Xebra E-Commerce

As of Release PI 610

Xebra E-Commerce

© 2009 Xetex Business Systems, Inc.

All rights reserved. No parts of this work may be reproduced in any form or by any means - graphic, electronic, or mechanical, including photocopying, recording, taping, or information storage and retrieval systems - without the written permission of the publisher.

Products that are referred to in this document may be either trademarks and/or registered trademarks of the respective owners. The publisher and the author make no claim to these trademarks.

While every precaution has been taken in the preparation of this document, the publisher and the author assume no responsibility for errors or omissions, or for damages resulting from the use of information contained in this document or from the use of programs and source code that may accompany it. In no event shall the publisher and the author be liable for any loss of profit or any other commercial damage caused or alleged to have been caused directly or indirectly by this document.

Printed: October 2009 in U.S.A.

Table of Contents

Part I	Xebra E-Commerce Overview	4
Part II	Initial Setup	5
1	Verify E-Commerce Availability In Xebra Client	6
2	Verify E-Commerce Web Server Availability	
3	Establish Commincation With Web Server	9
4	Set Your E-Commerce Logo Image	
Part III	Learning By Example	14
1	Customer Setup	
	Adding A Warehouse Catalog Item	
	Adding A Stock Sales Item	
2	Adding A Stationery Item	
2	Kenioving rest Data	
Part IV	Advanced Setup Options	219
Part V	Xebra E-Commerce Reference	220
	Index	0

Contents



1 Xebra E-Commerce Overview

Your Xebra E-Commerce Advantage subscription entitles you to features in the Xebra Client software that you can use to manage a web site hosted by Xetex. The combination of the E-Commerce features in the Xebra software and the web server allow you to provide multiple web portals for your customers to log in, place orders, and view information that you want them to see.

You use the Xebra Client software to build catalogs of products that you offer based on the items that are already in your Xebra database. Xebra is specialized to provide a way for you to offer printing, promotional products, items that you warehouse for your customers, and office supplies. You can make catalogs that are specific to your customer's company as a whole, or you can make catalogs that are specific to individual web users within the company. The Xebra Client software also offers many ways that you can customize the look and functionality of the web portal for each company or person that logs into your Xebra web site.

This Xebra E-Commerce documentation is divided into the following 5 major parts:

1. Xebra E-Commerce Overview - The current section that you are now reading.

2. Initial Setup - This section provides step by step instructions to get you started. If you are new to Xebra E-Commerce, you definitely need to look at this section first.

3. Learning By Example - This section describes step by step how to configure a customer's web portal. Because E-Commerce requires a web server and a Xebra database to be working closely together, the Xebra Tutorial does not cover E-Commerce. The Learning By Example section provides a workaround so that you can carry out tutorial-like steps with your live system in order to get familiar with Xebra E-Commerce basics.

4. Advanced Setup Options - This section covers topics such as assigning a domain name to your Xebra E-Commerce web server and acquiring a secure SSL certificate for your Xebra web server so that your web site can work with sensitive data such as credit card numbers. This section also describes all the ways that you can modify the look and functionality of your web pages.

5. Xebra E-Commerce Reference - This section describes in detail all of the Windows, menus, and data fields that are used to manage Xebra E-Commerce web sites.



2 **Initial Setup**

When you first start a Xebra E-Commerce Advantage subscription, Xetex should provide you with two things:

 Xetex should enable the E-Commerce features in your Xebra Client software.
 Xetex should setup a web server for you and give you a public Internet IP address for that web server.

Before you begin using Xebra E-Commerce, you should test to make sure that Xetex has completed the above steps.



2.1 Verify E-Commerce Availability In Xebra Client

Log into your Xebra Client and look at any Go menu.

🎉 Xebra Order Entry	
File View Commands Actions Inquiry	Go Help
Image: Status: Image: Status:	Order Entry Accounting Setup Reports Utilities
Customer:	Customer Specific Inventory Prospecting General Inventory Reports E-Commerce Production
Cost Center:	

If the Go > E-Commerce menu item is enabled, then the E-Commerce features are already enabled in your software.

If the E-Commerce menu is disabled (grayed out), then you need to install an update to enable the E-Commerce features. In the Go menu, choose Setup to load the Xebra Setup window.

🏀 Xebra Order Entry		
File View Commands Actions Inquiry	Go Help	
"`````````````````````````````````````	Order Entry	
	Accounting	
Job:	Setup	
🔲 Alternate Address 👘 File Attachme	Reports 😼	
Status:	Utilities	
Customer.	Customer Specific Inventory	
Billing Customer:	Prospecting	
	General Inventory Reports	

On the Xebra Setup window, choose Actions > Check for Update from the menu.

🎉 Xebra Setup 📃 🗖 🗙										
File	Actions	Options	Printing	Go	Help					
O¢	Or Check for Update Administrator)									
	Job delete Ok									
Г	Prevent update after invoice									
E Receive vendor invoice after customer invoice										
	Prevent update after in inventory									
ШЕ	No specs on exact repeat PD.									

NOTE: If Check for Update is disabled, you will need to find a person at your company who has the correct Xebra operator security privileges to perform these steps.

On the Check for Update window, you should be able to leave the Xetex Update Server section unchanged. Just hit the Continue button to see if an update is available. If an update is not available,



contact Xetex Customer support to find out when your E-Commerce features will be ready for you.



2.2 Verify E-Commerce Web Server Availability

Once you have made sure that the E-Commerce features are available in your Xebra Client, the next step is to see if your web server is ready. Xetex should provide you with an IP address for your web server. Go into a web browser, enter the IP address in the address bar of the browser, and hit the Enter key on your keyboard. If the web server is running and you have the right IP address, you should get a blank page with the title "New Xebra Web Site".



If no page loads for your address and you don't see the title "New Xebra Web Site", contact Xetex Customer support to find out when your E-Commerce web server will be ready for you.



2.3 Establish Commincation With Web Server

Once you have established that the E-Commerce features are available in your Xebra Client and your web server is running, the next step is to make sure your Xebra Client software can communicate with the web server.

In the Xebra Client, select E-Commerce from the Go menu to load the main Xebra E-Commerce window.

🌽 Xe	bra E-C	omn	nerce				_ 🗆 🗡
File	Actions	Go	Help				
١	Web Site	Addr	ess: 172	2.21.26.108			
				R	efresh	Web Site	
				🔲 Use a	lterna	e refresh method	
	Unpro	cesse	ed Activit	y From Web Si	ite —		
	Ware	ehous	e Relea	ses: 0] [Process Warehouse Releases	
		Ş	Stock Sa	ales: 0]]	Process Stock Orders	
			Station	iery: 0]]	Process Stationery Orders	
		Offi	ce Supp	lies: 0		Process Office Supply Orders	
	Ei	nd E-	Commer	ce Transaction	IS	Approval Order Audit	
Update	e web sit	e with	n new sta	atic data.			

At the top of the Window in the Web Site Address prompt, enter the IP address that Xetex gave you for your web server. Click the Refresh Web Site button below the Web Site Address prompt. If everything is working, you should see a message "Please Wait...Refreshing Web Site..." and then you should see a message similar to "Your web site was updated with 80 new files." If you receive an error, it may mean that Xetex did not finish configuring your new web server and you should contact Xetex Customer support to find out when your E-Commerce web server will be ready for you.



2.4 Set Your E-Commerce Logo Image

The Refresh Web Site button on the main Xebra E-Commerce window transfers settings that you make in the Xebra Client software and data from your Xebra database to your web server. If you have done this first refresh without making any E-Commerce configuration changes in your Xebra Client, your web server will contain bare minimum defaults. If you reload the web page for your E-Commerce IP address at this point, instead of getting a blank page with the title "New Xebra Web Site", you should see a simple log in page similar to the following:

🜈 Customer Log On - Windows Internet Explorer	
See http://172.21.26.108/ ▼ ★ K Live Search	P -
🛛 File Edit View Favorites Tools Help 🔹 🔹	Links »
😭 🚸 🌈 Customer Log On 🛛 🔹 Home 🔹 🔊 Feeds (J) 👻 🌧 Print 🔹 🔂 Page 🔹	»
	-
Customer Log On	
Password:	
Log On	
	_
Internet Protected Mode: Off	 3% ▼ //

Notice that in the web page, there is a missing image marked with a rectangle with a red X in it. This is a place holder for your company logo image. To set your logo image, choose the Actions > Default Appearance menu item from the main Xebra E-Commerce window.

Initial Setup



This will bring up the E-Commerce Default Setting window.

🌾 E-commerce Default Setting	
Catalog Text	Color Specifications
Warehouse Release: Warehouse Release	Color Selection Description
Stock Sales: Catalog Order	Main Navigation Links
Stationeur Imprint Items	Main Navigation Links On Mouse Over
	Header Information
Office Supplies: Office Supplies	Search And Query Text
Order Approval: Order Approval	Menu Header
Reports	Menu Header On Mouse Over
	Menu Subsection Header
Urder History: Urder History	Menu Entry
CSI Reports	Menu Entry On Mouse Over
Section Name: Warehouse Reports	Item Header
Status And Reorder: Status And Reorder Report	Item Links
Usage: Usage Report	Item Links Visited
Usage And Inventory: Usage And Inventory Report	Text Cells Text Cells Padding
Activity Report	BODY
- Constal Pasarta	Padding
	. Your Company Logo Customer's Logo
Section Name: Lueneral Reports	
Order Status: Order Status Report	OK Cancel Delete
Order History: Order History Report	Save Default Scheme Load Default Scheme

In the lower right hand corner of the E-Commerce Default Setting window is a button with the caption "Your Company Logo". Click this button to bring up the Internet Logo File window.

🏀 Internet Log	o File				
<u> </u>	<u>C</u> ancel	<u>A</u> dd	Delete	<u>S</u> ave As	Reduce Size
,					

You will need to produce an image file for your logo and you might want to include other information on the image such as your address and phone numbers. You should save your logo image file as a JPG file or PNG file. The dimensions of the file should be appropriate for the web pages that it will display on. Keep in mind that you can change your logo image file at any time, so your logo image doesn't have to be perfect before you can try it out.



Once you have an image file, click the Add button on the Internet Logo File window to open your logo image file. The image will be loaded into the Internet Logo File window.



Click the OK button to save the image and close the Internet Logo File window. Also, click the OK button to close the E-Commerce Default Setting window.

After you have made changes to E-Commerce images or other settings, you will have to click the Refresh Web Site button on the main Xebra E-Commerce window to make the changes active on your web site.

Once you complete the Refresh Web Site action you can reload your web page with your Xebra E-Commerce IP address and you should see the simple login page with your logo image on it.

Curtamor Log On - Windows Internet Suplayor		
http://172.21.26.108/	T 😽 🗙 Live Search	
File Edit View Eavorites Tools Help		tinks »
😭 🍄 🍘 Customer Log On	🔰 Home 🔹 🔊 Feeds (J) 🔹 🖶 Print 🔹 🔂 Page	• 🞯 Tools • »
Xebra 1103 Rocky Drive • West Lawn PA	Demo Graphics A 19609 • Phone: 610-898-1551 • Fax: 610-898-1564	
	Customer Log On User ID: Password:	
	Log On	▼ ▶

13

Initial Setup



3 Learning By Example

This section describes step by step how to configure a customer's web portal. Because E-Commerce requires a web server and a Xebra database to be working closely together, the Xebra Tutorial does not cover E-Commerce. The Learning By Example section provides a workaround so that you can carry out tutorial-like steps with your live system in order to get familiar with Xebra E-Commerce basics. There are several ways that you can approach this Learning By Example section:

1. Follow along and enter the data into your live system exactly as described. This is probably the best way to avoid frustration when getting started with Xebra E-Commerce. For purposes of demonstration, we will pretend that Xetex Business Systems, Inc. is your new customer that you want to setup. Wherever artwork files or other images are needed to complete steps, there will be a link for you to download the artwork file from <u>www.xebra.com</u>. At the end of the Learning By Example section are instructions for removing the test data that you entered into your live system so that this data doesn't clutter up your live system.

2. A more ambitious way to approach this Learning By Example section would be to pick one of your real customers and try to set them up according to the steps in this section. This approach could lead to frustration because many of the things done in this section likely won't apply to your real customer and you will want to do things differently for your real customer than the way it is described in this Learning By Example section. If you choose to go this route, treat this customer setup as a test rather than shooting for perfection. Keep in mind that you can modify the customer setup at any time and you don't have to have it exactly the way it should be until its time to give your customer their login information.

3. If you are in a real hurry, you could just read through this section and not follow the steps at all. This section contains numerous screen shots so you can gain a lot by simply reading and you don't necessarily have to complete the steps in your live system; however, there is a definite benefit to learning by doing.



3.1 Customer Setup

Each customer site that you setup for E-Commerce must have a Master Customer record in your Xebra database. The first step is to go to Xebra Order Entry > View > Customer > Shipping, make sure you have a master customer record entered, and make sure you know the code.

Go to Xebra Order Entry > View > Customer > Shipping.

							 •	
🌽 X	ebra Order I	Entry						l
File	View Comm	nands A	ctions	Inquiry	Go	Help		
1	Financial I	Review						
	Payment Sales Tax	History					 	
	Shipping I	informatio	m	hr	nents			
	Job Docu	ments tropic Do	sumont			-		
	EPDA EIEC	cronic Do	cumenc					
Bill	Control Fi	les		<u>→ </u>				
	Customer				Shippi	ing		
	Vendor			•	Billing	15		
	Item			F			 -	
	Inventory	/ Inquiry		L				
ե	Warehou:	se						

Choose Commands > New from the menu on the Customer Shipping window.



On the New Code window enter XETEX for the new customer code.

🌽 New Code	e							
Customer Code: XETEX								
<u>OK</u> <u>C</u> ancel								
Code 😽	Name	City 🔺						
SM0002	Hart Motors	Lanca						
SM0003	Martin Motors	Allent						
SMILES	Smiles Dentistry	Read						
TROUT	Troutman Transmissions	Read						
TUNE	Tune Town Music Store	Read						
WHS01	Demo Graphics Warehouse #1	Read						
WICKMAN	Wickman Landscaping	Read						
WINDSOR	Windsor Glass Company	Read						
XYZ	XYZ Corporation	Burlin						
4	WZ Corporation BA	Allow						



Click the OK button on the New Code window to create the new Customer Shipping record and enter the following information:

Name: Xetex Business Systems, Inc. Address 1: 1103 Rocky Drive Address 2: Suite 103 City: West Lawn State: PA Zip: 19609 Phone: 610-898-1551 Fax: 610-898-1554 Email: frh@xebra.com Contact: Fred Hickey Salutation: Fred Sales Rep: Pick any sales rep that you have in your system. Master Customer: XETEX

Notice that both the Customer Code and the Master Customer Code are XETEX on this record. Xetex only has one location, so this is the only customer shipping record for the XETEX master customer. If Xetex had multiple ship to locations, there would be multiple customer shipping records but they would all have the same Master Customer Code - XETEX. E-Commerce is centered on the Master Customer code when you setup a customer's web portal.

Tax Location: PA (If you don't have PA entered as a tax location in your live system, it won't hurt anything to use another Tax Location that you already have for this example. You do have to enter something for the Tax Location but it doesn't have to be accurate for this example.)
 Billing Reference: XETEX

When you get the message, "The code 'XETEX' does not exist. Create New?", answer Yes to create the new Customer Billing record. You can accept the default information for the new Customer Billing record and just close the Customer Billing window.

Your completed master customer record for Xetex Business Systems, Inc. should look like the following:

🖗 Customer Shipping	
File View Commands Options Help	
Customer Code: XETEX Link to Operator:	
Name: Xetex Business Systems, Inc.	
Address 1: 1103 Rocky Drive	
Address 2: Suite 103	
City: West Lawn State: PA Zip: 19609	
Phone: 610-898-1551 Fax: 610-898-1564	
Email: frh@xebra.com	
Contact: Fred Hickey Salutation: Fred	
Sales Rep: QC 🛛 🙀 Quota Crusher	
Master Customer: XETEX M Cost Center:	Inactive
Tax Location: PA 🎽 Pennsylvania Notes:	- Top op Notes
Customer Category:	
Billing Reference: 🛛 🗮 🕅 Xetex Business Systems, Inc.	
DUNS: Office Supply Pricing	

Learning By Example

Once you have the Master Customer record setup, your are ready to go to Xebra E-Commerce to get the web portal setup for this customer. Choose E-Commerce from the Go menu to load the main Xebra E-Commerce window. Then choose Actions > Customer setup.



This will open the Customer Setup window.

🖉 Customer Setup		
Master Customer:		
,	 	

Master

User

Master

User

Mixed Item User Catalog	
Web Users Office Supplies Default Search	PunchOut Properties DUNS: Base64 Order Message Shared Secret:
Office Supplies Customer Pricing Customer Specific HTML:	

Master

User

Master

User

In the Master Customer prompt, enter the Master Customer code for the site that you want to configure. In this example, the code is XETEX.

🏀 Customer Setup			
Master Customer: XETEX	📕 🛛 Xetex Busir	ness Systems, Inc.	
Create Client Internet Files	Reports	Shipping Methods	Credit Carc
- Catalogs			

Once you enter the Master Customer code and press Tab or Enter on your keyboard, the Create Client Internet Files button will be enabled. You need to click the Create Client Internet Files to initialize a web portal for a new customer site. After you click the Create Client Internet Files button, the caption of this button changes to Web Site Appearance and all of the other elements on this window that were previously disabled are now enabled.

Customer Setup						
faster Customer: XETEX	📕 🛛 Xetex Busir	ness Systems, Inc.				
Web Site Appearance	Reports	Shipping Methods	Credit Card Information			
Catalogs Warehouse Release Master User Mixed Item User Catal	Stock Sales Master User	Stationery Master User	Report Master User			
Web Users PunchOut Properties Office Supplies Default Search DUNS: Office Supplies Customer Pricing Shared Secret:						

Learning By Example

At this point, the XETEX master customer is setup with a bare minimum default web portal, but no one would ever know because nobody can log in. Each customer site that you setup needs to have at least one Web User setup so that they can log in and make use of the site. Click the Web Users button near the lower left corner of the Customer Setup window. This will open the Web Users window.

🗧 Web Users	
ile Commands Help	
<u> </u>	
ID:	Only show users for this master customer:
Master Customer: XETEX	Xetex Business Systems, Inc.
User Name:	Reports
Password:	Cost Centers Usage By Location
Real Name:	🔲 Usage And Inventory By Location
Email:	CSI Activity
Approval Operator	Approval Required
Approval User:	Bestrict Location
Order History	
Shipping Location:	<u>B</u>
Warehouse::	A
Start Screen:	Number Of Items Per Page:
Web User Specific HTML:	A
Catalog List	
ID Description	Add Catalog
	Office Supplies Catalog
	Web Site Appearance
Report Catalog:	<u> </u>
L Allerin Carally Caralle	Impose Order Quantities Don't Go To Cart After Adding
Allow Credit Cards	
Allow Alternate Address	Show history for all users PunchOut User

To add a web user, choose Commands > New from from the menu.

Xebra E-Commerce

20

🌽 W	eb Users		
File	Commands	Help	
ا	New	Ctrl+E	
	Clone	Ctrl+L	
1.	Find	Ctrl+F	Unly show users for this master customer:
M	Next	Ctrl+N	🔥 Xetex Business Systems, Inc.
Us	Previous	Ctrl+P	Reports
	Delete		- <u>S</u> tatus And Reorder
F F	Delete		Cost Centers 🛛 🗖 Usage By Location

The Master Customer for the new Web User defaults to the Master Customer that was selected on the

Customer Setup window when you opened the Web Users window. The password defaults to a series of random characters. For now, let's set the User Name to fhickey, the password to something easier to remember like fred, and the Real Name to Fred Hickey. This is the absolute minimum information required for a web user to log in to the site.

Learning By Example

🏀 Web Users	
File Commands Help	
ID: 1	Only show users for this master
Master Customer: XETEX	🙀 🛛 Xetex Business Systems, Inc.
User Name: [fhickey	Reports
Password: fred	Cost Centers
Real Name: Fred Hickey	
Email:	

Although other fields are highlighted as important on the Web Users window, with just the User Name, Password, and Real Name filled out, you can see what the new XETEX web site looks like so far. Close the Web Users window, close the Customer Setup window, and click the Refresh Web Site button on the main Xebra E-Commerce window. After the refresh completes, in your Web browser reload the page with your Xebra E-Commerce IP address. Enter fhickey for the User ID, enter fred for the password, and click the Log On button to see what the site looks like so far.



The web page that displays won't have much on it yet. There are no catalogs setup yet for this web user to order from. The only thing you can see so far that is configured is your company logo, the real



name of the web user fhickey in the part of the page that says "Welcome Fred Hickey", and a very bland logo image for Xetex Business Systems, Inc. that was created automatically when you clicked the Create Client Internet Files button. The logo image for your customers that is created automatically should definitely be replaced. Hopefully, you can get artwork files from your customers.

To change the customers logo, go back to Xebra E-Commerce > Actions > Customer Setup, enter the Master Customer: XETEX, and hit the Tab or Enter key on your keyboard. Click the Web Site Appearance button to load the E-Commerce Settings For Master Customer: XETEX window.

E-commerce Settings For Master Customer: XETEX	
Catalog Text	Color Specifications
Warehouse Release: Warehouse Release	Color Selection Description
Stock Sales: Catalog Order	Main Navigation Links
Stationers Imprint Items	Main Navigation Links On Mouse Over
	Header Information
Office Supplies: Office Supplies	Additional Information
Order Approval: Order Approval	Search And Query Text
Paranta Paranta	Menu Header On Mouse Over
Reports: Thepoils	Menu Subsection Header
Order History: Order History	Menu Entry
CSI Reports	Menu Entry On Mouse Over
Section Name: Warehouse Reports	Item Header
Chan In In Chan And Decades Decad	Item Details
Status And Reorder: Status And Reorder Report	Item Links
Usage: Usage Report	Item Links Visited
Usage And Inventory Usage And Inventory Beport	Text Cells
Activity: Activity Report	Padding
General Reports	
Section Name: General Reports	Your Company Logo Customer's Logo
Order Status: Order Status Report	OK Cancel Delete
Order History: Order History Report	Save Default Scheme Load Default Scheme

This window is almost identical to the E-Commerce Default Setting window, but the E-Commerce Settings For Master Customer window is specific to a Master Customer. Settings made on the E-Commerce Settings For Master Customer window override any settings made on the Default Setting window. The Default Setting window only defaults the settings for new customers.

Click the Customer's Logo button to open the XETEX Internet Logo File window.

🎉 XETEX Internet Logo File	
<u>OK</u> <u>C</u> ancel <u>R</u> eplace	Delete Save As Reduce Size
Xetex Business System	ns, Inc.
1103 Rocky Drive	Phone: 610-898-1551
Suite 103	Fax: 610-898-1564
West Lawn, PA 19609	

The image shown in this window is the automatically generated image that was made when you clicked the Create Client Internet Files button. Click the Replace button and open another image file to

use instead.

If you are following along, you can download another image from: http://www.xebra.com/Artwork/XetexLogo.png



Once you replace the customer's logo file, you can go back to the main Xebra E-Commerce Window, click the Refresh Web Site button, and after the refresh is complete you can check the progress of your web site. If you still have the browser open to the XETEX customer Welcome page, you can just refresh the page. If you don't still have your web site open in a browser, you will have to enter your web server IP address into the browser again and on the login page enter fhickey for the user and fred for the password.

The Home page for customer XETEX should now have the new logo.

🥭 Home Page - Windows Internet Explorer				
	•	1 4 7 🗙	Live Search	₽ -
File Edit View Favorites Tools Help				🍕 🔹 Links »
😪 🎄 🏉 Home Page	🔄 🏠 Home 🕞	- 🔊 Feeds	(J) 👻 🖶 Print 💌 🛃 Pa	age 🛛 🎯 Tools 🗸 🎽
	ûHome ?	Help	₩ _{Shopping} Cart	≜ Log Off
BUSINESS SYSTEMIS, INC.			You have 0 item(s)	in your cart.
			Welcome	Fred Hickey
Xet	ora D)em	o Graj	ohics
1103 Rocky Drive • West L	awn PA 19609 •	• Phone: 6	10-898-1551 • Fax: 6	10-898-1564
Done	Inter	rnet Protec	ted Mode: Off	• 100% • //



Xebra E-Commerce

24

In this section, we will add an item to the web site that is stored in a warehouse managed by Xebra Customer Specific Inventory. First, the item must be entered into Xebra Order Entry > View > Item.

🌽 X	🎉 Xebra Order Entry							
File	View	Commands	Actions	Inqu	iry Go	Help		
	Fin Pay Sal Shi Jot EP!	ancial Review yment History es Tax pping Informa documents 5A Electronic I	ition Document:	5	hments	_	Rep:	
Bill	Cor Cu: Ver	ntrol Files stomer ndor		+ + +				
Cu	Ite	m ventory Inquir	v					

For this example, we'll use a #9 Window Envelope with the Xetex logo and return address.

<i></i> It	em:		
File	Commands	Help	
1	New	Ctrl+E	44
	Clone Ite	hî?	
	Find	Ctrl+F	
	Change k	(ey	

On the New Code window, enter XETEX-ENV-9W for the new Item code and click the OK button to create the new Item record.

🏀 New Code				
Item:				
OK Cano	<u> </u>			
Code VS	Description			
IM16SP	Mug 16 oz			
IMPBNT	Imprint Charge			
L C D Q A D	Logo Golf Pollo			

Enter the following information on the new record in the Item window.

Description 1: White #9 Window Envelope Description 2: Imprinted Logo & Address

Customer: XETEX

From the Item window menu, choose Commands > New



Packed: 500 EA Per BX

Sell Unit of Measure: BX Buy Unit of Measure: BX

Since this product will be stored in a warehouse and managed by Customer Specific Inventory, click the Customer Specific Inventory Item check box and enter BX for the CS inventory unit of measure. By using BX for the CS unit of measure, you are saying that this item will always be released in BX units without exception.



Click the image button to add a picture of a printed envelope.

You can download a picture of the printed envelope from: http://www.xebra.com/Artwork/XETEX-ENV-9W.png

After you Add the image, you should have a fairly high resolution picture of the envelope.



By adding the image to the item record before creating the E-Commerce catalog item, you are saving a step when it comes to creating the E-Commerce catalog.

Your completed item record should look like this.

Xebra E-Commerce

26

/ Item	
File Commands Help	
Item: XETEX-ENV-9W	
Description: White #9 Window Envelope 👘 Long description and instructions	
Imprinted Logo & Address 🔽 Ordering instructions	
Product Category:	
Size Code: Group:	
Customer: 🗵 🕅 Xetex Business Systems, Inc. 🔽 Inactive	
Customer's Item Number: Vendor's Item Number:	
Packed: 500 EA Per: BX Suggested Vendor 1:	
Sell Unit of Measure: BX Suggested Vendor 2:	
Buy Unit of Measure: BX Suggested Vendor 3:	
🗖 Inventory Item 🔽 Customer Specific Inventory Item 🔲 Specifications 🔽 Image	
Tax Production Definition File Attachments	
☐ Kit	

Once you have the item record, you can move on to configuring the item for storage in a warehouse managed by Customer Specific Inventory. Close the Item window and use the Go menu to go to Customer Specific Inventory.

🏀 Xebra Order Entry					
File View Commands Actions Inquiry	Go Help				
Image: Second state Image: Second state Job: Image: Second state Image: Alternate Address Image: File Attachment	Order Entry Accounting Setup Reports				
Status:	Utilities				
Customer:	Customer Specific Inventory				
Billing Customer:	Prospecting 45				
Contact:	General Inventory Reports				
Customer PO #:	Production				
Cost Center					

To create a control record for them item in a warehouse, choose Commands > New from the menu on the Xebra Customer Specific Inventory window.

🌾 Xebra Customer Specific Inventory							
File View	Commands	Actions Go	Help				
	🛿 New	Ctrl+E					
lter	= Find ¹⁰ Change k	Ctrl+F (ey	1				
Location	Next Previous	Ctrl+N Ctrl+P					
Carton Label		abel					
	Delete						

On the New Control Record window, enter XETEX-ENV-9W for the item code. The warehouse code used in this example is WHS01 but if you are following along you could substitute another warehouse code if you don't have one with the code WHS01.

