shipping and tax.
currency	string	The currency symbol. Sample value - \$.
copies	int	Number of copies. Defined in the ordering process in the shopping cart.
CustomerRefCode	string	Reference code. Defined in the ordering process in the order confirmation screen.
UserID	int	Unique identifier of user. Not available in the GUI.
ExternalUserID	string	Defined in auto login module or when exporting accounts. Seen in GUI only when defined, and cannot be edited in the GUI.
CurrencyCode	string	Visible only in Online Payment flow. Sample value - USD
hasIform	bool	True for a personalized job.
hasVardata	bool	True for a personalized job with multiple records.
vardataCount	int	Number of variable data records.
hasFolding	bool	True if folding is defined for the job.
NoteFromCustomer	string	Note for the Print Provider from the Print Buyer.
InternalNote	string	Defined per job type /template. Can be changed in Tasks -> Production Queue notes.



XML Property Name	Type	Description / Comments
ProductionNote	string	Job production note.
FinishingNote	string	Job finishing note.
TemplatePath	string	Path of job template folder on the server file system. Sample value: D:/NewEdition/ipanel/jobtemplates/t00/01/52
TemplateRefCode	string	Template reference code.
TemplateSubject	string	Template subject/type (e.g. Letterhead).
TemplateISBN	string	Defined in template creation.
template	string	Template name
TemplateID	int	Template unique identifier. Seen as Template # in the template properties.
ExternalTemplateID	string	ID of the external template that was imported into the system.
priceOrigin	string	Origin of the price definition method used: generic - "site" level template - "template" level manual - "job tracking" level job-ticket - "imposition-schema" level
id	int	Deprecated, Duplicate of jobID
jobName	string	As defined in job creation.
jobPath	string	Path of job folder on the server file system. Sample value: D:/NewEdition/ipanel/profiles/business/customers/13/jobs/psei456-188
jobType	string	Selected in template or job creation, for list of available job types. Sample value: Brochure
jobTypeID	int	System unique identifier. Not visible in the GUI.
jobSubType	empty	Deprecated. Value should be ignored.
jobSubTypeID	empty	Deprecated. Value should be ignored.
CostCenterName	string	Selected in the ordering sequence. Defined in Accounts -> Account Setup -> Cost Centers.
CostCenterCode	int	
HasInventory	bool	True if managed as an inventory template.
jobTypeName	string	Deprecated, Duplicate of jobType field.
jobsubtypename	string	Deprecated, Duplicate of jobSubType field.
templateID	int	The ID of the template the job was created from. Relevant only in template based jobs,
templateName	string	Deprecated, Duplicate of template field.
templateISBN	string	Deprecated, Duplicate of TemplateISBN field.



XML Property Name	Type	Description / Comments
OmniumJobHash, OmniumOrderHash, OmniumJobPath		Deprecated.

pricingLineItems node

Pricing calculation in iWay is managed as a list of line items. Every part of the cost is broken down into priceLineItem nodes. For more information see the pricing module documentation.

priceLineItem node

XML Property Name	Type	Description / Comments
itemType	string	Sample Values: JBF Options
itemDescription	string	Sample value: Price per copy of brochure
itemID	Int	Unique reference number of the Line Item
itemQuantity	int	Quantity of the item
itemUnits	string	Sample value: copies
itemCost	float	Sample value :760.0000
itemPrice	float	Sample value:775.2

JBF node

This node contains the buyer's decisions as captured and described by JBF. It includes information from all the joblets that are defined for the specified job.

XML Property Name	Type	Description / Comments
pageSizeJBF	string	Page Size Options
width	float	The job width, in inches.
height	float	The job height, in inches.

Joblet node

The JBF node also includes the Joblets sub-node, which is further broken down into individual Joblet nodes. Each Joblet node describes a single property of a specific Joblet.

XML Property Name	Type	Description / Comments
jobletName	string	The joblet name.
jobfPropertyCaption	string	The joblet property.
jobfPropertyValue	string	The joblet property's value.

flatPage node

The flat page properties of a signal instance of the job (non imposed) before folding. iWay holds 2 sets of parameters (width, height and number of pages), one set as defined in the joblets in the job creation, and one set as defined in the media file (usually PDF).



XML Property Name	Type	Description / Comments
count	int	Number of pages as defined in the JBF.
width	float	In inches as defined in the JBF.
height	float	In inches as defined in the JBF.
size	string	Size name as defined in the JBF, defined in Print Settings -> Production -> Paper Sizes.
sides	string	This is the value defined in the job creation process, (not in the job imposition definitions). Sample value: TwoSidedHeadToHead
PdfFlatCount	int	Number of pages in the media file.
PdfFlatWidth	float	Job width in inches as defined in the media file.
PdfFlatHeight	float	Job height in inches as defined in the media file.

channels node

The channels node contains the details of the color printing parameters.

XML Property Name	Type	Description / Comments
colorGroup	string	Based on job properties. As defined in the color joblet in the job creation. Sample value: process
blackCount	int	Based on job properties. 1 if the job uses black ink, else 0.
processCount	int	Based on job properties. The number of cmyk colors used by the job (0 - 4).
spotCount	int	Based on job properties.
PdfBlackColorCount	int	Same as blackCount - based on media.
PdfProcessColorCount	int	Same as processCount - based on media.
PdfSpotColorCount	int	Same as spotCount - based on media.
PdfBlackAndWhitePages	int	The number of black and white pages in the job.
PdfBlackAndWhitePagesList	string	List of black and white pages in the job.
PdfColorPages	int	The number of color pages in the job.
PdfColorPagesList	string	List of color pages in the job.

production node

The production node contains the details of the production printing parameters.

XML Property Name	Type	Description / Comments
outputDevice	string	Output device name. Sample value: Digital Device
pressSheetCount	int	The number of press sheets planned for printing the job. Calculated by the imposition engine.
pressSheetActualCount	int	The number of press sheets that were actually used. Entered manually in the printing queue.
imposedFilePath	int	Full path to the imposed production file.



XML Property Name	Type	Description / Comments
printQuality	string	Deprecated. Always set to "Custom".

paper node

The paper node contains the details of the paper stock used. All property values are reproduced as they appear in the Stock Library (**PRINT SETTINGS -> PRODUCTION -> STOCK LIBRARY**).

XML Property Name	Type	Stock Library Name
vendorName	string	Vendor
thickness	float	Thickness
stockItemName	string	Stock Item Name
parentSizeName	string	Size
mediaTypeName	string	Type
mediaSetCount	string	Media Set Count
inStock	string	In Stock
gradeName	string	Grade
catalogID	string	Catalog ID
frontCoatingName	string	Front Coating
backCoatingName	string	Back Coating
stockItemID	int	Stock ID
weight	float	Weight
color	string	Color
brand	string	Brand Name
texture	string	Texture

finishing node

The finishing node contains the details of the finishing used.

XML Property Name	Type	Description / Comments
laminating		
type	string	Lamination type.
sides	int	Number of sides.
fold-marks		
catalogID	string	Catalog ID according to JDF standard.
count	int	Number of foldings
numbering		
position	string	Position of number on the page.
Start	int	Start number.
step	int	Numbering step.



XML Property Name	Type	Description / Comments
Start-page	int	Start page.
Duplex	string	duplex or single
type	string	Numbering type.
drilling		
position	string	Position of drilling on the page.
count	int	Number of drills.
radius	float	Radius of the drills.

shipping node

There is a shipping node per delivery in the job order (multiple nodes for the multi delivery option). In the case of a quote, the values are not yet defined since the checkout process has not completed, and default values are provided.

XML Property Name	Type	Description / Comments
DeliveryID	int	Unique identifier of the delivery. Not available in the GUI.
ProductID	int	Duplicate of JobID. Deprecated.
AddressID	int	Unique identifier of the delivery. Not available in the GUI.
Copies	int	Number of copied in the delivery.
ShippingMethod	string	As selected in the order checkout process. Sample value: Express Shipping (Same day delivery)
ShippingWeight	float	The weight of the delivery as calculated by iWay
ShippingPrice	float	Shipping price as calculated by the pricing plug-in
RequiredDate	Date	Delivery Required Date as defined in the checkout process. Sample value: 3/3/2009 9:00:00 PM
CarrierCode	string	Deprecated
CarrierName	string	Name of the carrier
TrackingNumber	string	Entered in the delivery queue. Based on input from the delivery company.
StatusID	int	ReadyForShipping = 190 Shipping = 200 Received = 300
ShippingMethodID	int	Unique identifier of the shipping method.
ShippingJobPrice	float	Deprecated. Duplicate of job price.
ShippingTax	float	Tax on the shipping price.
AddressID1	string	Deprecated. Duplicate of AddressID.
Company Name, Street, ExtendedAddress, City, State, ZipCode, Country, AddressNotes	string	Shipping address. As defined in the ordering flow.



XML Property Name	Type	Description / Comments
FirstName, LastName, JobTitle, CompanyName Phone, Mobile, Fax, Email	string	Shipping address, contact Information details. As defined in the ordering flow.
AddressName	string	Name of the address record as shown in the address book.
ContactField[1-5]	string	Contact customized fields. Configured in System Setup -> Customized Fields -> Contact Information tab.
AddressField1	string	Address customized fields. Configured in System Setup -> Customized Fields -> Address tab.
ShippingMethodID1		Deprecated. Copy of ShippingMethodID.
CarrierID	int	Unique ID of carrier (as selected in Shipping Method). Not visible in the GUI.
DeliveryMethodName	string	Name of the delivery method.
MethodDescription	string	Description of the shipping method, configured in Print Settings -> Shipping -> Shipping Methods and in Accounts-> Account Setup -> General Info -> Shipping Method Groups tab.
Markup	float	Markup on the shipping cost configured in Print Settings -> Shipping -> Shipping Methods.
HandlingFee	float	Deprecated
PricingModel	string	Intent / production/ excel Sample value: Intent Pricing
PricingModelSource	string	Job type / template. Deprecated Sample value: Price was calculated using Job Type pricing definitions
IsDefault	bool	Deprecated
ConfigurationGroupID	int	Deprecated
WeightLineItemID	int	Deprecated
VolumeLineItemID	int	Deprecated
WeightVolumeProportions	float	Deprecated
TaxPackageID	int	The tax package used for shipping costs.
TaxPackagename	string	Name of the tax package.
OnlineLineItemID	int	The delivery line item in the order result matrix.
RequiredDateISO	date	Requested shipping date
ShippedDateISO	date	When the job was really shipped.
DeliveryMethodName	string	Shipping method name
ISOCountry	string	ISO Country code as defined in User settings.
StatusName	string	Job status. Sample value: printing



billing node

The billing node contains the contact details of the billing address.

orderPriceLineItem node

This node describes the order pricing result break down. It includes information for each line item as a separate sub-node.

XML Property Name	Type	Description / Comments
orderPriceLineItem		
rateID	int	Not visible in the GUI. Defined in Print Settings -> Pricing -> Currency Rates.
adjustedPrice	float	Rounded price.
customerPrice	float	Price after customer discount.
discount	float	The amount of the discount.
urgencyPrice	float	The urgency price.
totalNoTax	float	The total price without tax,
taxName	string	The name of the tax.
tax	float	The amount of the tax.
total	float	Total.
allJobsPrices	bool	True if all jobs have prices.
shippingPrice	float	Price of the shipping.
totalWithShipping	float	Total with shipping.
Jobs		
jobId	int	Unique identifier of the job.
jobName	string	The name of the job.
price	float	Price.
cost	float	Cost.
copies	int	Number of copies.
Deliveries		
deliveryName	string	Delivery name.
addressID	int	ID of the delivery address.
price	float	Delivery price
cost	float	Delivery cost.
quantity	int	Delivery quantity.
Taxes		
taxName	string	Tax name.
taxId	int	Tax ID
percentage	float	Tax percentage.



XML Property Name	Type	Description / Comments
subTotal	float	Tax sub total
price	float	Tax price.

iWay Sales Manager Billing module links description

There are four links created when the iWay Sales Manager billing module is activated in the license. The Confirm Invoice link is available for all users who buy the links module. In the iWay Sales Manager links, currently only folder balance activation is available.

There are 4 event triggers:

- Invoice document confirmed
- Receipt document confirmed
- Deposit document confirmed
- Credit Note document confirmed

Since receipts and deposits have similar content, and invoice and credit note have similar content, they are described together.

Receipt & Deposit

[Receipt/Deposit]General node

XML Property Name	Type	Description / Comments
Numerator	string	Document per site numerator. Defined in System Setup -> Advanced -> Numbering
ExternalReference, Subject, Note	string	Defined in receipt/ deposit creation.
IssueDate, PrintDate	date	
ReceiptTotal	float	
RelatedDocumentNumber		Has value only in the case of related deposit and order numerators.

AddressGeneral node

The address to which the document is sent. Contains the billing address of the user sent the document. If no user was selected, the billing address of the customer is used.

PrintProvider node

This node contains the Print Provider's details.

XML Property Name	Type	Description / Comments
CustomerImageUrl	string	Print Service Provider image URL for the Account.
PrintProviderName, PrintProviderID, Street, City, Postal, Country, Phone, Fax	string	Print Service Provider details.



ReceiptLine node

A node for every invoice connected to the receipt / deposit (in the case of a deposit, there can be only one).

XML Property Name	Type	Description / Comments
ReceiptLineNumber	int	Internal counter
InvoiceNumber	string	Invoice numerator
InvoiceSubject	string	Invoice line properties as presented in the GUI.
PaidAmount, TaxAmount, PreviousPaidAmount InvoiceAmount	float	

PaymentLine node

A node per payment line.

XML Property Name	Type	Description / Comments
PaymentTypeName, Amount, Details, Note	string	Payment line details

Invoice & Credit Note

[Invoice/CreditNote]General node

XML Property Name	Type	Description / Comments
InvoiceNumerator, ExternalReference, RelatedDocumentNumber, Subject, Note, Currency, poNum	string	Values as shown in the invoice creation GUI
IssueDate, ValueDate, PrintDate	date	
InvoiceTotalExcTax, InvoiceTotalIncTax, InvoiceTotalExcTax, InvoiceDiscountAmmount, ExistingCreditNotesSum, DepositTotal, TaxAmount, InvoiceTotalIncTax, LeftToPay	float	

AddressGeneral node

The address to which the document is sent. Contains the billing address of the user sent the document. If no user was selected, the billing address of the customer is used.



InvoiceLine node

A node per order connected to the invoice. Does not exist for a Credit Note.

XML Property Name	Type	Description / Comments
InvoiceLineNumber	int	Values as shown in the invoice creation GUI
OrderEnumerator, Description	string	
OrderTotal, DiscountAmount, TotalAfterDiscount, TotalIncTax, Tax	float	

Writing a Connector

At the core of iWay Business Links is the INS (The iWay Nerve System). The INS serves as a mediator between requests for data processing and the implementation of the processing, so that the requesting component and the implementing component are independent of one another.

A Link is a point in the workflow where a specific event initializes the process of assembling a package of data that is related to the event. This package of data is then transferred to a Receptor, which is a software module, designed to receive the package and manipulate the data stored within. Each Link is uniquely defined by the information contained within the package that it sends and by the event that initializes it; however, the Receptor can be any software module written according to the specifications described in [Connector Implementation](#) (on page 220). The Receptor must receive the data according to the means dictated by the Link but once the package has been received, the Receptor component is free to process the data as seen fit.

Working with iWay Business Links

To be able to integrate with any peripheral system, the INS must be installed on the application server. When this component has been installed, the links are activated and the application begins exporting data using the existing links.

All of the parameters that will be transferred from the application to each Link are predefined. These parameters are then transferred to a Receptor for processing. An Integrator can create Receptors, for specific uses, in which case the logic implemented by the Receptor and the consequences of its action are the Integrator's responsibility.

INS Components

The request for processing is called an INS Event. An INS Event is issued by the application, together with a data package that contains the relevant parameters for that event. For each Event implemented by the INS, there is a corresponding Nerve. A Nerve is a logical container within the INS that maintains the definition of which data is expected to be delivered with the Event and which Receptor is to process that data.

The Receptors are implemented as COM components. They can run on any machine over the network, thus enabling load management.



Nerve

For each *Event* implemented by the INS, there is a corresponding Nerve. A Nerve is a logical container within the INS that coordinates the work for the implementation components, the Receptors. The Nerve maintains the definition of what data is expected to be delivered with the Event, and which Receptor, or Receptors, is to process that data.

It is possible to map more than one Receptor on a single Nerve. In such cases, the Nerve will initialize the Receptors, sequentially, transferring each returned value from one Receptor to the next Receptor.

Receptors

Receptors perform the actual work in the INS. They are implemented as COM components and can run on any machine over the network, thus enabling load management. When an INS Event occurs and a Nerve is being implemented, the Receptor defined within the Nerve will be loaded by the INS and unloaded after it finishes carrying out the operations it is designed for. The Receptor will then return a value to the calling Nerve. With each notification, the Receptor will receive a data-set, specific for the Event being implemented at that time. The data is referred to as the *Event Context*.

Connector Implementation

All links export Job-related information. The Event Context (set of data) is transported as a dictionary (Scripting, Dictionary Type). The Event that takes place can be related to more than one Job; however, there will be one Event issued to the INS that will hold the data of all of the Jobs involved. In such cases, the dictionary being transferred will contain sub-dictionaries, where each sub-dictionary corresponds to one Job only.

The Job Order link also transfers order-related information. In this case, there will be two sub-dictionaries, one containing all order information and one containing all Job information.

The structure of the nested dictionaries is coherent with that of the generated XML.

Receptor Implementation

Receptors are primarily COM objects and therefore, to implement a Receptor, one must be familiar with COM programming.

- The minimal requirement is the implementation of a one-function call.
- As INS works on top of MTS, it is preferable (but not compulsory) that Receptors be MTS aware.
- For better performance, Receptors should be implemented as Apartment Neutral (Aggregating FTM) or Apartment Threaded components.
- The INS recognizes each Receptor by its program ID; therefore, Receptors must use a predefined program ID for registration.

Notify Function

All *Receptors* must implement the following function which is called whenever an event is raised:

```
VARIANT Notify (eventObject, context, applicationContext, lastRet)
```




Parameter	Type	In/Out	Description
eventObject	Variant	[in]	A reference to the INS Event object that provides information on the event.
Context	Variant	[in/out]	The dictionary holding the exported data.
applicationContext	Variant	[in]	A constant context passed to the Receptor that configures according to the applicator in the current Nerve .
lastRet	Variant	[in]	The return value from the previous Receptor (if one exists).

The return value depends on the Receptor implementation.

Backward and Forward compatibility

The current iWay Business Links module includes deprecated properties, which are no longer relevant. They were left in place to enable easy backward compatibility. They will be removed in a future version.

The iWay Business Links module is currently being upgraded and may work differently in a future version.