Learning By Example

🖗 New Control Record
Item: XETEX-ENV-9W Mite #9 Window Envelope
Imprinted Logo & Address
Location: WHS01 🕅 Demo Graphics Warehouse #1

After you click OK to save the new control record, be sure to fill in XETEX as the Master Customer code on the Xebra Customer Specific Inventory window. Also, click the Bill as shipped check box. When you're done, your new control record should look something like this:

🌾 Xebra Customer Specific Inventory	
File View Commands Actions Go Help	
Item: XETEX-ENV-9W White #9 Window Envelope	
Imprinted Logo & Address	
Location: WHS01 Demo Graphics Warehouse #1	
Master Customer: 🛛 🗮 🕅 🕺 Xetex Business Systems, Inc.	
Sort Code:	
Customer Item Number:	
Unit of Measure: BX	
Estimated Monthly Usage: 0 🔽 Bill as shipped	
Lead Time (Months): 0	
Minimum Stock Quantity: 0 Stock item	
Master customer	

In order to show an available quantity on the web site, you will have to receive some of these



envelopes into the warehouse. From the Actions menu, choose Receive.

🏀 Xebra Customer Specific Inventory					
File View Commands	Actions Go Help				
🇎 🗙 🌬 🗲	Receive Transfer				
Item: XETEX-ENV	Adjust	√indow En•			
Location: WHS01	Post Physical Inventory Release Edit/Track	ogo & Addr iuse #1			
Master Cu	Process Backorders Build Kits	Business S			
Sor Customer Item N	Status And Reorder Report Reports				

Answer No to the question, "Would you like to take information from a previously created job?" and select the item XETEX-ENV-9W at the warehouse location in the Pick A Destination Control Record dialog.

💯 Pick A Destination Control Record				<u>_ </u>		
Item #: XETEX-ENV-9W	🐴 White	#9 Window	Envelope			
Customer Item #:	Imprinted Lo	ogo & Addre:	\$\$			
Location:						
	<u>/</u> arehouse Lo	ocation				
<u>S</u> earch <u>R</u> eset <u>C</u> an	cel					
Search Results						
Item Description	Location	Master	Item #	Warehouse		
XETEX-ENV-9W White #9 Window Envelope	WHS01	XETEX		Yes		
1						

On the Receive dialog you only have to enter a Quantity of 10 for this example. You can leave the rest of this dialog blank.

		Learning By Example	
Receive			
Item: XETEX-ENV-9W	Location: WHS01		
Activity Date: 09/19/09	Lot ID:		
Quantity: 10	BX		
Unit Cost: 0.00			
Unit Price: 0.00			
Value: 0.00			
Quantity Per Carton: 0	Cartons: 0		
Short Car	rton Quantity: 0		
Starting Number:	Ending Number:		
🗖 Receive to mu	ultiple racks		
Rack Location:	Control Number:		
	Cancel		

Click the OK button to save the receipt record and answer No to the question, "Receive another item?".

Notice that up to this point, we haven't done anything in E-Commerce to add this item to a catalog so that the web user can place an order for it online. Whenever you setup an E-Commerce catalog item, its good to make sure that the base item record exists and the information on it is as complete and accurate as it can be before you add the item to an E-Commerce catalog. In the case of Warehouse item catalogs in E-Commerce, you need to make sure that the CSI control records are in good shape too before you add the items to E-Commerce Warehouse catalogs.

If the background item information in your system is good, its easy to add the items to E-Commerce catalogs. Use the Go menu to switch to the Xebra E-Commerce window and choose Actions > Customer Setup from the menu.

Enter XETEX for the Master Customer code in the Customer Setup window and hit the Tab or Enter key on your keyboard to load the setup information for XETEX. Then, click the Master button in the Warehouse Release section of the Catalogs section.

🏀 Customer Setup		
Master Customer: XETEX	📕 🛛 Xetex Busi	ness Systems, Inc
Web Site Appearance	Reports	Shipping Me
Catalogs Warehouse Release	Stock Sales	Stationery
Master	Master	Maste
User	User	User
	1	



On the Warehouse Release Master Catalog window, Click the New Item button.

8	🌾 Warehouse Release Master Catalog						
	Master Custome	: XETEX	Xetex Business Systems, Inc.				
	Ne	w <u>I</u> tem					
	Item #	Customer Item #	Description				

On the New Warehouse Release Master Catalog Item window, choose the XETEX-ENV-9W item.

🎘 New Warehouse Release Master Catalog Item 📃 🗖 본						
Item #: XETEX-ENV-9W Customer Item #:						
Description:	Description: Category:					
Clear Selected Items Add Selected Items To Master Catalog						
Item #	Customer Item #	Description		Category		
XETEX-ENV-9W		White #9 Window Envel	lope			
2						

NOTE: If you had multiple CSI items to add to this catalog, you could select multiple items on the New Warehouse Release Master Catalog Item window and add them all at once.

Now that the item is in the Master Catalog, you should see it in the list on the Warehouse Release Master Catalog window.

4	🎉 Warehouse Release Master Catalog 📃 🗖 🗙					
	Master Custome	r: XETEX	Xetex Business Systems, Inc.			
	Ne	w <u>I</u> tem				
	Item #	Customer Item #	Description	Category	Notes	
	XETEX-ENV-9W	XETEX-ENV-9W	White #9 Window Envelope		No	
		V.				

Select the item in the list to bring up the Warehouse Release Catalog Item window.

🏀 Warehouse I	Release Catalog Ite	m		
Item #: 🗵	EX-ENV-9W	White #9 Window Envelope		
	⊻iew Item	Imprinted Logo & Address		
Customer It	em #: XETEX-ENV-9w	/		
Product Cate	egory:			
Small Image	Large Image			
иом ВХ	UOM Description:			
	Packing Description:	500 EA Per BX		
	Unit Price	0.00 🔲 Use Item Pricing Structure		
м	aximum Order Quantity:	: 0		
File Attachments	s			
🔲 🗖 Allow file atta	achments 🔽	Require file attachment		
Web user file attachment instructions:				
Notes:				
			-	
	<u>0</u> K	Delete Cancel		

Learning By Example

The description, unit of measure, and packing description defaults from the information in the base item record. You could potentially change this information to be displayed different on the web site. One thing that you should change is the Small Image. There are two images for each E-Commerce item. The Small Image should be thumbnail sized so that it can display in a list on a web page. The Large Image can be much bigger to show more detail of the product if the web user is interested. The image that you attached to the item record will be the default for both the small and large image on this E-Commerce master catalog item. The size of the image for the Large Image should be OK, but you will want to shrink the Small Image.

Click the Small Image button on the Warehouse Release Catalog Item window. You will see that the resulting image in the Small Image window will be too big for a thumbnail.

Small Imag	Cancel	Replace	Delete	Save As	uce Size
-	Contra Andrews	No. of Concession, Name	ALL	Stand and some to do	Statute of
				second second second second second second	
				ETEX	
		5	BUSINES	S SYSTEMS, II	NC.
		X	BUSINES 1103 Rock West L	S SYSTEMS, II by Drive • Suite * awn, PA 19609	NC. 103
		X	BUSINES 1103 Rock West L	S SYSTEMS, II ty Drive • Suite awn, PA 19609	NC. 103
		X	BUSINES 1103 Rock West L	S SYSTEMS, II ty Drive • Suite • awn, PA 19609	NC. 103
		X	BUSINES 1103 Rock West L	S SYSTEMS, II ty Drive • Suite awn, PA 19609	NC. 103

Click the Reduce Size button to bring up the Resize Image window.

🖗 Resize Image 📃 🔍 📉					
Original: Width 1311	pixels, Height 612 pixels, Size:	13.656250'' x 6.375000''			
 Small Image Large Image Logo Image 	Pixel Width: 100 Pixel Height: 47	Width In Inches: 1.041667 Height In Inches: 0.489583			
🔽 Maintain Aspect Ratio	OK	Cancel			

For this example, change the Pixel Height to 100 and hit Tab or Enter on your keyboard. Since the Maintain Aspect Ratio check box is checked, you will see that the Pixel Width adjusts in proportion to the Height, so when the Height is set to 100, the Width will change to 213.

After you click the OK button on the resize Image window, you will see the new shrunken image.



Click OK on the Small Image window to save the reduced picture.

One other thing that you should set is the price per BX of this bill as shipped item. Set the Unit Price to 40.00, then click the OK button to save the changes to this Warehouse Master Catalog Item.

Close the Warehouse Release Master Catalog window to return to the Customer Setup window.

Below the Master button in the Warehouse Release section, you will see a button labeled User.

🖗 Customer Setup				
Master Customer: XETEX	📕 🛛 Xetex Busi	ness Systems, In		
Web Site Appearance	Reports	Shipping M		
Catalogs				
Warehouse Release	Stock Sales	Stationery—		
Master	Master	Mast		
User	User	Use		
Mived Item User Cal	talon			

Click the User button in the Warehouse Release section to bring up the Warehouse Release User Catalog window.

🏀 Warehouse Release User Catalog	
File Commands Help	
🗎 🗶 🙀 🖊 🙀	
ID:	Description:
User Catalog	New Section Description
	Section Description:
	To remove a section beading or item from the user ca

The Master catalog is a list of items that are configured for a customer that can be used in a User catalog. Web users are assigned to particular User catalogs to define the products that the web user is allowed to order. User catalogs are often a subset of a Master catalog, but it is possible to assign all items in a Master catalog to a User catalog. If your customer is a large company with multiple divisions that will be ordering from you, you might set up a different user catalog for each type of person that will be ordering from that company. In cases like this, you might assign a User catalog to a web user that only contains items from the master catalog that are relevant to the web user's role in the company. Another approach would be to create multiple user catalogs with each catalog containing particular categories of items. Then, for each web user you would assign all the user catalogs that contain items of the type that the web user would want to order.

In this example, we just want to create a single User catalog that contains the one item that we have configured so far in the master catalog.

🏀 Warehouse Release User Catalog				
File	Commands Help			
"旨」	New	Ctrl+E		
	Find	Ctrl+F		
Usi	Next Previous	Ctrl+N Ctrl+P	New <u>S</u> ectio	
	Delete		Section De:	
	Sort Items In Sections By Item Descriptions Sort Sections By Section Descriptions		o remove a ighlight the	
			keu on uour l	

From the Warehouse Release User Catalog menu, choose Commands > New

For the Description on the new user catalog, enter: Xetex Warehouse Items

Click the New Section Description button and for the Section Description enter Envelopes and hit the

Learning By Example

35

tab key on your keyboard.

So far, the Warehouse Release User Catalog should look like this:

🏀 Warehouse Release User Catalog	
File Commands Help	
ID: 1 Desc	ription: Xetex Warehouse Items
User Catalog Envelopes	New Section Description
	Section Description:
	To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard.
	New Items
	//

Click the New Items button to display the Warehouse Release Master Catalog Items list.

🎉 Warehouse Release Master Catalog Items 📃 🗖 🗙				
Lear Selected Items		Add Selected Items To User	Add Selected Items To User Catalog	
Item #	Customer Item #	Description	Category	Notes
XETEX-ENV-9W	XETEX-ENV-9W	White #9 Window Envelope		No



Double click the XETEX-ENV-9W item to add it to the user catalog. The simple user catalog should now look like this:

🏀 Warehouse Release User Catalog	
File Commands Help	
ID: 1 Description	x Xetex Warehouse Items
User Catalog Envelopes XETEX-ENV-9W - White #9 Window Envelope	New Section Description Section Description: To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard. New Items

Close the Warehouse Release User Catalog window to return to the Customer Setup window.

Now that you have a user catalog, you need to link it to a web user. On the Customer Setup window, click the Web Users button to display the Web Users window.

Click the Find icon on the toolbar.

🏀 Web Users	
File Commands Help	
1 × 🖣 🗢 🐜	
ID:	🔽 Only show users for this master custome
Master Customer: 🛛 🕹 🖌 🖉	Xetex Business Systems, Inc.
User Name:	Heports Status And Reorder
Password:	Cost Centers

On the Find Web User window, enter fhickey for the User Name.
You can enter any part of the User Name, Real Name, or Email; capitilization does not matter. For example, to find all web users whose real name contains 'Jim', enter 'jim' and click search.	Find Web Use			
You can enter any part of the User Name, Real Name, or Email; capitilization does not matter. For example, to find all web users whose real name contains 'Jim', enter 'jim' and click search.	User ID:			
You can enter any part of the User Name, Real Name, or Email; capitilization does not matter. For example, to find all web users whose real name contains 'Jim', enter 'jim' and click search.	Master Customer:	#		
matter. For example, to find all web users whose real name contains 'Jim', enter 'jim' and click search.	User Name:	fhickey	You can er Beal Name	nter any part of the User Name, or Email: capitilization does not
and click search.	Real Name:		matter. For	r example, to find all web users
Search	Email Address:		and click s	earch.
-0		Search	Cancel	
*0		Search	<u>C</u> ancel	

Click the Search button on the Find Web User window and double click the fhickey record in the Search Results list to load the record.

Xebra	E-Commerc	е

38

🎉 Web Users	
File Commands Help	
ID: 1 🔽 Only show user:	s for this master customer:
Master Customer: XETEX Xetex Business User Name: fhickey Password: fred Cost Centers Real Name: Fred Hickey Email: Approval Operator Approval Bequired Approval User: Order History Shipping Location: Warehouse:: Start Screen: Number Of	Systems, Inc. Reports Status And Reorder Usage By Location Usage And Inventory By Location CSI Activity Order Status Report Order History Report Restrict Location:
Catalog List	
ID Description Type	Add Catalog Office Supplies Catalog Web Site Appearance
Report Catalog: M Allow Credit Cards Impose Order Quantitie Allow Alternate Address Show history for all use Allow Access To Settings Break Pages By Section Retain Session Information Use Sect. Desc. For P	s Don't Go To Cart After Adding rs PunchOut User n New web user on-line default g. No.

Look for the Catalog list near the bottom of the Web Users window. Notice that it's currently blank. You need to add the User catalog that you created to this list.

Click the Add Catalog button to the right of the Catalog list.

Ca	atalog Lisl	t			
	D	Description		Туре	
Г					Add Catalog
					Office Supplies Catalog
					Web Site Appearance
L					
	Report	Catalog:	<u>#4</u>		
	Аllow Ст	edit Cards	Impose Ord	ler Quantities	Don't Go To Cart After Adding



Unless you remember the Catalog ID for the user catalog that you created, click the binoculars to the right of the Catalog ID prompt on the Web User Catalog window to find your user catalog.

🏀 Web User Catalog 📃 🔲 🗙
Catalog Description
Catalog ID:
O Default Menu Description
O Use Catalog Description For Menu Item
OK Cancel Delete

Select the Xetex Warehouse Items catalog from the Find Code list.

🏀 Find Code			<u> </u>		
Cat	alog ID:				
<u>K</u>	Cancel				
ID Description Customer					
1 Xetex Warehouse Items XETEX					
13					

Now that the correct Catalog ID for the user catalog is selected, click the OK button on the Web User Catalog window to add the catalog to the list. The Catalog list on the Web Users window should now look like this:

	Web L	Iser Specific HTML:		<u>#4</u>			
1	Catalog List						
	ID	Description		Туре			
	1	Xetex Warehouse Ite	ms	Warehouse		Add Catalog	
	N					Office Supplies Catalog	
			13			Web Site Appearance	
Ľ							
	Report Catalog:						
Г	Allow Cre	edit Cards	🔲 Impose Ord	ler Quantities		Don't Go To Cart After Adding	
Г	Allow Alt	ernate Address	🔲 Show histo	ry for all users		PunchOut User	

Close the Web Users window.

Close the Customer Setup window.

On the main Xebra E-Commerce window, click the Refresh Web Site button to send your changes to the web server.

After the refresh completes, reload your web site in a browser. If you need to log in again use the fhickey user and password fred. If you don't need to log in again, simply push the refresh button on your browser to view the modified web page.

You should now see a new menu item on the web page with the caption, Warehouse Release.



If you click the Warehouse Release menu item, the Envelopes sub menu appears below which represents the text you entered in the Section description of the User Catalog. Below the Envelopes sub menu, the item appears. The Item information also appears in the main part of the page, including the small image for the item.



Learning By Example

If you click on the small image of the envelope, the large image will appear in a pop-up window.



Close the large image pop-up window and return to the main page. Notice that the On Hand quantity to the right of the small image of the Envelop is showing 10. This is the amount that we Received into



inventory. Also, the price per box is showing as \$40.00. This is what we entered on the Warehouse Release Catalog Item window for this item.

In the Quantity box, enter 1.

Warehouse Release					
Envelopes		Daico	Unit	Quantity	
Item		Price	Unit	Quantity	
XITEX Without and	XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo & Address	\$40.00	вх	1	
Real Property in the local sector	Packed: 500 EA Per BX				
	On Hand: 10 Last Order:				
				Add to Cart	
				Page [1]	

Click the Add To Cart button. This will put the item into the Shopping Cart and load the Shopping Cart page.



Click the Complete Order button to load the Checkout page.

I

Image: Market Ma Market Market Mar Market Market	=h49q45ey	<u> </u>	Live Search	
Edit View Favorites Tools Help	1 .	1		🍕 🕶] Li
🔅 🌈 Checkout		🛛 🔄 Home 🔻 🔊	Feeds (J) 👻 💼 Print 👻	醇 Page 👻 🎯 Tool
	Оно	me ?Help	Shopping Cart	🛍 Log Off
BUSINESS SYSTEMS, INC.		·	You have 1 item(s)	in your cart.
/			Welcome	Fred Hickey
Warehouse Release				
Checkout				
	Total order excl	uding applicable sh	ipping charges and tax:	\$40.00
Pleas	e complete the information below	so that your orde	er can be shipped pro	mptly.
Shipping Location	TEX Xetex Business Systems, Inc	1103 Rocky Drive	- Suite 103 - West Lawn	PA 19609 💌
	Attention: Fred Hir	ckey		
	Ship Via: Best Wa	зу		
	PO Number: P0123			
	Cost Center: CC123			
	Cost Center: CC123 Special Instructions: We are so ple	out of envel ase hurry!	opes 🔺	
	Cost Center: CC123 Special Instructions: We are so ple	out of envel ase hurry!	opes	

Learning By Example

On the Checkout page enter the following Information:

PO Number: PO123 Cost Center: CC123 Special Instructions: We are out of envelopes so please hurry!

Press the Continue button to complete the order. You should see the Order Confirmation page.

Image: Second state of the second	Live Search
File Edit View Favorites Tools Help Image: Second sec	J) 👻 🖶 Print 👻 🕞 Page
🔆 🎄 🍘 Order Confirmation 🛛 👘 Home 🔹 🗟 Feeds (J) 🗸 🖶 Print	I) 🔹 🖶 Print 🔹 🔂 Page
	A Cast At
	pping Cart 🔤 Log
You have 0 item(s) i	ave 0 item(s) in your cart
BUSINESS SYSTEMS, INC.	
Welcome	Molecome Fred High
	weicome Fred Hick
	Welcome Fred Hick
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You.	You.
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter	You. ty Extension
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo & Address \$40.00 BX 1 40.00	You. ty Extension 1 40.00
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo \$40.00 BX 1 40.00 & Address 1 40.00 40.00 1 40.00	You. 1 40.00
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo & Address \$40.00 BX 1 40.00 Sub Total: 40.00 Shipping & Handling: 1 100	You. ty Extension 1 40.00
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo & Address \$40.00 BX 1 40.00 Sub Total: 40.00 \$40.00 Stipping & Handling: \$300 Stipping & Tax: 2.40	You. ty Extension 1 40.00
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity External Externa	You. ty Extension 1 40.00 3 40
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo \$40.00 BX 1 40.00 & Address Sub Total: 40.00 40.00 1 40.00 Shipping & Handling: Sales Tax: 2.40 2.40 1 42.40 The total may not include all items, shipping charges, and tax. The total may not include all items, shipping charges, and tax. 1 1	You. ty Extension 1 40.00 2 40
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo & Address \$40.00 BX 1 40.00 Sub Total: 40.00 40.00 Exter 1 40.00 Window Envelope Imprinted Logo & Address \$ub Total: 40.00 1 40.00 Sub Total: 40.00 Exter 1 40.00 Handling: Sales Tax: 2.40 2.40 1 2.40 The total may not include all items, shipping charges, and tax. The total may not include all items, shipping charges, and tax. Shipping Location: XETEX Xetex Business Systems, Inc 1103 Rocky Drive - Suite 103 - W	You. ty Extension 1 40.00 40 • Suite 103 - West Lawn P.
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter XETEX-ENV-9W - White #9 Window Envelope Imprinted Logo \$40.00 BX 1 40.00 & Address \$40.00 BX 1 40.00 Sub Total: 40.00 \$40.00 BX 1 40.00 Shipping & Handling: Sales Tax: 2.40 2.40 Total: \$42.40 542.40 Total: \$42.40 Shipping Location: XETEX Xetex Business Systems, Inc 1103 Rocky Drive - Suite 103 - W 19609 19609 Attention: Fred Hickey 540 540 540	You. ty Extension 1 40.00 1 40.00 2 40 • Suite 103 - West Lawn Pr
Order Confirmation Your request has been processed. Your confirmation number is 1. Thank You. Item Price Unit Quantity Exter Mindow Envelope Imprinted Logo \$40.00 BX 1 40.00 & Address Sub Total: 40.00 40.00 1 40.00 Sub Total: \$40.00 BX 1 40.00 Bales Tax: 2.40 2.40 1 1 Total: \$42.40 1 542.40 1 1 Shipping Location: XETEX Xetex Business Systems, Inc 1103 Rocky Drive - Suite 103 - W 1 <td>You. ty Extension 1 40.00 40 • Suite 103 - West Lawn P.</td>	You. ty Extension 1 40.00 40 • Suite 103 - West Lawn P.
Order Confirmation Term confirmation number is 1. Thank You. Item Price Unit Quantity Externation <u>XETEX-ENV-9W - White #9</u> \$40.00 BX 1 40.00 <u>KAddress</u> \$40.00 BX 1 40.00 Sub Total: 40.00 40.00 8X 1 40.00 Kaddress Sub Total: 2.40 1 10.00 1 Total: \$42.40 Total: \$42.40 1 1 Mark total may not include all items, shipping charges, and tax. 1 1060 1 1060 Attention: Fred Hickey Ship Via: Best Way 2 1 102 1 PO Number: PO123 1 40.00 1 1 1	You. ty Extension 1 40.00 2 40 • Suite 103 - West Lawn P.

In the image that shows the Order Confirmation page, Sales Tax was calculated as \$2.40. If the tax location code that you used for your demo XETEX customer was not configured the same, the Sales Tax and Total that you see may differ.

Now that you've placed the order on the web site, go back to your Xebra Client and go to the main E-Commerce window.

ctions Go Help		
/eb Site Address: 172.21.26.108		
Refresh	Web Site	
🗖 Use alterna	te refresh method	
Unprocessed Activity From Web Site		
Warehouse Releases: 0	Process Warehouse Releases	
Stock Sales: 0	Process Stock Orders	
Stationery: 0	Process Stationery Orders	
Office Supplies: 0	Process Office Supply Orders	
Find E-Commerce Transactions	Approval Order Audit	

Learning By Example

Notice that the Unprocessed Activity From Web Site is still showing zero orders for each type. (If you don't see zero orders on your Xebra E-Commerce window, you must have Real Time processing already setup.)

Unless you have Real Time processing enabled, you have to click the Refresh Web Site button to receive orders from your web server into your Xebra database. For now, just click the Refresh Web Site button to receive the order. After the refresh completes, the Warehouse Releases total order count will change to 1 and the Process Warehouse Releases button will become enabled.

Unprocessed Activity From Web Site	
Warehouse Releases: 1	Process Warehouse Releases
Stock Sales: 0	Process Stock Orders
	Process Cardina and Cardon

Click the Process Warehouse Releases button to open the Process Warehouse Release window.

	rehouse Release					
Custom Ship 1 Da	er: XETEX Xetex Bu 1103 Ro o: XETEX Suite 10 te: 09/21/09	usiness System ocky Drive 3 wn PA 19609	s, Inc.			-
Req. N	o.: P0123	Con	firmation	No.: 1		-
ATT	N: Fred Hickey					-
From Operat	or: Fred Hickey					
V	ïa: Best Way					
Cost Cent	er: CC123					
Special Instructio	ns					
Sales Tax: 2.40						
Item #	Description	Quantity	Price	UOM	Warehouse	Attachments
XETEX-ENV-9V	White #9 Window Envelope	1	40.00	ВХ	WHS01	

46

Xebra E-Commerce

The Process Warehouse Release window shows all of the information that the web user submitted with the order on the web site. If you wanted to keep a printed record of this order as it came from the web site, you could press the Print button to generate the E-Commerce Warehouse Request document.



Learning By Example

On the Process Warehouse Release window, click the Process button to open the E-Commerce Warehouse Request Transfer window.

D	ate: 09/21/09	🔳 Requ	isition #: P0123			
Source Cor	trol Record	X-ENV-9W		estination Locati		-
Source	Location: WHS	:01		Show Used	and a contract	
			D	estination Rack	ID:	
	Price: 40. Quantity 1	III III	-	Bequested Quar	ititu: 1	BX
	Transfer: 1		Backorder: 0		Available: 10	
Date 09/19/09	Lot ID	QTY/CT	Available	Transfer 1	Price	Cost
03/13/03		U	10	I	0.00	0.00

Notice that the Price is set to 40.00 even though the Price in the list of available lots for the produce is 0.00. We didn't enter a price for this product when we did the CSI Receipt. We did set the price to 40.00 in the Warehouse Release Catalog Item window. The price that you set in the E-Commerce catalog is used instead of the lot specific price for E-Commerce releases. This way, the price on the E-Commerce order should always match what the web user saw on the web site when they placed the order and it won't matter which lot the of the product that the actual release is drawing from.

Click the Transfer button to complete the release and answer Yes to view the Release information. The regular Customer Specific Inventory Warehouse Release Edit window will be displayed.

Learning By Example

🖗 Warehouse Release Edit	
File View Commands Actions Help	
× ¶4[] ← →]	
Release ID: 1	Release Date: 09/21/09
Master Customer: 🛛 🗶 Xetex Bus	iness Systems, Inc.
Ship To: XETEX Marehou	use: WHS01 Demo Graphics Warehouse #1
Xetex Business Systems, Inc. 1103 Rocky Drive	Carrier: Best Way
Suite 103 West Lawn PA 19609	Date Shipped:
	Attention: Fred Hickey
Requistion Number: P0123	Billing Job:
Quantity Cartons Rack Item	Description Bill
1 0 XETEX-ENV-9W	White #9 Window Envelope YES
Comments:	
We are out of envelopes so please hurry!	Alternate Address
Sales Tax: 2.40	

From this point on, this release could be processed the same as any Customer Specific Inventory release.

Close the Warehouse Release Edit window to return to the main Xebra E-Commerce window. You should see that Warehouse Releases is now showing 0 unprocessed orders again.

If the Order Confirmation page is still displaying in your web browser, click the OK button to return to the Home page of your site. If you closed your browser, log back into the web site with user fhickey and password fred.

In the Envelopes section you should see that the On Hand quantity is now showing 9. You started out with 10 and 1 was released. Also, notice that the Last Order quantity is showing 1 BX, indicating that one box was ordered the last time this product was ordered.



It would be a good idea to remove this test release from your system right away to prevent confusion that might occur if somebody else in your company sees the release as ready for processing.

Use the Go menu to switch to Customer Specifc Inventory.

Choose Actions > Release Edit/Track from the Xebra Customer Specific Inventory menu.

Choose Commands > Find from the Warehouse Release Edit menu.

Enter XETEX in the Master Customer prompt and hit the Search button. Load any resulting releases for XETEX and void them using the red X in the toolbar.



After you void the release go back to the main Xebra E-Commerce window and click the Refresh Web Site button.

Once the refresh completes, go to your web site and refresh the page with the XETEX-ENV-9W item. You should now see that the On Hand quantity is back to 10, because the release associated with the order was voided.



Notice that the Last Order quantity still shows 1. Although the release was voided, the record of the last order remains.



3.1.2 Adding A Stock Sales Item

The Xebra E-Commerce Stock Sales catalog type has a variety of potential uses:

- 1. You can use it for items stored in General Inventory.
- 2. You can use it for items that you buy for your customers on demand.
- 3. You can use it for items that you produce in house on demand.

If you need to show your customer a quantity on hand value specific for that customer's item, you must use the Warehouse Release catalog rather than the Stock Sales catalog. If you want to accept orders where your customer will specify variable imprint data for the item, you should probably use the Stationery catalog instead of the Stock Sales Catalog, although it is possible to use the Stock Sales catalog with item options to handle simple imprint orders such as personalized name tags, pens, shirts, mugs, or other promotional products.

In this example, the item that we will use will be a postcard. Xetex sends out postcards to a list of potential trade show visitors before every trade show that they will attend. For every mailing, Xetex consistently uses the same type of 6" x 4" card. We will setup this item to be a generic "Xetex Trade Show Postcard". When the web user submits the orders, it will be up to them to send the new artwork for the current Trade Show. The web user will also be able to choose whether Xetex will do the address labeling and mailing or whether Xetex wants you to do the mailing for them. If Xetex asks you to do the addressing and mailing, you will need to be able to accept a mailing list in addition to the artwork for the postcards.

Also for this example, assume that you always want to send the order to an outside digital printing company to have the cards printed. We will create a demo vendor record for a fictional company called Test Digital Printing Co.

🌽 X	ebra Order Entry	,				
File	View Commands	Actions	Inqu	iry	Go Help	
	Financial Revie Payment Histo Sales Tax Shipping Inform Job Documents EPSA Electroni	w ry nation s c Document	:5	hme	ents	
Bill	Control Files Customer		+			
	Vendor		•	(Ordering	
L	Item			F	Remittance	
Ji	Inventory Inqu Warehouse	Jiry		H		

From the Order Entry window, select View > Vendor Ordering.

On the Vendor ordering window, choose Commands > New from the menu.

Xe	bra E-Con	nmerce		
🏀 Vendor	Ordering			
File View	Commands	Help		
	New	Ctrl+E		
	Find	Ctrl+F	-	
	Next	Ctrl+N		
	Previous	Ctrl+P		
	Delete			
	Print Labe	el		
	Print List			Stal
				Sta

On the New Code dialog, enter TESTDIGI for the Vendor Code and click the OK button to create the new vendor ordering record.

🌽 New Cod						
Vendor Code: TESTDIGI						
	<u>C</u> ancel					
Côle	Name	City 🔺				
DEMO	Xebra Demo Graphics	West Lawn				
FAST	Fast Forms	Indianapolis				
GLLB	General Loose Leaf Bindery	Waukegan				
MB	Mail Baggers	Birdsboro				
NORCA	Norco Awards Inc	Garwood				
PAPER	Paper Place	Seboomook				
QOFF	Quality Offset	Reading				
STATEF	State Farm Insurance	Concordville				
TRANG	Tranter Graphics Inc.	Syracuse				
	United Darcel Contrine					

On the new Vendor Ordering record, enter the following information:

Name: Test Digital Printing Co. Address 1: 123 Main Street City: Elverson State: PA Zip: 19520 Phone: 555-555-1234 Fax: 555-555-1235 Email: <u>orders@testdigitalprintingco.com</u>

When you get to the Remittance Reference...



Phone:	555-555-1234
Email:	orders@testdigitalprintingco.
WWW Address:	
Contact:	
Remittance Reference:	TESTDIGI 🙀
23	Notes:

...click Tab or Enter on your keyboard and yes to create a new Vendor Remittance record with the TESTDIGI code.

Accept the default information on the Vendor Remittance window and close it.

On the Vendor Ordering window, enter the following text for the Notes:

This vendor likes artwork files to be in Photoshop (.psd) format.

Also, check the Pop up notes on entry check box.

Contact:	Salutation:
tance Reference: TESTDIGI 🛛 🎽 Test Digital Printing C	o.
Notes:	_
This vendor likes artwork files to be in Photoshop (.psd) format.	
	Pop up notes on entry

With the pop-up notes on entry check box checked, you will get a reminder when you place an order to this vendor that they accept Photoshop files for artwork.

Your completed vendor record for TESTDIGI should look like the following.

View Commands Help Vendor Code: TESTDIGI Name: Test Digital Printing Co. Address 1: 123 Main Street Address 2: City: Elverson State: Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI Main Street	File View Commands Help	
Vendor Code: TESTDIGI Name: Test Digital Printing Co. Address 1: 123 Main Street Address 2:	Vendor Code: TESTDIGI Name: Test Digital Printing Co.	
Vendor Code: TESTDIGI Name: Test Digital Printing Co. Address 1: 123 Main Street Address 2: City: Elverson State: PA Zip: 19520 Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI M Test Digital Printing Co.	Vendor Code: TESTDIGI Name: Test Digital Printing Co.	
Name: Test Digital Printing Co. Address 1: 123 Main Street Address 2:	Name: Test Digital Printing Co.	
Address 1: 123 Main Street Address 2: City: Elverson State: PA Zip: 19520 Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI M Test Digital Printing Co.		
Address 2:	Address 1: 123 Main Street	
City: Elverson State: PA Zip: 19520 Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI M Test Digital Printing Co.	Address 2:	
Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI M Test Digital Printing Co.	City: Elverson State: PA Zip: 19520	
Email: orders@testdigitalprintingco.com WWW Address: Contact: Salutation: Remittance Reference: TESTDIGI MA Test Digital Printing Co.	Phone: 555-555-1234 Fax: 555-555-1235	
WWW Address: Contact: Salutation: Salutat	Email: orders@testdigitalprintingco.com	
Contact: Salutation: Salutation: Remittance Reference: TESTDIGI M Test Digital Printing Co.	WWW Address:	
Remittance Reference: TESTDIGI 🏄 Test Digital Printing Co.	Contact: Salutation:	
	Remittance Reference: TESTDIGI 🥢 Market Digital Printing Co.	
Notes:	Notes:	

Close the Vendor Ordering window.

Next, you need to create an item record for the postcard. Go to Xebra Order Entry > View > Item.

🥟 X.	ebra C	Order Entry						
File	View	Commands	Actions	Inquir	/ Go	Help		
	Fin Par Sal Shi Jot	ancial Review yment History es Tax pping Informa Documents 5A Electronic	, , ation Document	s	ments	7		Rep:
Bill	Co Cu Ver	ntrol Files stomer ndor		• •				
Cı	Ite	m ventory Inquir	~v				 1	

From the Item window menu, choose Commands > New

🌽 I	tem		
File	Commands	Help	
*	New	Ctrl+E	44
	Clone Ite	h¥	
	Find	Ctrl+F	
	Change k	(ey	

For the new item code, use XETEX-TSPC

🏀 New Code		
Item:	XETEX-TSPC	
	el	
Code 10	Description	▲
IM16SP	Mug 16 oz	
IMPRNT	Imprint Charge	
LGB943	Logo Golf Balls	
SADDLE	Collate, Saddle Stitch, and	
SAMPLE	Sample	
SCREEN	Screen Charge	
SETUP	Setup Charge	
TM14	Mug 14 oz	
TM21	Mug 21 oz	
XETEX-ENV-9W	White #9 Window Envelope	
1		

Click the OK button on the New Code dialog to close it and create the new Item record.

Enter the following information on the new item record:

Description 1: Xetex Trade Show Postcard Description 2: 6" x 4" Digital Printing

Customer: XETEX

Sell Unit of Measure: EA Buy Unit of Measure: EA

Suggested Vendor 1: TESTDIGI

So far, your Item record should look like this:

56 Xebra E-Commerce

🎉 Item	<u> </u>
File Commands Help	
Item: XETEX-TSPC	
Description: Xetex Trade Show Postcard 🔽 Long description and instructions	
6" x 4" Digital Printing 🔽 Ordering instructions	
Product Category:	
Size Code: Ma Group: 🔽	
Customer: 🗵 ETEX 🔥 Xetex Business Systems, Inc. 🗌 Inactive	
Customer's Item Number: Vendor's Item Number:	
Packed: 0 Per: Suggested Vendor 1: TESTDIGI M Test Digital Printing Co.	
Sell Unit of Measure: EA Suggested Vendor 2:	
Buy Unit of Measure: EA Suggested Vendor 3:	
🗖 Inventory Item 🔲 Customer Specific Inventory Item 🔲 Specifications 🔲 🕅	
🗖 Price Information 🔲 Tax 🔲 Production Definition 🔂 File Attachmen	nts
T Kit	

To show an example of what a completed postcard might look like, use an image of a past postcard mailing. Click the Image check box on the Item window to display the Image window. Then, add an image that shows the front and back of the postcard mailing.

You can download a picture of the past postcard mailing from: http://www.xebra.com/Artwork/XETEX_TSPC-sample.png

After you Add the image, you should have a fairly high resolution picture of the previously printed postcard.



Learning By Example

Click the OK button to save the Image and close the Image window.

It would be good to add a more detailed description of this item. On the Item window, click the Long description and instructions check box.

🌽 Item	
File Commands Help	
Item: XETEX-TSPC	
Description: Xetex Trade Show Postcard	Long description and instructions
6" x 4" Digital Printing	Didering instructions

This will open the Long Description And Instructions window. For the Long Description, enter the following text:

12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE

59 Yebra E-Commorco	
Jo Aebra L-Commerce	
🎉 Long Description And Instructions	
Long Description:	

Long Description:	
12PT. C-1-S GLOSS COVER WHITE	-
CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE	
	7
Vendor Instructions:	
	1
<u> </u>	7
Warehouse Instructions:	_
	1
	_
	7
<u> </u>	

The Long Description is generally meant to be a description that your customer will see. This description will carry over to the E-Commerce catalog for this item.

The Vendor Instructions are meant for the vendor to see on the purchase order. In this case, the long description also applies to the Vendor Instructions. Highlight the entire Long Description, right click on it and choose copy from the pop-up menu.

🏀 Long Descrip	tion And Instructions	
Long Description:		
12PT, C-1-S GLO PROCESS COLO	SS COVER WHITE R + UV COATING OVER BLACK - BLEE	EDS
CUSTOMER SU	Undo	PLACE
	Cut	-
	Сору	
) Manufas Instruction	Paste	
Vendor Instruction	Delete	
	Select All	-
	Right to left Reading order Show Unicode control characters Insert Unicode control character	
I Warehouse Instru	Open IME Reconversion	

Right click on the Vendor Instructions text area and choose Paste from the pop-up menu.

Learning By Example

	Undo	
	Cut	
Warehouse Instructions:	Сору	
	Paste	
	Delete	
	Select All	

The Warehouse Instructions don't apply to this item since it is not stored in a warehouse, so you can leave the Warehouse Instructions blank. Your completed Long Description And Instructions should look like this.

🌾 Long Description And Instructions	
Long Description:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE	4
	-
Vendor Instructions:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE	*
	-
Warehouse Instructions:	
	A
<u>Cancel</u>	

Click the OK button on the Long Description And Instructions window to save the Long Description and return to the Item window.

Additionally, it would be good to enter a reminder for the people who will place orders for this item from your company.

On the Item window, click the Ordering Instructions check box directly below the Long description and instructions check box.

60 Xebra E-Commerce		
tem: JXETEX-TSPC		
tion: Xetex Trade Show Postcard	Long description and instructio	
6" x 4" Digital Printing		
jory:	145°	
ode:	Group:	
mer: 🛛 🗛 🕺 🕹 🕹 🕹	ness Systems, Inc. 🔲 Inactive	

This will open the Ordering Instructions window. Enter the following text:

Place all orders for these postcards with Test Digital Printing Co. Remember to have the postcards shipped to us if they need addressing and mailing. Adjust the Vendor Instructions for the purchase order to Test Digital Printing Co. so that there is no reference to addressing and mailing since we will do that.



Click the OK button to save the Ordering Instructions and return to the Item window.

To add pricing for this item, click the Price Information check box on the Item window.
Buy Unit of Measure: EA

Inventory Item
Customer Specific Inventory Item
Price Information
Tax
Proc

Determines pricing information for the current product

You will be asked whether you want to create a multi-level pricing structure.





Since the price of this item depends on the quantity, answer Yes to bring up the Multi-level Pricing window.

Assume that you have worked with Test Digital Printing Co. before and you know what the unit costs are at various quantity breaks. You have also arrived at the prices that you want to charge Xetex.

For quantities up to and including 800, the price per card will be 0.344 and the unit cost will be 0.241. For quantities over 800 up to and including 1000, the price per card will be 0.335 and the unit cost will be 0.235.

For quantities over 1000 up to and including 1500, the price per card will be 0.315 and the unit cost will be 0.221.

For guantities over 1500 up to and including 2000, the price per card will be 0.305 and the unit cost will be 0.215.

For quantities over 2000, the price per card will be 0.301 and the unit cost will be 0.210.

💯 Multi-level Pricing _ 🗆 🗡 Pricing information 2 3 5 Levels: 1 4 1000 1500 2000 Max Quantity For Level (EA): 800 0 0 0 0 Percent Margin: 0 0.335 0.305 0.301 Price Per Unit (EA): 0.344 0.315 Cost Per Unit (EA): 0.241 0.221 0.210 0.235 0.215 OK Cancel

Enter this information into the Multi-leve Pricing window so that it looks like this:

Click the OK button to save and close the Multi-Level Pricing window.

Your completed item record should look like this:

Xebra E-Commerce

62

🌾 Item	
File Commands Help	
1 × 9 × 4	
Item: XETEX-TSPC	
Description: Xetex Trade Show Postcard	Long description and instructions
6" x 4" Digital Printing	Ordering instructions
Product Category:	
Size Code:	Group:
Customer: 🛛 🗡 Xetex Bu	isiness Systems, Inc. 🔽 Inactive
Customer's Item Number:	Vendor's Item Number:
Packed: 0 Per:	Suggested Vendor 1: TESTDIGI 🛛 🏄 Test Digital Printing Co.
Sell Unit of Measure: EA	Suggested Vendor 2:
Buy Unit of Measure: EA	Suggested Vendor 3:
🗖 Inventory Item 🔲 Customer Specific In	wentory Item 🔲 Specifications 🔽 Image
Price Information Tax	Production Definition File Attachments
☐ Kit	
Determines pricing information for the current product	

Now that you have the Item record, you are ready to create the actual E-Commerce Stock Sales catalog item.

Close the Item window and use the Go menu to go to the main Xebra E-Commerce window.

On the Xebra E-Commerce window, choose Actions > Customer Setup.

On the Customer Setup window, enter XETEX for the Master Customer code and hit Tab or Enter on your keyboard to load the setup information for this customer.

On the Customer Setup window, in the Stock Sales section of the Catalogs section, click the Master button.

🎉 Customer Setup		
Master Customer: XETEX	Xetex Busi	ness Systems, li
Web Site Appearance	Reports	Shipping N
Catalogs Warehouse Release Master User	Stock Sales Master User	- Stationery - Mas

This will open the Stock Sales Master Catalog window.

Learnin	ig By	/ Examp	le
---------	-------	---------	----

🏀 Stock Sales Master Catalog			
Master Customer: XETEX	Xetex Business Systems, Inc.		
New Item	Copy Items		
Item # Customer Item #	Description	Category Price	Notes

On the New Stock Sales Master Catalog Item window, click the New Item button and enter XETEX-TSPC for the Item code.

🏀 New Stock Sales	Master Catalog It	em:			_	
Item #: XETEX-1	SPC	Customer It	em #:			
Description:				Category:		
<u>C</u> lear Selected	Items	[<u>A</u> dd S	elected Items To Ma	ster Catalog	
Item #	Customer Item #	Description			Category	
FRT		Shipping and	d Handling	l	FRT	
GETREADY		Get Ready F	or Winter	Mailing	FP	
H82838		80# High Gl	oss Offsett	t Stock	SP	
HG80W		80# High Gl	oss Offset	- White	SP	
IM16SP		Mug 16 oz		MUG		
IMPRNT		Imprint Charge		CMP		
LGB943		Logo Golf Balls		SB		
SADDLE		Collate, Saddle Stitch, and		BND		
SAMPLE		Sample				
SCREEN	REEN Screen Charge			CMP		
SETUP		Setup Charg	je		CMP	
TM14		Mug 14 oz			MUG	
TM21	MUG21-GA	Mug 21 oz			MUG	
XETEX-ENV-9W		White #9 W	indow Env	/elope		
XETEX-TSPC		Xetex Trade	Show Pos	stoard		
						•

Click the Add Selected Items To Master Catalog button to close the the New Stock Sales Master Catalog Item window and return to the Stock Sales Master Catalog list.

NOTE: The New Stock Sales Master Catalog Item window is designed to allow adding multiple items at once to the catalog. In this case, we are only adding the one XETEX-TSPC item.



Select the XETEX-TSPC item form the Stock Sales Master Catalog list.

🏀 Stock Sales Ma	ster Catalog					
Master Customer: XETEX Xetex Business Systems, Inc.						
Ne	ew <u>I</u> tem	Copy Items				
Item #	Customer Item #	Description	Category	Price	Notes	
XETEX-TSPC	XETEX-TSPC	Xetex Trade Show Postcard		0.301 - 0.344	Yes	
	V					

This will open the Stock Sales Catalog Item window for item XETEX-TSPC.

🏀 Stock Sales Catalog Item	_ 🗆 🗙
Item #: XETEX-TSPC Xetex Trade Show Postcard	
View Item 6'' x 4'' Digital Printing	
Customer Item #: XETEX-TSPC	
Product Category:	
Small Image Large Image	
UOM: EA UOM Description:	
Packing Description:	
Unit Price: 0.00 🔽 Use Item Pricing Structure 🗌 Options	
Maximum Order Quantity: 0	
- File Attachments	
🗖 Allow file attachments 👘 Require file attachment	
Web user file attachment instructions:	
Notes:	,
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE	A
<u>QK</u> <u>D</u> elete <u>C</u> ancel	

The description and unit of measure defaults from the information in the base item record. Also, the Notes at the bottom of the window are set to the Long Description from the Item record. You could potentially change this information to be displayed differently on the web site.

One thing that you should change is the Small Image. There are two images for each E-Commerce item. The Small Image should be thumbnail sized so that it can display in a list on a web page. The Large Image can be much bigger to show more detail of the product if the web user is interested. The image that you attached to the item record will be the default for both the small and large image on this

Learning By Example

E-Commerce master catalog item. The size of the image for the Large Image should be OK, but you will want to shrink the Small Image.

Click the Small Image button on the Warehouse Release Catalog Item window. You will see that the resulting image in the Small Image window will be too big for a thumbnail.



Click the Reduce Size button to bring up the Resize Image window.

For this example, change the Pixel Width to 213 and hit Tab or Enter on your keyboard. Since the Maintain Aspect Ratio check box is checked, you will see that the Pixel Height adjusts in proportion to the Width, so when the Width is set to 213, the Height will change to 134.

🎉 Resize Image		
Original: Width 1000	pixels, Height 629 pixels, Size:	10.416667'' x 6.552083''
 Small Image Large Image Logo Image 	Pixel Width: 213 Pixel Height: 134	Width In Inches: 2.218750 Height In Inches: 1.395833
🔽 Maintain Aspect Ratio	СК	Cancel

Click the OK button to complete resizing the image. You should see the new shrunken image in the Small Image window.



Click the OK button on the Small Image window to save the new Small Image.



On the Stock Sales Catalog Item window, notice that Unit Price is 0.00 and Use Item Pricing Structure is checked.

UOM: EA UOM Description:
Packing Description:
Unit Price: 0.00
Maximum Order Quantity: 0
File Attachments
TAllow file attachments

Since you already entered a multi-level pricing structure on the main Item window, you don't have to redo it for E-Commerce. The Use Item Pricing Structure check box will use the Price Information from the item rather than the Unit Price field on the Stock Sales Catalog Item window if the check box is checked.

To give XETEX the option of mailing the post cards themselves or having you mail them, click the Options check box on the Stock Sales Catalog Item window.

UOM Description:		
Packing Description:		
Quantity: 0	Pricing Structure	

This will open the Item Options window.

🏀 Item Options	
Option Name: Add Option	Option Value: Add Value
Options	Additional Cost: 0.00 Additional Price: 0.00
Name Required	Option Values
	Value Default Cost Price
I Bight click on the list	J tentries for item features.
	ncel Relate Copy options from another item

For the Option Name prompt, enter :

Addressing & Mailing



I and so the

and click the Add Option button.

Item Options		
Option Name: Addressing & Mailing	Add Option	Option Value:
otions		Additional Cost: 0.00
vame	Required	Option Values
		Value

In the Option Value prompt enter:

No

and click the Add Value button to add the first option value.

🎉 Item Options			
Option Name:	Add Option	Option Value: No	Add Value
Options		Additional Cost: 0.00	Additional Price: 0.00
Name	Required	Option Values	
Addressing & Mailing		Value	Default Cost Price
		Value	

In the Option Value prompt enter:

Yes

If you are addressing and mailing the postcards for Xetex, you need to cover the cost of postage and the additional handling that will be involved. Assuming that postage for each card is \$0.27 and you want to add \$0.09 per card for the additional handling, the total additional unit price for addressing and mailing would be \$0.36.

In the Additional Price prompt, enter 0.36 and then click the Add Value button to add the second option value.

Add Option	Option Value: Yes		Ac	ld Value
	Additional Cost: 0.00 Additional Price: 0.	36	_	h
Required	Option Values			
I	Value	Default	Cost	Price
	No		0.00	0.00

Now that you have the option and the two values, set this option to be required so that the web user will be required to choose one of the two options. Right click on the Address & Mailing option and select Required from the pop-up menu.

💏 Item Options					_ 🗆 ×
Option Name:	Add Option	Option Value:		Ac	ld Value
		Additional Cost: 0.00 Additional Price:	0.00		
Name	Required	Option Values			
		Value	Default	Cost	Price
Rename		No		0.00	0.00
Delete		Yes		0.00	0.36

Since you want to encourage XETEX to let you do the mailing, right click on the Yes option value and choose Default Value.



Add Option	Option Value:	Add Value
Required	Additional Cost: 0.00 Additional Price: 0. Option Values	00
X	Value No	Default Cost Price
	Yes View Image	0.00 0.36
	Default Value Rename - Adjust Vost / price	
	Delete Value	

Your completed Item Options settings should look like this:

% Item Options				
Option Name:	Add Option	Option Value:		Add Value
Options		Additional Cost: 0.00	Additional Price: 0.00	
Name	Required	Option Values	,	
Addressing & Mailing		Value	Default	Cost Price
		No		0.00 0.00
		Yes	X	0.00 0.36
Rig	jht click on the list	entries for item features.		
		ncel <u>D</u> elete	Copy options from anoth	ner item

Click the OK button on the Item Options window to save the Item Options and return to the Stock Sales Catalog Item window.

The web user who orders this item online needs to be able to attach the artwork for the postcards. They also need to be able to attach a mailing list if they want you to put addresses on the printed postcards and mail them.

In the File Attachments section of the Stock Sales Catalog Item window, check the Allow file attachments check box.



Maximum Order Quantity: 0	
File Attachments	I
Allow file attachments	I
Web user file attachment instructions:	I
Notes	1

The web user must submit at least the artwork files before they can order this item. Also check the Require file attachment check box. This will force the web user to attach at least one file to the item before they will be able to complete the order.

Enter the following text in the Web user file attachment instructions box:

Please attach artwork files for both the front and back of the postcard. If you want us to do the addressing and mailing of the postcards, also attach your mailing list.

The completed Stock Sales Catalog Item window should look like this:

Item #: XETE	EX-TSPC	Xetex Trade Show Postcard
	⊻iew Item	6" x 4" Digital Printing
– Customer Ite	em #: XETEX-TSPC	
Product Cate	egory:	
Small Image	Large Image	
UOM: EA	UOM Description:	
	Packing Description:	
Unit Price: 0.00	🔽 Use Item	Pricing Structure 🔽 Options
Maximum Orde	er Quantity: 0	_
File Attachments		
Allow file atta	ichments 🔽 F	tequire file attachment
Please attach ar	achment instructions: twork files for both the fi	ont and back of the postcard. If you want us to do the
addressing and	mailing of the postcards,	also attach your mailing list.
l des:		
12PT_C-1-S_GLO	SS COVER WHITE	
PROCESS COLO	R + UV COATING OVE PLIED FILES WITH AL	R BLACK - BLEEDS LL ELEMENTS IN PLACE

Xebra E-Commerce

70

Click the OK button on the Stock Sales Catalog Item window to save the settings for this item.

Close the Stock Sales Master Catalog window to return to the Customer Setup window.

Below the Master button in the Stock Sales section, you will see a button labeled User.

- Catalogs Warehouse Release	Stock Sales	- Stationery	Repor
Master	Master	Master	
User	User	User	
Mixed Item User C	atalog		

Click the User button in the Stock Sales section to bring up the Stock Sales User Catalog window.



🏀 Stock Sales User Catalog	
File Commands Help	
ID:	Description:
User Catalog	New Section Description Section Description: To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard. New Items
	1

The Master catalog is a list of items that are configured for a customer that can be used in a User catalog. Web users are assigned to particular User catalogs to define the products that the web user is allowed to order. User catalogs are often a subset of a Master catalog, but it is possible to assign all items in a Master catalog to a User catalog. If your customer is a large company with multiple divisions that will be ordering from you, you might set up a different user catalog for each type of person that will be ordering from that company. In cases like this, you might assign a User catalog to a web user that only contains items from the master catalog that are relevant to the web user's role in the company. Another approach would be to create multiple user catalogs with each catalog containing particular categories of items. Then, for each web user, you would assign all the user catalogs that contain items of the type that the web user would want to order.

In this example, we just want to create a single User catalog that contains the one item that we have configured so far in the master catalog.

🌽 SI	tock Sales l	Jser Catalog		
File	Commands	Help		
"旨」	New	<u> </u>	Ctrl+E	
	Find	115	Ctrl+F	
Usi	Next Previous		Ctrl+N Ctrl+P	New <u>S</u> ection Description
	Delete			Section Description:
	Sort Item Sort Sect	s In Sections By Item Description ions By Section Descriptions	IS	o remove a section headin

From the Stock Sales User Catalog menu, choose Commands > New

For the Description on the new user catalog, enter: Xetex Marketing Materials

Click the New Section Description button, enter Postcards for the Section Description, and press the Tab or Enter key on your keyboard. So far, the Stock Sales User Catalog window should look like this:

Xebra E-Commerce	
🏀 Stock Sales User Catalog	
File Commands Help	
1 × 🙀 🗢 🙀	
ID: 2	Description: Xetex Marketing Materials
User Catalog Postcards	New Section Description
	Section Description:

To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete

key on your keyboard.

New <u>I</u>tems

On the Stock Sales User Catalog window, click the New Items button to display the Stock Sales Master Catalog Items list.

🖉 Stock Sales Master Catalog Items 📃 🗆 🗙					
Clear Selected Items		Add Selected Items To User C	atalog		
Item #	Customer Item #	Description	Category	Price	Notes
XETEX-TSPC	XETEX-TSPC	Xetex Trade Show Postcard		0.271 - 0.314	Yes

Double click the XETEX-TSPC item in the list to select it for the User Catalog. The User Catalog should now look like this:


🖗 Stock Sales User Catalog	
File Commands Help	
ID: 2 Desc	ription: Xetex Marketing Materials
User Catalog	New Section Description
XETEX-TSPC - Xetex Trade Show Postcard	Section Description:
	To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard.
	New Items

Close the Stock Sales User Catalog window to return to the Customer Setup window.

Now that you have a user catalog, you need to link it to a web user. On the Customer Setup window, click the Web Users button to display the Web Users window.

Click	the	Find	icon	on th	e tool	bar.
-						

🌽 Web Users	
File Commands Help	
ID:	🔽 Only show users for this master custome
Master Customer: XETEX	Xetex Business Systems, Inc.
User Name:	Heports
Password:	Cost Centers

On the Find Web User window, enter fhickey for the User Name.

🏀 Find Web User				
User ID:				
Master Customer:	#			
User Name: fhickey			You can enter any part Beal Name, or Email: c	t of the User Nam capitilization does
Real Name:			matter. For example, to	o find all web use
Email Address:			and click search.	ains Jim, enter jir
Search Results	Search .	<u>C</u> ancel		
D Master Custom	er User Name	Real Name	<u>,</u>	Email Address

Click the Search button on the Find Web User window and double click the fhickey record in the Search Results list to load the record.