XMPie PersonalEffect

XMPie PersonalEffect Integration

Pageflex iWay XMPie PersonalEffect enables Print Buyers to effectively reach their customers via print, web, and email, within the framework of dynamic publishing campaigns. By integrating XMPie PersonalEffect with iWay, Print Buyers can access the XMPie PersonalEffect application using the iWay workflow.

XMPie PersonalEffect with iWay facilitates the following:

- Print Buyers can access, customize, and order VI campaigns directly from iWay.
- Dynamic proofing and the generation of all VI output formats supported in PersonalEffect are available directly from iWay in a completely transparent way.
- An integrated, online solution that places a Print Service Provider at the center of all relevant media campaign information.

NOTE:

- A Direct Marketing Links license is required to enable XMPie.
- An expert level of understanding of the XMPie PersonalEffect accounts, campaigns, and variable template creation is required to effectively present the templates for order by a Print Buyer.

The following topics describe the procedures involved in importing and using an XMPie PersonalEffect template in to the iWay system.

Installing XMPie PersonalEffect

The first step is installing XMPie PersonalEffect. Take note of the following when installing the XMPie PersonalEffect application:

- The XMPie PersonalEffect application must be installed in the same domain or workgroup as iWay but **NOT** on the same server as iWay.
- The user that installs the XMPie PersonalEffect application must also exist as a user on the iWay server with admin permissions.



- Take note of the following XMPie PersonalEffect login information that will be needed for configuring within iWay: IP address, Customer Name, User, and Password.
- The XMPie PersonalEffect application must include the XMPie API install. Contact XMPie to receive the relevant API files.

To test the API has been successfully installed:

a Browse to `http://<server IP>/api/GetOutputFormatList.asp`

b Verify that you receive the following XML.

```
" <?xml version="1.0" encoding="utf-8" ?>
- <result>
  <err>-3</err>
  <src>GetOutputFormatList</src>
  <descr>Required Parameter [cn] Missing</descr>
</result>"
```

iWay and XMPie PersonalEffect Integration

iWay Setup

Before configuring iWay settings, make sure of the following iWay server requirements:

- 1 The User account used to install XMPie also exists on the iWay server and has the following configuration:
 - Password never expires.
 - Member of the following 3 groups: Administrators, IIS_WPG and Users
- 2 The **NewEdition** folder on the iWay server is shared as follows:
 - The share name must be: iWayDataFiles
 - The shared folder is configured with full permission to Everyone.

iWay Configuration

To create a link for Account(s) or Campaign(s) between the XMPie PersonalEffect Server and iWay:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> EXTERNAL SYSTEMS**.
- 2 In the **SYSTEMS** pane, select **XMPie PersonalEffect**.
- 3 Select the **Enable** checkbox.
- 4 Fill in the XMPie login information:
 - **XMPie Server Local IP**: the local IP address of the XMPie server (or DNS name).
 - **Production Server Local IP**: the local IP address of the iWay server (or DNS name),
 - **Customer**: the XMPie customer name.
 - **User**: the XMPie user name.
 - **Password**: the password to the XMPie user account.
- 5 Click **OK**.

NOTE: The user name and password must match the user login details of the XMPie user (who creates campaigns and upload cpkg files), not the XMPie administrator (who manages users and preferences, for example).



Configuration Check

To verify the configuration settings, click **Check Configuration** in the **Set-up Configuration** panel and the **Production Server Tests** window appears. If you have configured a setting correctly, the status in the Production Server Tests window appears as *Passed*. However, when a setting has been configured incorrectly, the status appears as *Failed* and the Production Server Tests window displays a comment message on the failure.

Test	Comment
XMPie Api calls	Verify that the XMPie server is installed. Verify in the Settings view that the XMPie Server Local IP field is correctly configured.
Validate Login Info	Verify that the XMPie server is installed. Verify in the Settings view that the Customer , User , and Password fields are correctly configured.
Copy file to XMPie server	Verify the following: <ul style="list-style-type: none"> In the Settings view, the Production Server Local IP field is correctly configured. The NewEdition folder on the Production server is shared. The share name is iWayDataFiles with full permission to Everyone.
Copy file from XMPie server	Verify that the XMPie server is installed. Verify in the Settings view that the XMPie Server Local IP field is correctly configured.

To verify XMPie PersonalEffect connectivity with the iWay server:

- On the XMPie PersonalEffect server, click **Start** and then click **Run**.
- In the **Run** dialog box, type the value appearing in the **XMPie uProduce Server Tests** field box.
- Click **OK**.

NOTE: The appearance of Windows Explorer confirms XMPie connectivity.


Importing an XMPie PersonalEffect Template to the iWay System

To import an XMPie PersonalEffect template for use within iWay:

- Navigate to **ACCOUNTS -> STORE SETUP -> TEMPLATES**.
- Click the **Synchronize with External Repository** link; the **Import Template Wizard** opens, displaying the **Choose Document Source** window.
- Select the **XMPie** option and click **Start Import Wizard**; the **Choose Campaign** window appears.
- In the dropdown lists, select an account and a campaign and click **Next**; the **Choose XMPie PersonalEffect Document** window appears.
- Select a document (template) and click **Next**; the **Choose Job Type** window appears.
- Select a job type and click **Next**; the **Edit Properties** window appears.
- Define the job's properties and click **Next**; the **Choose Output Device** window appears.
- In the dropdown lists, select an output format and an output device and click **Next**; the **Template Pricing window** appears.



- 9 Select the pricing model, type in template pricing values, select the pricing options, and click **Next**; the **Template Attributes** window appears.
- 10 Information entered into Template Attributes is used by the Template search engine for establishing the precise location of the template. Data entered is also sourced by the Template search engine to locate a template. Define the template attributes and click **Finish**; the XMPie template appears in the Templates list.

XMPie PersonalEffect templates are represented by the  icon.

Ordering From a Template

After you have uploaded an XMPie PersonalEffect template to iWay, the template is ready to use for creating new jobs. The workflow follows regular iWay template procedures.

To order a new job from an XMPie PersonalEffect template:

- 1 On the Print Buyer side, click **ORDER JOBS**; the **Order Jobs** window appears.
- 2 On the **Catalog** launch pad, click **START ORDER**; the **Choose a Template** window appears.
- 3 Select the target template and click **CONTINUE**; the **Enter the Variable Data** window appears.
- 4 To complete the job order, click **ADD TO CART** and **CHECKOUT**.
- 5 Proceed with the iWay workflow. For more information, refer to the **Pageflex iWay Print Buyer User Guide**.

Uploading a Database File

To upload a database file:

- 1 Click the **Add Records** link; the **Add Variable Data Records** window appears.
- 2 Browse to a target database and click **Continue**; the **Upload Variable Data Database** window appears.
- 3 Select a field name in each **Field Name** dropdown list and click **Continue**; the **Variable Data Express** window appears. You can view a PDF preview using the **Variable Data Express** window. All PDF previews in the XMPie workflow are automatically generated as low resolution images by the XMPie server.
- 4 Click **Add to Cart** to send the job to the **Shopping Cart**, or click **Add to Cart and Checkout** to complete the workflow.

Restrictions and Known Limitations

- The Auto Approve feature is not supported for XMPie Jobs.
- The Imposition feature cannot be used with the VDX format.
- In Track Jobs, when doing a PDF Preview, a "job in process" message is issued. To see the preview, you must click "abort process."
- iWay does not impose XMPie jobs. This is done in XMPie.
- iWay does not generate press sheet calculations in the imposition section in the Job Info panel in the Production queue.
- VI templates cannot download the Print Buyer's database that was uploaded in the order (there is no import/export database capability).
- XMPie VI fields behave like iForm Editor VI fields. Uploading a file that is unsupported through the iForm Editor will not work.



- When outsourcing an XMPie job, only the job ticket will be attached to the outsource email.
- VI Fields that do not apply to XMPie templates are not disabled in the iForm Editor. The table below lists the fields for which the XMPie template definitions you change using iForm Editor will apply, as well as fields for which the XMPie template changes that you make will not be applied. Fields that you want to define as Pinned must be defined as such in the XMPie template and not in iForm Editor.

Field Type	Definitions that are applied	Definitions that are not applied
Text	Field Type - Login Driven is the only valid value	Pinned
	Default Text	User moveable
	Field Input	Do not print this field
	View by	Text Alignment and Boundaries fields.
	Field Format	Font Properties fields Advanced Options.
Image	Use Image Generator	Pinned
	View By	User Moveable
	Image Upload	Non-Editable
	Image Selection GUI	Advanced Options
	Select Folder and Default Image	
Field Input		

DirectSmile

Overview

DirectSmile software provides customers with a variety of exciting, innovative and attractive options and ideas for creating variable data and image personalization solutions. DirectSmile has several products; the iWay integration is with the Image Generator tool. Demo the software at:

<http://www.greetingcardscafe.com/> <http://www.greetingcardscafe.com/>

Image Generator Main Features:

- Create personalized image layouts
- Use unique Fonts
- Add special effects such as: light, shadow or motion to any image.

Prerequisites

- iWay Integration License.
- DirectSmile dongle and license.
 - At least 1000 smiles within the DirectSmile license.
- DirectSmile Image Generator version 3.5 installed on the iWay server.
 - Installed on the C drive (default installation path).
- DirectSmile running on the iWay server at all times.



Installation process

With the DirectSmile Image Generator already installed on the iWay server, install the DirectSmile Adapter:

- 1 Open Windows Explorer and navigate to the iWay Installation > DirectSmile folder (usually on D:/.).
- 2 Double-click on the **Setup.exe** file.
- 3 Validate that the DirectSmile Image Generator is correctly installed:
 - a Navigate to **HOME -> INFO. CENTER.**
 - b In the *Grid Extensions* pane, verify that DirectSmile is listed.

Enabling DirectSmile

To enable DirectSmile within iWay:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> EXTERNAL SYSTEMS.**
- 2 In the **SYSTEMS** pane, select **DirectSmile.**
- 3 Select the **Enable** checkbox.
- 4 Select **Image Cropping** to improve the performance / speed of creating a low resolution preview, in cases where a Print Buyer uploads a heavy database to a template. Note that this feature must also be enabled on the DirectSmile license ("set scaler": paid feature).

Job Ordering Workflow

The ordering flow is similar to any other ordering flow in iWay. A template with the DirectSmile image behaves the same as any other Variable data template.

Print Buyer Ordering Flow:

- 1 Select the template.
- 2 Fill in the personalized data or upload a database.
- 3 Preview the job.
- 4 Order it.

Online Payment

Introduction

The Pageflex iWay Online Payment module enables Print Buyers to pay for the Print Service Provider's services through the use of an online payment vendor.

NOTE: The Online Payment feature is only available with the iWay Online Payment license.

Currently, Pageflex iWay supports Online Payments through the following payment services:

- Authorize.Net (www.authorize.net)
- PayPal (www.paypal.com)
- SaferPay (www.saferpay.com)
- DebiTech (www.dibspayment.com)
- Moneris (www.moneris.com)
- ePDQ (www.barclaycard.co.uk)



- Atos (www.atosworldline.com)
- ChinaBank (www.chinabank.com.cn)

To work with an online payment vendor not yet supported by iWay, see [Adding Online Payment Vendors to iWay](#) (on page 230).

Integrating with the Online Payment Vendor

Before configuring iWay, you must have opened an account with one or more of the supported Online Payment vendors. Depending on the way the vendor account is configured, a URL may be needed for posting the transaction response. If a URL is needed when configuring the vendor account, use the URL given in the table below.

Vendor	URL needed for vendor account configuration
Authorize.net	Response URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/authorizenet/relayresponse.asp
PayPal	Path back to server: http://[DNS]/newsway/versions/250/site/iway/app/payment/paypal/status.asp
SaferPay	Return URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/saferpay/status.asp
DebiTech	URL return link in code snippet: [ver location= http://[DNS]/newsway/versions/250/site/iway/app/payment/debitech/status.asp?ordernumber=[ver id no]&custom=[ver valueof=custom]&amount=[ver sum]&status=[ver reply]&[ver mac]]
Moneris	Approval/Declined URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/moneris/status.asp
ePDQ	Allowed URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/epdq/paymentposting.asp Post URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/epdq/statusdataprocessing.asp
Atos	Approve URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/Atos/statusSuccess.asp Cancel URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/Atos/statusCancel.asp Decline/Error URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/Atos/status.asp
ChinaBank	Approval/Declined URL: http://[DNS]/newsway/versions/250/site/iway/app/payment/ChinaBank/status.asp

*Replace **[DNS]** with the actual iWay DNS or IP address, as specified in **SETTINGS -> SYSTEM -> SERVER ADDRESS** (for example: www.iWay.com).

NOTE:

- For more information on configuring the vendor's account, read the documentation provided on their website or contact the vendor's technical support.
- The *DemoOnlinePayment* option in is a restricted tool intended for training purposes only. It is not fully certified, and its use may result in unexpected errors.



Authorize.Net

To configure Authorize.Net as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select Authorize.Net in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the Authorize.Net account information:
 - a **Login ID**
 - b **Transaction Key**
- 5 To send the user's shipping address to Authorize.Net, enable the **Send Shipping Address** checkbox.
- 6 To test payment without processing actual data, enable the **Test Mode** checkbox.
- 7 Click on the **Save** button to apply the new settings.

NOTE: U.S. dollars (USD) are the only supported currency for U.S.-based merchants when *Authorize.Net* is the selected Payment Service for Online Payment.

PayPal

To configure PayPal as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select PayPal in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the PayPal account information:
 - o **Merchant ID (e-Mail)**
- 5 To test payment without processing actual data, enable the **Test Mode** checkbox.
- 6 Click on the **Save** button to apply the new settings.

SaferPay

To configure SaferPay as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select SaferPay in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the SaferPay account information:
 - o **Account ID**
- 5 Click on the **Save** button to apply the new settings.

DebiTech

To configure DebiTech as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select DebiTech in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.



- 4 Fill in the DebiTech account information:
 - **Account Name**
 - **Method**
 - **Page Set**
 - **SHA-1 Security Key**
- 5 Click on the **Save** button to apply the new settings.

Moneris

To configure Moneris as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select Moneris in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the Moneris account information:
 - **Store ID**
 - **Store Key**
- 5 Click on the **Save** button to apply the new settings.

ePDQ

To configure ePDQ as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select ePDQ in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the ePDQ account information:
 - **Client ID**
 - **Passphrase**
- 5 Click on the **Save** button to apply the new settings.

Atos

To configure Atos as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select Atos in the list.
- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the Atos account information:
 - **Client API Installation Path**
 - **Merchant Country (2 letter code)**
 - **Merchant ID**
- 5 Click on the **Save** button to apply the new settings.

ChinaBank

To configure ChinaBank as a Online Payment Vendor, carry out the following steps:

- 1 Navigate to **SYSTEM SETUP -> INTEGRATIONS -> ONLINE PAYMENT**.
- 2 Select ChinaBank in the list.



- 3 Click on the **Enabled** checkbox and edit the **Caption** if necessary.
- 4 Fill in the ChinaBank account information:
 - o **Account Number**
 - o **MD5 key**
- 5 Click on the **Save** button to apply the new settings.

Enabling Online Payments for iWay Accounts

The Online Payment feature is set per account, and is disabled by default. To enable one or more Online Payment vendors for a specific account, carry out the following procedure:

- 1 Navigate to **ACCOUNTS -> ACCOUNT SETUP -> PREFERENCES**.
- 2 Select the account.
- 3 In the **PRICING** sub pane, enable the relevant **Payment Method** checkboxes. Only enabled Online Payment vendors are displayed.
- 4 Click on the **Save** button to apply the new setting.

Verifying Print Buyer Workflow via Online Payment

To verify that the feature is configured correctly and that the Print Buyer can now pay for an order using a payment vendor, carry out the following steps:

- 1 Order a job as a Print Buyer, following the order workflow until the **CONFIRM ORDER** pane appears.
- 2 In the **PAYMENT METHOD** sub-panel, select an online payment option and then click on **Place the Order**; the Print Buyer should be automatically transferred to the Online Payment vendor's web page.

Adding Online Payment Vendors to iWay

In order to add new Online Payment vendors to iWay's list of available vendors, send an email message to your Pageflex iWay representative with the following information:

- The name of the Online Payment vendor to add.
- The website of the Online Payment vendor.
- Test account details for the Online Payment vendor's site or a description of the way in which to create a test account.
- Documentation, in English, outlining the means by which to interact with the Online Payment vendor's site or a link to a location where such documentation can be downloaded.

NOTE: Adding Online Payment vendors is a paid service. For more information, contact your Pageflex iWay representative.



iWay Sales Manager

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Introduction

The **iWay Sales Manager User Guide** provides the information and instructions you need to set up and use iWay Sales Manager on your site.

iWay Sales Manager is an add-on module to Pageflex iWay. Whereas Pageflex iWay enables receiving and processing orders that enter via the web, iWay Sales Manager enables the processing of all off-line communication/business interactions received by a CSR (Customer Service Representative) through such means as the fax, phone, email or from a "walk-in" customer.

Once the Print Service Provider has received a request for a quotation, iWay Sales Manager enables the Print Service Provider to create a quote, and then records all the interactions with the customer regarding this quote. After the Print Buyer has accepted the quote, the Print Service Provider can convert this quote into an order. When the order has been completed, the Print Service Provider can close the sales cycle by issuing an invoice and a receipt. The process is automated and efficient. The CSRs can view account and job statuses, handle all tasks, and issue reports on a daily basis. The built-in follow-up mechanism also allows better customer service and helps drive sales.

NOTE: iWay Sales Manager is not an accounting system; so for general ledger purposes it is still necessary to enter the data into an accounting system.

In addition to the pricing calculation models provided by Pageflex iWay, iWay Sales Manager also provides production pricing calculation models. Instead of defining an overall cost for an intent joblet (for example, cutting), production pricing allows a Print Service Provider to define the costs and prices for each part of the production process, such as setup time, labor charges, cutting charges and waste charges (for the cutting process, for example).

iWay Sales Manager uses a single database for all quotes, orders, billing documents, and customer contact information.



Overview

This guide provides all the necessary information, procedures and steps to effectively use iWay Sales Manager and includes the following information:

- [Configuration](#) (on page 232)
- [Sales](#) (on page 238)
- [Invoicing and Billing](#) (on page 253)
- [Managing Your Business and Production](#) (on page 265)
- [Production Pricing](#) (on page 274)

Configuration

This chapter explains how to configure the system: part of the configuration applies to Pageflex iWay, and part of the configuration is unique to iWay Sales Manager. Before setting up the system, ensure that the iWay Sales Manager software license is enabled.