Learning By Example

🌾 Web Users 📃 🗖	×
File Commands Help	
ID: 1 ID: 0 Only show users for this master customer:	
Master Customer: XETEX Max Xetex Business Systems, Inc.	
User Name: [fhickey	
Password: fred Cost Centers 🛛 🗍 Usage By Location	
Real Name: Fred Hickey	
Email: CSI Activity	
Approval Operator Approval Required Order Status Report	
Order History	
Shipping Location:	
Warehouse:	
Start Screen: Number Of Items Per Page: 5	
Web User Specific HTML:	
Catalog List	
ID Description Type	
1 Xetex Warehouse Items Warehouse Line Add Catalog	
Office Supplies Catalog	
Web Site Appearance	
Report Catalog:	
Allow Credit Cards Impose Order Quantities Don't Go To Cart After Adding	
🗖 Allow Alternate Address 👘 Show history for all users 👘 PunchOut User	
🗖 Allow Access To Settings 👘 Break Pages By Section 👘 New web user on-line default	
🗖 Retain Session Information 🛛 🔲 Use Sect. Desc. For Pg. No.	

If you followed along in the last section, Adding A Warehouse Catalog Item, you should see Xetex Warehouse Items in the Catalog List already. We need to add another catalog for the Stock Sales item that we just configured.

On the Web Users window, click the Add Catalog button. This will open the Web User Catalog window.

🗧 Web Liser Catalog	
, neb oser eatalog	
Catalog Descr Catalog ID:	ription
O Use Catalog Description For Menu Item	
C Use Catalog Description For Menu Item OK Cancel	Delete

On the Web User Catalog, click the binoculars to the right of the Catalog ID. This will open the Find Code window.

🏀 Find Code						
Catalog ID:						
<u> </u>						
ID	Description	Customer				
1	Xetex Warehouse Items	XETEX				
2	Xetex Marketing Materials	XETEX				
45						

Double click the Xetex Marketing Materials item from the Find Code list to close the Find Code window and return to the Web User Catalog window.

🏀 Web User Catalog	
Catalog ID: 2	Catalog Description Xetex Marketing Materials
	Cancel Delete

On the Web User Catalog window, notice that Default Menu Description is checked. This means that this catalog would result in a menu caption on the web site that says whatever the default description for a stock sales catalog type is set to. By default, this would be simply Catalog Order. Instead of the default description, for this example we want the menu caption on the web site to be the same as the description that we used for the user catalog - Xetex Marketing Materials.

Click the Use Catalog Description For Menu Item option.

		Learning By Example
Web User Catalog		
Catalog ID: 2	Catalog Description Xetex Marketing Materials	
 Use Catalog Description For Mer 	nu Item	
ССК	Cancel Delete	

Click the OK button on the Web User Catalog window to complete adding the new catalog to the Catalogs list for web user fhickey. The Catalog list on the Web Users window should now look like this:

Webl	Jser Specific HTML:	# 4			
Catalog Lis	t				
ID	Description	Туре			
1	Xetex Warehouse Items	Warehouse		Add Catalog	
2	Xetex Marketing Materials	Stock		Office Supplies Catalog	
				Web Site Appearance	
Report	Catalog:				

Close the Web Users window.

Close the Customer Setup window.

On the main Xebra E-Commerce window, click the Refresh Web Site button to send your changes to the web server.

After the refresh completes, reload your web site in a browser. If you need to log in again use the fhickey user and password fred. If you don't need to log in again, simply click the Home link on the web site to load or re-load the Home page.

You should see the new Xetex Marketing Materials menu item.



On the Home page, click the Xetex Marketing Materials menu item. This will open the Xetex Marketing Materials catalog page.

Xetex Marketing Materials - Windows Intern	et Explorer		
🚱 🕤 🔻 🙋 http://172.21.26.108/cgi-bin/Xebra	?Stock&s=cbdkhl0o&searchType=AND&keywords=&catalogID=2	💌 🔸 🗙 Live Search	P -
File Edit View Favorites Tools Help		🗞	✓ Links ≫
😭 🏟 🌈 Xetex Marketing Materials		🛛 🏠 Home 🔹 🔊 Feeds (J) 👒 🚔 Print 🔹 🛃 Page 🔹 🔇)Tools 🕶 🎽
	1 Home	? Help 🫒 Shopping Cart 💧 Log Off	1
BUSINESS SYSTEM	VIS, INC.	You have 0 item(s) in your cart.	
		Welcome Fred Hickey	
Warehouse Release	Search Results: Items 1 through 1 of 1 matching	ng items.	
Xetex Marketing Materials		More Search Results: Page [1]	
XETEX-TSPC - Xetex Trade Show	Search	1	
Postcard 6" × 4" Digital Printing	Match All Words		
	O Match Any Word		
	O Match Exact Phrase		
	Xetex Market	ing Materials	
	Item	Price Unit Quantity	
	XETEX-TSPC Trade Show Po 6" x 4" Digital Packed:	Xetex <u>stcard</u> <u>Printing</u> <u>Special Pricing</u> EA	
	Last Order: More Detail	Addressing & Mailing:	
	<u>_</u>		
		Page [1]	
 avascript: openWin('/cgi-bin/Xebra?Image&s=cbdkhl0o8	spath=/images/3.png',",'scrollbars=yes,res	🕞 🚱 Internet Protected Mode: Off	 100% ▼ //

🥖 Item Preview - Windows Internet Explorer <u>_ D ×</u> http://172.21.26.108/cgi-bin/Xebra?Image&s=cbdkhl0o&path=../images/3.png Ŧ PRSRT. STD. U.S. POSTAGE PAID the Produ kes to at started on the road to REATER EFFICIENCY IMPROVED PROFITS! Your complete software solution 800.356.277 www.xebra.com 4-6th 📑 💽 😜 Internet | Protected Mode: Off 🔍 100% 📼 Done

Close the large image browser window to return to the Xetex Marketing Materials catalog page.

Click the More Detail link in the item section for the postcard.

Xetex Marketing Materials

Postcards			
Item	Price	Unit	Quantity
XETEX-TSPC - Xetex Trade Show Postcard 6" x 4" Digital Printing Packed: Last Order: More Detail	<u>Special Pricing</u> Information	EA	
	Addressi	ing & Mailing	Yes 0.36 💌
		[Add to Cart
			Page [1]

The More Detail links opens a browser pop-up window that displays the additional information that you entered in the Long Description for the item.

On the Xetex Marketing Materials page, click the thumbnail image of the postcards or the item description to see the large image of the item in a separate pop-up browser window.

7

Learning By Example



Close the XETEX-TSPC Details pop-up window to return to the Xetex Marketing Materials catalog page.

Click the Special Pricing Information link in the item section for the Trade Show Postcard.

	Price	Unit	Quantity
XETEX-TSPC - Xetex Trade Show Postcard 6" x 4" Digital Printing Packed: Last Order: More Detail	Special Pricing Information	EA ng & Mailing	
			Tes 0.50 •

The Special Pricing Information link will open a browser pop-up window that displays the multi-level pricing structure that you configured on the main item record in the Xebra Client software.

SETEX-TSPC Pricing - Windows Internet	Explorer 📃	Ľ
🙋 http://172.21.26.108/cgi-bin/Xebra?DisplayPr	icing&s=cbdkhl0o&	da 💌
		*
Quantity	Price	
800 or less	\$0.344	
1000 or less, but more than 800	\$0.335	
1500 or less, but more than 1000	\$0.315	
2000 or less, but more than 1500	\$0.305	
More than 2000	\$0.301	
		-
🔽 😜 Internet Protected Mode: Off	🔍 100% 🗠	• //

Close the XETEX-TSPC Pricing pop-up window to return to the Xetex Marketing Materials catalog page.

Notice that the Addressing & Mailing option is a drop down list and it has defaulted to Yes with an additional price of 0.36 as you specified in the Item Options for this stock catalog item. If you click the drop down arrow, you can see the No option, but for this example leave the option set to Yes.

		Learning By Example	81
	Plice Ulin	Quantity	
XETEX-TSPC - Xeter Trade Show Postcar 6" x 4" Digital Print Packed: Last Order: More Detail	<u>rd</u> ing <u>Special Pricing</u> _{EA} <u>Information</u>		
	Addressing & M	ailing: Yes 0.36	
		Yes 0.36	
		I	
Set the Quantity to 837. Price Unit	Quantity		
<u>itex</u> icard <u>finting</u> <u>Special Pricing</u> EA <u>Information</u>	837		
Addressing & M	ailing: Yes 0.36 💌		
	Add to Cart		
Click the Add to Cart button	to add the item to the sho	opping cart.	

/

Xetex Marketing Materials



This will load the Shopping Cart page.



Notice that the Unit Price is showing \$0.695. This is calculated when the item is added to the cart based on the quantity ordered, the multi-level pricing record, and the additional charge option selection. According to the pricing structure, quantities over 800 but less than 1000 should have resulted in a per card price of \$0.335. If you add \$0.335 to 0.36 you get \$0.695.

Notice that the text you entered for the Web user file attachment instructions on the Stock Sales Catalog Item window is showing at the bottom of the item section in the Shopping Cart page. Below the instructions is an Add Attachment button.

Item		Price	Unit	Quantity	кета
XETEX-TSPC- Xetex Trade Show Postcard 6" x 4" Digital Printing Packed: More Detail	<u>Special</u> <u>Pricing</u> <u>Information</u>	\$0.695	EA	837	
		Addressing	g & Mailin	^{g:} Yes 0.36 💌	·
Please attach artwork files for bot	h the front and b	ack of the po	stcard. I ailing list	f you want us t	to do

NOTE: If you are following along, you should download the following files from xebra.com and save them to a known location on your computer. This way, you will have the files available so that you can test uploading them to your web site: <u>http://www.xebra.com/Artwork/ChiPostcard.psd</u> <u>http://www.xebra.com/Artwork/ChiPostcardBack.psd</u> <u>http://www.xebra.com/Artwork/ChiPostcardBack.pdf</u> <u>http://www.xebra.com/Artwork/ChiPostcardBack.pdf</u> <u>http://www.xebra.com/Artwork/ChiPostcardBack.pdf</u>

Click the Add Attachment button on the Catalog Order Section of the Shopping Cart Web Page.

Please attach artwork files for both the front and back of the postcard. If you want us to do the addressing and mailing of the postcards, also attach your mailing list.

Step 1 -	Select a fil	e to attach			
					Browse
Step 2 -	Click on "	Attach" to inclu	ide the file w	vith the e	ntry
Attach	Cancel				

Click the Browse button and select the file, ChiPostcard.psd from the browser specific file dialog. Please attach artwork files for both the front and back of the postcard. If you want us to do the addressing and mailing of the postcards, also attach your mailing list.

Step 1 - Select a file to attach

C:\Artwork\ChiPostcard.psd	Browse

Step 2 - Click on "Attach" to include the file with the entry

Attach	Cancel
5	

Then, click the Attach button to begin uploading the file from your local computer to your web site. If the upload takes more than several seconds, you will see an upload complete percentage as the file uploads. Once the upload completes, the attachment section should look like this:



Repeat the Add Attachment procedure for this item and add the four other files that should be submitted with this order:

ChiPostcardBack.psd ChiPostcard.pdf ChiPostcardBack.pdf ChiPostcardMailingList.xls

Once you finishing uploading the files to your web site, the Shopping Cart page should look like this:

e http://172.21.26.108/cgi-bin/Xeb	ra?StockAddToCart&s=cb	dkhl0o&catalogID=2&	group=1	•	1 🛃 🗙	Live Search	
View Favorites Tools Help							@
Order Confirmation		1		🟠 Home ,	• 🔊 Feed	s (J) 👒 🖶 Prin	nt 🔹 🔂 Page 🔹
	•			0			4
	-		1 Home	? Help	H Sho	opping Cart	🕮 Log Of
	-2~				You	have 1 item(s) in your cart.
BUSINESS SYSTE	MS, INC.						
/						Welcome	e Fred Hickey
Warehouse Release							
Xetex Marketing Materials	Shopping Ca	rt					
		- Enter a numbe - Click Empty Ca	r in the Qty. box rt to delete ALL if	to change th tems from ye	he numbe our Cart.	r of items you'	d like to order.
		 Click the Remo Click the Update Click the Comp 	ove box to delete te Cart button to	an item from view most re	m your Ca acent chan	irt. Iges. Ior	
		- click the comp		n to complet	e your ore		Empty Car
	Catalog Orde	r					
	Item	T d Ch		Price	Unit	Quantity	Remove
	Postcard 6" x 4"	<u>ex Trade Show</u> Digital Printing	Special Pricing	\$0.695	EA	837	
	More Detail	1	<u>Information</u>	Addrossing	& Mailing		
	_			Addressing		Yes 0.36 💌	
	Please attach art the addressing an	d mailing of the po	the front and bac stcards, also att	ck of the pos ach your ma	iling list.	you want us to	do
		ChiPostcard.psd	(6681076 Bytes)	Downlo	ad V	iew Delet	e
	Ch	iPostcardBack.psd	(1249371 Bytes)	Downlo	ad V	ïew Delet	e
		ChiPostcard.pdf	(7823977 Bytes)	Downlo	ad	iew Delet	e
	Cł	ChiPostcard.pdf iiPostcardBack.pdf	(7823977 Bytes) (1850693 Bytes)	Downlo Downlo	ad V ad V	iew Delet	e
	ChiPos	ChiPostcard.pdf niPostcardBack.pdf stcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes)	Downlo Downlo Downlo	ad V ad V	iew Delete iew Delete iew Delete	e e
	ChiPos	ChiPostcard.pdf niPostcardBack.pdf stcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme	Downlo Downlo Downlo	ad V ad V	iew Delet iew Delet	e e
	ChiPos	ChiPostcard.pdf niPostcardBack.pdf stcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme	Downlo Downlo Downlo nt	ad V ad V	iew Delete iew Delete iew Delete	e e
	ChiPos	ChiPostcard.pdf iiPostcardBack.pdf itcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme Subtotal	Downlo Downlo Downlo nt \$581	ad V ad V ad V	iew Delet	e e
	Cł ChiPos	ChiPostcard.pdf iiPostcardBack.pdf atcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme Subtotal: Update	Downlo Downlo Downlo nt \$58: e Cart	ad V ad V ad V	iew Delet	e
	ChiPos	ChiPostcard.pdf iiPostcardBack.pdf stcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme Subtotal: Update Complete	Downlo Downlo Downlo nt : \$581 e Cart e Order	ad V ad V ad V	iew Delet	e
	ChiPos	ChiPostcard.pdf iiPostcardBack.pdf stcardMailingList.xls	(7823977 Bytes) (1850693 Bytes) s (258560 Bytes) Add Attachme Subtotal Update Complet Save	Downlo Downlo Downlo nt \$581 e Cart Cart	ad V ad V ad V	iew Delet	e

Learning By Example

Notice the Download button to the right of each file attachment, if for some reason you needed to download the file back to your local computer from the web site, you could press the Download button.

The View button will download the file and attempt to open it in the appropriate program if it is available on your computer. To try this out, click the View button to the right of ChiPostcard.pdf. You should see the following PDF after the download from the web site completes.



Close the PDF.

A delete button is also available to the right of each file attachment so that you can remove an attachment if you got the wrong file by mistake. Unless you made a mistake, you don't have to Delete anything at this time.

Click the Complete Order button on the Shopping Cart page.

Learning By Example

					E	<u>mpty Cart</u>
Catalog Order Item		Price	Unit	Quant	ity	Remove
XETEX-TSPC- Xetex Trade Show Postcard 6" x 4" Digital Printing Packed: More Datail	<u>Special</u> Pricing Information	\$0.695	EA	837		
Note Detail		Addressing	& Mailin	Yes 0	.36 💌	
Please attach artwork files for both the addressing and mailing of the p	the front and bac ostcards, also atta	k of the pos ch your ma	stcard. I Niling list	f you war	nt us to d	0
ChiPostcard.psc	(6681076 Bytes)	Downlo	ad	View	Delete	
ChiPostcardBack.psd	(1249371 Bytes)	Downlo	ad	View	Delete	
ChiPostcard.pd	f (7823977 Bytes)	Downlo	ad	View	Delete	
ChiPostcardBack.pd	f (1850693 Bytes)	Downlo	ad	View	Delete	
ChiPostcardMailingList.x	ls (258560 Bytes)	Downlo	ad	View	Delete	
1	Add Attachmen	t				
	Subtotal:	\$58:	1.72			
	Update	Cart				
	Complete Save (Order]			
	Continue S	hopping				

This will load the final Checkout page. Enter the following information on the Checkout Page:

PO Number: Fred

Special Instructions: I submitted both Photoshop and PDF versions of the artwork files just in case.

	t Explorer			
C C + I + ttp://172.21.26.108/cgi-bir	n/Xebra?UpdateCart&s=cbdkhl0o		← × Live Search	
File Edit View Favorites Tools He	lp .] 🍕
😪 🍄 🄏 Order Confirmation		Home 👻	🔊 Feeds (J) 👒 🖶 Print 👻	😥 Page 🔻
		∆Home ?Help	Shopping Cart	📾 Log
			You have 1 item(s)	in your car
BUSINESS SYSTE	EMS, INC.		Tou have I trent(s)	in your car
			Walcoma	Fred Hick
			Welcome	Treatmen
Warehouse Release Xetex Marketing Materials	-			
-	- Checkout	Total order excluding applicable s	inning charges and tax: \$5	81 72
	Please complete the info	ormation below so that your o	rder can be shipped pro	mptly.
	Shipping XETEX Xetex Busine	ss Systems, Inc 1103 Rocky Dr	ve - Suite 103 - West Lawn	PA 19609
	,	Attention: Fred Hickey		
		Ship Via: Best Way		
	PO	Number: Fred		
	Cos	it Center:		
	Special Ins	tructions: I submitted both	<u>_</u>	
		Photoshop and PDF		
		files just in cas	e.	
		Continuo		
		Continue		

Click the Continue button to complete checkout and load the Order Confirmation page.

	nation - Windows Internet Explorer							_
🐑 🔻 🥭	http://172.21.26.108/cgi-bin/Xebra?Complete	eOrder&s=cbdkhl0o			• +,	Live Search		
e Edit Vie	w Favorites Tools Help							, - Lir
A 🚳 🛶		1 1			Home - 🔊	Feeds (1) - English	nt = 과 Dana =	Toole
Se on	der Commadon] 🖬	nome · 🔤	10000(0) · Baga Fill	nc · 🛃 rago ·	- COL
			Ω.	lome ?	Help 🔛	Shopping Cart	Log Of	F
				ionie 11	Telp 11	Shopping cure	Log OI	
		A				You have 0 item(s) in your cart.	
	BUSINESS SYSTEMS, IN	c.						
	-							
						Welcome	e Fred Hickey	
		0.1-		•				
		Orde	r Confirmat	ion				
	Your requi	est has been processed	 Your confirma 	ition number is	s 6. Thank Y	ou.		
	Item		Price	Unit	Quanti	ty Extensio	on	
	YETEY-TSDC - Yetey Trade Show							
	Postcard 6" x 4" Digital Printing		\$0.695	EA	8	337 581.72		
	Addressing & Mailing: Yes							
	Attached Files							
	Attached Thes.							
	ChiPostcard.psd (6681076 Bytes)							
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt	tes)						
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byte ChiPostcard.pdf (7823977 Bytes)	es)						
	ChiPostcard.pdf (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcardBack.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt	tes)						
	ChiPostcard.pdf (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcardBack.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt	es) Bytes)						
	ChiPostcard.pdd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) Bytes)						
	ChiPostcard.pdf (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) Bytes)		Sub Total:	: 581.72			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	tes) tes) Bytes)	Shippi	Sub Total: ng & Handling:	: 581.72			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) Bytes)	Shippi	Sub Total: ng & Handling: Sales Tax:	: 581.72 : : 34.90			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) es) Bytes)	Shippi	Sub Total: ng & Handling: Sales Tax: Total:	: 581.72 : : 34.90 : \$616.62			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) Bytes) e total may not include	Shippi : all items, ship	Sub Total: ng & Handling: Sales Tax: Total: Total: oing charges, a	: 581.72 : : 34.90 : \$616.62 and tax.			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	es) Bytes) e total may not include	Shippi all items, ship	Sub Total: ng & Handling: Sales Tax: Total: ping charges, a	: 581.72 : : 34.90 : \$616.62 and tax.			
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	e total may not include	Shippi e all items, ship ess Systems, Ir	Sub Total: ng & Handling: Sales Tax: Total: ping charges, a ping charges, a ping charges, a	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su	ite 103 - West Lawr	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560	e total may not include XETEX Xetex Busin Fred Hickey	Shippi e all items, ship ess Systems, Ir	Sub Total: ng & Handling: Sales Tax: Total: oing charges, i nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su	ite 103 - West Law	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via:	e total may not include XETEX Xetex Busin Fred Hickey Best Way	Shippi all items, ship ess Systems, Ir	Sub Total: ng & Handling: Sales Tax: Total: oing charges, a nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su	ite 103 - West Lawr	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via: PO Number:	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred	Shippi all items, ship ess Systems, Ir	Sub Total: ng & Handling: Sales Tax: Total: ping charges, i nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su	ite 103 - West Lawr	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Bytes) ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via: PO Number: Cost Center:	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred	Shippi e all items, ship ess Systems, Ir	Sub Total: ng & Handling: Sales Tax: Total: ping charges, a nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su	ite 103 - West Lawr	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byte ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via: PO Number: Cost Center: Special Instructions:	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred I submitted both Pho	Shippi e all items, shipi ess Systems, Ir toshop and PDF	Sub Total: ng & Handling: Sales Tax: Ding charges, a nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su he artwork fil	ite 103 - West Lawr es just in case.	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardBack.pdf (1850693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via: PO Number: Cost Center: Special Instructions:	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred I submitted both Pho	Shippi e all items, shipi ess Systems, Ir toshop and PDP	Sub Total: ng & Handling: Sales Tax: Ding charges, a nc 1103 Rock	: 581.72 : : 34.90 : \$616.62 and tax. ky Drive - Su he artwork fil	ite 103 - West Lawr es just in case.	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcard.psd (6681076 Bytes) ChiPostcard.pdf (7823977 Bytes) ChiPostcardBack.pdf (1830693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Shipping Location: Attention: Shipving PO Number: Cost Center: Special Instructions:	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred I submitted both Pho	Shippi e all items, ship ess Systems, Ir toshop and PDF	Sub Total: ng & Handling: Sales Tax: Total: oing charges, i nc 1103 Rock	: 581.72 : 34.90 : \$616.62 and tax. ky Drive - Su he artwork fil	ite 103 - West Lawr es just in case.	n PA 19609	
	ChiPostcard.psd (6681076 Bytes) ChiPostcardBack.psd (1249371 Byt ChiPostcardBack.pdf (7823977 Bytes) ChiPostcardBack.pdf (1830693 Byt ChiPostcardMailingList.xls (258560 Th Shipping Location: Attention: Ship Via: PO Number: Cost Center: Special Instructions: Print Page	e total may not include XETEX Xetex Busin Fred Hickey Best Way Fred I submitted both Pho	Shippi e all items, ship ess Systems, Ir toshop and PDF OK	Sub Total: ng & Handling: Sales Tax: Ding charges, i c 1103 Rock	: 581.72 : 34.90 : \$616.62 and tax. 	ite 103 - West Lawr es just in case.	n PA 19609	

Learning By Example

The Order Confirmation page displays all the information entered on the order, including a list of the file attachment names and sizes.

Notice that in the image that shows the Order Confirmation page, Sales Tax was calculated as \$34.90. If the tax location code that you used for your demo XETEX customer was not configured the same, the Sales Tax and Total that you see may differ.

Now that you've placed the order on the web site, go back to your Xebra Client and go to the main E-Commerce window.

🗧 Xebra E-Commerce	
ile Actions Go Help	
Web Site Address: 172.21.26.108	
Re	fresh Web Site
Use alt	ernate refresh method
Unprocessed Activity From Web Site	•
Warehouse Releases: 0	Process Warehouse Releases
Stock Sales: 0	Process Stock Orders
Stationery: 0	Process Stationery Orders

Update web site with new static data.

Notice that the Unprocessed Activity From Web Site is still showing zero orders for each type. (If you don't see zero orders on your Xebra E-Commerce window, you must have Real Time processing already setup.)

Unless you have Real Time processing enabled, you have to click the Refresh Web Site button to receive orders from your web server into your Xebra database. For now, just click the Refresh Web Site button to receive the order. After the refresh completes, the Stock Sales total order count will change to 1 and the Process Stock Orders button will become enabled.

Unprocessed Activity From Web Site-	
Warehouse Releases: 0	Process Warehouse Releases
Stock Sales: 1	Process Stock Orders
Stationery: 0	Process Stationery Orders
Office Supplies: 0	Process Office Supply Orders

Click the Process Stock Orders button to open the Process Stock Sales window.

Learnin	ig By	Examp	le
---------	-------	-------	----

9	1	

🏀 Process Stock	Sales				_ 🗆 🗙
File Help					
Customer:	XETEX Xetex Business Systems, In 1103 Bocky Drive	nc.			
Ship To:	XETEX Suite 103				
Date:	09/23/09				
Req. No.:	Fred Confir	mation No.	: 6		
ATTN:	Fred Hickey				
From Operator:	Fred Hickey				
Via:	Best Way				
Cost Center:					
Special Instructions:					
I submitted both Phe	otoshop and PDF versions of the artwork file	es just in ca	ise.		<u> </u>
Sales Tax: 34.90					
					7
Item #	Description	Quantity	UOM	Price	Attachments
XETEX-TSPC	Xetex Trade Show Postcard	837	EA	0.695	5
					45
Proc	ess <u>P</u> rint <u>S</u> kip <u>D</u> el	ete	Einished	View Cr	edit Card

The Process Stock Sales window shows the information that the web user submitted with the order on the web site. Notice that the Attachments column of the item list for the order has the number 5 in it. This means that five files are attached to this item. To view the file attachments, double click the XETEX-TSPC item in the list to open the E-Commerce Stock Sales Item Detail window.

🎉 E-Commerce Stock Sales Item Detail	
File Attachments	
File Name	Size
ChiPostcard.psd	6.4 MB
ChiPostcardBack.psd	1.2 MB
ChiPostcard.pdf	7.5 MB
ChiPostcardBack.pdf	1.8 MB
ChiPostcardMailingList.xls	252.5 KB
13	
J	
<u>0</u> K	

Double click the ChiPostcardMailingList.xls file in the list to open the mailing list file attachment in

Xebra E-Commerce

Excel.

92

1	Microsoft E	xcel - T∼Cl	hiPostcardMailingList.xls						_	. 🗆 🗙
	🗳	🖨 🖪 💙	? 👗 🛅 🛍 🝼 🗠 - 🗠 -		📘 🚜 100% 👻 💽 🗸 🛛 Arial	• 10 • H	B I ∐ ≣ ≣	■ ■ ■ •	🕭 - <u>A</u>	- ~ »
	Eile Edit	⊻iew Insert	t Format Tools Data Window H	Help Adobe PDF					-	- B ×
Í.										
	61	*	= Zin							<u> </u>
		A	B	С	D	E	F	G	Н	
1	Attention	1	Company Name	Address 1	Address 2	City	State	Zip		- -
2	Attention	Name1	Company Name1	1 Main Street	Suite 1	City	PA	19608		
3	Attention	Name2	Company Name2	2 Main Street	Suite 2	City	PA	19609		
4	Attention	Name3	Company Name3	3 Main Street	Suite 3	City	PA	19610		
5	Attention	Name4	Company Name4	4 Main Street	Suite 4	City	PA	19611		
6	Attention	Name5	Company Name5	5 Main Street	Suite 5	City	PA	19612		
7	Attention	i Name6	Company Name6	6 Main Street	Suite 6	City	PA	19613		
8	Attention	i Name7	Company Name7	7 Main Street	Suite 7	City	PA	19614		
9	Attention	i Name8	Company Name8	8 Main Street	Suite 8	City	PA	19615		
10	Attention	i Name9	Company Name9	9 Main Street	Suite 9	City	PA	19616		
11	Attention	i Name10	Company Name10	10 Main Street	Suite 10	City	PA	19617		
12	Attention	Name11	Company Name11	11 Main Street	Suite 11	City	PA	19618		
13	Attention	Name12	Company Name12	12 Main Street	Suite 12	City	PA	19619		
14	Attention	Name13	Company Name13	13 Main Street	Suite 13	City	PA	19620		
15	Attention	Name14	Company Name14	14 Main Street	Suite 14	City	PA	19621		
16	Attention	i Name15	Company Name15	15 Main Street	Suite 15	City	PA	19622		
17	Attention	Name16	Company Name16	16 Main Street	Suite 16	City	PA	19623		
18	Attention	i Name17	Company Name17	17 Main Street	Suite 17	City	PA	19624		
19	Attention	i Name18	Company Name18	18 Main Street	Suite 18	City	PA	19625		
20	Attention	i Name19	Company Name19	19 Main Street	Suite 19	City	PA	19626		
21	Attention	i Name20	Company Name20	20 Main Street	Suite 20	City	PA	19627		
22	Attention	Name21	Company Name21	21 Main Street	Suite 21	City	PA	19628		
23	Attention	Name22	Company Name22	22 Main Street	Suite 22	City	PA	19629		
24	Attention	Name23	Company Name23	23 Main Street	Suite 23	City	PA	19630		
25	Attention	Name24	Company Name24	24 Main Street	Suite 24	City	PA	19631		
26	Attention	Name25	Company Name25	25 Main Street	Suite 25	City	PA	19632		
27	Attention	Name26	Company Name26	26 Main Street	Suite 26	City	PA	19633		
28	Attention	i Name27	Company Name27	27 Main Street	Suite 27	City	PA	19634		
29	Attention	i Name28	Company Name28	28 Main Street	Suite 28	City	PA	19635		
30	Attention	i Name29	Company Name29	29 Main Street	Suite 29	City	PA	19636		
31	Attention	i Name30	Company Name30	30 Main Street	Suite 30	City	PA	19637		
32	Attention	i Name31	Company Name31	31 Main Street	Suite 31	City	PA	19638		
33	Attention	Name32	Company Name32	32 Main Street	Suite 32	City	PA	19639		
34	Attention	Name33	Company Name33	33 Main Street	Suite 33	City	PA	19640		
35	Attention	Name34	Company Name34	34 Main Street	Suite 34	City	PA	19641		
36	Attention	Name35	Company Name35	35 Main Street	Suite 35	City	PA	19642		
37	Attention	Name36	Company Name36	36 Main Street	Suite 36	City	PA	19643		-
	I D D SI	heet1 / She	et2 / Sheet3 /							
Rea	ady							NUM		

For this example, the Excel file contains dummy data rather than real addresses. Close the Excel file to return to the E-Commerce Stock Sales Item Detail window. If you right click on any of the files in the list, you will see a pop-up menu with two options: Open and Save.

🏀 E-Commerce Stock Sale:	s Item Detail	_ 🗆 🗙
File Attachments		
File Name		Size
ChiPostcard.psd		6.4 MB
ChiPostcardBack.psd	Open	1.2 MB
ChiPostcard.pdf	Save 13	7.5 MB
ChiPostcardBack.pdf		1.8 MB
ChiPostcardMailingList.xls		252.5 KB
	<u>0</u> K	

Open would open the file just as if you double clicked it. The Save option would present that standard Windows File Save dialog so that you could save the file to a place on your local computer. On E-Commerce orders, you are not permitted to delete file attachments or add to the file attachment list. The E-Commerce order is meant to be a permanent record of the order as it came into Xebra from the web user.

© 2009 Xetex Business Systems, Inc.

93

Close the E-Commerce Stock Sales Item Detail window.

On the Process Stock Sales window, click the Process button.

Item #	Description	Quantity	UOM	Price	Attachments
XETEX-TSPC	Xetex Trade Show Postcard	837	EA	0.695	5
Proc	ess Print Skip Del	ete f	Finished	View Cr	edit Card
1,100				1677 617	and the second
N					

This will open the Create Job - Stock Sales window.

<i> C</i> reate Job - St	ock Sales					
Item #	Description	Quantity	UOM	Price	Attachments	Ordering Instructions
XETEX-TSPC	Xetex Trade Show Postcard	837	EA	0.695	5	Place all orders for these postcards with Test Digital Printing Co. Remember to have the postcards shipped to us if they need addressing and mailing. Adjust the Vendor Instructions for the purchase order to Test Digital Printing Co. so that there is no reference to addressing and mailing since we will do that.
Job Type: S	Standard Job Order in Process	▼				
Vendor for al	l line items: TESTDIGI 🛛 🧥	Test Digital Printing	Co.			
	Create Job	Add To Job		<u>C</u> ancel		

Notice the Ordering Instructions reminder in the list. This comes from the Ordering Instructions that you entered on the main item record. Also notice that the Vendor for all line items has defaulted to TESTDIGI. This is because you entered Suggested Vendor 1 as TESTDIGI on the Item record.

You don't have to change anything on the Create Job - Stock Sales window. Click the Create Job button to open the Create Job Dialog.

%	Create Job	Dialog	_ 🗆 🗙
	Job Numł	ber: 100000	#
	<u>L</u> oad Job	Continue E-Com	merce

If you are using automatic job numbers, the Job Number will default to the next available job number in your system. For this example, change the job number to TESTSS instead so that it will be easier to find the job and delete it when you're done testing.

The Continue E-Commerce button would create the job and then return you to E-Commerce. For this example, click the Load Job button to create the job and switch to Order Entry to view the job.

Job Number:	ESTSS	•					
🎘 Xebra Order Entr	1						
File View Command:	Actions Inquiry	Go Help					
<u> na ka ka</u>	Þ 🔿 🌆						
Job: TESTSS					_	🔲 Special Co	ommission
Alternate Address	File Attachme	ents	Re	p: QC	Quota	a Crusher	
Status: Ord							
Customer: XE		etex Business Syster	ns, Inc.		(Quote Date:	
Billing Customer: XE	EX Marken	etex Business Syster	ns, Inc.			Order Date: 09/2	22/09
Contact: Free	HICKEY					Due Date:	
Customer PO #: Fred			1		Date	Completed:	
Lost Center:						_ Invoice	
Job Type: Standard	Job					Number	r:
Date Note			Add			Date	e:
			🔽 Sneo	ial Instr	uctions	Paid	±
			10 0000				
				LION	Status		Follow-up
Item	Description		Quantity	DOW			

Notice that the Special Instructions check box in the center of the Xebra Order Entry window is checked.



ob	Add Spec	 cial Inst	ructions	- Invoice Number: Date: Paid:	
Description	Quantity	UOM	Status		Follo
Xetex Trade Show Postcard	837	EA			

Click the Special Instructions check box to open the Special Instructions window for the job.

🎉 Special Instructions 📃 🗖	×
Special Instructions:	
I submitted both Photoshop and PDF versions of the artwork files just in case.	
Sales Tax: 34.90	
	-
<u> </u>	

The Special Instructions have the Special Instructions that the web user entered on the web site's Checkout page as well as the Sales Tax that was calculated on the web site for the order.

Close the Special Instructions window.

On the Xebra Order Entry window, double click the XETEX-TSPC item on the line item list to open the Line Item window.

Xebra	a E-Co	omme	rce
-------	--------	------	-----

96



Notice that the File Attachments check box is checked at the lower left corner of the Line Item window.

🔽 Image	
Artwork included	Alternate address
Repeat for vendor	Consecutive numbering
Specifications	Sales tax exception
File Attachments	Production definition
3	

Click the File Attachments check box to open the File Attachments window.

<u>Add</u>		
File Name	Size	
ChiPostcard.psd	6681076	1
ChiPostcardBack.psd	1249371	
ChiPostcard.pdf	7823977	
ChiPostcardBack.pdf	1850693	
ChiPostcardMailingList.xls	258560	

This is a list of the artwork files and mailing list file that the web user submitted with the order on the web site.

Learning By Example

You are going to want to send the Photoshop (.psd) files to Test Digital Printing Co. with the purchase order to have these postcards printed.

Double click ChiPostcard.psd in the File Attachments list to open the File Attachment window.

🎉 File Attachment			
File Name: ChiPostcard.psd			
Size: 6681076	Size: 6681076		
Open Save To Disk Delete			
Attach to emails of the following document types:	-		
🔲 Zip 🔲 Vendor Quote Request			
🔲 Zip 🔲 Customer Quote			
🔲 Zip 🔲 Customer Acknowledgement			
🔲 Zip 🔲 Purchase Order			
🗖 Zip 🔲 Invoice			
🔲 Zip 🔲 Packing Slip			
🗖 Zip 📕 CSI Release			
<u> </u>			

You could click Open to view the attachment, Save To Disk to save a copy of the .psd file to your local computer, or you could Delete the attachment from the line item.

All you really need to do is check the Purchase Order check box in the Attach to emails of the following document types section.

Xebra E-Commerce	
// File Attachment	
File Name: ChiPostcard.psd	
Size: 6681076	
O <u>p</u> en <u>S</u> ave To Disk <u>D</u> elete	
Attach to emails of the following document types:	
🔲 Zip 📄 Vendor Quote Request	
Zip 🗖 Customer Quote	
Zip Customer Acknowledgement	
☐ Zip IV Purchase Urder	
I ∠ip I Packing Slip	
Zip USI Helease	
<u> </u>	

Click OK to save the email option changes for the ChiPostcard.psd attachment and close the File Attachment window.

Double click the ChiPostcardBack.psd file in the File Attachments list and set the Purchase Order option for this file as well.

The two .psd files are the only ones that you need to attach to the purchase order to Test Digital Printing Co. They don't need the .png versions that the web user sent and they don't need the .xls mailing list either because you are going to do the mailing, not Test Digital Printing Co.

After you are done setting the Purchase Order email option for the two .psd files, return to the Line Item window.

Notice that the Long description and instructions check box is checked on the Line Item window.

6'' x 4'' Digital Prir
Product Cat.: GL Sales: 4000
Remarks:
Long description and instructions
Sell To: XETEX Xetex Business Systems, Inc. Buy F
Quantity Ordered: 837 EA

1

Click the Long description and instructions check box to open the Long Description And Instructions window.

.earning	Ву	Examp	le
----------	----	-------	----

E

🎉 Long Description And Instructions	_ 🗆 🗙
Long Description:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Addressing & Mailing: Yes	<u> </u>
	v
Vendor Instructions:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Addressing & Mailing: Yes	*
	7
Addressing & Mailing: Yes	<u> </u>
<u></u>	-
<u>O</u> K <u>Cancel</u>	

When you process an E-Commerce Stock Sales item with item options, the item options are appended to all description and instruction types on the Long Description And Instructions window. In this case, the Addressing & Mailing: Yes option doesn't apply to Vendor Instructions because the vendor who will be receiving the purchase order to print the post cards won't be doing the mailing. Also, the Warehouse Instructions are not needed at all for this item because the item is not coming from a warehouse.

Remove the Addressing & Mailing: Yes line from both the Vendor Instructions and the Warehouse Instructions. The resulting Long Description And Instructions window should look like this.

Long Description And Instructions	
Long Description:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Addressing & Mailing: Yes	
Vendor Instructions:	
12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE	
Warehouse Instructions:	

Click the OK button to save the modified Long Description And Instructions and close the window.

When you prepare the purchase order to have the postcards printed at Test Digital Printing Co., you want to specify that the cards should ship back to you instead of to your XETEX customer. To accomplish this, you need to enter an alternate address on this line item record.

Click the Alternate Address check box on the Line Item window.

🔽 Image		
Artwork included	🔽 Alternate address	
Repeat for vendor	Consecutive numbering	
Specifications	Sales tax exception	
File Attachments	Production definition	
Alternate address and shipping information		

This will open the Alternate Address window.



The printed cards should ship back to you, so you should enter your address information in the Alternate Address window. You might have a Vendor record entered for your in house production or services. In this case, you could choose the Copy From > Vendor button to quickly fill in the Alternate Address window.

Learning By Example

Once you have entered your address information into the Alternate Address window, click OK to save and close the Alternate Address window.

Another problem with the way that this order came over from the web site is that printing of the postcards, postage, and handling are all lumped together into this one line item with a total unit price of 0.695. It would be better to split this line item into 3 parts. The current line item will be the line item that represents the printing of the post cards.

Change the Unit Price from 0.695 to 0.335. 0.335 represents the price of the actual post cards based on the pricing that you entered on the Item record.

Sell To: XETEX	Xetex Busi	ness Systems,	, Inc. Buy
Quantity Ordered: 837		EA	
Quantity Shipped: 0			
Unit Price: 0.33	35	% <u>M</u> argin:	29.85
Cost Center:		-40	
Reorder Date:			Ship By:

Next, you need to add an additional charge for the postage.

Close the Line Item window.

From the Xebra Order Entry window, choose Commands > Additional Charge from the menu.



This brings up the Additional Charge window.



NOTE: The following procedure adds another item to the database for direct mail postage. If you already have a product for direct mail postage, you can just read through this procedure but use your existing product code for postage instead of creating a new one. If you don't already have a product code for postage, you might want to keep the new postage item in your Xebra database after you create it through the following steps.

For the Item, enter POSTAGE and hit the Tab or Enter key on your keyboard. If you don't have a POSTAGE item record yet, you will see the following message.



If you want to create the new record, answer Yes to create a new item record.

On the Item record, you can set the first Description line to Direct Mail Postage.

Enter PST for the Product Category code on the new item record and hit Tab or Enter on your keyboard. (If you already have a product category for postage, you can use that code instead)

In this example, the PST record doesn't exist so you would get another Invalid Code message box asking you if you want to create a new product category record.



If you want to create the new record, answer Yes to create a new product category.

On the Product Category window, enter Postage for the Category Description.

For the Alternate GL Sales Reference and Alternate GL Purchase Reference, you should pick a GL code that is appropriate for postage. This example uses code 5510 but in your chart of accounts, the best code might be something else. If you are creating this record and are thinking about keeping it, you might want to consult with your bookkeeper or accountant if you aren't sure which code to use.

Check the Exclude from sales check box on the Product Category window. This will prevent postage line items from affecting sales rep commissions and other sales reports.

The Postage Product Category record should look something like this.

Close the Product Category window to return to the main Item window.

🎉 Item		×					
File Commands Help							
Item: POSTAGE							
Description: Direct Mail Postage	Long description and instructions						
	C Ordering instructions						
Product Category: PST 🕅 Postage							
Size Code: 🦰 🌺	Group:						
Customer: 🦰 🏄	Inactive						
Customer's Item Number:	Vendor's Item Number:						
Packed: 0 Per: S	juggested Vendor 1: 🦰 🏄						
Sell Unit of Measure:	Suggested Vendor 2:						
Buy Unit of Measure: S	Suggested Vendor 3:						
🔲 Inventory Item 👘 Customer Specific Inve	entory Item 🔲 Specifications 📄 Image						
Price Information Kit	Production Definition File Attachments						
Taxability information for the item							

So far, your Item record for postage should look something like this.

The only other thing you really need to do is set the taxability for your postage item.

Click the Tax check box near the bottom left of the Item window to open the Tax window.



Click the Tax exempt product check box. You also need to enter a Tax exempt reason.

Enter PST for the Tax exempt reason and hit the Tab key or Enter key on your keyboard. (If you already have a tax exempt reason suitable for postage in your system, you can use that code instead).

If you don't have a PST tax exempt reason record, you will get the following message.

Invalid Code	×
The code 'PST' does not exist. Create New?	

If you want to create the new Tax Exempt Reason, answer Yes to open the Tax Exempt Reason window and enter Postage for the Description.

🏀 Tax Exempt Reason	_ 🗆 🗙
File Commands Help	
Tax Exempt Reason: PST	
Description: Postage	
Tax exempt reason description	

Close the Tax Exempt Reason window to return to the Tax window which should now look like this.

Xebra E-Commerce	
🎉 Тах	
🔽 Tax	
Tax exempt product Tax exempt reason: PST M Postage	
Alternate sales tax:	
<u>Cancel</u>	

Click the OK button to save your changes and close the Tax window.

🎉 Item	
File Commands Help	
M <p< td=""><td></td></p<>	
Item: POSTAGE	
Description: Direct Mail Postage	Long description and instructions
	Crdering instructions
Product Category: PST 🎽 Postage	
Size Code: 🥻	Group:
Customer:	Inactive
Customer's Item Number:	Vendor's Item Number:
Packed: 0 Per: Su	ggested Vendor 1:
Sell Unit of Measure: Su	ggested Vendor 2:
Buy Unit of Measure: Su	ggested Vendor 3:
🗖 Inventory Item 🔲 Customer Specific Invent	tory Item 🥅 Specifications 🦳 Image
Price Information	Production Definition
🗖 Kit	
Taxability information for the item	

You completed POSTAGE item should look something like this.

Close the Item window to return to the Additional Charge window. When you Tab off of the Item prompt, the Description and Product category should be pulled from the postage Item record. If you have an item record pre-configured for the future, you will save the steps just described to setup the postage item, postage product category, and postage tax exempt reason.

So far, your Additional Charge window should look like this.

Additional Charge	
Item: POSTAGE	
Description: Direct Mail Postage	
roduct Category: PST 🎽 Postage	
Vendor:	
Cost/Lt: 0	.t
Price/Lt: 0	n
Percent Margin:	

The Additional Charge window expects Cost and Price to be entered as lot values. For this postage, the lot price would be 837×0.27 which would be 225.99.

Enter 225.99 for the the Cost/Lt and Price/Lt.

🌾 Additional Charge	
Item: POSTAGE	
Description: Direct Mail Postage	
Product Category: PST 🎽 Postage	
Vendor:	
Cost/Lt: 225.99	
Price/Lt: 225.99	
Percent Margin: 0	
<u>Cancel</u>	

Your completed Additional Charge window should look like this.

Click the OK button to complete adding the separate postage charge to the order.

The job should now have both the XETEX-TSPC item for the postcards, and the POSTAGE item for the postage.

File View Commands Actions Inquiry Go Help Image: State Address Image: State Address Image: File Attachments	Special Commission
Image: Second secon	Special Commission
Job: TESTSS	Special Commission
Alternate Address File Attachments	
	Rep: QC Quota Crusher
Status: Urder in Process 🛛 💌	.,
Customer: XETEX 🎽 Xetex Business S	ystems, Inc. Quote Date:
Billing Customer: XETEX M Xetex Business S	ystems, Inc. Order Date: 09/23/09
Contact: Fred Hickey	
Customer P0 # Fred	Data Camplata d
Cast Cantan	
Cost Center.	Invoice
Job Type: Standard Job	Number:
Date Note	Add Date:
	Paid:
	Special Instructions
Item Description	Quantity UOM Status Follow-up

Adding an additional charge to a job results in adding a line item to the job just like any other line item. The difference between Xebra Order Entry > Commands > Additional Charge and Xebra Order Entry > Commands > Add Line Item is that the Additional Charge method is less complex and the Add Line Item method gives you more options.

The next step for processing this order is to add the handling charge. For this example, use the Add Line Item method to add the handling charge.

From the Xebra Order Entry window, choose Commands > Add Line Item from the menu.

<i> </i> x	Cebra O	rder Entry							<u>_ ×</u>
File	View	Commands	Actions	Inquiry	Go	lelp			
1	XI G	New Job		Ctrl+E					
屵		Add Line	Item 📐	Ctrl+L					
	Job: T	Additiona	l Charge	Ctrl+G				📃 Special Commission	
	Alternat	Repeat T	his Job			Rep: QC Quota Crusher	Quota Crusher		
		Find Job		CHUE		-			

This will bring up the New Line Item Type window.
🎉 New Line Item Type 💦 📃 🗖 🗙
Choose a line item creation method Item code Without item code Copy from another line item Automatic Multi-line Office Supply
<u>D</u> K <u>C</u> ancel

The item creation method defaults to Item code. Normally, you might want to have an item code that represents a service that you provide for addressing direct mail and preparing it for the post office.

Learning By Example

For this example, choose the Without item code option and click the OK button on the New Line Item Type window to open the Item Data window.

For the Description 1 field enter: Addressing & Mailing

🎉 Item Data	
Item:	Ordering Instructions:
Description 1: Addressing & Mailing	
Description 2:	
Remarks:	
Product Category:	
🔲 Total as freight	
Inventory item	
<u>OK</u> <u>Cancel</u>	

There are other optional fields on the Item Data window that you don't need to fill in for this example. Click the OK button on the Item Data window to move on to the Vendor/Scheduling Information window.

Vendor/Scheduling 1	nformation			
Tracking:	▼	Follow-up Date	<u> </u>	
Vendor:	<u>#</u>			
Vendor Quote #:				
Vendor Job #:				
Vendor Order Date:				
Ship By Date:	I			
Request/Due Date:	III			
Shipped Date:				
Re-order Date:				

If you really are a service provider for preparing direct mail, you should probably have a vendor code that represents your company. If you do, you can use that code. For this example, we are just going to leave everything on the Vendor/Scheduling Information window blank.

Click OK on the Vendor/Scheduling Information window to move on to the Line Item Quantities window.

Enter the following information on the Line Item Quantities window:

Sell Quantity Ordered: 837 Sell Unit of Measure: EA Buy Quantity Ordered: 837 Buy Unit of Measure: EA Unit Price: 0.09

The resulting Line Item Quantities window should look like this:

🖗 Line Item Quantities	×
Disable automatic calculations Discou	unt Code: 📕 👫 Price:
Sell Quantities	Buy Quantities
Quantity Ordered: 837 EA	Quantity Ordered: 837 EA
Quantity Shipped: 0	Quantity Shipped: 0
Unit Price: 0.09	Unit Cost: 0.00
Percent <u>M</u> argin:	
Cost only item	
	Customer Item Inquiry

Notice that the Unit Cost is 0.00 in the image above. The cost is something that you might want to

Learning By Example

_ _ _ _

enter in a real world situation to represent the estimated cost of labor for preparing this mailing. For this example, we simplified and let the Unit Cost be zero.

Click OK to complete the creation of the Addressing & Mailing line item. The completed Line Item for Addressing & Mailing should look something like this.

🌾 Line Item	
File View Commands Actions Help	
Job Number: TESTSS Tracking:	Follow up:
Item: Addressing & Mailing	
Product Cat.: 🚺 GL Sales: 4000 🏙	
Bemarks	Inventory item 📃 New job for customer
Long description and instructions	Total as freight 📃 Exclude from sales
	Total as composition 📃 Proof required
	Print item on invoice 📃 Cost only item
Sell To: XETEX Xetex Business Systems, Inc. Buy From:	<u>#1</u>
Quantity Ordered: 837 EA	Quantity Ordered: 837 EA
Quantity Shipped: 0	Quantity Shipped: 0
Unit Price: 0.09 % <u>M</u> argin:	Unit Cost: 0.00
Cost Center:	Vendor Order Date: 🗾 🗖 Acknowledged
Reorder Date: Ship By:	🔟 Date Due: 🗾 Shipped: 🗾
🗖 Image	Vendor Quote #:
Artwork included Alternate address	Vendor Job #:
🔲 Repeat for vendor 👘 Consecutive numbering	
🔲 Specifications 👘 Sales tax exception	Ar Jequence.
File Attachments Production definition	
Product description line 1	

Close the Line Item window to return to the Xebra Order Entry window. You should now have 3 separate line items for this job.

Item	Description	Quantity	UOM	Status	Follow-up	
XETEX-TSPC	Xetex Trade Show Postcard	837	EA			
POSTAGE	Direct Mail Postage	1	Lt			
	Addressing & Mailing	837	EA			

The 3 line items at this point are unrelated. To Xebra, these are 3 separate products. You can optionally create a relationship between these items. Assuming that XETEX-TSPC is your main item and the POSTAGE and Addressing & Mailing are related to this main item, right click on the POSTAGE item and select Add To Group from the pop-up menu.



					L		
Item	Description		Quantity	UOM	Status	Follow-up	
XETEX-TSPC	Xetex Trade 9	how Postcard	837	EA			
POSTAGE	Discould De	stage	1	Lt			
	taa to Group	Hailing	837	EA			
							_

This will open the Add Line Item To Group window.

On the Add Line Item To Group window, double click the XETEX-TSPC item to link POSTAGE to this main item for the postcards.

On the line item list of the Xebra Order Entry window, you should now see that the POSTAGE item is indented slightly and the text is not bold anymore like other master items on this job. POSTAGE is now a child of the main XETEX-TSPC item.

Item	Description	Quantity	UOM	Status	Follow-up
XETEX-TSPC	Xetex Trade Show Postcard	837	EA		
POSTAGE	Direct Mail Postage	1	Lt		
	ressing & Mailing لمط	837	EA		
Add To Group					
N					

Right click the Addressing & Mailing item and choose Add To Group from the pop-up menu to make this item a child of the XETEX-TSPC item as well.

When you are done grouping the line items on the TESTSS job, the Xebra Order Entry window should look like this.

Learning By Example

113

🎉 Xebra Order Entry					
File View Commands Actions Inquiry Go Help					
Job: TESTSS					
Alternate Address File Attachments Rep: QC Quota Crusher					
Status: Order in Process 🔹		.,			
Customer: 🗵 🕅 🕅 Xetex Business Systems, I	nc.		Quote Date:		
Billing Customer: 🛛 🗛 🕺 Xetex Business Systems, I	nc.		Order Date: 09/23/09 🛅		
Contact: Fred Hickey			Due Date:		
Customer PO #: Fred			Date Completed:		
Cost Center:					
Job Tupe: Standard Job	-	1	Invoice		
Date Note	Job Type: Standard Job Number:				
	Add		Date:		
	E Cara		Paid:		
	I v spec	aarmsu	auctoris		
Item Description (Quantity	UOM	Status Follow-up		
XETEX-TSPC Xetex Trade Show Postcard	837	EA			
POSTAGE Direct Mail Postage	1	Lt			
Addressing & Mailing	837	ΕA			
Line item list			li.		

To send the purchase order and artwork to Test Digital Printing Co., choose Actions > Prepare Vendor Purchase Order from the Xebra Order Entry menu.

🔗 Xebra Order Entry		
File View Commands	Actions Inquiry Go Help	
🗎 🗶 🛌 🗲		
Job: TESTSS	Prepare Vendor Purchase Order	
Alternate Address	Customer Acknowledgement	Rep: QC Quota
	Deter De el de la Clie	

This will open the Prepare Vendor Purchase Order window.

	Prepare Vendor	Purchase O	rder					
File	Commands He	lp						
1	² #4							
	Vendor: TESTDI	GI 🖵 💩	🕯 🛛 Test Digital Printi	ina Co.		_ Shipp	oing Information	n
						Carr	ier: Best Way	
	P.U. Date:	03724703	<u> </u>				- Instale deline	
Pr	oduction Contact:	Quota Crushe	er				Inside delivi	ery required
Exis	ting purchase orde	rs for the sele	cted vendor on this j	ob				
P.I	D. Number 🛛 🛛)ate	Item	Descriptio	on			
 	at itaana far tha an						Lipit Cost	Extension
Sele	ect items for the pu	rchase order.			Quantitu			CAGHSION
Sele	ect items for the pu Item XETEX-TSPC	rchase order. Descriptio Xetex Tra	on ade Show Postcard		Quantity 837	EA	0.235	196,70
Sele X	ect items for the pu Item XETEX-TSPC POSTAGE	rchase order. Descriptio Xetex Tra Direct Ma	on ade Show Postcard ail Postage		Quantity 837 1	EA Lt	0.235	196.70 225.99

On the Prepare Vendor Purchase Order window, note that the Vendor defaulted to TESTDIGI and the only item selected for the purchase order is the XETEX-TSPC item. This is because the XETEX-TSPC line item is the only one set with the TESTDIGI Buy From code.

To generate the purchase order, choose Commands > Create Purchase Order from the Prepare Vendor Purchase Order menu.

🌾 Prepare Vendor Purchase Order					
File Commands Help					
Create Purchase Order					
Vendor: TESTDIGI 💽 🍂 Test Digital Printing Co.					
P.O. Date: 09/24/09					
Production Contact: Quota Crusher					

This will open the Purchase Order Editor window and show a preview of the purchase order document.