This chapter is divided into the following tasks:

- 1 [Define Accounts](#) (on page 232)
- 2 [Add CSR Users](#) (on page 233)
- 3 [Configure iWay Sales Manager Email](#) (on page 234)
- 4 [Configure iWay Sales Manager Settings](#) (on page 235)

Define Accounts

To set-up new accounts and manage existing ones:

- 1 Navigate to **ACCOUNTS -> ACCOUNT SETUP**.
- 2 Create or update accounts as needed, and define at least one user for each account (**ACCOUNTS -> ACCOUNT SETUP -> USERS**).
- 3 Add *Account Manager* and *Sales Person* custom fields to the account's details (**ACCOUNTS -> ACCOUNT SETUP -> GENERAL INFO**) by defining these fields and making them visible in **SYSTEM SETUP -> ADVANCED -> CUSTOMIZED FIELDS**.

For more detailed information on managing accounts, see [Account Setup](#) (on page 44) in the Print Service Provider User Guide.

Set up Account Groups

The Account Groups feature provides the Print Service Provider with an additional option for managing accounts and categorizing them into different group types for different purposes such as billing, reports and activities. The Print Service Provider also assigns CSRs to an Account Group that only contains the accounts that CSR will handle, thus isolating the CSR from accounts handled by other CSRs and limiting the CSRs ability to modify other account information.

To manage account groups, navigate to **SYSTEM SETUP -> ADVANCED -> ACCOUNT GROUPS**.

NOTE:

- Create an Account Group for each CSR that you plan on adding as a system user.
 - Accounts can be included in more than one Account Group if necessary.
-



To add a new account group:

- 1 Click the **New** button.
- 2 Enter a **Group Name** and **Description**.
- 3 Select one or more accounts in the **NOT A MEMBER:** list box and click the **Add** arrow. The accounts are moved to the **MEMBER:** list box.

NOTE: To select more than one account, press the Ctrl key while selecting an additional account.

- 4 Click **Save**.

To delete an account group:

- 1 Select the Account Group in the list and click the **Delete** button.
- 2 Click **Yes** in the confirmation dialog box that opens.

To duplicate an existing account group:

- 1 Select the Account Group in the list and click the **Duplicate** button. A new group is created with the same description and group members.
- 2 Enter a **Group Name** and update the **Description** if necessary.
- 3 Update the group membership if necessary by selecting accounts in one of the list boxes and clicking the **Add** or **Remove** arrow as appropriate.
- 4 Click **Save**.

To edit an existing account group:

- 1 Select the Account Group in the list.
- 2 Update the **Group Name** and **Description** if necessary.
- 3 Update the group membership if necessary by selecting accounts in one of the list boxes and clicking the **Add** or **Remove** arrow as appropriate.
- 4 Click **Save**.

Add CSR Users

- 1 Navigate to **SYSTEM SETUP -> USERS**.
- 2 Create a user account for each CSR:
 - a Assign each CSR a *System Admin, Manager, or Manager Advanced* **User Type**. The Manager Advanced user type is only available with iWay Sales Manager. It provides the same privileges as Manager but also allows the user to create and edit credit notes, and cancel receipts. System Admin users can also create and edit credit notes and cancel receipts. but have more extensive privileges.
 - b Assign each CSR to an **Account Group**. The CSR will only have privileges to accounts that are members of this Account Group. This field does not display for *System Admin* user types (who have full access to all accounts).

For more detailed information on managing users and user types, see [Managing Print Service Provider Users](#) (on page 17) and [Print Service Provider User Privileges](#) (on page 18) in the Print Service Provider User Guide.



Configure iWay Sales Manager Email

In order for iWay Sales Manager to match the email replies from customers to the relevant quotes and orders, iWay Sales Manager needs a dedicated email account. Each CSR must also have an email account, and these accounts must be configured so that emails received by the CSR are also forwarded to the iWay Sales Manager email account. The procedure to configure iWay Sales Manager email involves the following steps:

- 1 Set up iWay Sales Manager Email (on page 234)
- 2 Configure CSR Email Forwarding (on page 234)

Set up iWay Sales Manager Email

- 1 Create a dedicated iWay Sales Manager email account (for example, an account called iWay_Email) on the company's exchange server / ISP. For assistance, consult your PC support team / IT.
- 2 Configure the mail listener file, as follows:
 - a Open **WINDOWS EXPLORER**, and browse to the **IPANEL\DB** folder (default installation path: D:\NewEdition\IPanel\Db).
 - b Open the **MAILLISTENER.CONFIG** file for editing (for example, using Notepad).
 - c Change the value of the **PopServer** parameter from *NONE* to the name of your organization's POP3 (Incoming email) Server. If necessary, change the **Port** and **useSSL** parameters according to your network configuration.
 - d Replace the values of the **Username** and **Password** parameters within the relevant data according to the email account defined for the iWay Sales Manager (for example, iWay_Email).
 - e **Save** and close the mailListener.config file.
- 3 Restart Pageflex iWay using the Toolbox.

Configure CSR Email Forwarding

Perform the following steps to ensure that the CSR's emails are forwarded to the dedicated iWay Sales Manager email account. This is not limited to initial iWay Sales Manager email setup; use this procedure whenever adding a new CSR user to Pageflex iWay.

NOTE:

If more than one CSR is defined in the application, the same dedicated iWay Sales Manager email account needs to be used for forwarding emails from all the CSRs.

The following procedure is an example for configuring CSR email forwarding on Microsoft Exchange Server 2007 (the steps for other mail servers will be slightly different):

- 1 Access the Microsoft Exchange Server 2007 computer.
- 2 Navigate to **START -> ALL PROGRAMS -> MICROSOFT EXCHANGE SERVER 2007 -> EXCHANGE MANAGEMENT CONSOLE**.
- 3 Expand the **RECIPIENT CONFIGURATION** node and select **MAILBOX**.
- 4 For each CSR, configure the iWay Sales Manager email account to also get a copy as follows:
 - a Select the user (CSR).
 - b Click **Properties**, and then select the **MAIL FLOW SETTINGS** tab in the Properties dialog box.



- c Select **DELIVERY OPTIONS** and click the **Properties** button.
 - d In the *Delivery Options* dialog box that opens, enable the **Forward to** checkbox and then click on the **Browse** button.
 - e In the *Select Recipient* dialog box that opens, enter the name or email address of the iWay Sales Manager mailbox (e.g. iWay_Email) and then click **OK**. The dialog box closes.
 - f In the *Delivery Options* dialog box, ensure that both the CSR email account and the iWay Sales Manager email account receive the email, by selecting the **Deliver message to both forwarding address and mailbox** checkbox, and then clicking **OK**. The dialog box closes.
 - g In the *Properties* dialog box, click **OK**. The dialog box closes.
- 5 **Close** the **EXCHANGE MANAGEMENT CONSOLE**.

To validate that email is set up and working correctly (that the CSRs will be able to use the system to send Quotes/Orders/Billing doc's to a customer), do the following:

- 1 Create and send a quote (**ACCOUNTS -> SALES -> QUOTES**) to a non-user email account (e.g. a personal mail account), and then reply to it.
- 2 Make sure that the Quote - Unread Message status icon is displayed in the Sales - Quotes window.
- 3 Under history, view the emails content in the Activity Details.

NOTE:

In order for iWay Sales Manager to know how to match the email replies to the relevant quotes and orders, the recipients must reply to the email without changing the emails subject.

Configure iWay Sales Manager Settings

After setting up the iWay Sales Manager software, configure the following optional settings:

- Define the Banks List (on page 235)
- Modify Follow-up and Validity Periods (on page 236)
- Modify Documents Attachment Format (on page 236)
- Set Sales Tips (on page 236)
- Customize Document Numbering (on page 237)
- Define Invoice Settings (on page 236)

Define the Banks List

Define the list of banks from which you accept checks. This list is used to select the name of the bank when a payment is made.

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.
- 2 Click the **Add** button under the Banks list. In the empty row that is added to the list, type in the banks name.
- 3 To remove a bank, select the bank and click **Remove**.
- 4 Click **Save**.

NOTE:

To enable the Bank Check payment option for an account, at least one bank must be defined in the Bank list, otherwise the Billing documents cannot be confirmed.



Define Invoice Settings

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> BILLING**.
- 2 To enable the automatic creation of invoices and receipts for all the online orders made using online payment, select the **Create an Invoice and Receipt for Web created orders with online payment** check box .
- 3 To issue the invoices to a parent account instead of to the account that generated the order, select the **Allow issuing invoice for parent account** check box.
- 4 Click **Save**.

Modify Follow-up and Validity Periods

Set the follow-up and validity time periods for quotes (and orders):

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.
- 2 In the **DEFAULT FOLLOW UP** field, type the default time period by which follow-up is expected. The default is 3 days.
- 3 In the **DEFAULT VALID UNTIL** field, type the time period after which the quote is no longer considered valid. The default is 30 days.
- 4 Click **Save**.

NOTE:

The date for a specific quote can be changed on the General page of the quote details. When the quote is converted to an order, the order dates are reset regardless of what was set in the quote.

Modify Documents Attachment Format

It is optional to convert the Word documents into PDF format when quotes/orders/billing documents are sent by email to a customer. The documents will still be displayed to the CSR as Word documents that the CSR can modify, and the conversion to PDF will take place when the CSR sends the documents to the customer. To enable Word document conversion to PDF format, perform the following steps:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> CRM**.
- 2 Under the Email attachment format, select **Send attached documents as PDF (applies to Quote, Order and Billing documents)** checkbox.

Set Sales Tips

This optional feature enables the Print Service Provider to define sales tips that will assist the CSR in the sales process. The sales tip can be an image or a URL, and multiple sales tips can be defined for each Job type or Template to be displayed in a loop.

NOTE:

Sales tips are shown for Printable and Not printable Job Types or Templates but not for Set Templates.

- 1 Navigate to **PRINT SETTINGS -> JOB BUSINESS FLOW -> JOB TYPE LIBRARY**.
- 2 For each job type that you want to define a sales tip:
 - a Select the job type and click the **Edit** button.
 - b On the **GENERAL PROPERTIES** tab click the **Add Sales Tip Message** button.



- 3 Select a message from the list (or click the New button to create additional messages) and then click **OK**.

The maximum size of a sales tip image:

NOTE:

- Height: 540px
- Width: 400px

Customize Document Numbering

All quote, order and billing documents are uniquely numbered. These numbers are used to identify the objects in the system and the documents that are sent to the customers at different stages of the sales process. Each document number has an alphabetic prefix that indicates the document type (for example, QUO for quotes) and different document types are numbered independently of each other. The prefixes and the starting number of each counter can be customized and the same counter can be used for several objects, according to the system limitations.

To customize document numbering:

- 1 Navigate to **SYSTEM SETUP -> ADVANCED -> NUMBERING**.
- 2 Modify the prefixes in each of the prefix fields as required.
- 3 Change the starting numbers for each of the objects in the **STARTING NUMBER** fields as required.
- 4 To separate the prefix and numbering of web-submitted orders, select the **Use separate numbering definitions for online and offline orders** check box; the **ONLINE ORDER NUMBER** prefix and starting number fields are then enabled.
- 5 To combine the prefix and counter of receipts and deposits, select the **Use Receipt numbering definitions for Deposit** check box; the **DEPOSIT NUMBER** prefix and starting number fields are then disabled.
- 6 To combine the prefix and counter of the invoices and credit notes, select the **Use Invoice numbering for Credit Notes** check box; the **CREDIT NOTES** prefix and starting number fields are then disabled.

NOTE:

- The numbering of existing quotes, orders and billing documents is not influenced by changes in numbering.
- Numbering prefixes are NOT case sensitive (e.g. INV is the same as inv). Changing only the case of a prefix and then resetting the numbering could result in errors.

Document Type	Default Prefix	Other Options
Quotes	QUO	
Orders	OSR	
Online orders	OSR	Use a separate counter, with a default OWB prefix.
Invoices	INV	
Receipts	RCT	
Deposits	DEP	Use the same counter and prefix as receipts.
Credit notes	CDT	Use the same counter and prefix as invoices.



Sales

This chapter describes how to use iWay Sales Manager to handle sales, and covers the sales management life cycle from creating a quote through to committing an order.

The sales cycle begins with a customer's request for a quotation. This request can be received by phone, fax, email or from a "walk-in" customer. Based on the request, a quote is created and then delivered to the customer. When the customer accepts the quote, it can be converted into an official order to be produced and shipped to the customer. After the order is produced, an invoice is sent to the customer and when the customer pays the invoice, a receipt can be issued.

The most common sales cycle would go as follows:

- 1 Customer requests a quote.
- 2 Print Service Provider CSR creates a quote and sends it to the customer.
- 3 Customer approves the quote.
- 4 Print Service Provider CSR converts a quote into an order. If the order includes ready production files they are transferred directly to production. If the order does not have ready production files it is sent to artwork.
- 5 Print Service Provider Designer (artwork) creates the job production files, verifies and corrects supplied customer files, and handles proofing cycles.
- 6 Print Service Provider Production operators print and finish the jobs.
- 7 Print Service Provider Dispatch operator packs jobs for delivery, prints delivery labels, and approves the delivery.
- 8 Print Service Provider Administrator creates an invoice.
- 9 Customer pays the invoice.
- 10 Print Service Provider Administrator issues a receipt.

This chapter contains the following major topics.

- [Creating a Simple Quote](#) (on page 238)
- [Performing Additional Edits in the Quote or Order](#) (on page 242)
 - [Selecting a Quote and Displaying its Product Tab](#) (on page 242)
 - [Adding/Deleting Jobs and Items](#) (on page 242)
 - [Editing Pricing Details](#) (on page 244)
 - [Uploading, Attaching, and Mapping Files](#) (on page 243)
- [Progressing from Quotes to Orders](#) (on page 246)
 - [Understanding Quote/Order Statuses and Icons](#) (on page 247)
 - [Moving Through the Stages in the Quote-Order Life Cycle](#) (on page 248)
 - [Handling Follow-up Activities for Quotes and Orders](#) (on page 251)
 - [Viewing Quote and Order History](#) (on page 252)

Creating a Simple Quote

Create a quote by performing the following actions in sequence:

- 1 [Create the Quote](#) (on page 239)
- 2 [Define the General Details](#) (on page 239)
- 3 [Add and Define the Products](#) (on page 240)
- 4 [Define the Shipping Information](#) (on page 241)



Create the Quote

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
- 2 Select the account in the drop-down list.
 - The left pane displays the list of existing Open quotes for the account (that is, quotes that require attention).
 - The right pane displays the details of the selected quote.
- 3 To filter the list of quotes by Status or the name of the CSR who created the quote, select values for any combination of the following:
 - From the **STATUS** drop-down list, select the status of the quotes. For an explanation of statuses, see [Understanding Quote/Order Statuses and Icons](#) (on page 247).
 - From the **CSR** drop-down list, select the name of the CSR.
- 4 To search for a specific quote or job with a known number, select either **Quote #** or **Job #** from the drop-down list, fill in the number and then click **Search**.
- 5 Create a new quote (or duplicate an existing quote), as follows:
 - To create a new quote, click **Create New**.
 - To duplicate an existing quote, select the quote and click **Duplicate**.

The quote is added to the quote list. The quote is assigned a unique ID having a default prefix of **QUO** (for quote) followed by a numeric increment; the status of the quote is set to **DRAFT**.

NOTE:

A quote can also be created by duplicating an existing order in the **ACCOUNTS -> SALES -> ORDERS** screen.

Quotes and orders have two main statuses – *Draft* and *Committed*. As long as a document is in draft mode, it can be changed and edited as required. When the document is finalized and has to be transferred to the customer, it must be committed. The commit action makes the document official; a committed document can no longer be edited.

Define the General Details

Fill in or edit the **GENERAL** details of the quote, as follows:

- 1 Type an identifying name for the quote **Name** field.
- 2 To select a different contact person
 - a Click the **Contact Person** link.
 - b In the dialog box that opens, select the contact in the list and click **Save**.
- 3 Define the Billing Address; the default is taken from the Contact Person settings.
- 4 If supplied, type the reference number in the **Customer Reference** field.
- 5 In the **Received as** list, select how the Request For Quote (RFQ) was received.
- 6 To assign a different CSR to the quote (by default, a new quote is assigned to the user creating the quote):
 - a Click the **Assigned to CSR** link.
 - b In the dialog box that opens, select the user and click **Save**.
- 7 To assign an account manager to this quote (available only if the Customize Fields feature is enabled):
 - a Click the **Account Manager** link.
 - b In the dialog box that opens, select the user and click **Save**.



- 8 To assign a sales person to this quote (available only if the Customize Fields feature is enabled:):
 - a Click the **Sales Person** link.
 - b In the dialog box that opens, select the user and click **Save**.
- 9 Type your internal reference number, if one exists, in the **Internal Reference** field.
- 10 Optionally change the default quote expiration and follow-up dates using the **Valid Until** and **Next Follow-up** calendars. For information on follow-up actions, see [Handling Follow-up Activities for Quotes and Orders](#) (on page 251).
- 11 Optionally add notes as follows:
 - o In the **Internal Note** text box, add notes that you want to appear on internal Print Service Provider documents (for example, on the job ticket).
 - o In the **Note for Customer** text box, add additional information that should appear in the quote that you send to the customer.
- 12 Click **Save**.

NOTE: A number of different quote/order custom fields can be added to quotes and orders. For information on customizing fields, see the System Setup chapter in the *Print Service Provider User Guide*.

Add and Define the Products

When filling in the details for the job type or template, see the *Print Service Provider User Guide* for instructions such as:

- NOTE:**
- Adding Joblets and Joblet options to Intents.
 - Defining Tax Groups and Tax Packages.
 - Adding Line Items to the Line Item Library.
 - Defining Shipping.
-

Add the products (jobs and/or templates) to the **PRODUCTS** details of the quote, as follows:

- 1 Click the **Add** button and select one of the following options:
 - o **Add New Job** - to add a job from a job type.
 - o **Add Job from Template** - to add a job from one of the account's templates.
 - o **Add Non-Printable Job** - to add a non-paper job (for example, a mouse pad).
 The **CHOOSE JOB TYPE** (or for a template, the **CHOOSE TEMPLATE**) dialog box opens.
- 2 Select the job type or template and click **Continue**.
 The **CREATE A NEW JOB** dialog box opens and displays the tabs (**JOB DETAILS**, **INTENT**, **PRICING**, and **VARIABLE INFORMATION** if needed) that you use to define the job or template. If Sales tips are defined for the Job Type or Template, the CSR will see them while defining the job details and job intent. See [Setting Sales Tips](#) (on page 236) for more information.
- 3 Select the **JOB DETAILS** tab, fill in the details as in Pageflex iWay, and click **Continue**. Note that this is the only place a Cost center can be assigned to a job.
- 4 Select the **INTENT** tab, fill in the details as in Pageflex iWay, and click **Continue**. Note that it is possible to add any joblet or joblet options that were not defined for the job type or template, but defined in the application.



- 5 If there is a **VARIABLE INFORMATION** tab, select the tab and fill in the details as in Pageflex iWay. Note that VDP or Archive templates will not have a preview from the summary panel (these jobs can be previewed by clicking on the **Preview** button on the **EDIT PROPERTIES -> VARIABLE INFORMATION** tab).
- 6 Select the **PRICING** tab.
 - To use the default pricing calculation method defined for the job or template, fill in the quantity in the **Copies** field, and click **Calculate**.
 - If the calculation method is Manual, the results matrix returns a line (Type: **MANUAL**; Item: **CSR MANUAL PRICE**) where you can type in the price manually. Fill in the price.
 - For all calculation methods except Manual, an itemized results matrix indicates the prices.
 - To use a different pricing calculation method or perform other pricing changes for the quote, see [Editing Pricing Details](#) (on page 244).
- 7 After filling in the last tab in the **CREATE A NEW JOB** dialog box, click **Finish**. The new job appears on the **PRODUCTS** page.

Repeat this process for each job or template to be added. To add an item from the Items List Library to table, see [Adding An Item from the Line Item Library](#) (on page 243).

The details in the Products tab of a quote or order are organized into Tax Group tables: items are displayed in tables organized by the tax group that applies to them.

- If all items belong to the same tax group, all items are listed in the same tax group table.
- If items belong to different tax groups, a table for each tax group lists the items that belong to that tax group.

The tables will also contain an urgency surcharge line item and a discount line item (if defined).

NOTE:

When multiple quantities are listed for the same job in a quote, Urgency, Shipping and Tax will not be calculated and displayed on the quote's Product tab. However, when the quote is converted to an Order and the desired quantity is selected, these parameters will be displayed under the Order Product tab.

Define the Shipping Information

After adding at least one job a link to define the shipping information will be displayed. The CSR needs to manually select the desired delivery date and method. Only after selecting these parameters will the shipping information be displayed in the top panel (delivery date, method and delivery address) and the shipping price will be added to the quote pricing breakdown.

- If multiple shipping is defined, only the Multiple shipping string will be displayed and not all the shipping details.
- iWay Sales Manager has more flexible delivery date options than in Pageflex iWay alone, and jobs can be selected to be ready from the time the quote is created and with an urgent surcharge added.
- If shipping details are not defined, the default values will be selected when committing this quote.



Performing Additional Actions on the Quote

NOTE: The procedures in this section describe how to modify quotes. You can modify orders the same way by performing these procedures in the *Sales - Orders* window (**ACCOUNTS -> SALES -> ORDERS**). The *Sales - Orders* and *Sales - Quotes* windows are almost identical.

This section contains the topics:

- [Selecting A Quote And Displaying Its Product Tab](#) (on page 242)
- [Adding/Deleting Jobs and Items](#) (on page 242)
- [Editing Pricing Details](#) (on page 244)
- [Uploading, Attaching, and Mapping Files](#) (on page 243)

Selecting a Quote and Displaying the Product Tab

If the quote is not selected and its product tab is not displayed, you can select the quote and display its Products tab, as follows:

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
- 2 Select the account from the **ACCOUNT** list box on the right side of the window.
- 3 In the list of quotes on the left side of the window, select the quote. If the list of quotes is long, you can search for a specific quote or job if you know the quote number or job number. The list of displayed quotes can be filtered according to quote status and/or responsible CSR.
- 4 In the **QUOTE DETAILS** pane on the right side of the window, select the **PRODUCTS** tab. (To edit the General details of the quote, select the **GENERAL** tab, and see [Define the General Details](#) (on page 239) for information on editing the field of the **GENERAL** tab.)

Adding/Deleting Jobs and Items

This section includes the following procedures:

- [Adding Another Job or Template](#) (on page 242)
- [Duplicating a Job](#) (on page 242)
- [Deleting a Job](#) (on page 243)
- [Adding an Item from the Line Item Library](#) (on page 243)

Adding Another Job or Template

Follow the instructions in [Add and Define the Products](#) (on page 240).

Duplicating a Job

- 1 In the **PRODUCTS** tab, select the job to duplicate.
- 2 Click the **Duplicate** button. Another job will be added with a different item number.
- 3 To edit the duplicated job, select it and click the **Properties** button.

NOTE: The job's urgency is also duplicated and added to the order.



Deleting a Job

- 1 In the **PRODUCTS** tab, select the job to delete.
- 2 Click the **Delete** button.

NOTE: If more than 1 quantity was defined for this job then deleting the job will delete all quantities. In order to change the quantity, select the job, click the **Pricing** button, edit the desired quantity and then click the **Finish** button.

Adding an Item from the Line Item Library

- 1 In the **PRODUCTS** tab, locate the *Taxes* group to which to add the item.
- 2 Click the **Add Item** button connected to that *Taxes* group.
- 3 Select the item and click **Add**.

NOTE: To remove an item, select the item in the tax group and click the **Remove Item** button.

The price is updated automatically after adding or removing an item.

Uploading, Attaching, and Mapping Files

iWay Sales Manager provides two mechanisms for uploading and attaching files. Although these mechanisms are very similar, each mechanism is intended for a specific situation, and are described accordingly in this section:

- **Attaching a File Where Upload is Required** (on page 243): If the files were created in-house, or received by digital media, they must be uploaded and assigned to the appropriate job(s).
- **Mapping Files from a Reply Email** (on page 244): If the customer received a quote by email from the system, and the customer attached the files to the reply email, they will be automatically uploaded to the quote (the uploading stage is skipped). The files must still be mapped to the appropriate job(s).

Attaching a File Where Upload is Required

- 1 Do either of the following:
 - If you are in the process of creating a quote, in the **JOB DETAILS** tab of the **EDIT PRODUCTS** dialog box, click the **Attachments** link. The **ATTACHMENTS** dialog box opens.
 - If you previously saved the quote, open the Attachments dialog box, as follows:
 - i In the **Products** tab in the Quote details pane, select the job or template.
 - ii Click the **Attachments** button. The **ATTACHMENTS** dialog box opens.
- 2 In the **ATTACHMENTS** dialog box, click the **Upload Files** button.
- 3 In the **UPLOAD FILE** dialog box, ensure that the **Upload a Single file** option is selected, and then click the **Browse** button. The **CHOOSE FILE TO UPLOAD** dialog box opens.
- 4 Select the file for upload and click **Open**. The **CHOOSE FILE TO UPLOAD** dialog box closes.
- 5 Click **Continue**. The **UPLOAD REPORT** appears informing that the file has been uploaded.
- 6 Click **Close**. The uploaded file appears in the **ATTACHMENTS** dialog box.





- 7 If the file requires no prepress work and is ready to print, activate the preflight process by selecting the file and clicking the **Mark for Production** button. The file is processed and marked as ready for production and the job is automatically sent to the Production queue once the quote is converted to an order and then committed.

NOTE: There is an option to upload multiple files, using Multi-file upload. Note that only one of the files attached to a job can be marked for production. For more information, see the *Print Service Provider User Guide* for instructions.

Mapping Files from a Reply Email

If the customer received a quote by email, and then attached the files to the reply email, they will be automatically uploaded to the quote, but must still be mapped to the correct job.

NOTE: When a customer replies to the email, the subject or content from the sent mail should not be changed, otherwise the application will not be able to correctly identify the email and map it to the correct quote. The customer must reply to the email and add his text to the existing content.

- 1 Select the quote or order in the **SALES-QUOTE** or **SALES-ORDER** screen.
- 2 Select the **FILE MAPPING** tab in the Details pane.
The files that were included in the reply are listed in the File Mapping tab together with all files that were manually uploaded and attached to jobs in the quote or order. If the file was submitted by email, an icon appears in the Email column. Double-clicking this icon displays the email message content.
- 3 Select the file, and then select the job to which it should be assigned in the **Job Name** dropdown box.
- 4 If the file requires no prepress work and is ready to print, activate the preflight process by selecting the file and clicking the **Mark for Production** button. The file is processed and marked as ready for production; the job is automatically sent to the Production queue once the quote is converted to an order and then committed. The following icons indicate the result of the preflight operation:
 -  — Preflight processing was successful.
 -  — Preflight processing encountered errors.
 Double clicking on an icon opens a report on the process.

Editing Pricing Details

This section describes how to view, define and modify pricing at the quote or order level.

NOTE: The editing of pricing details is only possible when a quote or order is still in draft mode, and cannot be changed otherwise.

If the **PRICING** tab in the **EDIT PRODUCT** dialog box is not displayed, display it as follows:

- 1 In the **Products** tab, select the job or template.
- 2 Click the **Pricing** button (or click the **Properties** button and then select the **Pricing** tab).



The following types of pricing adjustment can be performed.

- [Generating Prices for Different Quantities](#) (on page 245)
- [Changing the Pricing Calculation for a Job Type or Template](#) (on page 245)
- [Requesting a Quote from another Print Provider](#) (on page 246)

NOTE:

- Pricing instructions that apply to Pageflex iWay are not repeated. For information on defining pricing in Pageflex iWay, see the *Print Service Provider User Guide*.
- This section does not describe how to set up Production Pricing using iWay Sales Manager. For more information, see [Production Pricing](#) (on page 274).

Generating Prices for Different Quantities

Customers might want to know the prices for different quantities (number of copies) of the same job. Different prices can be generated according to the number of copies as follows:

- 1 Click the **Add** button. A new field is added to allow you to specify a number of copies.
- 2 Fill in the number of copies and then click **Calculate**. The price is calculated for the newly defined quantity.
- 3 To use a particular quantity in the total costs calculation, select the appropriate number of copies line and the pricing is calculated accordingly.
- 4 Click **Save**, or if done with all pricing changes, click **Finish**. The Save button is only enabled when editing an existing Quote.

NOTE:

When multiple quantities are listed for the same job in a quote, Urgency, Shipping and Tax will not be displayed on the quote's Product tab. However, when the quote is converted to an Order and the desired quantity is selected, these parameters will be displayed under the Order Product tab.

Changing the Pricing Calculation for a Job Type or Template

There are several calculation models that can be used to calculate the price of a job. Each job type and template has a default calculation mode. When a quote or order is created, the default calculation model is used, and the criteria used in this model cannot be adjusted.

By following the steps in this procedure, you can either change the calculation model, or use the same model but adjust the calculation criteria.

- 1 Click the **Change Planning and Pricing Setup** link. The **PLANNING** dialog box opens and displays the **PRICING** tab (it also contains a Tax and Urgency tab).
- 2 Select the **Use New Settings** option, which turns the **CALCULATION MODEL** field into a drop-down list.
- 3 Select the new Calculation Model, or select the same calculation model if you want to make changes to the default calculation model.
- 4 Depending on your selection, fill in the fields in the **PRICING** tab of the **PLANNING** dialog box:
 - If you chose one of the Production pricing models as the calculation model, see **Define Production Pricing As The Default Calculation Model For A Job Type or Template** (on page 285).
 - If you chose Manual as the calculation model, another line (Type: **MANUAL**; Item: **CSR MANUAL PRICE**) will be added to the result matrix.
- 5 Click **Save**. The **PLANNING** dialog box closes.



- 6 Select the quantity and click **Calculate**, to update the **TOTAL PRICE** according to the new price settings. If you chose Manual as the calculation model fill in the price manually.
- 7 Click **Save**, or if you are done with all pricing changes, click **Finish**.

Requesting a Quote from another Print Provider

Use this feature send a request for quotation to another print provider, if you expect to outsource this job and don't know the outsourcing cost.

- 1 Click the **Request for Third Party Quote** button, The **REQUEST FOR QUOTE** dialog box is displayed.
- 2 Select a partner print provider already defined in the system from the **Print Provider Name** list.
 - To add new partner print providers, use the **New Print Provider** button.
 - Details of any partner in the list can be changed using the **Edit Details** button.
 - Any partner can be removed from the list using the **Remove Print Provider** button.
- 3 Click the **Job Ticket** link in **EDIT JOB TICKET** section, if editing is required. For information about editing the job ticket, see the section about Production, in the Print Service Provider Guide.
- 4 Write your comments in the text box, in the **Add Comment** section.
- 5 To attach the job PDF to the email that will be sent, select the **Add Job PDF to Email Content** check box.
- 6 Click the **Send Email** button to send the request for quotation to the selected partner print provider.

NOTE: Once an answer on the request for quote (RFQ) has been received via email or by any other means, the price must be manually entered in the **PRICING** screen for the job.

Progressing from Quotes to Orders

After defining a quote, the next step is to send the quote to the customer, and then to handle the customer's response, which is usually either an acceptance or rejection, or a request for a change to the quote. However, to be able to progress through the quote-order life cycle, two separate, but related, tasks must be performed in parallel:

- Checking the quote/order statuses—this is just a matter of looking at the status icon in the **QUOTE** or **ORDER** screen, and knowing what the status icon means.
- Performing follow-up activities—for example, contacting the customer if no response is received within a specified period of time.

With this in mind, this section covers the following topics.

- [Understanding Quote/Order Statuses and Icons](#) (on page 247)
- [Moving Through the Stages in the Quote-Order Life Cycle](#) (on page 248)
- [Handling Follow-up Activities for Quotes and Orders](#) (on page 251)
- [Viewing Quote and Order History](#) (on page 252)



Understanding Quote/Order Statuses and Icons

All quotes appearing in the **SALES - QUOTES** window, and all orders appearing in the **SALES-ORDERS** window, have icons that indicate their status. As you work with quotes and orders, and progress through the quote–order life cycle, you will need to recognize these icons, and their meanings. The following tables describe the quote and order statuses and icons.

Quote Statuses

Icon	Name	Description
	Quote - Draft	The quote is in draft form.
	Quote - Committed	The quote has been committed and sent to the customer.
	Quote - Ordered	The quote has been ordered by the customer (this quote may be used again to generate a new order).
	Quote - Unread Message	A message has been received from the customer regarding the quote.
	Quote - Follow-up Due	Contact should be made with the customer concerning the quote.
	Quote - Expired	The expiration date defined for the quote has been exceeded.
	Quote - Canceled	The quote was not accepted by the customer and was therefore canceled.

Order Statuses

Icon	Name	Description
	Order - Draft	The order is in draft form.
	Order - Committed	The order was committed and the jobs are in production.
	Order - Unread Message	A message has been received from the customer regarding the order.
	Order - Follow-up Due	Contact should be made with the customer concerning the order.
	Order - Canceled	The order was not accepted by the customer and was therefore canceled.

NOTE:

- Opening a screen that displays lists of quotes or orders (for example, the **QUOTES** or **ORDERS** screen), by default all Open quotes or orders are displayed. These are quotes or orders that require your attention (quotes or orders in the draft or expired mode, or with overdue activities, or with attached unread messages).
- Quote or order expiration, overdue activities, and unread messages are technically not statuses but rather they are flags marking additional information about a quote or order status. The available work steps depend on the actual quote or order status, and not on these flags.



Moving Through the Stages in the Quote–Order Life Cycle

This section covers the following topics:

- Providing the Quote to the Customer (Committing) (on page 248)
- Handling the Customer Response (on page 249)
 - Placing the Order (on page 249)
 - Revising the Quote or Order (on page 250)
 - Cancelling the Quote or Order (on page 250)

Providing the Quote to the Customer (Committing)

A draft quote that is ready to be sent to the customer must first be committed: the quote must be changed from a draft document to an official document.

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
 - The left pane displays the list of existing Open quotes for the account (that is, quotes that require attention).
 - The right pane displays the details of the selected quote.
- 2 Select the account in the drop-down list.
- 3 To filter the list of quotes by Status or the name of the CSR who created the quote, select values for any combination of the following and then click **Search**:
 - From the **STATUS** drop-down list, select **Draft**.
 - From the **CSR** drop-down list, select the name of the CSR.
- 4 To search for a specific quote with a known number, select **Quote #** from the drop-down list, fill in the number and then click **Search**.
- 5 Select the quote in the list.

NOTE:

For orders that don't require sending a quote to the customer, quickly convert the draft quote to a committed order by clicking on the **Convert to Committed Order** button. In this case, all the following steps are not relevant.

- 6 Click the **Commit and Send to Customer** button. The Quote detail pane is replaced by the **COMMIT THE QUOTE AND CONVERT IT INTO AN OFFICIAL QUOTE** pane.
- 7 Optionally, edit the **VALID UNTIL** and **NEXT FOLLOW-UP** dates.
- 8 Select one of the following methods to commit and convert the quote.
 - To send the customer the quote as an email:
 - i In the **ACTION** drop down list, select **Commit and Send an Email**, and then click **Go**. The **SEND DOCUMENT** preview dialog box opens. You can preview and edit the document.
 - ii To send the document, click **Send Email**. Depending on the basic settings defined during Setting up the system, the quote document is either attached to the email as a Word document or converted to a PDF and attached, and sent to the customer and the CSR.
 - To print the quote (for example, for a walk-in customer or to fax the quote):
 - i In the **ACTION** drop down list, select **Commit and Print**, and then click **Go**. The **PRINT DOCUMENT** preview dialog box opens. You can preview and edit the document.
 - ii To print the document, click **OK**.
 - To commit the quote without printing or sending, in the **ACTION** drop down list, select **Commit**, and then click **Go**.



The **COMMIT THE QUOTE AND CONVERT IT INTO AN OFFICIAL QUOTE** pane is replaced by the details pane for the quote.

NOTE: If the shipping details were not defined for this quote, the application will notify the user and allow him to stop the committing process or continue with the default shipping details.

Handling the Customer Response

This section describes how to handle the customer's response to the quotes. Generally, any of the following actions will be performed, depending on the customer response:

- [Placing the Order](#) (on page 249)
- [Revising the Quote or Order](#) (on page 250)
- [Cancelling the Quote or Order](#) (on page 250)



Placing the Order

After the customer has accepted the quote and decided on the quantities to print for each quoted job, convert the quote to an order. Both committed quotes and draft quotes can be converted to orders.

Convert quotes to a:

- **Committed Order** when all the order details are finalized.
- **Draft Order** when the order information is not complete and finalized (for example, files still need to be supplied).

NOTE: A quote can be repeatedly converted into an order, potentially generating an unlimited number of orders, each with a unique order number. This is useful for creating repeat orders from the same quote.

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES**.
- 2 Select the account in the drop-down list.
- 3 Filter the quotes list to only display committed quotes by selecting **Committed** in the **STATUS** drop-down list.
- 4 Select the quote.
- 5 Click one of the following icons:
 - Click the **Convert** icon () to convert the quote to a draft order.
 - Click the **Convert to Committed Order** icon () to convert the quote to a committed order.
- 6 The **CONVERT THE QUOTE INTO AN ORDER** screen appears.
- 7 Adjust the number of copies, if required.
- 8 Click the **Convert** button. The *Next Follow up* and *Valid Until* dates are reset.

NOTE: If a budget inventory template is used for this quote and there is insufficient budget or customer inventory when converting the quote to an order, the CSR will not be blocked.