Learning By Example

1	15

Purchase Order Editor						
Your Quote Number See Below TO: 1 E	Vest Lawn PA 19609 • Phor Ship Date A.S.A.P. Test Digital Printing C 23 Main Street Iverson PA 19520	no Grapt e: 610-898-1551 • Fax: 610-8 Our Account Number 0.	PiCS 98-1564 Contact Quota Crusher	PURCHA Number TESTSS Customer XETEX Ship Via: Best Way	SE ORDER Date 09/24/09 Page 1 of 1 Customer Order No. Fred	
Vendor Info.: Phone: 53 Ship Xel 110 Wa	is-555-1234 Fax: 555-55 io: ora Demo Graphics 13 Rocky Drive sst Lawn PA 19609	55-1235 Email: orders@	testdigitalprintingco.com			
	M tem Des	cription		Linë (`ost Evten	ion
837 E	™ ntem Des A XETEX-TSPC Xet 6°: Sp: PR CU	eripiion ex Trade Show Pos « 4" Digital Printing ecial Instructions: 1: OCESS COLOR + STOMER SUPPLIE	tcard 2PT. C-1-S GLOSS (UV COATING OVER D FILES WITH ALL I	0.2 COVER WHITE BLACK - BLEEDS ELEMENTS IN PLACE	.ost Exten: 235 196	.70

The Ship To area on the purchase order should show your company name and address that you entered into the Alternate Address of the line item record for the XETEX-TSPC item.

From the Purchase Order Editor menu, choose Options > Additional Instructions After Last Line.

<i> թ</i>	urchase Order Editor	
File	Options Help	
	 No Additional Instructions 	
	Additional Instructions After Last Line	
	^W Additional Instructions On Separate Page	
		PURCHAS

For the Addtional Instructions, enter the following text:

Please see the attached artwork files in Photoshop format for the front and back of the postcard: ChiPostcard.psd ChiPostcardBack.psd



On the Purchase Order Edit toolbar, click the Save button to finalize the purchase order.



The completed Purchase Order document will be displayed in Xebra Print Preview.

Learning By Example

117

Image: Control basic ba	call commands insort	Help					
Ventor Demo Graphics Visit Rody Drive - West Law PA 1960 - Proce: 610.085.1501 - Fra: 610.0	◙∄Q¤ ž	<u>> x B</u>		19 🗾 🌆			
Verifielde Number Ship Otet Our Accound Number Curtomer Curtomer Curtomer Curtomer Curtomer Curtomer Curtomer Curtomer Curtomer Fred TO: Test Digital Printing Co. 123 Main Street Elverson PA 19520 Ship Vix Best Way Vender Inte: Phone: 555-555-1234 Fax: 555-555-1235 Email orders@testdigtelprintingoo.com Ship Vix Best Way Vender Inte: Phone: 555-555-1236 Email orders@testdigtelprintingoo.com Ship Vix Best Way Unit Cost Unit Cost Our Actor of Craphics 1103 Rocky Drive West Lawn PA 19609 Unit Cost Our Actor of Cost </td <td></td> <td>bra Dei</td> <td>no Grapł</td> <td></td> <td>PURCHAS Number TESTSS</td> <td>Date 09/24/09</td> <td></td>		bra Dei	no Grapł		PURCHAS Number TESTSS	Date 09/24/09	
TO: Test Digital Printing Co. 123 Main Street Elverson PA 19520 Ship Via: Best Way Vender Info: Phone: 555-555-1234 Fax: 555-555-1235 Enait orders@testdigtelprintingco.com Ship To: Xabra Demo Graphics 1103 Rocky Drive West Lawn PA 19509 Ouertity UM Item Description West Lawn PA 19509 Unit Cost Extension 837 EA XETEX-TSPC Xetex Trade Show Postcard 0.235 Special Instructions: 12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Additional Instructions: Please see the attached antwork files in Photoshop format for the front and back of the postcard: ChiPostcard.pad Please see the attached antwork files in Photoshop format for the front and back of the postcard: ChiPostcard.pad	Your Quote Number See Below	Ship Date A.S.A.P.	Our Account Number	Contact Quota Crusher	Customer XETEX	Customer Order No.]
Vendor Into: Phone: 555-555-1234 Fax: 555-555-1235 Email: orders@testdigitalprintingco.com Ship To: Xebra Demo Graphics 1103 Rocky Drive West Lawn PA 19609 Image: Comparison of the part of	TO: Test 123 Elve	Digital Printing C Main Street rson PA 19520	:o.		Ship Via: Best Way		
Quantity UM Item Description Unit Cost Extension 837 EA XETEX-TSPC Xetex Trade Show Postcard 0.235 196.70 6" x 4" Digital Printing Special Instructions: 12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Additional Instructions: Please see the attached artwork files in Photoshop format for the front and back of the postcard: ChiPostcard.psd ChiPostcard.psd	Vendor Info.: Phone: 555-5: Ship To: Xebra 1103 F West I	55-1234 Fax: 555-5: Demo Graphics Rocky Drive Lawn PA 19609	55-1235 Email: orders@	Xtestdigitalprintingco.com			
837 EA XETEX-TSPC Xetex Trade Show Postcard 0.235 196.70 6" x 4" Digital Printing Special Instructions: 12PT. C-1-S GLOSS COVER WHITE PROCESS COLOR + UV COATING OVER BLACK - BLEEDS CUSTOMER SUPPLIED FILES WITH ALL ELEMENTS IN PLACE Additional Instructions: Please see the attached artwork files in Photoshop format for the front and back of the postcard: ChiPostcard.psd ChiPostcardBack.psd Output Output Output Output	Quantity UM	ttem Des	scription		Unit Co	st Extension	1
Additional Instructions: Please see the attached artwork files in Photoshop format for the front and back of the postcard: ChiPostcard.psd ChiPostcardBack.psd	837 EA	XETEX-TSPC Xet 6" Sp PR CI	tex Trade Show Post x 4" Digital Printing ecial Instructions: 12 OCESS COLOR + U ISTOMER SUPPLIE	tcard 2PT. C-1-S GLOSS C UV COATING OVER D FILES WITH ALL E	0.23 OVER WHITE BLACK - BLEEDS ELEMENTS IN PLACE	5 196.70	
		~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~					

To email the purchase order to the vendor, click the email button from the Xebra Print Preview toolbar.



<u> </u>	* <u>%</u> <b>BB</b> ;	× ←→ ℤℤ	15 🗖 🐪
E-mail [	Document Ctrl+E		
	bra Dei	no Grap	nics
1103 Rocky Drive • West	t Lawn PA 19609 • Pho	ne: 610-898-1551 • Fax: 610-8	198-1564
Your Quote Number	Shin Date	Our Account Number	Contact
			0

The email should open in the default email client for your computer. The following image shows the email in Windows Mail.

📑 Purchase Ord	er
File Edit View	Insert Format Tools Message Help
📑 Send 🛛 🔏 🛛	🗈 📋 🄊   🏖 💞   🕘 👫 +   📪 👒
From: frh@x	ebra.com (mail.xebra.com)
📧 To: 🛛 Test D	iqital Printing Co. <orders@testdiqitalprintingco.com>;  </orders@testdiqitalprintingco.com>
💽 Cc:	
🔲 Bcc:	
Subject: Purcha	se Order
Attach: 🔂 Ch	PostcardBack.psd (915 KB) 💼 ChiPostcard.psd (4.77 MB) 📕 Job TESTSS.pdf (21.0 KB)
	· · · · · · · · · · · · · · · · · · ·
Please view t	he Purchase Order attached to this email.

Notice that the artwork files are attached as you specified on the line item File Attachments. The Job TESTSS.pdf file is a PDF version of the purchase order document. From this point, you could alter the text of the email to again describe the file attachments and what they are and you could send the email. Since Test Digital Printing Co. isn't real and this isn't a real order, don't try to send the email.

Close the email without sending.

Close the Xebra Print Preview window.

Close the Prepare Vendor Purchase Order window.

Since the TESTSS job is just an example, it would be good to remove it from your live system. Click the red X on the Xebra Order Entry toolbar to remove the job.





NOTE: If the red X is disabled, you will need to find a Xebra operator in your company with the correct security privileges to delete the job.

## 3.1.3 Adding A Stationery Item

The Xebra E-Commerce Stationery catalog type is for any items for which the web user will need to specify text to be imprinted on the item. A common example of an item for which the Stationery catalog is suitable is a business card where the web user might want to specify the name, address, phone, email, etc. to be printed on the cards. You might also use the Stationery catalog for items such as personalized pens, embroidered or silk screened shirts, direct mail pieces, etc. Whenever you want the web user to be able to specify text to be imprinted on an item and provide the web user with a proof image of the imprinted item, the Stationery catalog type is the one to use.

For this example, we are going to use a Xetex business card for the item to add to the stationery catalog. Let's assume that Xetex sends you the artwork file in Adobe InDesign CS3 format.



If you want to follow along with this example and you can work with .indd files, you can download the



file from the following link:

http://www.xebra.com/Artwork/XetexBusCard.indd

If you can't work with this .indd file, don't worry. Just read along. You will be provided with all the files that are absolutely necessary to work through this example. Even if you don't use Adobe InDesign CS3, you might be able to apply some of the concepts, shown in the InDesign examples, to your own graphics tools.

The first step to setting up this item is to create the main Item record in Xebra.

🌽 X	ebra Order Entry		
File	View Commands Actions	Inquiry Go Help	
	Financial Review Payment History Sales Tax Shipping Information Job Documents EPSA Electronic Documents	hments	Rep
Bill	Control Files Customer Vendor Them		
	Inventory Inquiry		

From the Xebra Order Entry window, choose View > Item from the menu.

From the Item window menu, choose Commands > New

<i></i> It	em:		
File	Commands	Help	
1	New	Ctrl+E	44
<u> </u>	Clone Ite	fi)	
	Find	Ctrl+F	
	Change K	(ey	

On the New Code window, enter XETEX-BC for the new Item code.

🏀 New Code					
Item:	Item: XETEX-BC				
OK Cano	el				
Code	Description	▲			
IMPRNT	Imprint Charge				
LGB943	Logo Golf Balls				
POSTAGE	Direct Mail Postage				
SADDLE	Collate, Saddle Stitch, and				
SAMPLE	Sample				
SCREEN	Screen Charge				
SETUP	Setup Charge				
TM14	Mug 14 oz				
TM21	Mug 21 oz				
XETEX-ENV-9W	White #9 Window Envelope				
VETEV TODO	Yatau Trada Shaw Postaard				

Click the OK button on the New Code window to create the new Item record.

On the Item window, enter the following information:

Description 1: Xetex Business Cards Description 2: Digital Print Packed: 500 EA Per: BX Sell Unit of Measure: BX Buy Unit of Measure: BX Suggested Vendor 1: TESTDIGI

Note: In the Adding A Stock Sales Item section, we created the TESTDIGI vendor code. If you did not create the TESTDIGI vendor code, but you want to follow along with this section, please refer to the Adding A Stock Sales Item 51 section for instructions to create the TESTDIGI vendor code.

Learning By Example

So far, the Item window should look like this.

Xebra E-Commerce

122

🖗 Item	
File Commands Help	
Item: XETEX-BC	
Description: Xetex Business Cards	Long description and instructions
Digital Print	Critering instructions
Product Category:	
Size Code: 🎽	Group:
Customer: M	Inactive
Customer's Item Number:	Vendor's Item Number:
Packed: 500 EA Per: BX	Suggested Vendor 1: TESTDIGI 🛛 🏄 Test Digital Printing Co.
Sell Unit of Measure: BX	Suggested Vendor 2:
Buy Unit of Measure: BX	Suggested Vendor 3:
🔲 Inventory Item 📄 Customer Specific In	nventory Item 🦳 Specifications 📃 Image
🗖 Price Information 🔲 Tax	Production Definition
🗖 Kit	

It would be good to add an image that represents the business card. If you can open the XetexBusCard.indd file in Adobe InDesign CS3, choose File > Export from the menu.

ID	Adobe	: InDesig	in CS3								
Fi	e Edit	Layout	Туре	Notes	Objec	t Table	View	Window	Help		
	New Open Browse Open R Close Save Save A: Save A:	 lecent s	Alt-	Ctrl+0 +Ctrl+0 Ctrl+W Ctrl+S +Ctrl+S		/o	<b>⊡</b> [ ⊡ [ .   ¹ .		¥ ¥ 1/2		
	Save a Revert	Copy	Alt	+Ctrl+S	Ŀ						
	Place Import	XML		Ctrl+D					,		,
	Adobe I	PDF Prese	ets		•				_	X 5	72
	Export. Cross-n	nedia Exp	ort	Ctrl+E	Þ		N				
	Docume	ent Preset ent Setup.	s Alt	+Ctrl+P	•	ten n	5	10			$\sum_{i=1}^{n}$

In the Export file save dialog, choose JPEG for the Save as type and specify a location on your computer to save the file.

Learning By Example	123

🔟 Export						×
Save in:	📃 Desktop		•	G 🜶 📂 📰•		
Recent Places Desktop Desktop XETEX Computer Network	Name Network Computer Public XETEX			<b>▼</b> Size	<b>↓</b> Type	<b>, , , , , , , , , , , , , , , , , , , </b>
	•					Þ
	File name:	XetexBusCard.jpg			•	Save
	Save as type:	JPEG Adobe PDF EPS InDesign Interchange JPEG SVG SVG SVG Compressed XML				Cancel
Use Adobe Dialo	og					1.

Click the Save button to open the Export JPEG window. In the Export JPEG window, set the following options:

Export: All Quality: Maximum Format Method: Baseline Resolution (ppi): 300

124 Xebra E-Commerce	
Export JPEG	
Export C Selection C Range: 1 C All Spreads	
Image Quality: Maximum  Format Method: Baseline  Resolution (ppi): 300	
Export Cancel	

The Maximum quality setting minimizes the degrading effects of JPEG compression, but it doesn't completely eliminate unsightly artifacts. It would be better to save the file in a non-lossy format, such as PNG, but it doesn't seem that Adobe InDesign has that option. An alternative would be to export the file to a PDF, then open the PDF file in Photoshop, and then save the file as a PNG. We will explore this alternative later in this example, but for now, we will stick with the JPEG option.

Click the Export button on the Export JPEG dialog to complete saving the .jpg file.

If you weren't able to Export the JPEG from Adobe InDesign, you can download it from this link: http://www.xebra.com/Artwork/XetexBusCard.jpg

Back on the Xebra Item window, click the Image check box.

em	Specifications	T Image
	Production Definition	File Attachments

On the Image window, click the Add button.

🌽 Image					
<u>K</u>	<u>C</u> ancel	<u>Add</u>	<u>D</u> elete	<u>S</u> ave As	<u>R</u> educe Size

In the standard Windows File Open dialog, open the file XetexBusCard.jpg. You should end up with a fairly high resolution image of the business card in the Image window.





Click Ok on the Image window to save the Image and return to the Item window.

Click the Long description and instructions check box and enter the following for both the Long Description and Vendor Instructions:

BOXES OF 500 BUSINESS CARDS 12PT. C-1-S GLOSS COVER WHITE

Remember that you can use CTRL+C to copy the text and CTRL+V to paste the text into the multiple instructions fields.

Long Description:	
BOXES OF 500 BUSINESS CARDS 12PT - C-1-S GLOSS COVER WHITE	
 Vendor Instructions:	
BOXES OF 500 BUSINESS CABDS	
12PT. C-1-S GLOSS COVER WHITE	
Warehouse Instructions:	

Click the OK button to save the descriptions and close the Long Description And Instructions window.

For this example, assume that you have an agreement with Test Digital Printing Co. that the cost of a box of 500 cards will be \$15.00 regardless of the quantity of boxes.

On the Item window, click the Price Information check box.

Answer No to the question, "Would you like to create a multi-level pricing structure?"

Leave the Price Per Unit blank and enter a Cost Per Unit of 15.00.

Pricing information	
Price Per Unit: 0.00	B×
Cost Per Unit: 15.00	В×
	ancel

Click OK to save the Single Level Pricing information.

The completed item record should look like this.

Learning By Example	127

🎉 Item	
File Commands Help	
1 X 9 2 4 2 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	
Item: XETEX-BC	
Description: Xetex Business Cards	Long description and instructions
Digital Print	Crdering instructions
Product Category:	
Size Code:	Group:
Customer:	Inactive
Customer's Item Number:	Vendor's Item Number:
Packed: 500 EA Per: BX St	uggested Vendor 1: TESTDIGI 🛛 🏄 Test Digital Printing Co.
Sell Unit of Measure: BX St	uggested Vendor 2:
Buy Unit of Measure: BX St	uggested Vendor 3:
🗖 Inventory Item 🗖 Customer Specific Inver	ntory Item 🔽 Specifications 🔽 Image
Price Information 🔲 Tax	Production Definition File Attachments
🕅 Kit	
Determines pricing information for the current product	

Now that you have the Item record, you are ready to create the actual E-Commerce Stationery catalog item.

Close the Item window and use the Go menu to go to the main Xebra E-Commerce window.

On the Xebra E-Commerce window, choose Actions > Customer Setup.

On the Customer Setup window, enter XETEX for the Master Customer code and hit Tab or Enter on your keyboard to load the setup information for this customer.

On the Customer Setup window, in the Stationery section of the Catalogs section, click the Master button.

Customer Setup			
Master Customer: XETEX	📕 🛛 Xetex Busi	ness Systems, Inc.	
Web Site Appearance	Reports	Shipping Methods	Credit Card Information
Catalogs Warehouse Release Master	Stock Sales Master	Stationery Master	Report Master

This will open the Stationery Master Catalog window.

Master Custon	er: XETEX ×	etex Business Systems Inc.		
	ewltem			
Item #	Customer Item # [	escription	Category	Notes

On the Stationery Master Catalog window, click the New Item button. This will bring up the New Stationery Master Catalog Item window.

New Stationery Mas	ter Catalog Item		
Item #:		Customer Item #:	
Description:		Category:	
<u>C</u> lear Selected	Items	Add Selected Items To Maste	er Catalog
Item #	Customer Item #	Description	Category
SAMPLE		Sample	
XETEX-BC		Xetex Business Cards	
XETEX-ENV-9W		White #9 Window Envelope	
XETEX-TSPC		Xetex Trade Show Postcard	
CSEP		Color Separation Negatives	ART
B101		Collate and Staple	BND
B106		Burst and Decolate	BND
B110		Stuff and Seal Envelopes	BND
B120		Shrink Wrap Packs	BND
B130		1/4 Inch Standard 3 Hole Drill	BND
SADDLE		Collate, Saddle Stitch, and	BND
A1207		Tour Pro Cap	CAP
A1210		The Cool Cap	CAP
ABC12	SI001G-REV A	Service Invoice 91/2×7-4PT	CC
ABC14	99197A	Part Release Request	CC

For the Item # enter XETEX-BC and then press the Add Selected Items To Master Catalog button.

Learn	ing	By	Exar	nple	
-------	-----	----	------	------	--

129

New Stationery Master Catalog Item					
Item #: XETEX-BC		Customer Item #:			
Description:		Category:			
<u>C</u> lear Selected I	tems	Add Selected Items To Maste	er Catalog		
Item #	Customer Item #	Description	Category		
H82838		80# High Gloss Offsett Stock	SP		
HG80W		80# High Gloss Offset - White	SP		
IM16SP		Mug 16 oz	MUG		
IMPRNT		Imprint Charge	CMP		
LGB943		Logo Golf Balls	SB		
POSTAGE		Direct Mail Postage	PST		
SADDLE		Collate, Saddle Stitch, and	BND		
SAMPLE		Sample			
SCREEN		Screen Charge	CMP		
SETUP		Setup Charge	CMP		
TM14		Mug 14 oz	MUG		
TM21	MUG21-GA	Mug 21 oz	MUG		
XETEX-BC		Xetex Business Cards			
XETEX-ENV-9W		White #9 Window Envelope			
XETEX-TSPC		Xetex Trade Show Postcard			
				•	

Since we only added one new item to the Master Catalog, the Stationery Catalog Item window comes right up.

Item #: XETEX-BC	Xetex Busines	es Cards
Man Bar	Digital Print	
Customer Item #: XETEX-BC	-1	
Product Category:	<b>b</b>	
Small Image Large Image	Template	Add Quantity Restriction
Packing Description: 500 EA Per	BX	Quantity Restrictions
rtwork Attachment Default Options-		
Default File Name: Xetex Business	Cards	
Check the default type(s) of artwor	k to attach to PO emai	ls.
Screen resolution proo	f (PNG)	J
Text-only PDF		
	0 6-04	
PDF with background	& text	
PDF with background	& text	
PDF with background  ile Attachments  Allow file attachments	& text Require file attachm	ent
PDF with background  Ie Attachments  Allow file attachments  (eb user file attachment instructions:	& text Require file attachm	ent
PDF with background ile Attachments     Allow file attachments     /eb user file attachment instructions:	& text Require file attachm	ent
PDF with background     ile Attachments     Allow file attachments     /eb user file attachment instructions:	& text	ent
PDF with background ile Attachments Allow file attachments /eb user file attachment instructions:	& text	ent
PDF with background  I Allow file attachments  /eb user file attachment instructions:  tes:	& text Require file attachm	ent
PDF with background     ile Attachments     Allow file attachments     //eb user file attachment instructions:     tes:     XES OF 500 BUSINESS CARDS     PT_C:1:S GLOSS COVEB WHITE	& text	ent
PDF with background ile Attachments     Allow file attachments     /eb user file attachment instructions: tes: Exes: Exes	& text Require file attachm	

Xebra E-Commerce

130

There are two images for each E-Commerce item. The Small Image should be thumbnail sized so that it can display in a list on a web page. The Large Image can be much bigger to show more detail of the product if the web user is interested. The image that you attached to the item record for XETEX-BC will be the default for both the small and large image on this E-Commerce master catalog item. The size of the image for the Large Image should be OK, but you will want to shrink the Small Image.

Click the Small Image button on the Warehouse Release Catalog Item window. You will see that the resulting image in the Small Image window will be too big for a thumbnail.



Click the Reduce Size button to bring up the Resize Image window.

For this example, change the Pixel Width to 213 and hit Tab or Enter on your keyboard. Since the Maintain Aspect Ratio check box is checked, you will see that the Pixel Height adjusts in proportion to the Width, so when the Width is set to 213, the Height will change to 121.

🏀 Resize Image		
Original: Width 1050	pixels, Height 600 pixels, Size:	10.937500'' x 6.250000''
<ul> <li>Small Image</li> <li>Large Image</li> <li>Logo Image</li> </ul>	Pixel Width: 213 Pixel Height: 121	Width In Inches: 2.218750 Height In Inches: 1.260417
🔽 Maintain Aspect Ratio		Cancel

Click the OK button to complete resizing the image. You should see the new shrunken image in the Small Image window.

🎉 Small Image		
<u> </u>	<u>R</u> eplace <u>D</u> elete	Save As Reduce Size
	Advantage Advantage Tour complete solution! We cam our stripes every day. Dave Hartranft 103 Rocky Dirle, Skite 183 - West Lawn, På 1960 393-396-2772 - 639-8381 - 6551 ext. 21 - Fai: 600-898 - f554 WWW.xebra.com	

Click the OK button on the Small Image window to save the new Small Image.

On the Stationery Catalog Item window, notice that the Packing Description defaulted to 500 EA Per BX. This information came from the XETEX-BC item record that you created. If you want pricing to show on the web site for this item, you need to add quantity restrictions with pricing.

Click the Add Quantity Restriction button.

132 Xebra E-Commerce	
Product Category:	
Small Image Large Image Template	Add Quantity Restriction
Packing Description: 500 EA Per BX	Quantity Restrictions
Artwork Attachment Default Options	Quantity UOM Price
Default File Name: Xetex Business Cards	
Check the default type(s) of artwork to attach to PO emails.	
Screen resolution proof (PNG)	
Text-only PDF	

On the Internet Quantity Restriction window, enter the following information:

Quantity: 1 UOM: BX Price: 39.99

Click the OK button on the Internet Quantity Restriction window to save this first quantity option.

🏀 Internet Quantity Restriction	
Quantity: 1	UOM: BX
Price: 39.99	)
	<u>D</u> elete

On the Stationery Catalog Item window, click the Add Quantity Restriction button again to add another quantity/price option. This time, use the following information on the Internet Quantity Restriction window.

Quantity: 2 UOM: BX Price: 74.99

The Price field on the quantity restriction is not a unit price. It is the extended price for the item at the specified quantity.

Enter another quantity restriction with the following information:

Quantity: 3 UOM: BX Price: 99.99

After you are done entering the three quantity restrictions, the Quantity Restrictions list on the Stationery Catalog Item window should look like this:

Template	Add Quantity Restriction				
	Quantity	UOM	Price		
	1	ВХ	39.99		
ds	2	ВX	74.99		
) attach to PO emails.	3	ВХ	99.99		
NG)	I				

Stationery items are meant to capture information from the web user to be imprinted on the item. To accomplish this, you need to setup a template that specifies what information you are going to ask the web user to enter and where to print the information that the web user enters.

To create the template for this item, click the Template button on the Stationery Catalog Item window.

🏀 Stationery Catalog Item					
Item #: XETEX-BC	Xetex Business Card	ds			
<u>⊻</u> iew Item	Digital Print				
Customer Item #: XETEX-BC					
Product Category:					
Small Image   Large Image	emplate	<u>A</u> dd (	Quantity	Restrictior	า
Packing Description: 500 EA Per BX		Quantity Re	estriction	s	
- Artwork Attachment Default Options		Quantity	UOM	Price	
		1	ВХ	39.99	
Default File Name: Xetex Business Card	8	2	ВХ	74.99	
		2	DV	00 00	

There are currently two options for creating a new template as shown in the Template Creation Method window.

🖗 Template Creation Method 💦 📃 🗖 🗙				
Choose Background Image				
C Insert Tanalata File				
Comport remplate rile				
Cancel				

If you had a similar template that you used for another item, you might start with Import Template File to bring in a template that you exported from another item. You might also use Import Template File if somebody at Xetex creates a template file for you.

In this case, we want to create a new template from scratch, so we will leave the Choose Background Image option checked.

Before we go further with creating the Template in Xebra, we need to gather some information and the background image.

If you can open the XetexBusCard.indd file in Adobe InDesign CS3, start by opening the file.



InDesign, seems to default to showing measurements in picas. Since the Xebra template editor works with inches, the first thing you should do in InDesign is change the preference so that it will work with inches instead of picas.

From the InDesign CS3 Edit menu, choose Preferences > Units & Increments...

ID A	dobe InDesign CS3				
File	Edit Layout Type Notes	Object Table	View Window	Help	
<b>B</b> CC	Undo Redo	Ctrl+Z 5hift+Ctrl+Z		- <u>4</u>	
	Cut Copy Paste Paste without Formatting Paste Into Paste in Place Alt+: Clear Duplicate Alt+: Step and Repeat	Ctrl+X Ctrl+C Ctrl+V 5hift+Ctrl+V Alt+Ctrl+V Backspace 5hift+Ctrl+D Alt+Ctrl+U	<u> 6</u>	 	
	Select All Deselect All	<b>Ctrl+A</b> 5hift+Ctrl+A	General Interface	Ctrl+K	
	InCopy	•	Type		
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1	Edit Original Edit in Story Editor	Ctrl+Y	Advanced Ty Composition.	pe	Ur (OI
<u>ि</u> दि	Quick Apply Find/Change Find Next	Ctrl+Enter Ctrl+F Alt+Ctrl+F	Units & Increa Grids Guides & Past	teboard	ftwar 1 our s
	Spelling	+	Dictionary		il: dave@
	Transparency Blend Space Transparency Flattener Pres	ets	Spelling Autocorrect	•	, PA 19609
P.	Color Settings		Notes		610-898-
1000 C	Assign Profiles Convert to Profile		Story Editor D Display Perfo	)isplay rmance	ra.co
	Keyboard Shortcuts Menus Preferences	•	Appearance of File Handling, Clipboard Har	of Black  ndling	
	234% • 14 4	1	• k k @ 0	pen	

This will open the Preferences window for Units & Increments.