The quote is converted to an order and now appears in the following screens:

- The quote still appears in the **QUOTE** screen with its quote ID and its status is set to **Quote-Ordered**. The details pane indicates that the quote has been ordered.
- The quote is added as an order to the **ORDER** screen (**ACCOUNTS -> SALES -> ORDERS**). The default prefix for this order is changed to OSR and it is assigned a new numeric increment. The status of the order is set as follows:
 - If the quote was converted to a draft order, the status of the order is set to **Draft**.



- If the quote was converted to a committed order, the status of the order is set to **Committed**.

When converting a quote to a committed order, the *Next Follow up* and *Valid Until* dates are reset and the attached jobs are automatically sent to the appropriate queue:

- Jobs with attached files that are marked for production are sent to the Production queue.
- Jobs without attached files and jobs with attached files that are not marked for production, are sent to the Artwork queue.

NOTE: Uploaded jobs from the customer where *Send file separately* was selected will also go to the Artwork queue

Revising the Quote or Order

To revise a committed quote that has been sent to a customer (for example, the customer will not accept the quote without certain changes), or make changes to a committed order:

- 1 Select the quote or order in the **QUOTES** or **ORDERS** screen. To simplify selection, do the following:
 - To display the list of draft quotes, select **Draft** in the **STATUS** drop down list.
 - To display the list of committed quotes, select **Committed** in the **STATUS** drop down list.
- 2 To revise a committed quote or order, do the following:
 - a Click the **Revise** button. The **REVISE THE QUOTE** (or **REVISE THE ORDER**) screen is displayed. This screen allows you to add a note explaining why you are revising the quote.
 - b Type a note text in the **Quote Internal Note** field and click **Save**.
The Quote (or Order) is set back to **DRAFT** status, and the revision number is updated in the General tab with the relevant revision number.
- 3 Perform the necessary edits and changes to the quote and job, as described throughout this chapter.
- 4 After updating or revising the quote or order, commit it. To send a revised quote to the customer, see [Providing the Quote to the Customer \(Committing\)](#) (on page 248).

NOTE: When revising a committed order, all jobs from this order will be removed from the Print Service Provider queues.

Cancelling the Quote or Order

If the customer decides against placing an order, or if the user placed the order but is now canceling it, you can close the quote or order as follows:

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES** to cancel a quote, or navigate to **ACCOUNTS -> SALES -> ORDERS** to cancel an order.
- 2 Select the quote or order.
- 3 Click **Cancel**. The **CANCEL THE QUOTE** (or **CANCEL THE ORDER**) pane appears.
- 4 Fill in the following relevant information if available (which might be useful for future decisions):
 - Name of the print provider to whom you have lost the business.
 - Price at which the other print provider won the order.
- 5 Type any additional relevant information in the **Quote Internal Note** box.



6 Click **Save**.

NOTE:

- A quote that has already been converted into an order cannot be canceled.
- When an order is canceled, jobs from this order will be removed from the Print Service Provider queues.
- The competitor's name, price and internal note can be viewed in the **HISTORY** tab of the Quote or Order screen. For details, see [Viewing Quote and Order History](#) (on page 252).

Handling Follow-up Activities for Quotes and Orders

Concepts

Many, if not most, business transactions cannot be completed in a single action from start to finish. Often, follow-up activities are required. Examples:

- If after a predetermined amount of time the customer has still not responded to your quote, you should check whether to proceed with the order. To remind you to follow-up with the customer, the Activities feature automatically creates a follow-up activity when you provide a quote.
- If a designer makes a change in a job's design, you might need to modify the job's pricing or scheduling. The Activities feature automatically alerts you to design changes so that you can check if pricing or scheduling changes are needed.
- If you need to contact or schedule a meeting with a customer, you can use the Activities feature to remind you to make the contact or set up the meeting.

As the above examples illustrate, there are two types of activities:

- Automatically generated and scheduled activities.
 - Change in order – an activity that is generated when a designer marks a change in job or order in the artwork queue. For more information, see [The Artwork Queue](#) (on page 268).
 - Follow-up phone call - an activity that is generated when a Follow-up date is defined in a quote or an order. **Note:** In new quotes, the system automatically assigns a follow-up date. You can change this date, which will affect the activity.
- Manually created (ad-hoc) activities that you create according to need.

Viewing and Handling Quote and Order Activities

The steps in this procedure describe how to view and handle quote activities.

- 1 Navigate to **ACCOUNTS -> ACTIVES**.
- 2 Select the **Account** in the drop-down list.
- 3 Filter the displayed activities as needed, as follows:
 - a Specify filtering criteria based on status, date type (Start, Due) and period, and person assigned to the activity.
 - b Select the activities to include by enabling the relevant check boxes (Account, Quotes and/or Orders).
 - c Click **Search**.

The filtered list of activities is displayed in the window.

- 4 Do any of the following in the Activities window:
 - **To create a new activity from scratch**, click **New**. The **NEW ACTIVITY** dialog box opens. The activity parameters are set to the default values, where appropriate.



- **To duplicate an existing activity**, select the activity and click **Duplicate**. The **DUPLICATE ACTIVITY** dialog box displays the duplicated details of the activity (these are basically the same details that are displayed for the selected activity record in the Activity window). Note that System activities (like next follow up) can't be duplicated.
 - **To edit an existing activity**, select the activity and click **Edit**. The **EDIT ACTIVITY** dialog box displays the details of the activity (these are basically the same details that are displayed for the selected activity record in the Activity window). Note that only uncompleted activities can be edited.
- 5 Fill in or modify the details of the activity as needed. Note the following important points and hints:
- You can edit the list of available activity types:
 - i Click **Edit List**. The **ACCOUNT ACTIVITY TYPE** dialog box opens.
 - ii Add, edit, or remove the items in the list.
 - iii Click **Save**. The dialog box is closed and the list updated.
 - By adjusting the priority value and then sorting on priority, you can view the most important activities first.
 - You can adjust the **% COMPLETE** values and the due date according to need, to make the information more accurate and valuable.
 - You can adjust the status according to subsequent follow-up results:
 - a Click **Change Status**.
 - b In the Change Status dialog box, select the appropriate status (Active, On Hold, Complete, or Cancelled).
 - c Specify a reason (or other relevant information) for making the change.
 - d Click **OK**.
- 6 When you are done editing the activity, click **OK** in the **EDIT ACTIVITY** dialog box.

Viewing Quote and Order History


You can view a list of the stages, to date, in the life cycle of a quote or order.

- 1 Navigate to **ACCOUNTS -> SALES -> QUOTES**. The **SALES - QUOTES** window opens and displays all Open quotes. For an explanation of statuses, see [Understanding Quote/Order Statuses and Icons](#) (on page 247).

NOTE:

The steps in this procedure describe how to view the history of a quote. To view the history of an order, perform these steps in the **SALES - ORDERS** window (**ACCOUNTS > SALES > ORDERS**). The **SALES - ORDERS** and **SALES - QUOTES** windows are almost identical.

- 2 Select the **Account** in the drop-down list.
- 3 If helpful, filter the display.
- 4 Select the quote in the **SALES - QUOTES** list.
- 5 Select the **History** tab to view the list of the stages in the quote's life cycle.

To view the details of a particular stage, click the  button in the **DETAILS** column for that stage. The **ACTIVITY DETAILS** dialog box opens and displays the Activity description. When done viewing the details, click the **Close** button in the Activity Details dialog box.

NOTE:

Any action in the Quote or Order History tab is written in the same language the user was logged in with while performing this action.



Invoicing and Billing

The Billing module of iWay Sales Manager enables you to generate and manage the billing documents. This module provides:

- Separate screens, under **ACCOUNTS -> BILLING**, for generating and handling invoices, receipts, credit notes, and deposits, at the account level.
- The **BILLING MANAGER** screen (**TASKS -> BILLING**) that provides a single entry point for monitoring and intervening in billing issues for any account. This screen and its usage is described in [Managing Your Business And Production](#) (on page 265).

This chapter provides instructions for performing the following tasks:

- [Handling Deposits](#) (on page 253)
- [Handling Invoices](#) (on page 256)
- [Handling Credit Notes](#) (on page 259)
- [Handling Receipts](#) (on page 262)

Handling Deposits

A deposit is a partial payment for an order, made by the customer in advance before commencing work on a job, and is therefore linked to a specific order. Because it is possible to make several advance payments, multiple deposits can be linked to a single order.

Deposits for an account are handled in the Deposits screen. The screen contains two panes:

- The left pane lists the deposits for the account. By default, only the draft deposits are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.
- The right pane lists information about the selected deposit. It contains two tabs:
 - General tab—lists general information such as contact person and billing address.
 - Details tab—displays key details specific to the particular deposit. This includes order number, total order amount, and the existing confirmed deposit amount.

This section contains the following procedures:

- [Opening the Deposits screen and Displaying Deposits](#) (on page 253)
- [Creating or Editing a Deposit](#) (on page 254)
- [Confirming a Draft Deposit](#) (on page 255)
- [Canceling a Deposit](#) (on page 255)
- [Printing a Deposit](#) (on page 255)

Opening the Deposits screen and Displaying Deposits

- 1 Open the Deposit screen as follows:
 - a Navigate to **ACCOUNTS -> BILLING -> DEPOSITS**.
 - b Select the account in the dropdown list.
- 2 To filter the list by any combination of status, name of CSR who created the deposit, issue dates, or value dates, select values for any combination of the following and then click **Search**:
 - From the **STATUS** drop-down list, select the status of the deposits.
 - From the **CREATED BY** drop-down list, select the name of the CSR.



- From the **DATE** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.
 - From the **SELECT DATE** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).
- 3 To search for a specific deposit with a known number, fill in the **DEPOSIT #** and click **Search**.
 - 4 To clear the search results and display the entire list of deposits, click **Reset**.

Creating or Editing a Deposit

You can create new deposits and edit draft deposits for committed orders only. A deposit cannot be edited if the order is already a part of a draft or confirmed invoice.

- 1 In the **DEPOSIT** screen, do either of the following:
 - To create a new deposit, click **Create New** under the list of deposits. The **NEW DEPOSIT** dialog box opens.
 - To edit an existing draft deposit, select the deposit and click **Edit** under the deposit details pane. The **EDIT DEPOSIT** dialog box opens. You cannot edit a confirmed deposit; if a confirmed deposit is incorrect, you can cancel it, and then define a new, correct deposit.
- 2 In the **GENERAL** tab of the **NEW DEPOSIT** (or **EDIT DEPOSIT**) dialog box, enter information in the editable fields.
 - a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account.
 - b Fill in any extra information:
 - Internal Note for internal use only.
 - Customer's Note that will appear on the deposit printout to the customer.
- 3 Select the **Details** tab.
- 4 For a new deposit (or to correct the order), click **Select Order**. The **SELECT ORDERS** dialog box appears.
 - a Find and select the order. Only committed orders that have not been invoiced will be displayed (clicking an order number link will open a dialog box with the order details for viewing only, and changes should not be made from this screen).
 - b Click **OK**. The dialog box closes and the order information appears in the **INSERT DEPOSIT** dialog box. The total will be updated with the selected order's amount and any previous deposit amount (if any - else 0).
- 5 To add or edit payments:
 - a Click **Add Payment**, or select the payment and click **Edit Payment**. The **PAYMENTS** dialog box opens.
 - b Select the form of payment. The dialog box contents change for each method of payment.
 - c Fill in the details and amounts, as required. If the payment type is Credit Card or Debit Card, and payment is being made in more than one installment, use the **Installment** button to open a dialog box where you can enter the required information.



- d Click **OK**. The dialog box closes and the payment is added to the list.

NOTE: The payment screens have no interface to online payment gateways.

- 6 Type the total payments amount in the **Total Amount** text box. Payment must be greater than 0 and less than or equal to the order total minus all previous deposits (if any).
 - o If required, edit the selected payment line information using the **Edit Payment** button.
 - o If required, remove the selected payment(s) from the table using the **Delete Payment** button.
- 7 Save the deposit as follows:
 - o To save as a draft deposit, click **OK**.
 - o To save as a confirmed deposit, click **Confirm**.

Confirming a Draft Deposit

- 1 Select the draft deposit.
- 2 Click the **Confirm** button.
- 3 In the confirmation prompt warning that the deposit will not be editable, click **Yes**. The message dialog box is closed and the status of the deposit is changed to **CONFIRMED**.

NOTE: Confirmed deposits cannot be edited. If you find a mistake in a confirmed deposit, cancel the deposit and create a new deposit in its place.

Canceling a Deposit

- 1 Select the deposit.
- 2 Click the **Cancel Deposit** button.
- 3 In the confirmation prompt, click **Yes**.
- 4 In the dialog box that opens requesting the reason for the cancelation, enter the information in the **Reason** field and click **OK**.

NOTE: A deposit for an invoiced order cannot be canceled.

Printing a Deposit

- 1 Select the deposit.
- 2 Click the **Print** button. The Send Document dialog box opens.
- 3 Click the link to open the deposit for editing / printing or click the Send **Email** button.

NOTE:

- The email will be sent to the email Billing address displayed on the General Tab.
- The deposit will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).



Handling Invoices

An invoice is a request for payment for orders produced within the system. Invoices for an account are handled in the Invoices screen. The screen contains two panes:

- The left pane lists the invoices for the account. By default, only the draft invoices are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.
- The right pane lists information about the selected invoice. It contains two tabs:
 - General tab—lists general information such as contact person and billing address.
 - Details tab—displays key details specific to the particular invoice.

The key details specific to the invoice are displayed in the Details tab. The Details tab includes the following:

- A list of the orders to be paid—order lines are links. Clicking an order number link opens a dialog box with the order details. Note that the order window is for viewing only, and changes should not be made from this screen.
- Any manually added lines (components that are not linked to an order but have a value that will influence the invoice total). The manual lines do not have an order number.
- A price breakdown that also includes:
 - **TOTAL CREDIT NOTES** amount line—if credit notes exist for the invoice, the Total Credit Notes amount becomes an active link. Clicking the link opens the **CREDIT NOTES** window in a dialog box, for viewing credit note information for this invoice.
 - **TOTAL DEPOSITS** amount line—if a deposit exists for the connected order, the Total Deposits amount becomes an active link. Clicking the link opens the **DEPOSITS** window in a dialog box, for viewing deposit information for the order(s) in this invoice.

This section contains the following procedures:

- [Opening the Invoices Screen and Displaying Invoices](#) (on page 257)
- [Creating or Editing an Invoice](#) (on page 257)
- [Confirming a Draft Invoice](#) (on page 258)
- [Canceling an Invoice](#) (on page 258)
- [Issuing a Credit Note](#) (on page 259)
- [Printing an Invoice](#) (on page 259)

Opening the Invoices Screen and Displaying Invoices

- 1 Open the Invoice screen as follows:
 - a Navigate to **ACCOUNTS -> BILLING -> INVOICES**.
 - b Select the account in the dropdown list.
- 2 To filter the list by any combination of status, name of CSR who created the invoice, issue dates, or value dates, select values for any combination of the following and then click **Search**:
 - From the **STATUS** drop-down list, select the status of the invoices.
 - From the **CREATED BY** drop-down list, select the name of the CSR.
 - From the **DATE** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.



- From the **SELECT DATE** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).
- 3 To search for a specific invoice with a known number, fill in the **INVOICE #** and click **Search**.
- 4 To clear the search results and display the entire list of invoices, click **Reset**.

Creating or Editing an Invoice

- 1 In the **INVOICE** screen, do either of the following:
 - To create a new invoice, click **Create New** under the list of invoices. The **NEW INVOICE** dialog box opens.
 - To edit an existing draft invoice, select the invoice and click **Edit** under the invoice details pane. The **EDIT INVOICE** dialog box opens. You cannot edit a confirmed invoice; if a confirmed invoice is incorrect, you can cancel it, and then define a new, correct invoice.
- 2 In the **GENERAL** tab of the **NEW INVOICE** (or **EDIT INVOICE**) dialog box, enter information in the editable fields.
 - a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account.
 - b Fill in any extra information:
 - Internal Note for internal use only.
 - Customer's Note that will appear on the invoice printout to the customer.
- 3 Select the **Details** tab.
- 4 Add order(s) to the invoice as follows:
 - a Click the **Select Orders** button. The **SELECT ORDERS** dialog box appears, listing all the committed (online and offline) orders that have not been invoiced for the account. The list does not include any orders that are already connected to a draft invoice.
 - b If necessary, filter the orders using the search feature. The listed orders display the following information: Order number, description, creation date, total, total deposits for the order, amount left to pay on the order, shipped status of the order and whether the order was placed online or by a CSR (clicking an order number link will open a dialog box with the order details for viewing only, and changes should not be made from this screen).
 - c Select the check boxes next to the orders to be included in the invoice and click **OK**. The **SELECT ORDERS** dialog box closes, and the selected orders appear in the **NEW INVOICE** dialog box. The invoice total is also recalculated.
- 5 If required, add a new price component to the total amount of the selected invoice draft (e.g. an item or service such as art design that cannot be ordered through iWay but needs to be charged for):
 - a Click the **Add Manual Line** button.
 - b Enter the information in the editable fields of the **SET MANUAL LINE** dialog box. This can include a description, amount excluding tax, discount amount or percentage, and tax amount.
 - c Click **OK**. The new line appears in the **NEW INVOICE** dialog box, and the invoice total is recalculated.



- 6 To remove orders or manual lines from the invoice draft, select the item and click the **Remove** button. Then click **Yes** to confirm. The selected line is removed from the invoice, and the invoice total is recalculated.
- 7 To set a discount for a component in the invoice draft:
 - a Select the line in the invoice component list and click the **Set Discount** button. An appropriate dialog box opens allowing the user to enter the discount for the selected line.
 - b Type the discount description.
 - c Enter the discount value or percentage.
 - d Click **OK**. The dialog box is closed, the corresponding data in the selected line is changed, and the invoice total is recalculated.
- 8 To set a discount for the entire invoice, enter a percentage in the **DISCOUNT** text box
- 9 To manage the credit notes for this invoice, click the **TOTAL CREDIT NOTES** link to open the **CREDIT NOTES** screen. The link is only available if at least one credit note exists for one of the orders to be invoiced. For more information on creating and editing credit notes, see [Handling Credit Notes](#) (on page 259).
- 10 To manage the deposits for this invoice, click the **TOTAL DEPOSITS** link to open the **DEPOSITS** screen. The link is only available if at least one deposit exists for one of the orders to be invoiced. For more information on creating and editing deposits, see [Handling Deposits](#) (on page 253).
- 11 To save the invoice as a draft, click **OK**; to save the invoice as a confirmed invoice, click **Confirm**.

Confirming a Draft Invoice

- 1 Select the draft invoice.
- 2 Click the **Confirm** button.
- 3 In the confirmation prompt warning that the invoice will not be editable, click **Yes**. The message dialog box is closed and the status of the invoice is changed to **CONFIRMED**.

NOTE: Confirmed invoices cannot be edited. If you find a mistake in a confirmed invoice, cancel the invoice and create a new invoice in its place.

Canceling an Invoice

Only invoices in Draft or Confirmed status can be canceled. For invoices in any other status the Cancel Invoice button is disabled.

- 1 Select the invoice.
- 2 Click the **Cancel Invoice** button.
- 3 In the confirmation prompt, click **Yes**.
- 4 In the dialog box that opens requesting the reason for the cancelation, enter the information in the **Reason** field and click **OK**.

NOTE:

- Canceling an invoice also cancels all the credit notes issued for that invoice.
- If the canceled invoice was a confirmed invoice, a new credit note is created with an amount equal to the amount of the canceled invoice, and it is linked to the canceled invoice. This is done for balancing the books.



Issuing a Credit Note

Credit Notes are linked to specific invoices. You can only issue a Credit Note for an invoice with a **CONFIRMED** or **PARTIALLY PAID** status. See [Handling Credit Notes](#) (on page 259) for more information.

- 1 Select the invoice.
- 2 Click the **Issue Credit Note** button. The **NEW CREDIT NOTE** dialog box opens.
- 3 Fill in the necessary information. The number of the selected invoice is displayed in the **Issued for Invoice #** field of the **DETAILS** page.
- 4 Click **OK** to save the draft credit note for the selected invoice; or click **Confirm** to save the draft and convert it to a confirmed credit note.

Printing an Invoice

- 1 Select the invoice.
- 2 Click the **Print** button. The Send Document dialog box opens.
- 3 Click the link to open the invoice for editing / printing or click the Send **Email** button.

-
- NOTE:**
- The email will be sent to the email Billing address displayed on the General Tab.
 - The invoice will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).
-

Handling Credit Notes

A credit note is a billing document issued to a customer in order to record the reduction of an invoice because of a discount, product return or cancelation.

- Credit notes are linked to an invoice, influencing the invoice balance to be paid. The invoice is linked to a receipt. The credit note amounts are displayed in the receipt.
- Multiple credit notes can exist for an invoice. When creating a receipt for an invoice with a linked credit note, the total amount to pay will be:

Total to Pay = Invoice Total - Credit Notes

Credit Notes for an account are handled in the Credit Notes screen. The screen contains two panes:

- The left pane lists the credit notes for the account. By default, only the draft credit notes are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.
- The right pane lists information about the selected credit note. It contains two tabs:
 - General tab—lists general information such as contact person and billing address.
 - Details tab—displays key details specific to the particular credit note. The credit note details contain information on the connected invoice, the credit note amount and tax.

This section contains the following procedures:

- [Opening the Credit Notes Screen and Displaying Credit Notes](#) (on page 260)
- [Creating or Editing a Credit Note](#) (on page 260)
- [Confirming a Draft Credit Note](#) (on page 261)
- [Canceling a Credit Note](#) (on page 261)
- [Printing a Credit Note](#) (on page 261)



Opening the Credit Notes Screen and Displaying Credit Notes

- 1 Open the Credit Note screen as follows:
 - a Navigate to **ACCOUNTS -> BILLING -> CREDIT NOTES**.
 - b Select the account in the dropdown list.
- 2 To filter the list by any combination of status, name of CSR who created the credit note, issue dates, or value dates, select values for any combination of the following and then click **Search**:
 - o From the **STATUS** drop-down list, select the status of the credit notes.
 - o From the **CREATED BY** drop-down list, select the name of the CSR.
 - o From the **DATE** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.
 - o From the **SELECT DATE** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).
- 3 To search for a specific credit note with a known number, fill in the **CREDIT NOTE #** and click **Search**.
- 4 To clear the search results and display the entire list of credit notes, click **Reset**.

Creating or Editing a Credit Note

Only users with System Administrator or Manager Advanced user type privileges can create or edit credit notes, and only draft credit notes that are connected to a confirmed but not yet paid invoice can be edited.

- 1 In the **CREDIT NOTE** screen, do either of the following:
 - o To create a new credit note, click **Create New** under the list of credit notes. The **NEW CREDIT NOTE** dialog box opens.
 - o To edit an existing draft credit note, select the credit note and click **Edit** under the credit note details pane. The **EDIT CREDIT NOTE** dialog box opens. You cannot edit a confirmed credit note; if a confirmed credit note is incorrect, you can cancel it, and then define a new, correct credit note.
- 2 In the **GENERAL** tab of the **NEW CREDIT NOTE** (or **EDIT CREDIT NOTE**) dialog box, enter information in the editable fields.
 - a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account.
 - b Fill in any extra information:
 - Internal Note for internal use only.
 - Customer's Note that will appear on the credit note printout to the customer.
- 3 Select the **Details** tab.
- 4 Click the **Select Invoice** button. The **SELECT INVOICE** dialog box opens.
 - a Select the invoice. Only invoices with the following status will be displayed: Confirmed, Partially Paid or invoices with a Draft credit note.
 - b Click **OK**. The dialog box closes; the invoice number appears in the credit note details.
- 5 Enter an amount for the credit note and set the tax. The amount must be more than zero and less than or equal to the amount left to pay on the invoice.



- 6 Save the credit note as follows:
 - To save as a draft credit note, click **OK**.
 - To save as a confirmed credit note, click **Confirm**.

Confirming a Draft Credit Note

Only authorized users (users with System Administrator or Manager Advanced user type) can confirm a draft credit note.

- 1 Select the draft credit note.
- 2 Click the **Confirm** button.
- 3 In the confirmation prompt warning that the credit note will not be editable, click **Yes**. The message dialog box is closed and the status of the credit note is changed to **CONFIRMED**.

NOTE: Confirmed credit notes cannot be edited. If you find a mistake in a confirmed credit note, cancel the credit note and create a new credit note in its place.

Once the credit note is confirmed, the Left to Pay total for the invoice is updated.

Canceling a Credit Note

Only authorized users (users with System Administrator or Manager Advanced user type) can cancel a credit note.

- 1 Select the credit note.
- 2 Click the **Cancel Credit Note** button.
- 3 In the confirmation prompt, click **Yes**.
- 4 In the dialog box that opens requesting the reason for the cancelation, enter the information in the **Reason** field and click **OK**.

NOTE:

- Credit notes that are connected to an invoice that was paid cannot be canceled.
- If the canceled credit note was a confirmed credit, a new credit note is created with a negative amount equal to the amount of the canceled credit note. This is done for balancing the books.

Printing a Credit Note

- 1 Select the credit note.
- 2 Click the **Print** button. The Send Document dialog box opens.
- 3 Click the link to open the credit note for editing / printing or click the Send **Email** button.

NOTE:

- The email will be sent to the email Billing address displayed on the General Tab.
- The credit note will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).



Handling Receipts

Receipts are issued in response to payments made. Receipts for an account are handled in the Receipts screen. The screen contains two panes:

- The left pane lists the receipts for the account. By default, only the draft receipts are listed and the list is sorted by issue date, in ascending order. The list can also be sorted by each of the data types by clicking the corresponding column header.
- The right pane lists information about the selected receipt. It contains two tabs:
 - General tab—lists general information such as contact person and billing address.
 - Details tab—displays key details specific to the particular receipt.

The key details specific to the receipt are displayed in the Details tab. This tab displays:

- Invoices included in the receipt—these are links and clicking the invoice number link opens a dialog box with the invoice details - for display only.
- Confirmed credit note total for an invoice—this amount is shown in the **Invoices** table.
- Total amount of the receipt.
- Total credit notes.
- Amount and type of each payment.
- Total payments.

Receipts:

- can be issued for one or multiple invoices.
- can be issued for a payment covering the full balance of the invoices or a partial payment.
- can contain one or multiple payments with different payment forms.
- can be paid using various payment methods. In case of credit card, it can be divided into several installments.

Examples

The following examples present the most simple receipt scenario and a complex one.

- Simple Receipt—A receipt is issued for one invoice; one payment is made for the full amount.
- Multiple invoices and multiple payments receipt—A receipt is issued for two invoices; two payments are made, in cash and with a credit card; the payments are for a partial amount.

When payments are made for a partial amount and there is more than one invoice, you can decide how to divide the payment between the invoices. In this example, the first invoice was accredited full payment, and the left-over payment was accredited to the second invoice.

This section contains the following procedures:

- [Opening the Receipts Screen and Displaying Receipts](#) (on page 263)
- [Creating or Editing a Receipt](#) (on page 263)
- [Confirming a Draft Receipt](#) (on page 264)
- [Canceling a Receipt](#) (on page 264)
- [Viewing the Details of an Invoice in the Receipt](#) (on page 265)
- [Printing a Receipt](#) (on page 265)



Opening the Receipts Screen and Displaying Receipts

- 1 Open the Receipt screen as follows:
 - a Navigate to **ACCOUNTS -> BILLING -> RECEIPTS**.
 - b Select the account in the dropdown list.
- 2 To filter the list by any combination of status, name of CSR who created the receipt, issue dates, or value dates, select values for any combination of the following and then click **Search**:
 - o From the **STATUS** drop-down list, select the status of the receipts.
 - o From the **CREATED BY** drop-down list, select the name of the CSR.
 - o From the **DATE** drop-down list, select the type of date (issue date, value date) by which you want to filter the list.
 - o From the **SELECT DATE** drop-down list, select a predefined date range, or supply a date range for the search in the **From** and **To** fields (manually or using the calendar).
- 3 To search for a specific receipt with a known number, fill in the **RECEIPT #** and click **Search**.
- 4 To clear the search results and display the entire list of receipts, click **Reset**.

Creating or Editing a Receipt

- 1 In the **RECEIPT** screen, do either of the following:
 - o To create a new receipt, click **Create New** under the list of receipts. The **NEW RECEIPT** dialog box opens.
 - o To edit an existing draft receipt, select the receipt and click **Edit** under the receipt details pane. The **EDIT RECEIPT** dialog box opens. You cannot edit a confirmed receipt; if a confirmed receipt is incorrect, you can cancel it, and then define a new, correct receipt.
- 2 In the **GENERAL** tab of the **NEW RECEIPT** (or **EDIT RECEIPT**) dialog box, enter information in the editable fields.
 - a Change the default account billing address and contact person information, if required, by clicking on the **Billing Address** link. A dialog box appears allowing the selection of a different user of the account.
 - b Fill in any extra information:
 - Internal Note for internal use only.
 - Customer's Note that will appear on the receipt printout to the customer.
- 3 Select the **Details** tab.
- 4 Add an invoice to the receipt as follows:
 - a Click the **Select Invoices** button. The **SELECT INVOICES** dialog box appears. Only confirmed invoices that have not been fully paid are displayed.
 - b If necessary, filter the invoices using the search feature.
 - c Select the check boxes next to the invoice(s) to be included and click **OK**. The **SELECT INVOICES** dialog box closes.

The invoices now appear in the **INSERT RECEIPT** dialog box and also include the following information:

- o **LEFT TO PAY** shows the current amount left for payment on the invoice - this is the invoice amount less credit notes, deposits and previous receipts (if any).



- **PAID AMOUNT** by default contains the same amount as **LEFT TO PAY**. If the payment amount is less than this amount (see below) then this field must be manually updated to the paid amount.
- 5 To remove an invoice, select it and click **Remove line**.
- 6 To add or edit payments:
 - a Click **Add Payment**, or select the payment and click **Edit Payment**. The **PAYMENTS** dialog box opens.
 - b Select the form of payment. The dialog box contents change for each method of payment.
 - c Fill in the details and amounts, as required. If the payment type is Credit Card or Debit Card, and payment is being made in more than one installment, use the **Installment** button to open a dialog box for entering the required information.
 - d Click **OK**. The dialog box closes and the payment is added to the list.

NOTE: The payment screens have no interface to online payment gateways.

- 7 If the payment amount does not cover the full amount left to pay on the invoice(s), type the paid amount per invoice in the **Paid Amount** text box.
- 8 (Optional) Enter a positive or negative **Rounding Value** to generate a *Rounded Total*.
- 9 To save as a draft receipt, click **OK**. The dialog box closes. The status of all the invoices included in the draft receipt and of all the credit notes linked to the draft receipt is changed to **LINKED TO DRAFT RECEIPT**.

Confirming a Draft Receipt

- 1 Select the draft receipt.
- 2 Click the **Confirm** button.
- 3 In the confirmation prompt warning that the receipt will not be editable, click **Yes**. The message dialog box is closed and the status of the receipt is changed to **CONFIRMED**.

NOTE: Confirmed receipts cannot be edited. If you find a mistake in a confirmed receipt, cancel the receipt and create a new receipt in its place.

The statuses of all the invoices included in the receipt are changed to **PAID** or **PARTIALLY PAID**, depending on the amount paid.

Canceling a Receipt

Only authorized users (users with the System Administrator or Manager Advanced user type) can cancel a receipt:

- 1 Select the receipt.
- 2 Click the **Cancel Receipt** button.
- 3 In the confirmation prompt, click **Yes**.
- 4 In the dialog box that opens requesting the reason for the cancelation, enter the information in the **Reason** field and click **OK**.

The statuses of all the invoices included in the receipt, will be updated as follows:

- If the invoice does not have another receipt it will be changed to *Confirmed* status.
- If there is another confirmed receipt for this invoice it will be changed to *Partially Paid* status.



Viewing the Details of an Invoice in the Receipt

- 1 Select the receipt.
- 2 Select the **Details** tab.
- 3 Click the **Invoice** link. A dialog box displays the Invoice details.

Printing a Receipt

- 1 Select the receipt.
- 2 Click the **Print** button. The Send Document dialog box opens.
- 3 Click the link to open the receipt for editing / printing or click the Send **Email** button.

NOTE:

- The email will be sent to the email Billing address displayed on the General Tab.
 - The receipt will either be attached as a Microsoft Word doc or as a PDF file - as defined in the CRM settings (**SYSTEM SETUP -> ADVANCED -> CRM**).
-

Managing Your Business and Production

This chapter describes various tasks performed using iWay Sales Manager. Many of these tasks utilize the functionality described in the earlier chapters of this guide, but iWay Sales Manager also provides several more screens to help simplify a number of these management tasks. Some these screens are queue screens accessed from the **TASK** option in the main menu, where iWay Sales Manager offers a number of improvements in the Business-to-Production flow, including the following:

- Jobs are automatically sent to the Production queue after the order has been committed.
- When a Job needs to be revised (following user confirmation of the request to revise), the Job is withdrawn from the Production or Delivery queues (if already located there).
- Jobs can now be approved for production without an attached file.
- Users can now select the target file that is to be printed from among existing files.

This chapter covers the following topics:

- **The Dashboard** (on page 266) for viewing account data at a glance — generally performed by the CSR.
- **The Commercial Queue** (on page 267) for monitoring open quotes and orders — generally performed by the CSR.
- **The Artwork Queue** (on page 268) for handling jobs that are not ready for production — generally performed by the designer.
- **The Activities Screen** (on page 273) for managing an account's activities — generally performed by the CSR.
- **The Billing Manager** (on page 273) for managing the billing process — generally performed by administrative personnel.



The Dashboard

The Dashboard is best used as an entry point to managing accounts and viewing all the relevant account business data at a glance. Reviewing account data on a frequent basis can make it much easier to keep the customer satisfied.

Print Service Provider users must have Manager, Manager Advanced or Administrator privileges to have access to the Dashboard screen.

There are several important reasons for reviewing account business data:

- To ensure that everything is fine with an account. For example:
 - To ensure that orders and jobs are handled quickly.
 - To determine if any follow-up activities are required, and ensure that they get performed.
 - To identify any outstanding issues or problems, and ensure that they do not "fall between the cracks."
- To help in pre-sales preparation. For example, before providing a quote to a customer, it might be useful to check the customer's account history. Checking the history might help you decide:
 - how fast you should respond to the request for quotation.
 - what kind of payment terms and price to quote.

To review account data in the Dashboard

- 1 Navigate to **ACCOUNTS -> DASHBOARD**. The Dashboard screen contains the following panes:
 - Account list pane —from which you select the account to whose data you want to view.
 - Account Business Details pane—displays details and links to other details, for the account you selected.
- 2 To filter the account list or search for an account, do the following"
 - a In the **SEARCH FOR ACCOUNTS** text box, enter an account name (partial or complete).
 - b In the **GROUP** list, select which groups to search.
 - c Click **Search**; the relevant name(s) appear(s) in the list.
(You can click **Reset** to restore the complete list of accounts.)
- 3 Select the account.

The details of the account are displayed in the Account Business Details pane. This pane contains the following sections that provide key information about the account at a glance:

- **INFORMATION AND ACTIONS**—this section contains:
 - Totals for commonly requested data, and links to access the windows where that data is normally displayed. For example, the **Quote Drafts** link displays the number of Quote Drafts (for the account), and provides direct access to those quote drafts in the **QUOTES** screen (as if you selected **ACCOUNTS -> SALES -> QUOTES** and then selected **Drafts** as the **TYPE** filter).
 - Buttons to perform common actions (create new quotes and add new activities).
 - Summary and pie chart indicating the Web orders and Offline orders for the month.



- **STATISTICS**—displays (for the account) the number of quotes and orders and their total prices, for a time period you select (month, quarter, year), and compares these figures to quotes and orders for the same time period last year.
 - **CONTACT PERSON**—displays the contact details of the contact in the Print Buyer's organization.
 - **NOTES**—allows you to enter, save, and view at a glance, important notes regarding the account.
- 4 For shortcut access to a type of item that requires intervention in the appropriate screen (for example, to access Quote Drafts in the **QUOTES** screen), click the appropriate link in the **INFORMATION AND ACTION** section.

The following table lists the shortcut links, the screens that those links open, and the lists displayed in the opened screens.

Shortcut Links in the Dashboard

Link	Screen Opened	List displayed
Quote Drafts	Sales- Quotes	Filtered list of draft quotes
Overdue Activities	Activities	Filtered list of overdue activities
Expired Quotes	Sales - Quotes	Filtered list of expired quotes
Unread Messages	Commercial queue	Unread messages on quotes from the selected account
Jobs in Production	Production queue	All the jobs in the Production queue
Not Billed Orders	Sales - Orders	Filtered list of committed orders
Invoice Drafts	Billing - Invoices	Filtered list of draft invoices

- 1 To perform one of the following actions for the account, click the appropriate button:
 - To create a new quote, click **Create New Quote**. (Alternatively, you can perform this action in the Quotes screen). For instruction on filling in quote details, see [Creating a Simple Quote](#) (on page 238).
 - To add a new activity, click **Add New Activity**. (Alternatively, you can perform this action in the Activities screen). For instructions on filling in activity details, see [The Activities Screen](#) (on page 273).
- 2 To view quote and order statistics for a particular time period, select the time period in the drop down list in the **STATISTICS** section.
- 3 To add a note concerning the account, type the note in the **NOTES** text box and click **Save**.