Learning By Example

1	35
---	----

rerences	
	_
General	Units & Increments
Interface	Duday Unite
Туре	
Advanced Type	Origin: Spread
Composition	Horizontel: Dices
Units & Increments	
Grids	Ver <u>t</u> ical: Picas 🗾 points
Guides & Pasteboard	
Dictionary Coolline	– Point/Pica Size –
Spelling	Deinte (Inch) DestCevint (72 statistic)
Autocorrect	Points/Incn: PostScript (72 pts/incn)
Notes Charles Editors Directors	
Display Deference	- Keyboard Increments
Ospiay Perioritance	Cursor Key: 0n1
Eile Handling	
Clipboard Handling	Size/Leading:  2 pt
Copposid Handling	Baseline Shift: 2 pt
	Kerning: 120 / 1000 em
	OK Cancel

In the Ruler Units section of the Preferences window, change the Horizontal value to Inches and change the Vertical value to Inches.

Units & Increments		
– Ruler Units –		
Origin	Sprood	
Ongina		_
<u>H</u> orizontal:	Inches 🔹	points
↓ Ver <u>t</u> ical:	Inches 🔽	points

Click the OK button on the Preferences window to save the changes and close the window.

Now, just by looking at the rulers in InDesign, you should be able to see that this business card is the standard 3 1/2 Inches wide by 2 Inches high.



One of the things that you will need to know to setup the template in Xebra is the size of the artwork in inches. We now know that the size for this artwork is  $3.5" \times 2"$ .

The next step is to determine what part of this card will be variable text that the web user will be able to enter. One part of this card that will be variable is the person's first name, which in the artwork is specified as Dave.

Make sure you select the dark arrow in the InDesign toolbar.

🔟 Ado	be InDesi	gn CS3	
File E	dit Layout	Туре	Notes O
	X: ➡-0.1: Y: ➡0.44	375 in 44 in	₩: <u>▼</u> H: <del>▼</del>
	Vetex 1/2 0 Selection T	(BusCar	d.indd @ 2
۵.	-		

With the Selection Tool selected, click on the text, Dave, to select that box.



When you select the Dave text box in InDesign, notice that the coordinates of that box are available in the upper left hand corner of the InDesign window.

ID	D Adobe InDesign CS3						
Fil	e Ed	lit	Layout	Туре	Notes	Object	Table
		X: Y:	÷0.7378	3 in 5 in	₩: <b>‡</b>	1.2396 in ).1799 in	<b>*</b>
Ī	D		Xetex	BusCar	d.indd (	@ 234%  1/2	1

To the left of the coordinate values is a series of 9 little boxes, 8 white ones and one black one. The black box sets the origin for the coordinate values. In the picture above, the origin is set to be the center of the page. In Xebra, the origin is always the top left, so click the top left box to set the origin to match Xebra.



After you set the origin of the coordinates to be the top left, look at the positioning values for the Dave text box.

좋음문	X: 🚔 0.1181 in	W: 韋 1.2396 in	
899	Y: ≢ 1,1736 in	H: ≢ 0.1799 in	- 60

By looking at the X value, we know that the left of this text box is at 0.1181 inches. By looking at the W value, we know that the width of this text box is 1.2396 inches. By looking at the Y value, we know that the top of this text box is at 1.1736 inches. By looking at the H value, we know that the height of this text box is 0.1799 inches.

It will be helpful to know these values when you create the template in Xebra.

Another thing we need to know about this text box is what font was used. From the InDesign Window menu, choose Type & Tables > Character.



This will bring up a window that will show you information about the font.



**Xebra E-Commerce** 

138

We can see from this character information that the font was Arial Black 14.5 pt.

Also, notice that this box has a character spacing adjustment specified.



A Metrics		
IT €100%	Tracking (in th	ousandths of an em)
Aª €0 pt		ETEX
Language:	English: USA 🚽	SS SYSTEMS, INC.

Tracking is set to 325.

One other thing we need to know is how InDesign is setting the baseline for the first line of text within this text frame. Right click on the Dave text frame and, from the pop-up menu, choose Text Frame Options...



This will open the Text Frame Options window.

Ge	
	Number: 1 Gutter: 10 in
	Width: 1 2396 ir
	Eixed Column Width
Г	- Inset Spacing
	Top: 🗘 0 in Left: 🗘 0 in
	Bottom: 🗘 0 in Right: 🗘 0 in
L	Vention Ductification
	Paragraph <u>S</u> pacing Limit: 📩 0 in
	Ignore Text Wran
1	Ignore reactivitap

140

Xebra E-Commerce

Click the Baseline Options tab on the Text Frame Options window.

Text Frame Options		
General Baseline Options		
- First Baseline		
Offset: Fixed	<u>M</u> in: <b>₽</b> 0.17 in	
N_		

At the top of the Baseline Options tab, you can see that the First Baseline is set to a Fixed Offset with a value of 0.17 inches.

Click the Cancel button to close the Text Frame Options window.

One more thing that you should note about the Dave text frame is that the text is centered horizontally within the box and the text is black.

Now that we know the positioning of this box and the font information, delete the box from the InDesign artwork. This box will be variable on the Xebra template for the item and the web user will enter the text to be printed. We don't want the text "Dave" to be part of the background for this template.

With the Dave text frame selected, press the Delete key on your keyboard to remove the box. The

artwork in InDesign should now look like this:



Learning By Example

The last name will also be text that the web user will specify. In the artwork, the text box for the last name is Hartranft. Make sure the dark selection arrow is selected in InDesign and click on Hartranft to select that text frame.

142 X	lebra E-Commerce
×: •	20.1181 in W: € 1.2396 in 1.4028 in H: € 0.1181 in H: € 0.1881 in H: € 0.1881 in H: € 0.1881 in H: € 0.1881 in H
	(etexBusEard.indd @ 261%)         0       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1         1       1
$\begin{array}{c} \mathbf{T}_{\mathbf{x}} \\ \mathbf{Z}_{\mathbf{x}} \\ \mathbf{X}_{\mathbf{x}} \\ \mathbf{X}_{\mathbf{x}} \\ \mathbf{Z}_{\mathbf{x}} \\ \mathbf{Z}_{\mathbf{z}} \\ \mathbf{Z}_{\mathbf{x}} \\ \mathbf{Z}_{\mathbf{x}} \\ \mathbf{Z}_{\mathbf{z}} \\ \mathbf{Z}_{z$	Character × tyles raph tyles -× Arial Black T ÷9.5 pt • A ÷(11.4 pt) • Av = 0
	Image:       English:       USA         Image:       English:       USA    Find:: Control of the second s
	Hartranft     1103 Rocky Drive, Suite 103 • West Lawn, PA 19609 800-356-2772 • 610-898-1551 ext. 21 • Fax: 610-898-1564  WWW.Xebra.com

Note the coordinates and font information: Left=0.1181 inches Width=1.2396 inches Top=1.4028 inches Height=0.1181 inches Font=Arial Black 9.5 pt Tracking=0

/

Right click on the Hartranft text frame, choose Text Frame Options... from the pop-up menu, and click on the Baseline Options tab. Notice that the First Baseline Offset is set to Ascent, which means that the top of the highest letters in the font text should touch or be close to the top of the text frame.

Te	kt Frame	Options		
	General	Baseline Options		
	– First	Baseline		
		Offset: Ascent		Min: ᢏO in
	_		3	

Close the Text Frame Options window.

With the Hartranft text box selected, press the Delete key on your keyboard to remove it from the background artwork.

Another field that will be variable on this card is the email address. Make sure the dark selection arrow is still selected in InDesign and click on dave@xebra.com to select that text box.

Learning By Example

	X: € Y: €	1.97 inW: $\textcircled{+}0.85$ in $\textcircled{+}$ $\textcircled{+}$ $\textcircled{+}100\%$ $\checkmark$ $\textcircled{+}$ $\textcircled{+}0^{\circ}$ $\checkmark$ $\bigcirc$ $\bigcirc$ $\bigcirc$ $\textcircled{+}$ $\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}\textcircled{+}$
	[™] Xe	texBusCard.indd @ 261%
k k.		
T. Z		
₽ E K	1 2 -	
े X 3		Image: Metrics     Image: All the second secon
		Language: English: USA E-Mail: Jave@xebra.com
	$\frac{1}{2}$	1103 Rocky Drive, Suite 103 • West Lawn, PA 19609

Note the coordinates and font information: Left=1.97 inches Width=0.85 inches Top=1.3192 inches Height=0.1143 inches Font=Arial Bold 6.5 pt Tracking=0

If you check the text frame options for the dave@xebra.com text frame, you will see that the First Baseline Offset for this box is set to Ascent.

With the dave@xebra.com text box selected, press the Delete key on your keyboard to remove it from the background artwork.

The only other field that will be variable on this card is the telephone extension. Make sure the dark selection arrow is still selected in InDesign and click on the 21 to select that text box.



Note the coordinates and font information: Left=1.524 inches Width=0.1004 inches Top=1.6736 inches Height=0.1143 inches Font=Arial Bold 6.5 pt Tracking=0

If you check the text frame options for the 21 text frame, you will see that the First Baseline Offset for this box is set to Ascent.

With the 21 text box selected, press the Delete key on your keyboard to remove it from the background artwork.

Although we've covered the four fields that will have variable text, there are two more text boxes on this InDesign layout that we need to look at. The line starting with 800-356-2772 and ending with Fax: 610-898-1564 should be left justified. The space between the variable telephone extension and the fax number should remain constant, so the fax number (including the bullet before the fax number) will have to shift depending on the width of the telephone extension that the web user enters. Also, we want the telephone extension field to be optional. If the web user doesn't specify an extension, the text "ext." should not show in the artwork either and the fax number should shift left to fill in the gap.

Make sure the dark selection arrow is still selected in InDesign and click on the ext. box.


Note the coordinates and font information: Left=1.345 inches Width=0.1556 inches Top=1.6736 inches Height=0.1143 inches Font=Arial Bold 6.5 pt Tracking=0

If you check the text frame options for the ext. text frame, you will see that the First Baseline Offset for this box is set to Ascent.

With the ext. text box selected, press the Delete key on your keyboard to remove it from the background artwork.

Make sure the dark selection arrow is still selected in InDesign and click on the Fax: 610-898-1564 box.

146		Xeb	ra E-Cor	nmerce	Î Î				
	<b>*</b> 000	X: ‡1. Y: ‡1.	647 in 6736 in	W: 🔷 0.9 in H: 🔷 0.1143 in	- - - - - - - - - - - - - - - - - - -	100% -			
	D * .	Vet	exBusCar	d.indd @ 234%	.   ¹	1/2 .	² <u>.</u>	1,2	
	¥Τ. ℤ∖⊠□	- - - - - - - - - - - - - - - - - - -	≎ Chara Arial Bold	cter × tyles raph	tyles - ×	2	KETT I		
	<u>।</u> ि ४ ३ ।			$\begin{array}{c c} 5 \text{ pt} & \bullet & & & \\ etrics & \bullet & & & \\ \hline 0\% & \bullet & & \\ \hline pt & & & & \\ \end{array}$	(7.8 pt) • 0 • 100% •	We e	Your co softwa arn our	ompla re so stripe:	
		1 2 - -	Langu 1103 800-3	Rocky Drive, 56-2772 • 610	Suite 103 0-898-1551	• West L	E-Mail: .awn, PA 196 Fax: 610-89 <b>ebra.c</b>	09 8-1564 🖁	
		_							

Note the coordinates and font information: Left=1.647 inches Width=0.9 inches Top=1.6736 inches Height=0.1143 inches Font=Arial Bold 6.5 pt Tracking=0

/

If you check the text frame options for the fax text frame, you will see that the First Baseline Offset for this box is set to Ascent.

Another thing that you need is the actual text. This won't be variable information that the web user enters. You will have to enter this text in this fax box into the Xebra template.

Double click the text in the fax text box and then highlight all of the text in the box, including the bullet.



With the text in the fax box highlighted, hold the CTRL key on your keyboard and then press the C key on your keyboard to copy the text to the Windows clipboard.

Learning By Example 147

From the Windows Start menu, choose Run.

sta™	P	Search +
s Vis	2	Help and Support
Mob	Þ	Run
Win	0	Shut Down
<b>//</b> 9	Start	) 🔜 🏉 📑 💥 🛱 🥘 🥘

In the Windows Run dialog, enter notepad as the program to Open and click the OK button.

📨 Run		×
	Type the name of a program, folder, document, or Internet resource, and Windows will open it for you.	
Open:	notepad 💌	
	This task will be created with administrative privileges.	
	OK Cancel Browse	

Once Notepad opens, hold the CTRL key on your keyboard and then press the V key to paste the text of the Fax information text box into Notepad.

/iiii U	ntitle				
File	Edit	Format	View	Help	
• F	ax:	610-89	8-15	64	<u> </u>
•					V
					Ln 1, Cc //

Click the minimize button on the Notepad window to get it out of your way without closing it.

/ U	Intitle	d - Note	pad		_	٩
File	Edit	Format	View	Help		Minimize
• F	ax:	610-89	8-15	64		<b>A</b>
						-
						Þ
					Ln	1, Cc 🎢



Now that you have all the information that you need from the fax text box, you can delete it from the InDesign background artwork.

Make sure that you switch to the dark selection arrow in InDesign and then make sure that the fax information text box is selected. Then, press the Delete key on your keyboard to remove the fax information text box.

The resulting artwork in InDesign with only the background art should look like this:



Xebra can't currently work with this InDesign artwork directly. The best format for Xebra to use is PNG, but InDesign doesn't seem to be able to create PNG files. This requires an intermediary step.

From the InDesign File menu, choose Export...

ID A	dobe	InDesig	n CS3				
File	Edit	Layout	Туре	Notes	Ob	oject	Table
N	ew				۲		
0	pen			Ctrl+O			
Br	rowse.		Alt-	+Ctrl+O			
0	pen Re	ecent			×	)0%	
C	lose			Ctrl+W		ببنا	1
Sa	ave			Ctrl+S			
Sa	ave As		Shift+Ctrl+S			<u> </u>	
C	heck Ir	ī					
Sa	ave a (	Сору	Alt	+Ctrl+S		1 - I	
R	evert					1	
Pl	ace			Ctrl+D		0.	NUR
In	nport >	(ML				14	R.A.
A	dobe F	DF Prese	ts		۲	510	(Cales
E:	xport			Ctrl+E		10V	
C	ross-m	edia Expl	ōrt		۲		2

149

Learning By Example

In the Export dialog, choose Adobe PDF as the Save as type.

Export					
Save in:	📃 Desktop		•	G 🖄 📂 🖽	•
Recent Places Desktop XETEX Computer	Name A XETEX Public Computer Network			▼ Size	▼ Type File Folder
Network	<b>▼</b> File name:	XetexBusCard.pdf			
	Save as type:	Adobe PDF Adobe PDF EPS InDesign Interchange JPEG SVG SVG SVG Compressed XML			Can

Click the Save button on the Export dialog to open the Export Adobe PDF dialog.

Learning By Example

151
-----

Export Adobe PDF	
Adobe PDF Pre <u>s</u> et: [[Hi	gh Quality Print]
S <u>t</u> andard: No	ne <u>C</u> ompatibility: Acrobat 5 (PDF 1.4)
General	General
Compression Marks and Bleeds Output Advanced Security	Description: Use these settings to create Adobe PDF documents for quality printing on desktop printers and proofers. Created PDF documents can be opened with Acrobat and Adobe Reader 5.0 and later.
Sommary 4	Pages   All   Range: 1  Spreads  Ontions
	<ul> <li>Ciptions</li> <li>Embed Page Thumbnails</li> <li>Optimize for Fast Web View</li> <li>Create Acrobat Layers</li> <li>Create Tagged PDF</li> <li>Export Layers: Visible &amp; Printable Layers</li> </ul>
	Include         Bookmarks       Non-Printing Objects         Hyperlinks       Interactive Elements         Visible Guides and Baseline Grids       Multimedia:         Use Object Settings       Image: Comparison of the setting s
Save Preset	Export Cancel

At the top of the Export Adobe PDF dialog, set the Adobe PDF Preset to [High Quality Print]

Click the Compression menu item on the Export ADobe PDF dialog.

Export Adobe PDF							
	Adobe PDF Preset:	lig					
	S <u>t</u> andard: N	oni					
		1					
	General						
	Compression						
	Marks and Bleeds						

On the Compression setting screen, select Do Not Downsample for all image types. Also, change Compression to None for all image types. You are trying to get the highest quality image possible, so you don't want lossy JPEG compression or downsampling of raster images. The Export Adobe PDF compression settings should look like this.

xport Adobe PDF	
Adobe PDF Pre <u>s</u> et:	[High Quality Print] (modified)
Standard:	None Compatibility: Acrobat 5 (PDE 1.4)
General	
Compression Marks and Bleeds	Color Images
Output	Do Not Downsample 300 pixels per inch
Advanced	for images above: 450 pixels per inch
Security	Compression: None  Tile Size: 128
Summary	Image Quality:
	Grayscale Images
	Do Not Downsample 💿 300 pixels per inch
	for images above: 450 pixels per inch
	Compression: None
	Monochrome Images
	Do Not Downsample 1200 pixels per inch
	for images above: 1800 pixels per inch
	Compression: None

Click the Export button on the Export Adobe PDF window to complete creation of the PDF file.

If you don't have InDesign and you want to see the PDF file, you can download it from the following link:

http://www.xebra.com/Artwork/XetexBusCard.pdf

Now that you have the PDF file, you can close InDesign. If you want to save the InDesign background art, you should save it to a file with a different name than the original, such as XetexBusCardbackground.indd

For Xebra, we still need to convert the pdf to a PNG file. One way of doing this is with Adobe Photoshop. If you have Photoshop, open the XetexBusCard.pdf file with Photoshop.

If you open the XetexBusCard.pdf file in Adobe Photoshop CS3, you will see the Import PDF dialog.

Learning By Example

53

Ps Adobe Photoshop CS3 Extended	
File Edit Image Layer Select Filter Analysis View Window Help	
Resize Windows To Fit Coom All Windows	Pixels Fit Screen Print Size
Import PDF	×
Ps Select:	Page Options
	Name: XetexBusCard
P 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	Crop To: Media Box 💌
	✓ Anti-aliased
<b>4</b>	- Image Size: 7.21M
<u>×.</u>	Width: 3.5 inches 🔽 🤟
	Height: 2
<i>J</i> . 2	Constrain Proportions
97	Resolution: 600 pixels/inch 💌
<i>a</i> .	Mode: RGB Color
	Bit Depth: 8 bit 💌
	Supress Warnings
T 1 of 1 page(s) selected	
Thumbnail Size: Small	

In the Page Options section of the Import PDF dialog, select Crop To: Media Box. This should make the Image size display correctly at 3.5 inches by 2 inches. Set the Resolution to 600 and the color Mode to RGB Color with a Bit Depth of 8 bit, then click the OK button to convert the PDF file to a Photoshop image.

Choose Layer > Flatten Image from the menu.



Xebra E-Commerce

154

Then, choose File > Save As...

Ps A	dobe	Photos	hop CS	3 Exten	ded				
File	Edit	Image	Layer	Select	Filter	Analysis	View	Window	Help
Ne	ew					Ctrl+N		Windows	Actual Pixels
O	pen					Ctrl+O			
Br	owse.				All	t+Ctrl+O			
O	pen As				Alt+Shift	t+Ctrl+O			
Open As Smart Object									
O	pen Re	cent				1			
Device Central							NO		
C	ose					Ctrl+W			
C	ose All				Alt	+Ctrl+W			
C	ose an	id Go To l	Bridge		Shift	+Ctrl+W			
Sa	ave					Ctrl+S	2		
Sa	ave As			N	Shif	t+Ctrl+S	1415		
C	heck Ir	)		3			Re		
Sa	ave for	Web & D	Devices.		Alt+Shif	t+Ctrl+S		6	Yo
D	avart					E12		1	

In the Save As dialog, choose PNG as the Format and save the XetexBusCard.png file to your local computer.

Learning By Example

155



Photoshop Raw (*.RAW)

Scitex CT (*.SCT) Targa (*.TGA;*.VDA;*.ICB;*.VST)

PICT File (*.PCT;*.PICT)

Pixar (*.PXR) PNG (*.PNG)

TIFF (* TIF; TIFF)

In the PNG Options dialog, select None and click the OK button.

🗖 Thumbnail

Λ

Use Adobe Dialog

File must be

PNG Options	×
Interlace None  Interlaced	OK Cancel

Now that you have the background PNG file, you can close Photoshop and return to Xebra to continue creating the E-Commerce Stationery Template.

Portable Bit Map (%BM;*PGM;*PPM;*PNM;*PFM;*PAM)



If you haven't been able to follow along with the InDesign and Photoshop example, you can download the background image PNG from the following link: http://www.xebra.com/Artwork/XetexBusCard.png

Return to Xebra and on the Template Create Method dialog, select Choose Background Image and then click the OK button.

🏀 Template Creation M	1ethod 📃 🗖 🗙		
<ul> <li>Choose Background Image</li> <li>Import Template File</li> </ul>			
<u>Lo</u> K	Cancel		

In the Windows Open dialog, choose the XetexBusCard.png file.

🏀 Template Page Properties				
Template Page Size	Image Size			
Width (Inches):	Width (Pixels): 2100			
Height (Inches):	Height (Pixels): 1200			
Maximum Resolution (DPI): <u>Replace Background Image</u>				
Target Print/PDF Resolution (DPI):				
Online Proof Image Resolution (DPI):				
<u>0</u> K	<u>C</u> ancel			

Next you will see the Template Page Properties window.

From the InDesign example, we know that this business card is 3.5" x 2".

In the Template Page Properties dialog, enter 3.5 for the Width (Inches).

When you tab off of the Width prompt, the Height should get set to 2.0 because the template editor always maintains the proportions of the page size.

Based on the Width and Height in inches and the Width and Height of the background image in pixels, Xebra calculates the Maximum resolution for this template to be 600 DPI.

🗧 Template Page Properties		
Template Page Size	Image Size	
Width (Inches): 3.5	Width (Pixels): 2100	
Height (Inches): 2.0	Height (Pixels): 1200	
Maximum Resolution (DPI): 600	Replace Background Image	
Target Print/PDF Resolution (DP	D:	
Online Proof Image Resolution (DP	n:	

You should specify for the Target Print/PDF Resolution (DPI) the highest resolution that you expect a printer to use to print this item. You can't specify a higher resolution than the Maximum Resolution. If you needed a higher resolution than what displays in the Maximum Resolution (DPI), you would have to replace the background image with a higher resolution PNG. For this example, use 600 dpi for the Target DPI.

The Online Proof Image Resolution (DPI) provides you with a way to specify how big the proof image will be on the web site. Normal screen resolution is 96 DPI. Previous versions of Xebra always made the proof image at 96 DPI. Since this business card has a small page size and some small fonts, it would look better and be easier to read online at a slightly bigger size. Enter 120 for the Online Proof Image Resolution (DPI).

Your Template Page Properties settings should look like this.

🤗 Template Page Properties					
Template Page Size	Image Size				
Width (Inches): 3.5	Width (Pixels): 2100				
Height (Inches): 2.0	Height (Pixels): 1200				
Maximum Resolution (DPI): 600	<u>R</u> eplace Background Image				
Target Print/PDF Resolution (DPI): 600					
Online Proof Image Resolution (DPI): 120					
	Cancel				

Click the OK button on the Template Page Properties dialog to save the settings and open the new template in the Template Editor.

Notice that the title bar of the Template Editor shows 100% (1:1). This means that the template is going to be displayed at 100% of the Target Print/PDF Resolution that you specified in the Template Page Properties. At 600 DPI, this 3.5" x 2" template displays very large at 100%. You probably will only be able to see a small part of the template at a time.

From the Template Editor menu, choose Zoom > 25% of Target Print/PDF Resolution (4:1)

Learning By Example	)
---------------------	---

🏀 Template Editor - 100% (1:1)				
File Edit	Zoom Insert Help			
	25% of Target Print/PDF Resolution (4:1) 50% of Target Print/PDF Resolution (2:1)			
200% of Target Print/PDF Resolution (1:2)				

At the 25% zoom level, you should be able to see the entire template page without scrolling.



So far, the only thing showing in the template is the background. To add the first variable field to this template, click the Insert Box button on the toolbar.



Clicking the Insert Box toolbar button will put the Template Editor into insert mode. As you move the mouse pointer across the template, you should see that the mouse pointer is now a cross. Click the mouse down at approximately the place where the top left corner of the first name field will go and drag with the mouse still down to create an insertion rectangle about the right size. It is not important to get the box positioned correctly at this point. All you need to do is draw a box somewhere on the template page.



When you let go of the mouse button, your new box should appear on the template outlined in blue with red sizing rectangles.



Double click the new box to open the Box Properties window.



🏀 Box Properties	
Caption: Display Text: Box type O Variable text Drop Down List Entries Add Entry	Font         Name:       Arial         Style:       Regular         Size (pt):       10         Character spacing:       0         Set font baseline distance from top of box         Character spacing:       0         Set font baseline distance from top of box         Image: Character spacing:       0         Set font baseline distance from top of box         Image: Character spacing:       0         Image: Character spaci
Static text Link to box. Box positioning Lock box to these values Left: 0.126667 Top: 1.24	Sample Text
Right 1.3     Bottom: 1.433333     Width: 1.173333     Height 0.193333	Highlight Color: None Entry Order: 0 DK Cancel Box Movement Vertical C Top ID: C Center C Bottom C Bottom C Bottom

The Caption field is what the web user will see when they are prompted to enter the variable text for the box. For this box, set the Caption to First Name. The Display Text prompt allows you to enter sample text to display in the box instead of just showing the Caption. If you use the Display Text field, you will see this text in the Template Editor, and the web user will see this text on the image of the template on the web page that prompts them to enter the variable text. For this box, enter Dave for the Display Text.

🎉 Box Properties	
Caption: First Name	- Font
Display Text: Dave	Name: Ari
Box type	Style: Regu

In the Box positioning section of the Box Properties window, check Lock box to these values.

Static text Link to be	
Box positioning Lock box to these value:	
Left: 0.126667	тор: 1.24
<ul> <li>Right 1.3</li> </ul>	Bottom: 1.433333
O Width: 1.173333	Height: 0.193333

Since we are going to enter specific coordinates that we got from the InDesign artwork, checking Lock box to these values will keep the box position locked in to the exact coordinates that we enter for the box in inches. The box will no longer be moveable with the mouse or keyboard. Also, without the Lock box to these values check box checked, Xebra would adjust any values entered to values that match a coordinate in pixels at the Target Resolution. Checking the Lock box to these values check box will prevent any adjustments from occurring except for values that you enter specifically in the Box positioning values.

Xebra allows you to either enter a Right coordinate or a Width. Since InDesign used Width instead of specifying the right edge of the box, click the Width option button so that you can specify a Width in Xebra. The same applies to the box height. Click the Height option button. Then, enter the values



that we got from the InDesign artwork for this box:

Left: 0.1181 Width: 1.2396 Top: 1.1736 Height: 0.1799

Your Box positioning values should now look like this:

Sox positioning Lock box to these values				
Left: 0.1181	Top: 1.1736			
C Right: 1.3577	O Bottom: 1.3535			
<ul> <li>Width: 1.2396</li> </ul>	<ul> <li>Height: 0.1799</li> </ul>			

We saw that in InDesign, the font used for the first name was Arial Black 14.5 pt. In the Font section of the Box Properties window, select Arial Black from the Name drop down list.

Regular is the only style that is truly available in the Arial Black font. If you see any other styles for this font available in other applications, these are pseudo styles that the application is rendering on its own and not styles that are part of the font. Xebra currently only supports the styles that are really available in the font.

Set the Size (pt) of the font to 14.5. Since this is an odd size, you will have to type in the size manually rather than select it from the drop down list.

The color of the text in InDesign was black, so you can leave the color set to black.

We saw that in InDesign, Tracking was set to 325 for the first name text frame. In the Font section of the Xebra Box Properties dialog, enter 325 for Character spacing. Xebra uses that same unit of measure that was used in InDesign, which was Thousandths of an em or in other words, Thousandths of the size of the font in points.

We saw that in InDesign, the baseline of the text in the first name text frame was set to a fixed value of 0.17 inches. Click the option button ...equal to a fixed distance. Then, enter 0.17 in the Fixed baseline from top of box prompt.