The Commercial Queue

Although you can view and handle quotes in the **SALES - QUOTES** window, and orders in the **SALES - ORDERS** window, the Commercial Queue provides a single location for handling quotes and orders for all accounts. The **COMMERCIAL** window provides:

- Access to all the quotes and orders in the system.
- The ability to perform tasks on quotes and orders.
- Access to overdue account level activities.



As with the **SALES - QUOTE** and **SALES - ORDER** screens, the Commercial Queue contains two panes. The left pane lists the open quotes and orders, and the right pane displays the details of the selected quote or order.

- the Commercial window allows you to filter and specify selection criteria for listed quotes and orders
- the details pane displays the same information and allows you to perform the same actions.

To Handle Open Quotes and Orders in the Commercial window

1 Navigate to **TASKS -> COMMERCIAL**.

By default, the Commercial Queue displays all quotes and orders having one of the various Open statuses, as well as overdue account level activities. Open statuses include the **FOLLOW-UP**, **EXPIRED**, **DRAFTS**, and **UNREAD MESSAGES** statuses.

2 (Optional) Filter the displayed items as follows:

- Specify a **Status** in the dropdown box.
- Specify the responsible **CSR** in the dropdown box.
- Search for a specific quote/order/job number by selecting the item type, filling in the number and then clicking on the **Search** button.

3 Select the quote or order to be handled. All relevant details and parameters are displayed in the adjacent details pane.

4 Handle the quote or order as you would in the **SALES - QUOTE** window or the **SALES - ORDER** window. (The functionality of these pages is the same as in the **QUOTES** and **ORDERS** in the **SALES** window, depending on the quote/order status. For details regarding the functionality of these windows, see Section 3 Handling Sales.)

The Artwork Queue

Concepts

Jobs that are not ready for production arrive in the **ARTWORK** queue. This generally occurs in the following cases.

- A job in a committed order has no production file.
- A Print Buyer orders a job online without uploading a print file.

Use the **ARTWORK** queue screen to manage the jobs that require some work before they can be sent to production. These jobs can generally be made ready for production in one of the following ways.

- At the request of the Print Buyer, the Print Service Provider can create or design the production file and then get it approved by the Print Buyer.
- The Print Buyer can supply the production file (as might normally be done before the order has been committed).

The **ARTWORK** window contains two panes:

- List – includes all the jobs that require handling before they can be sent to production.
- Job details – displays the detailed information for the selected job and a tool bar with options for handling the job.



List pane

Jobs in the Artwork list are sorted according to the sequence of job arrival, with new jobs added to the bottom of the list. The following information appears for every job in the queue: job thumbnail (the thumbnail will be empty if there is no production file), job number and name, number of ordered copies, shipping date, account name, order change status, and soft proof status.

Functional icons and buttons of the **ARTWORK** queue allow you to search for any job in the artwork phase, to upload and download print files, to send a job to production when the artwork is ready, to send a job to a soft proof, and, in case a job was printed externally, to move the job from the **ARTWORK** queue directly to **DELIVERY**, skipping the production.

Job details pane

When a job is selected in the list, the job information appears in the right pane:

- Job alerts – initially displays the No Production File icon while the job has no file attached. After a file has been added, additional alerts may be displayed regarding preflight problems, font problems, etc. For more information about alerts, see the chapter discussing Production, in the Print Service Provider User Guide.
- Details of the selected job.
- Details for the order that contains the selected job: order number (linked to the order), number of jobs in order, account name, price, order date and shipping date.

NOTE:

The Order # link is for viewing the order's information only; no editing of the order should be applied at this stage. To edit the order, navigate to **ACCOUNTS -> SALES -> ORDERS**.

Tasks Handled in the Artwork Queue

You can perform the following tasks in the Artwork queue:

- [Managing Production Files](#) (on page 269)
- [Managing Follow-up Activities for Order And Job Changes](#) (on page 271)
- [Moving Jobs from the Artwork Queue to Other Queues](#) (on page 272)

Managing Production Files

This section contains covers the following topics:


- [Handling File Attachments](#) (on page 269)
- [Sending And Confirming Soft Proofs](#) (on page 270)

Handling File Attachments

You can upload, download and attach files to a job, and view, modify or replace the files that are attached to a job. The files can be copied to any other location or placed in any folder, using standard Windows Explorer procedures.


In some cases, a designer might want to download files to a local computer to do the design work, and then upload the files back to the system when the design work is done.

The steps in this procedure describe how use the **ATTACHMENTS** dialog box to upload, download, and attach files, and how to mark files for production. The Mark for Production functionality performs a preflight, creates a preview and thumbnail, and when you close the dialog box, updates the thumbnail in the list.


In the **ATTACHMENTS** dialog box, a file's status is indicated with the following icon:  — the file is ready for production



To handle file attachments



- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed. You can filter the display.
- 2 Select the job.
- 3 In the details pane, click the **Attachments** icon (). The **ATTACHMENTS** dialog box opens and displays currently uploaded files.
- 4 To upload additional files to the list of files:
 - a Click the **Upload Files** button. The **UPLOAD FILE** dialog box opens.
 - b Ensure **Upload a Single file** is selected, and click **Browse**. The **CHOOSE FILE** dialog box opens.

NOTE: There is an option to upload multiple files, using Multi-file upload. See the Print Service Provider Guide for instructions.

- c Select the file for upload and click **Open**.
 - d Click **Continue**. The **UPLOAD REPORT** appears informing that the file has been uploaded.
 - e Click **Close**. The uploaded file appears in the **ATTACHMENTS** dialog box.
 - f Repeat this step for each file to be added.
- 5 To download files (for example, to your local computer):
 - a Select the file(s).
 - b Click the **Download** icon (). The **DOWNLOAD FILE** dialog box opens and displays one or two file download links.

NOTE:

- When downloading one file, the dialog box will contain two links: for the single file and a zip file containing the file to be downloaded.
- When downloading several files, the dialog box will only contain a link to a zip file containing all the files to be downloaded.

- c Click the link. The **FILE DOWNLOAD** dialog box opens.
 - d Save the file to the desired location as you would any file in the web browser.
 - e Close the **DOWNLOAD FILE** dialog box.
- 6 To delete a file, select the file and click the **Delete** icon (). This can be useful, for example, if the Print Buyer rejects a proof that you uploaded and sent as a soft proof for approval.
- 7 To activate the preflight process on a file, select the file and click **Mark for Production**. The preflight is performed, a preview and thumbnail created, the dialog box is closed and the thumbnail is updated in the list. A Marked for Production icon () appears by the file.
- 8 When done, click **Close**.

Sending and Confirming Soft Proofs


If your design team is designing or creating the production file, you will need to send a soft proof to the Print Buyer for approval. When you send soft proof, a flag is added to the job in the Artwork queue.

When the Print Buyer approves the soft proof, you must update the job in the Artwork queue to indicate the approval. These update actions are recorded in the order history.





In many cases, the status icons that is used to indicate that an activity was performed matches the icon of the button that was used to perform the action (for example, the icon indicating that a soft proof was sent is identical to the button used for sending a soft proof).


To send a soft proof:

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job to send as a soft proof.
- 3 Click the **Send Soft Proof** icon (). The **SEND SOFT PROOF** dialog box opens. The dialog box displays the list of files already attached to the job (if any).
- 4 In the dialog box, specify who will receive the soft proof. You can select a different user, or select the **Other Mail Address** check box and fill in an email address.
- 5 Fill in a Subject and Message for the email. The default Subject and Message does not include any information about the Job ID or Order ID; in case this information is needed, add it manually.
- 6 To upload additional files to be sent, click the **Upload Additional Files** button. The Attachments dialog box opens. Attach the files as described in [Handling File Attachments](#) (on page 269).
- 7 Select the check boxes of the files for soft proofing.
- 8 Click **OK**. An email with the soft proofs is sent and a message confirming that the email was sent appears.
- 9 Click **OK** to close the confirmation message. The  icon appears in the list, indicating that a soft proof has been sent.

To indicate that the Print Buyer approved the soft proof, do the following:

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job that has been approved by the Print Buyer.
- 3 Click the **Confirm Soft Proof** icon (). The **CONFIRM SOFT PROOF** dialog box opens.
- 4 If necessary, change the name of the Confirmed By user. Click the name of the user and then select a different user from the Select Contact Person dialog box, or select the **Other User Name** check box and fill in the name of the person.
- 5 Set the Confirmation Date.
- 6 Add a Note if necessary.
- 7 Click **OK**. The Confirmed icon () appears in the list, indicating that the change was confirmed.

Managing Follow-up Activities for Order and Job Changes



Certain changes that the designer performs might require follow-up activities. For example, the designer might change a job in a way that can affect the job's pricing or production time. In such a case the designer manually indicates the required follow-up, using the Define Change in Order/Job Activity () button. This results in the following:

- The order appears in the **COMMERCIAL** queue with an Overdue Activity status and icon. This indicates that the CSR should handle the job.
- The appropriate activity is added to the order details.
- An activity flag is added to the job in the **ORDER CHANGE STATUS** column (second column from the right) in the Artwork queue.





When the CSR marks the activity as completed, the flag in the Artwork queue is changed to confirmed. Optionally, the CSR can notify the designer that the change is approved, and the designer can confirm the change from the artwork queue.

To define a change in the job

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job requiring a change. All relevant details and parameters are displayed in the adjacent details pane.
- 3 In the job details pane, click the **Define Change in Order/Job Activity** icon (). The **DEFINE CHANGE IN ORDER/JOB ACTIVITY** dialog box opens. In the dialog box, the default activity type is **Change in Order**.
- 4 Change the activity properties as required.
- 5 Click **OK**. The  icon appears in the list, indicating that the job status was changed to **WAITING FOR CHANGE APPROVAL**.

An activity is added to the order and the order appears in the commercial queue as an order with overdue activities.

To approve a change in the job:

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job that is waiting for change approval.
- 3 Click the **Confirm Change in Activity** icon (). The **CONFIRM CHANGE IN ACTIVITY** dialog box opens.
- 4 If necessary, change the name of the Confirmed By user. Click the name of the user and then select a different user from the Select Contact Person dialog box, or select the **Other User Name** check box and fill in the name of the person.
- 5 Set the Confirmation Date.
- 6 Add a Note if necessary.
- 7 Click **OK**. The Confirmed icon () appears in the list, indicating that the change was confirmed.

Moving Jobs from the Artwork Queue to Other Queues

To approve a job in the Artwork queue for production

The **APPROVE** functionality is used by all the system queues as the standard way to move a job to the next processing step (queue). In the case of the **ARTWORK** queue, it means moving the job to the **PRODUCTION** queue.

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job.
- 3 Click the **Approve** button. The job is moved to the **PRODUCTION** queue.

To move a job from the Artwork queue to the Delivery queue without any processing

Use this option to move a job without any processing to the **DELIVERY** queue, skipping the standard step of production.

- 1 Navigate to **TASKS -> ARTWORK**. The **ARTWORK** window is displayed.
- 2 Select the job.
- 3 Click the **Move To...** button. The **CHANGE JOB STATUS** dialog box opens.
- 4 Select the **Delivery** queue.
- 5 Click **OK**. The dialog box closes and the job is moved to the selected queue.



The Activities Screen

Generally, follow-up activities that are relevant to a feature are performed from the screen that is relevant to that feature (for example, performing follow-up activities on quotes in the Quote screen). The Activities screen provides a single entry point from which to view and handle activities for an account, and is the same screen as the Activities screen that is opened directly from the Quote or Order screen, except that it allows for a greater choice in selecting the combination of activities to be displayed.

- 1 Navigate to **ACCOUNTS -> ACTIVITIES**.
- 2 Select the account from the **ACCOUNT** dropdown box on the right side of the screen.
- 3 Filter the displayed activities as follows:
 - a Specify filtering criteria based on status, date type (Start, Due) and period, and person assigned to the activity.
 - b In the **ACTIVITIES RELATED TO:** check boxes, select the activities to include (Account, Quotes and/or Orders).
 - c Slick **Search**.

The filtered list of activities is displayed in the screen.

- 4 Perform activities as you would if you opened the screen from the **QUOTE** screen or the **ORDER** screen. For more information see [Handling Follow-up Activities for Quotes and Orders](#) (on page 251).

The Billing Manager

The **BILLING MANAGER** screen provides a single entry point from which to view and access accounting documents for all accounts, and perform different billing related actions on the documents.

- 1 Navigate to **TASKS -> BILLING MANAGER**. The Billing Manager screen contains two panes:
 - o the left pane displays the Accounts List.
 - o the right pane, called the **ACCOUNTS DOCUMENTS** pane, displays the list of documents for the selected account.

The account list displays the following information for each account:

- o **ID** – the automatically generated account identification number.
 - o **ACCOUNT** – the name of the account.
 - o **RECEIVABLES** – total amount in un-invoiced orders, and the number of un-invoiced orders in brackets.
 - o **SHIPPED** – total amount in shipped jobs that were not invoiced yet, and the number of these jobs in brackets.
 - o **UN-PAID INVOICES** – total amount in un-paid invoices and the number of un-paid invoices in brackets.
- 2 Filter the list of displayed billing documents as needed, as follows:
 - a To filter on billing document status and or group name, select the status in the **Show** drop-down list, and/or select the group name in the **Groups** drop-down list.
 - b Optionally, specify an account name (or prefix).
 - c Click **Search**.



- 3 To perform any of the following actions on documents, click the appropriate button in the Accounts Documents pane.
 - Generate new invoices.
 - Generate new receipts.
 - Issue deposits.
 - Issue credit notes.
 - View billing documents.
 - Edit billing documents in draft mode.
 - Cancel billing documents.
 - Confirm draft documents.
 - Print billing documents.

For more information about performing related tasks after clicking a button, see the relevant section in [Invoicing and Billing](#) (on page 253).

Production Pricing

To use production pricing for jobs and templates, you must first define production pricing settings. To do this, you should understand certain basic pricing concepts.

This chapter contains the following major topics:

- [Pricing Concepts](#) (on page 274)
- [Setting Up Production Pricing](#) (on page 277)

Pricing Concepts

Pageflex iWay provides several pricing calculation models for defining pricing settings, and these are described in the *Print Service Provider Guide*. iWay Sales Manager provides several additional pricing calculation models, based on production pricing, described in this section.

You determine which calculation models to use for defining pricing for a job type or template. Then, when you request a quote for a print job, the application returns price quotations depending on the selected/defined model.

This section covers the following concepts:

- [Regular Pageflex iWay Pricing Mechanism](#) (on page 274)
- [Hierarchy Pageflex iWay Uses To Calculate The Price Of A Job](#) (on page 275)
- [Expanded Pricing Capabilities Provided By iWay Sales Manager](#) (on page 276)
- [Choosing between Intent Pricing and Production Pricing](#) (on page 277)

Regular Pageflex iWay Pricing Mechanism

The regular Pageflex iWay pricing mechanism uses the following flow:

- 1 When defining the System Setup, you define the following sets of Pricing parameters:
 - Business parameters—this set of parameters include currency and how to round off amounts (**SYSTEM SETUP -> BASIC -> REGION AND LANGUAGE**).
 - Tax Packages—this set of parameters includes various taxing packages that can be added to the price of the job.



- Line Items Library—this set of parameters consists of individual items that you generally define elsewhere (for example, stock paper items, shipping items). Not all the items in this library need to contain cost or pricing information, but many of the items do contain this information (for example, prices for specific paper types, prices for shipping, etc.). You can add additional items to this library directly, without defining them elsewhere.
- 2 When you define a job type, you define the job intent joblets that are included in the job. Then, when you define the job pricing settings, you define the following:
 - Calculation model to be used in determining the job’s pricing. This is the default pricing model and can be one of the following models:
 - Intent—this model allows you to define pricing based on the job intent definition. You can define base costs and prices for the job and particular intent options included. Though you can have in mind the time, labor, waste, and other costs, when you define the cost and price of an intent joblet, there are no fields that allow you to actually specify these amounts. Therefore, the job price is fixed according to the intent price regardless of the actual time, labor, waste, and so on, that the job requires.
 - Manual—this model allows the CSR to define the price manually while the job has not been ordered yet (in shopping cart, saved job, etc.).
 - Excel pricing—this model allows the CSR to define pricing at the account level using an Excel file.
 - If you select Intent Pricing, the following sections allow you to define the Intent Pricing for the job:
 - Planner—this section of the Pricing tab allows you to specify output devices and related parameters according the quantities being printed.
 - Job Type Options—When you select Intent Pricing, this section allows you to define both basic pricing for the job, and pricing for all of the intent options that might be selected by the Print Buyer.
 - If you select Manual Pricing, the Planner section allows the CSR to define pricing at the time the job is ordered.
- 3 When you define a template, the template inherits the characteristics of the job type, including the Calculation Model. In the Pricing tab of the Settings, you can accept the default Calculation Model of the parent (that is, the job type), or you can choose to use new settings. If you choose to use new settings, you can change the Calculation model (that is, make a different model the default model) and/or modify the pricing settings.
- 4 If different pricing plans are possible (for example, the job can be printed on different output devices, and pricing will be different depending on the device chosen), you can see the plans in Track jobs.

Hierarchy Pageflex iWay Uses to Calculate the Price of a Job

When Pageflex iWay calculates the price of a job request, the pricing mechanism has a hierarchy that contains the following 4 levels. It begins with the most specific pricing, and if that level is not found, it moves to the next level:

- 1 Manual override for a pre-ordered job. This is where the Print Service Provider has overridden the default pricing model and manually selected the pricing model to use for the job (including setting the prices manually).
- 2 Price setting per template (Intent).
- 3 Account pricing (Excel).
- 4 Price setting per job type.



Expanded Pricing Capabilities Provided by iWay Sales Manager

In addition to the pricing calculation models available from Pageflex iWay, iWay Sales Manager allows for the use of various forms of Production Pricing to determine the costs and prices. Instead of defining an overall cost for an intent joblet (such as cutting), production pricing allows you to define the costs and prices for each part of the production process (such as setup time and labor charges, cutting charges, waste charges for the cutting process, etc.).

In general, production pricing is determined by a combination of stock pricing, output device pricing and process estimator pricing.

- 1 When defining System Setup:
 - a Enable production pricing. (**PRINT SETTINGS -> PRICING -> BUSINESS**).
 - b Define Process Estimators. Pageflex iWay uses a pre-supplied set of Process Estimators to define the costs and prices of each production process (such as cutting, drilling, wide format printing). Costs and prices can factor in such things as number of times the process is performed, setup labor, run labor, and materials.
- 2 When defining Job Types and Templates in the wizard:
 - a In the Intent panel, you select joblets for the processes (such as drilling, laminating, etc.) that can be applied to the job. (Many process joblets correspond to the process estimators that you defined earlier.) In addition, you can select any generic joblets that you have defined.
 - b In the Pricing tab of the Settings panel, you select the Calculation model as you would in Pageflex iWay. However, iWay Sales Manager provides you with several production pricing Calculation Models. Production pricing calculation models apply the pricing breakdowns you defined in the process estimators to the process joblets used by the job (which you selected in the Intent panel).
iWay Sales Manager provides the following production pricing calculation modules:
 - **Production Pricing**—regular production pricing. Printing pricing is based on press sheet counts, and total pricing is calculated based on the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering).
 - **Wide Format Production**—production pricing for wide format printing such as posters and banners. Printing pricing is and is based on print area, and total pricing is calculated using the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering + wide format printing).
 - **Production with Generic Joblets**— production pricing where the job also uses generic joblets (such as joblets for design work, artwork, or other special inputs). Printing pricing is based on press sheet counts, and total pricing is calculated using the following formula: Stock library + output devices + process estimators (cutting + folding + drilling + laminating + numbering) + generic joblets. (Although generic joblets are technically intent pricing items, they are used for production pricing as well.)



The [hierarchy](#) (on page 275) used to calculate the price of a job remains unchanged with production pricing, however the Pricing result matrix will be displayed differently. In the result matrix:

- All intents used for this job and priced at the intent level will be displayed under JBF Options.
 - All selected intent options will be displayed with the cost as set in the Estimators but with a Price of 0 since the intent pricing module is enabled for this job.
 - For each option that was not calculated with Production pricing there is an option to add the production pricing by clicking on the Restore default Price icon - this will add the selected item price to the total.
- 3 When you create quotes or orders, you can use the default calculation model to determine pricing or you can choose a different calculation model for the quote or the order.
 - 4 If different output devices are used, each providing different pricing plans, iWay Sales Manager selects the lowest price; if several plans have the same lowest price, iWay Sales Manager selects the most cost effective. The plans can be viewed while creating the quote and are limited to a maximum of 7 plans.

Choosing between Intent Pricing and Production Pricing

Intent pricing and production pricing provide different approaches according to situation and need.

- Intent pricing—this calculation model allows you to define pricing for job type and template intents, according to the number of copies, the total pages or the actual printed press-sheets. It is useful when you know how much you want to charge—for example, you know what the market charges for a particular intent—even if you do not know your actual costs or do not want to manage them through Pageflex iWay. You define intent pricing individually for each job type and template intent. You can specify costs if you know them, but these are for your information, and they are not central to the price calculation.
- Production pricing—this calculation model is useful when you know the cost of various production processes and materials. You define the costs of these processes and materials, and the percentage you want to mark up those costs to determine the price. Production process pricing (for example, the cost of cutting, drilling or lamination) is defined at the system level, not the job level. You define, for each job type or template, whether production pricing will be available for that job type or template.

Production pricing can also include generic joblet pricing (for example, to set the design or packaging costs and markups). Though technically intent pricing, they will be added to production pricing calculations.

When production pricing is enabled, the job price calculation uses the same mechanism for Print Buyers and for CSRs who prepare quotations for offline orders. Several pricing plans (up to seven) can be presented to the CSR, who can then choose the best plan (generally according to price).

Setting Up Production Pricing

You set up Production Pricing by performing the following high-level steps:

- [Enable Production Pricing](#) (on page 278)
- [Define Output Device Pricing Parameters](#) (on page 278)
- [Define Stock pricing](#) (on page 279)
- [Define Process Estimator parameters](#) (on page 280)



Once you have implemented Production Pricing, you can define Production Pricing as the calculation model for job types and templates, by performing the following procedure:

- [Define Production Pricing As The Default Calculation Model For A Job Type or Template](#) (on page 285)

Enable Production Pricing

To enable production pricing:

- 1 Navigate to **PRINT SETTINGS -> PRICING -> BUSINESS**.
- 2 Select the **Enable pricing based on production pricing** check box.
- 3 Click the **Save** button.

Define Output Device Pricing Parameters

Define output device pricing parameters as follows (for each output device):

- 1 Navigate to **PRINT SETTINGS -> PRODUCTION -> OUTPUT DEVICES**.
- 2 Select the output device to configure in the **OUTPUT DEVICES** window.
- 3 Select the **PRESS SETUP** tab.
 - In the **SETUP TIME** field, define the minutes needed for the initial output device setup.
 - In the **PASS SETUP TIME** field, define the minutes needed for setting up one pass through the device.
 - For offset devices, define the minutes needed to set up each print head per pass in the **PRINT HEAD SETUP TIME** box.

Click **Save**.

- 4 Select the **SPEED AND WASTE** tab.

Configure the definitions depending on the output device type.

- For digital devices or copiers:
 - In the **PAPER WEIGHT** fields, define the minimum and maximum weights (in grams per square meter) that are wasted by the device during a run.
 - In the **SPEED BY PAPER SIZE** fields, define the number of run sheets that the device can run per hour, depending on the paper size.
 - Click **Add** to add more runs to the job and define the additional values.
 - In the **PRODUCTION FACTORS** area, define the **Process Color**, **Spot Color**, and **Duplex Mode** speed factors.
- For offset devices:
 - In the **FIXED WASTE** field, define the number of run sheets that are wasted during a run.
 - In the **RUN LENGTH** field, define the number of copies that can be run.
 - In the **SPEED** field, define the number of sheets that can be run per hour.
 - In the **WASTE** field, define the approximate percentage of run sheet waste (derived from output device adjustments, run sheet examination, or other waste factors).
 - Click **Add** for additional job runs; define the parameters in the resulting fields.
 - In the **PRODUCTION FACTORS** area, define speed and waste factors in the **PROCESS COLOR**, **SPOT COLOR**, and **PAPER WEIGHT** fields.



- (Optional) Click **Add** for additional weights to be added to the job; define the parameters in the resulting fields.

Click **Save**.

5 Select the **LABOR CHARGE** tab

Define labor and mark-up charges used to calculate the production cost of a job, depending on the device type.

- To define a digital labor charge:
 - Define the **Mark-up** percentage.

For both Setup-Time and Run-Time:

 - Define the **Labor Cost** per hour.
 - Define the **Min Labor** time in minutes.
- To define an offset labor charge:
 - Define the **Mark-up** percentage.
 - Define the **Plate Fee**.

For both the Setup time and the Run time:

 - Define the **Labor Cost** per hour.
 - Define the **Min Labor** time in minutes.
 - Define the **Process Wash-up Cost**.
 - Define the **Spot Wash-up Cost**.

Click **Save**.

- Select the **CLICK CHARGE** tab.

You can use external devices for digital print jobs, and calculate the cost per click in the production costs, as follows:

- Define the **Mark-up percentage**.
- Define the **Color page 'click' costs**.
- Define the **Black and White page 'click' costs**.

Click **Save**.

NOTE: Click Charges are calculated based on the planned number of press sheets and do not include the clicks on any waste in the calculation.

Define Stock pricing

Navigate to **PRINT SETTINGS -> PRODUCTION -> STOCK LIBRARY**. For each stock item for which you are defining pricing, do the following:

- 1 Select the stock item and click **Edit**.
- 2 Define the cost and the price at the bottom of the screen, per number of copies. These costs and prices can only be defined if Production Pricing is enabled.
- 3 To add another line, click **New Range** and define the cost and price for that range.
- 4 Click **OK**.

NOTE: Make sure that the other parameters on the page contain real values as they are also used in the production pricing calculation. For example, without setting the Thickness of the stock item, the cutting process estimator will not be calculated correctly.



Define Process Estimator Parameters

You define process estimators one at a time by displaying the Process Estimators window (**PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**), selecting the process, and filling in the appropriate estimator values. You can define estimators for the following processes:

- Cutting—cutting the printed sheets/copies at the end of the print process. In the case that press sheets are made from the Parent sheet paper, the cutting costs and price will be calculated as well.
- Folding—folding the printed material for a brochure, calendar, etc. It is assumed that only one fold type is defined for a job and folding is calculated per press sheet.
- Drilling—drilling holes in the printed sheets.
- Laminating—laminating the printed sheets.
- Numbering—adding serial numbers to the printed sheets.
- Wide-Format Printing—printing large format jobs such as posters, advertisements for building, etc.

NOTE: You can only define process estimators if production pricing is enabled. For instructions on enabling production pricing, see [Enable Production Pricing](#) (on page 278).

Cutting Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Cutting**.
- 3 At the top of the **CUTTING** area, select whether the pricing should be calculated by the labor involved in the cuts (**Use Price by Labor Time**) or by the number of cuts (**Use Price by Cuts**). The tabs and fields that can be edited depend on the value you select.
- 4 If you selected **USE PRICE BY LABOR TIME**, fill in the fields as follows:
 - a In the **GENERAL** tab, fill in the Maximum Stack Height.
 - b In the **SETUP TIME** tab, define the following:
 - i In the **JOB PREPARATION** field, specify the number of minutes it takes to prepare the job on the cutting device.
 - ii In the **CUT CONFIGURATION** field, specify the number of minutes it takes to configure the cutting device per cut.
 - iii In the **CUTTING SETUP LABOR PRICE** area, define the fixed and variable cutting setup labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable cutting setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable cutting setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
 - c In the **RUN TIME** tab, define the following:
 - i In the **STACK RELOADING** field, specify the number of minutes it takes to reload the stack of the printed job on the cutting device.
 - ii In the **CUT RUN TIME** field, specify the number of minutes it takes to cut the loaded job.
 - iii In the **CUTTING RUN LABOR PRICE** area, define the fixed and variable runtime cutting labor costs per unit of time, per number of copies in a range, and do either of the following:



- Fill in the fixed and variable cutting run labor prices based on your own calculations.
 - Have the system calculate the fixed and variable cutting run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 If you selected **USE PRICE BY CUTS**, fill in the fields as follows:
 - a In the **GENERAL** tab, fill in the **MAXIMUM STACK HEIGHT** in inches
 - b In the **PER CUT** tab, in the **CUTTING PRICE** area, define the fixed and variable cutting costs per number of cuts, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable cut prices based on your own calculations.
 - Have the system calculate the fixed and variable cut prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 6 Click **Save**.

Folding Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Folding**.
- 3 In the **SETUP TIME** tab, define the following:
 - a In the **JOB PREPARATION** field, specify the number of minutes it takes to setup the job on the folding device.
 - b In the **FOLD CONFIGURATION** field, specify the number of minutes it takes to setup the folding parameters.
 - c In the **SETUP TEST RUN** field, specify the number of minutes it takes to run a trial process.
 - d In the **SETUP WASTE** field, specify the number of press sheets that are wasted during setup and test run.
 - e In the **FOLDING SETUP LABOR COST** area, define the fixed and variable folding set-up labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable folding setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable folding setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 4 In the **RUN TIME** tab, define the following:
 - a In the **MACHINE SPEED** field, specify the number of press sheets the machine can fold per hour.
 - b In the **RUN WASTE FACTOR** field, specify the percentage of waste during the trial run process.
 - c In the **FOLDING RUN LABOR COST** area, define the fixed and variable folding run labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable folding run labor prices based on your own calculations.



- Have the system calculate the fixed and variable folding run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 Click **Save**.

Drilling Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Drilling**.
- 3 At the top of the **DRILLING** area select whether the pricing should be calculated by the labor involved in the drilling (**Use Price by Labor Time**) or by the number of holes (**Use Price by Holes**). The tabs and fields that can be edited depend on the value you select.
- 4 If you selected **USE PRICE BY LABOR TIME**, fill in the fields as follows:
 - a In the **GENERAL** tab, fill in the maximum stack height, and the maximum number of holes the machine can drill
 - b In the **SETUP TIME** tab, define the following:
 - i In the **JOB PREPARATION** field, specify the number of minutes it takes to prepare the job on the drilling device.
 - ii In the **DRILLS CONFIGURATION** field, specify the number of minutes it takes to configure the drilling device per drill.
 - iii In the **SETUP TEST RUN** field, specify the number of minutes it takes to run a trial process.
 - iv In the **SETUP WASTE** field, specify the number of press sheets that are wasted during setup and test run.
 - v In the **DRILLING SETUP LABOR PRICE** area, define the fixed and variable drilling setup labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable drilling setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable drilling setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
 - c In the **RUN TIME** tab, define the following:
 - i In the **HOLE RUN TIME** field, specify the number of minutes it takes to drill the loaded job.
 - ii In the **DRILLING RUN LABOR PRICE** area, define the fixed and variable drilling run labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable drilling run labor prices based on your own calculations.
 - Have the system calculate the fixed and variable drilling run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 If you selected **USE PRICE BY HOLES**, fill in the fields as follows:
 - a In the **GENERAL** tab, fill in the maximum stack height, and the maximum number of holes the machine can drill.



- b In the **BY HOLES** tab, in the **DRILLING PRICE** area, define the fixed and variable drilling costs per number of holes, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable drill prices based on your own calculations.
 - Have the system calculate the fixed and variable drill prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 6 Click **Save**.

Laminating Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Laminating**.
- 3 In the **SETUP TIME** tab, define the following:
 - a In the **JOB PREPARATION** field, specify the number of minutes it takes to setup the job on the laminating device.
 - b In the **SETUP TEST RUN** field, specify the number of minutes it takes to run a trial process.
 - c In the **SETUP WASTE** field, specify the number of press sheets that are wasted during setup and test run.
 - d In the **LAMINATING SETUP LABOR COST** area, define the fixed and variable laminating setup labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable laminating setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable laminating setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 4 In the **RUN TIME** tab, define the following:
 - a In the **MACHINE SPEED** field, specify the number of meters the machine can laminate per hour (when laminating on one side).
 - b In the **TWO SIDES SLOW DOWN** field, specify the percentage of time that the Machine Speed value decreases if the lamination is performed on two sides.
 - c In the **RUN WASTE** field, specify the number of press sheets that are wasted during the run.
 - d In the **LAMINATING RUN LABOR COST** area, define the fixed and variable laminating run labor costs per unit of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable laminating run labor prices based on your own calculations.
 - Have the system calculate the fixed and variable laminating run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 In the **MATERIALS** tab, in the **LAMINATING MATERIAL COST** area, define the fixed and variable costs of laminating material per unit of size, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable laminating material prices based on your own calculations.



- Have the system calculate the fixed and variable laminating material prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.

6 Click **Save**.

Numbering Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Numbering**.
- 3 At the top of the **NUMBERING** area select whether the pricing should be calculated by the labor involved in the numbering (**Use Price by Labor Time**) or per number (**Use Price by Numbering**). The tabs and fields that can be edited depend on the value you select.
- 4 If you selected **USE PRICE BY LABOR TIME**, fill in the fields as follows:
 - a In the **SETUP TIME** tab, define the following:
 - i In the **JOB PREPARATION** field, specify the number of minutes it takes to setup the job on the numbering device.
 - ii In the **SETUP TEST RUN** field, specify the number of minutes it takes to run a trial process.
 - iii In the **SETUP WASTE** field, specify the number of press sheets wasted during the trial run process.
 - iv In the **NUMBERING SETUP LABOR PRICE** area, define the fixed and variable numbering setup labor costs per units of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable numbering setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable numbering setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
 - b In the **RUN TIME** tab, define the following:
 - i In the **MACHINE SPEED** field, specify the number of press sheets the machine can number per hour.
 - ii In the **RUN WASTE FACTOR** field, specify the percentage of waste during the trial run process.
 - iii In the **NUMBERING RUN LABOR PRICE** area, define the fixed and variable numbering run labor costs per units of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable numbering run labor prices based on your own calculations.
 - Have the system calculate the fixed and variable run labor numbering prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 If you selected **USE PRICE BY NUMBERING**, in the **PER NUMBERING** tab, in the **NUMBERING PRICE** area, define the fixed and variable numbering costs per number of units, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable numbering prices based on your own calculations.
 - Have the system calculate the fixed and variable numbering prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 6 Click **Save**.



Wide-Format Printing Process Estimators

- 1 Navigate to **PRINT SETTINGS -> PRICING -> PROCESS ESTIMATORS**.
- 2 In the **PLUG INS** area of the **PROCESS ESTIMATORS** window, select **Wide-Format Printing**.
- 3 In the **SETUP TIME** tab, define the following:
 - a In the **JOB PREPARATION** field, specify the number of minutes it takes to setup the job on the wide-format printing device.
 - b In the **SETUP WASTE** field, specify the amount of paper that is wasted during setup.
 - c In the **WIDE FORMAT PRINTING SETUP LABOR** area, define the fixed and variable wide format printing setup labor costs per units of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable wide format printing setup labor prices based on your own calculations.
 - Have the system calculate the fixed and variable wide format printing setup labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 4 In the **RUN TIME** tab, define the following:
 - a In the **MACHINE SPEED** field, specify the area that the machine can print per hour.
 - b In the **WIDE FORMAT PRINTING RUN COST** area, define the fixed and variable wide format printing run labor costs per units of time, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable wide format printing run labor prices based on your own calculations.
 - Have the system calculate the fixed and variable wide format printing run labor prices as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 5 In the **PRINTING** tab, in the **WIDE PRINTING COST** area, define the wide printing run labor cost and price per number of copies in a range.
 - a In the **WIDE FORMAT PRINTING RUN COST** area, define the fixed and variable wide format printing costs per units of area, per number of copies in a range, and do either of the following:
 - Fill in the fixed and variable wide format printing prices per units of area based on your own calculations.
 - Have the system calculate the fixed and variable wide format printing prices per units of area as a percentage of markup over the costs by selecting **User Markup**, and in the **%** field that is displayed, type the markup percentage.
- 6 Click **Save**.

Define Production Pricing as the Default Calculation Model

If Production Pricing is enabled, to make Production Pricing the default Calculation Model for a job type or template, do the following:

- 1 Display the **PRICING** tab for the selected job type or template in the **SETTINGS** panel of the Definition wizard.



- 2 In the **CALCULATION MODEL** field, select one of the type of production pricing calculation model:
 - **Production Pricing**.—select this model if the job type or template does not need generic joblets or wide format printing. Print pricing will largely be determined by number of press sheets.
 - **Wide Format Production**—select this model if the job pricing should be largely calculated based on size of the printing area (such as posters/banners).
 - **Production with Generic Joblets**—select this model if the production is calculated according to production pricing (cost) but there is a need to use additional pricing elements (such as Design, packaging, etc.) which were added to the system using Generic Joblets.

NOTE:

Selecting one of the above values disables Intent pricing for this job type, and pricing calculations will be based on the production pricing parameters.

- 3 If you are editing a template, and are choosing a different calculation model than is used by its job type, select the **Use New Settings** radio button, and select the calculation model.
- 4 Fill in the details of the Pricing tab as you would in Pageflex iWay (for details, see the *Print Service Provider Guide*):
 - If you chose **Production Pricing** or **Wide Format Production**, only the **PLANNER** section of the Pricing tab is displayed; stock and process estimator prices are taken depending on the definition of the production job.
 - If you chose **Production with Generic Joblets**, both the **PLANNER** section and the **JBF OPTIONS** section are displayed; the **JBF OPTIONS** section displays the base product and generic joblets.



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