The first name was centered within the box, so click the Center option under Horizontal Alignment.

The Font section of the Box Properties window should now look like this:

Name: Arial Black Style: Regular Character spacing: 325 Horizontal Alignment C Left • Center C Right	<ul> <li>Size (pt): 14.5</li> <li>Set font baseline distance from top of box</li> <li>equal to the font ascent - Windows text metrics</li> <li>equal to the font ascent - font file outline metrics</li> <li>equal to a fixed distance.</li> </ul>	
	Fixed baseline from top of box: 0.17	-

Xebra allows you to specify a background color for variable text. This background color is meant to highlight the fields that are variable in the image of the template that is shown to the web user when they are prompted to enter the text for the variable fields. For this example, click the Highlight Color picker...

Highlight Color:	
🗖 None 🗖 🖉	

...and in the Color dialog, select yellow.

Color			×
Basic colors:			
Custom colors:			
		Hue: 40 Sat: 240	Red: 255 Green: 255
Define Custom Colors >>	Color Solid	Lum: 180	Blue: 128
OK Cancel	A	dd to Custom (	Colors

Click the OK button on the Color dialog to close it and return to the Box Properties window.

Your completed Box Properties for the First Name field should look like this:

Son Properties	Font
Display Text: Dave Box type      Variable text     Drop Down List Entries     Add Entry	Name:       Arial Black       Image: Character spacing:       Size (pt):       14.5       Image: Character spacing:       Text Color:         Character spacing:       325       Set font baseline distance from top of box       Image: Character spacing:       Set font baseline distance from top of box         Horizontal Alignment       Image: Character Character       Image: Character Character       Image: Character Character         Character spacing:       325       Set font baseline distance from top of box:       Image: Character         Character spacing:       325       Set font baseline distance from top of box:       Image: Character         Character spacing:       325       Set font baseline distance.       Image: Character         Fixed baseline from top of box:       0.17
Static text Link to box: Box positioning ✓ Lock box to these values	Sample Text

Click the OK button on the Box Properties window to save the changes and return to the main Template Editor window. Your template should now look like this:

<u>0</u>K

<u>C</u>ancel

C Center

C Bottom

ID:

•

•

ID:

C Center

C Right



Click the Insert Box button on the toolbar and draw another new box for the Last Name field below the First Name box. The size and position doesn't have to be exact since we will enter the position values in the Box Properties dialog.

Double click the new empty box to set the Box Properties. Enter the following information, most of

Learning By Example

which came from the original artwork in In Design:

Caption: Last Name Display Text: Hartranft

Box positioning

Lock box to these values=checked Left: 0.1181 Width: 1.2396 Top: 1.4028 Height: 0.1181

Font

Name: Arial Black Size (pt): 9.5 Character spacing=0 Horizontal Alignment: Center Set Font baseline distance from top of box...equal to the font ascent - font file outline metrics

Note that there are two options in Xebra for setting the baseline of a font based on the font ascent. It turns out that Windows reports a different value for a font's ascent than what is really specified in the font file. Windows ascent values are generally higher, which results in a little space between the highest characters in the box and the top of the box. Font file ascent values generally result in the highest characters of the box going all the way up to the top edge of the box with little or no space. When you specify that the baseline should be an Offset based on the Ascent in In Design, In Design is always referring to the ascent value that comes directly from the font file. In this case, you need to use the "equal to the font ascent - font file outline metrics" option in Xebra's Box Properties window.

The yellow Highlight color should default from the previous box that you created.

Click the OK button on the Box Properties to save the settings for the new box and return to the main Template Editor window. Your template should now look like this:



Click the Insert Box button on the toolbar and draw another new box for the email field to the right of the Email: caption in the template background. The size and position doesn't have to be exact since we will enter the position values in the Box Properties dialog.

Double click the new empty box to set the Box Properties. Enter the following information, most of which came from the original artwork in In Design:

Caption: E-Mail Display Text: dave@xebra.com

Box positioning

Lock box to these values=checked Left: 1.97 Width: 0.85 Top: 1.3192 Height: 0.1143

Font

Name: Arial Style: Bold Size (pt): 6.5 Character spacing=0 Horizontal Alignment: Left Set Font baseline distance from top of box...equal to the font ascent - font file outline metrics

The yellow Highlight color should default from the previous box that you created.

For this example, we will setup this Email address field so that it shows up as a drop down list for the web user to select from pre-set values. In the Box type section of the Box Properties dialog, click the Drop down list option button.

Learnin	g By	Exam	ple
---------	------	------	-----

🟀 Box Properties	
Caption: E-N	1ail
Display Text: day	ve@xebra.com
Box type Variable text Drop down List Add Entry	Drop Down List Entries
C Static text Lin	nk to box:

Click the Add Entry button to open the Add Drop Down List Item window.

🏀 Add Drop Down List Item	
Text	
<u>D</u> K <u>Cancel</u> <u>D</u> elete	

In the Text prompt, enter:

dave@xebra.com

then, click the OK button to add this first entry and return to the Box Properties window.

Click Add Entry and add the following additional email addresses to the list:

sales@xebra.com george@xebra.com ron@xebra.com kathy@xebra.com

The completed Box Properties window for this email address variable field should look like this:

w bow roperties	
Caption: E-Mail	Font
Display Text: dave@xebra.com	Name: Arial
Box type	Style: Bold Size (pt): 6.5
C Variable text Urop Down List Entries	Character spacing: 0 Set font baseline distance from top of box
Drop down List     sales@xebra.com	Horizontal Alignment     Gequal to the font ascent - Windows text in
Add Entry george@xebra.com	Left C Center C Right Cequal to a fixed distance.
kathy@xebra.com	Fixed baseline from top of box:
C Static text Link to box:	
Distance in the second s	Sample Text
Box positioning	Gample Text
Box positioning Lock box to these values	
Box positioning ↓ Lock box to these values Left: 1.97 Top: 1.31	92
Lock box to these values     Left: 1.97     Top: 1.31     Right: 2.82     Bottom: 1.43	92 35 Highlight Color: Box Movement
Box positioning ✓ Lock box to these values Left: 1.97 Top: 1.31 C Right: 2.82 C Bottom: 1.43 ⓒ Width: 0.85 ⓒ Height: 0.11	92 35 Highlight Color: Box Movement 43 Vertical Color: Horizontal
Box positioning         ✓ Lock box to these values         Left:       1.97         ○ Right       2.82         ⓒ Width:       0.85	92 35 Highlight Color: Box Movement 43 Entry Order: 0 Up: T C Center Up: T C

Click the OK button on the Box Properties to save the settings for the new box and return to the main Template Editor window. Your template should now look like this:

<u>C</u>ancel

<u>0</u>K



Click the Insert Box button on the toolbar and draw another new box for the extension number field to the right of the phone number text in the background image. The size and position doesn't have to be exact since we will enter the position values in the Box Properties dialog.

Double click the new empty box to set the Box Properties. Enter the following information, most of

which came from the original artwork in In Design:

Caption: Extension Display Text: 21

Box positioning Lock box to these values=checked Left: 1.524 Width: 0.1004 Top: 1.6736 Height: 0.1143

Font

Name: Arial Style: Bold Size (pt): 6.5 Character spacing=0 Horizontal Alignment: Left Set Font baseline distance from top of box...equal to the font ascent - font file outline metrics

The yellow Highlight color should default from the previous box that you created.

Click the OK button on the Box Properties to save the settings for the new box and return to the main Template Editor window. Your template should now look like this:



The next box to add is the box with the static "ext." text that should come before the extension number only if the extension number isn't blank.

Click the Insert Box button on the toolbar and draw another new box between the phone number text and the extension number box. The size and position doesn't have to be exact since we will enter the



position values in the Box Properties dialog.

Double click the new empty box to set the Box Properties.

For the Caption, enter:

ext.

In the Box type section, select the Static text option. Then, select Extension as the Link to box.

<ul> <li>Box type</li> <li>Variable text</li> <li>Drop down List</li> </ul>	Drop Down List Entries
Add Entry	
<ul> <li>Static text</li> </ul>	k to box: Extension

If you specify a Link to box for a Static text box, this means that the static text will not show in the proof/artwork if the web user doesn't enter any text for the field specified by the Link to box.

Continue entering the following information into the Box Properties window, most of which came from the original artwork in In Design:

Box positioning

Lock box to these values=checked Left: 1.345 Width: 0.1556 Top: 1.6736 Height: 0.1143

Font

Name: Arial Style: Bold Size (pt): 6.5 Character spacing=0 Horizontal Alignment: Left Set Font baseline distance from top of box...equal to the font ascent - font file outline metrics

The yellow Highlight color should default from the previous box that you created.

Click the OK button on the Box Properties to save the settings for the new box and return to the main Template Editor window. Your template should now look like this:



Learning By Example

The last box to add to this template isn't a variable field and it will always print, but you need to add the static fax number text in a way that it will shift depending on the length of the telephone extension number. The fax number should shift right as the extension number gets longer. If there is no extension number, the ext. caption and the number won't show and the fax information should move left to fill the gap.

Click the Insert Box button on the toolbar and draw another new box for the fax field to the right of the extension number box. The size and position doesn't have to be exact since we will enter the position values in the Box Properties dialog.

Double click the new empty box to set the Box Properties.

Restore the Notepad document and highlight the fax number text including the bullet. Hold the CTRL key on your keyboard and press C just once to copy the text into the Windows clipboard. Then, minimize Notepad and click on the Caption prompt on the Box Properties dialog to set focus to it. Hold the CTRL key on your keyboard and press V to paste the fax text into the Caption prompt. The bullet will show up as a weird character in the Caption prompt but it will display correctly in the main Template Editor window once you are done setting the Box Properties.

Note: If you didn't have the text for the bullet and fax number text in Notepad, you can enter it manually. Hold the Alt key on your keyboard and press the following sequence of numbers on the number pad of your keyboard: 0, 1, 4, 9. After you enter the last number in the sequence, release the Alt key and the strange character that represents the bullet should appear in the Caption prompt. Then, enter a space followed by the text: Fax: 610-898-1564

In the Box type section of the Box Properties window, select the Static text option.

Display Text:			
C Variable text	Drop Down List Entries		
C Drop down List			
	-		

Leave the Link to box blank because the fax information should print regardless of what the web user enters in the other fields.

Enter the following information, most of which came from the original artwork in In Design:

Box positioning

Lock box to these values=checked Left: 1.647 Width: 0.9 Top: 1.6736 Height: 0.1143

Font

Name: Arial Style: Bold Size (pt): 6.5 Character spacing=0 Horizontal Alignment: Left Set Font baseline distance from top of box...equal to the font ascent - font file outline metrics

So far, the Box Properties window should look like this:

🏀 Box Properties	
Caption: Fax: 610-898-1564	Font
Display Text:	Name: Arial
Box type	Style: Bold 💌 Size (pt): 6.5 💌
C Variable text Drop Down List Entries	Character spacing: 0 Set font baseline distance from top of box
🔿 Drop down List	Cequal to the font ascent - Windows text metrics
Add Entry	Horizontal Alignment
	Center C Right Cequal to a fixed distance.
	Fixed baseline from top of box:
Static text Link to box:     Sox positioning     Lock box to these values     Left: 1.647     Top: 1.6736	Sample Text
Right: 2.547     Bottom: 1.7879	Highlight Color: Box Movement
Width: 0.9	Vertical Horizontal
	Entry Order:

Click the OK button to save the settings and return to the main Template Editor window.

When you return to the Template Editor window, you should see the fax text box is selected. Hold the CTRL key on your keyboard and click the extension box that says 21. You should see that now both the 21 box and the fax box are selected. Hold the CTRL key on your keyboard and click the ext. box. Now, all three boxes should be selected.

Learning By Example



Once the three fields are selected, double click the Fax information box to open the Box Properties window again.

You will notice that every field on the dialog is highlighted now. This happens when you open the properties window with multiple boxes selected at the same time.

🎉 Box Properties	
Caption: Fax: 610-898-1564	Font
Display Text:	Name: Arial
- Box type	Style: Bold Size (pt): 6.5
C Variable text Drop Down List Entities	Character spacing: O Set font baseline distance from top of box
C Drop down List	Horizontal Alignment
Add Entry	Eft C Center C Right Cequal to a fixed distance.
	Fixed baseline from top of box:
	Fixed baseline from top of box:
Static text Link to box: ▼	Fixed baseline from top of box:
Static text Link to box:     Static text     Lock box to these values	Fixed baseline from top of box: Sample Text
Static text Link to box:     Static text Link to box:     Societationing     Lock box to these values     Lock link 1647     Tage 16736	Fixed baseline from top of box:
<ul> <li>Static text Link to box.</li> <li>Box positioning</li> <li>Lock box to these values</li> <li>Left: 1.647 Top: 1.6736</li> <li>C Bister 2.547</li> </ul>	Fixed baseline from top of box: Sample Text
<ul> <li>Static text Link to box: ▼</li> <li>Box positioning</li> <li>✓ Lock box to these values</li> <li>Left: 1.647 Top: 1.6736</li> <li>○ Right: 2.547 O Bottom: 1.7879</li> </ul>	Fixed baseline from top of box: Sample Text Highlight Color: Box Movement
<ul> <li>Static text Link to box: </li> <li>Box positioning</li> <li>Lock box to these values</li> <li>Left: 1.647 Top: 1.6736</li> <li>Right: 2.547 Bottom: 1.7879</li> <li>Width: 0.900 Height: 0.1143</li> </ul>	Fixed baseline from top of box: Sample Text Highlight Color: None Vertical Top Top

In the Box Movement section of the Box Properties window, click the Horiontal ID prompt and enter 1. Then, hit the Tab key on your keyboard.

Highlight Color:	Box Movement Vertical ID: C Top	Horizontal
<u>O</u> K <u>C</u> ancel	C Bottom	C Right

When you Tab off of anything on the Box Properties form, the attention highlight goes away. Any field that doesn't have the attention set will get modified when you click the OK button. The fields that still have the attention won't be modified. This is to prevent changing things that should not be the same on all of the boxes that are selected.

In this case, we want all three boxes to have the Horizontal ID set to 1. Giving multiple boxes the same Horizontal Box Movement ID creates a horizontal movement group. You can really pick any number for the ID as long as the number is the same for all boxes in the group. It's a good idea to use 1 for the ID on the first group. In this case, we only want one horizontal box movement group, but if we wanted to have multiple groups, we would use 2 for the next ID to make sure that it is a different ID for the next group.

When you tab off of the Horizontal Box Movement ID, the Left option is selected automatically. This is what we want. When a horizontal group is left justified, the group is always placed starting with the left edge of the left most box in the group. The next box from left to right in the group is placed depending on the length of the text in the first box. The left of the second box will be set to the right edge of the text in the first box, plus the horizontal space between the two boxes in the Template Editor. Once the 2nd box is placed, the left of the 3rd box, plus the space between the 2nd and 3rd boxes. The space between the Extension number box and the fax information box will be maintained when the length of the text in the Extension number changes. In this group, if the web user doesn't enter an Extension number, the ext. box and the Extension box will be removed making the Fax information box the only box in the group. If the fax information box is the only box left in the group, it will be aligned to the left of where the ext. box was in the template before it got removed.



Click the OK button on the Box Properties window to save the changes to the three boxes in the horizontal group and return to the main Template Editor window.

Click anywhere on the template page that there isn't a box to remove the selection from the extension and fax boxes. So far, your template should look like this:



The final step is to set the order that the web user will be prompted to enter the variable fields. The first field that they should enter is the first name, so right click on the box with the text "Dave" in it. You should see a red one appear in the lower right hand corner of the box indicating that this is the first variable field that the web user should enter.



Right click on the box with the last name, Hartranft, to set it to be the 2nd box.

Right click on the box with the email address, dave@xebra.com, to set it to be the 3rd box.

Right click on the box with the extension, 21, to set it to be the 4th box.

Your completed template should look like this.



Note: In this example, we locked the position of the boxes and we specified the exact size and positioning of the boxes in the Box Properties window. This insures that everything is lined up exactly the way that we want it. If you create a template without specifying exact size and positioning in the Box Properties, and instead use the mouse or keyboard to move and size boxes on the template page, you should always review your template at 100% or 200% and make minor adjustments if necessary. At 50% and especially at 25%, you might not see that the position of the boxes isn't quite where you intended because the re-sampled view doesn't show every pixel. Movements of the boxes with the keyboard or mouse are always in increments of pixels at 100% of the Target resolution.

Close the Template Editor and be sure to answer Yes to save your changes.

When you return to the Stationery Catalog Item window, notice that some additional options are available in the Artwork Attachment Default Options section.

l	Artwork Attachment Default Options
	Default File Name: Xetex Business Cards
	Check the default type(s) of artwork to attach to PO emails.
l	Screen resolution proof (PNG)
	🕞 🔲 Text-only PDF
	PDF with background & text

When you process Stationery orders from your web site and create jobs, three attachments will be added to the line item:

1. The same screen resolution proof that was shown on the web site to the person placing the order.

- 2. A PDF document that contains only the text boxes of the artwork.
- 3. A PDF document that contains the background image and the variable text.

When you generate a purchase order and create an email to send to the printer, you might want to include some of these attachments on the email.

You would send them the screen resolution proof if you want to give the printer an idea of what the finished product should look like.

You would send the Text-only PDF version of the artwork if the printer already has the background artwork or pre-printed masters that only need to be over-printed with the variable text.

You might send the full PDF with background & text if the artwork is going to be printed on a digital printer and the background image was produced at a sufficient resolution to create a quality print.

By default, Xebra always selects the Screen resolution proof (PNG) option. Xebra selects the Textonly PDF option by default if the background image is low resolution. If the background image is high resolution, as in this example, Xebra selects the PDF with background & text to be attached to PO emails.

It is ultimately up to you what you want to send to the vendor so you can change these options at any time. For this example, we will keep the default selections for which versions of the imprint artwork to email to the vendor.

Click the OK button on the Stationery Catalog Item window to complete the new master catalog item.

Challing and							
ltem #: XF	TEX-BC		Xetex	Business Ca	rds		
item #. pre	View Item	1	Digita	l Print	100		_
Customer Ite		і С					
Product Cate		<i>#</i>					
Small Image	Large Image		nplate	1	<u>A</u> dd (	Quantity	Restriction
Packing De	scription: 500 E/	A Per BX	<u> </u>		Quantity Re	estrictior	IS
- Artwork Attachr	ent Default Ont	ions — —			Quantity	UOM	Price
Default File N	ame: Xetex Bus	iness Cards			1	BX	39.99
Derdakt file fi					3	BX BX	74.99
File Attachment     Allow file att     Web user file att	Screen resolution Fext-only PDF PDF with backgr s achments achment instruc	ound & text	) juire file	attachment			
Notes: BOXES OF 500 B 12PT. C-1-S GLC	BUSINESS CAR SSS COVER WH	DS HITE					×
		<u>ok</u>	<u>D</u> elet	e <u>C</u> an	cel		

Xebra E-Commerce

178

Close the Stationery Master Catalog window to return to the Customer Setup window.

Below the Master button in the Stationery section, you will see a button labeled User.

Warehouse Release	Stock Sales	Stationery	Report
Master	Master	Master	Master
User	User	User	User

Click the User button in the Stationery section to bring up the Stationery User Catalog window.



🖗 Stationery User Catalog	
File Commands Help	
ID: Desc	sription:
User Catalog	New Section Description
	Section Description:
	To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard.
	New <u>I</u> tems

The Master catalog is a list of items that are configured for a customer that can be used in a User catalog. Web users are assigned to particular User catalogs to define the products that the web user is allowed to order. User catalogs are often a subset of a Master catalog, but it is possible to assign all items in a Master catalog to a User catalog. If your customer is a large company with multiple divisions that will be ordering from you, you might set up a different user catalog for each type of person that will be ordering from that company. In cases like this, you might assign a User catalog to a web user that only contains items from the master catalog that are relevant to the web user's role in the company. Another approach would be to create multiple user catalogs with each catalog containing particular categories of items. Then, for each web user, you would assign all the user catalogs that contain items of the type that the web user would want to order.

In this example, we just want to create a single User catalog that contains the one item that we have configured so far in the master catalog.

🌾 Stationery User Catalog						
File	Commands	Help				
1	New		Ctrl+E			
	Find	45	Ctrl+F			
Us	Next Previous		Ctrl+N Ctrl+P	New <u>S</u>		

From the Stationery User Catalog menu, choose Commands > New

For the Description on the new user catalog, enter: Xetex Stationery Catalog

Click the New Section Description button, enter Business Cards for the Section Description, and press the Tab or Enter key on your keyboard. So far, the Stationery User Catalog window should look like this:

🏀 Stationery User Catalog	
File Commands Help	
🖹 🗙 🙀 🗲 🖬	
ID: 3	Description: Xetex Stationery Catalog
User Catalog	New Section Description
Business Cards	
	Section Description:
	To remove a section heading or item from the user cata
	highlight the item in the user catalog and press the De

On the Stationery User Catalog window, click the New Items button to display the Stationery Master Catalog Items list.

1				
<u>C</u> lear Selected Items			: To User Catalo <u>c</u>	1
Item #         Customer Item #         Description           XETEX-BC         XETEX-BC         Xetex Bus		ss Cards	Category	Notes
	tomer Item #	tomer Item # Description TEX-BC Xetex Busines	tomer Item # Description TEX-BC Xetex Business Cards	tomer Item # Description Category TEX-BC Xetex Business Cards

Double click the XETEX-BC item in the list to select it for the User Catalog. The User Catalog should now look like this:


🎉 Stationery User Catalog	
File Commands Help	
ID: 3 Descript	ion: Xetex Stationery Catalog
User Catalog Business Cards XETEX-BC - Xetex Business Cards	New Section Description         Section Description:         To remove a section heading or item from the user catalog, highlight the item in the user catalog and press the Delete key on your keyboard.         New Items

Close the Stationery User Catalog window to return to the Customer Setup window.

Now that you have a user catalog, you need to link it to a web user. On the Customer Setup window, click the Web Users button to display the Web Users window.

Click the Find icon on the toolbar.

🏀 Web Users	
File Commands Help	
ID:	Only show users for this master custome
Master Customer: XETEX	Xetex Business Systems, Inc.
User Name:	Heports
Password:	Cost Centers Usage By Location

On the Find Web User window, enter fhickey for the User Name.

🖗 Find Web User		
User ID:		
Master Customer:		
User Name: Thickey	You can enter a	any part of the User Nam Email: capitilization does
Real Name:	matter. For exa	mple, to find all web use
Email Address:	and click search	ie contains Jim', enter 'jir h.
<u>Search</u>	Cancel	
Search Hesuits		

Click the Search button on the Find Web User window and double click the fhickey record in the Search Results list to load the record.

Learning By Example

183

🎉 Web Users 📃 🗆 🗶
File Commands Help
ID: 1 🔽 Only show users for this master customer:
Master Customer:       XETEX       Xetex Business Systems, Inc.         User Name:       fhickey       Beports         Password:       fred       Cost Centers         Real Name:       Fred Hickey       Usage By Location         Email:       Usage And Inventory By Location         Approval Operator       Approval Bequired         Approval User:       Master Custom:
Order History         Shipping Location:         Warehouse::         M         Start Screen:         Veb User Specific HTML:
ID     Description     Type       1     Xetex Warehouse Items     Warehouse       2     Xetex Marketing Materials     Stock       Office Supplies Catalog       Web Site Appearance
Report Catalog:       M         Allow Credit Cards       Impose Order Quantities       Don't Go To Cart After Adding         Allow Alternate Address       Show history for all users       PunchOut User         Allow Access To Settings       Break Pages By Section       New web user on-line default         Retain Session Information       Use Sect. Desc. For Pg. No.

If you followed along in the previous sections, you should see Xetex Warehouse Items and Xetex Marketing Materials in the Catalog List already. We need to add another catalog for the Stationery item that we just configured.

On the Web Users window, click the Add Catalog button. This will open the Web User Catalog window.

Web User Catalog	_ <u> </u>
Catalog Description Catalog ID: Catalog ID: Catalog ID: Catalog ID: Catalog ID: Catalog Description Catalo	
OK Cancel Delete	

On the Web User Catalog, click the binoculars to the right of the Catalog ID. This will open the Find Code window.

🏀 Find Code			<u> </u>
Cal	alog ID:		
<u>0</u> K	Cancel		
ID	Description	Customer	
1	Xetex Warehouse Items	XETEX	
2	Xetex Marketing Materials	XETEX	
3	Xetex Stationery Catalog	XETEX	
13			
1			

Double click the Xetex Stationery Catalog item from the Find Code list to close the Find Code window and return to the Web User Catalog window.

Now that the correct Catalog ID for the user catalog is selected, click the OK button on the Web User Catalog window to add the catalog to the list. The Catalog list on the Web Users window should now look like this:

Webl	Jser Specific HTML:	<u>#</u>		
Catalog Lis	t			
ID	Description	Туре		
1	Xetex Warehouse Items	Warehouse		Add Catalog
2	Xetex Marketing Materials	Stock		Office Supplies Catalog
3	Xetex Stationery Catalog	Stationery		Office Supplies Catalog
			<b>'</b>	Web Site Appearance
Report	Catalog:			

Close the Web Users window.

Close the Customer Setup window.

On the main Xebra E-Commerce window, click the Refresh Web Site button to send your changes to the web server.



After the refresh completes, reload your web site in a browser. If you need to log in again use the fhickey user and password fred. If you don't need to log in again, click the Home link on the web site to load or re-load the Home page.

You should see the new Imprint Items menu item.



On the Home page, click the Imprint Items menu item. This will open the Imprint Items catalog page.



Click the Order button to load the page where you can enter the variable text to be printed on the card.



Learning By Example

For the first name, enter Kathy.

For the last name, enter Eck.

Select kathy@xebra.com from the E-Mail dropdown list.

Enter 17 for the extension.

( = = = : <	Please Enter Your Imprint Information:
	First Name: Kathy
ADVANTAGE	Last Name: Eck
'our complete oftware solution!	E-Mail: kathy@xebra.com 💌
ırn our stripes every day.	Extension: 17
-Mail: dave@xebra.com	Review Proof
wn, PA 19609 Fax: 610-898-1564	

Click the Review Proof button to view the Online Proof page.



The proof image is displayed at the resolution that you specified for this template in the Template Editor Page Properties. The web user can view a higher resolution version of the artwork by clicking the View PDF link below the proof image.

View PDF	
400	

The background image in the PDF will be based on the Target Resolution that you specified and the variable text will be scalable so the web user will be able to get a closer look at the details if they want to zoom in.

If the web user notices an error in their typing when they view the proof image, they can return to the Edit Imprint page to make changes by clicking the Edit link in the item details section below the proof image.

			_/
		Learning I	By Example 18
		Quantity	
ETEX-BC - Xetex Business Cards igital Print icked: 500 EA Per BX st Order:	<u>Edit</u>	1 BX 39.99 💌	
pre Detail			
		Add To Cart	

The web user can choose a quantity at a specific price from the Quantity drop down list that is based on the Quantity Restrictions that you entered on the Stationery Catalog Item window.

TEX-BC - Xetex Business Cards gital Print		
:ked: 500 EA Per BX ;t Order: <u>re Detail</u>	<u>Edit</u>	1 BX 39.99 1 BX 39.99 2 BX 74.99 3 BX 99.99
		Add To Cart

For this example, 1 BX is fine.

Click the Add to Cart button		
		Quantity
ital Print		
ced: 500 EA Per BX	Edit	1 BX 39.99 💌
. order:		
<u>e Detail</u>		
		Add To Cart

...to add the item to the cart and load the Shopping Cart page.

			Shopping cure
			You have 1 item(s)
			Welcome
Cart			
- Enter a num - Click Empty - Click the Re - Click the Up - Click the Co	ber in the Qty. box to chang Cart to delete ALL items fror move box to delete an item date Cart button to view mos mplete Order button to comp	e the numbe n your Cart. from your Ca st recent char plete your ord	r of items you'd like to or rt. ges. er.
ems			
			Quantity
tex Business Cards	Edit		1 BX 39.99 💌
A Per BX			
		±20.00	
( ( ( E)	Cart - Enter a num - Click Empty - Click the Re - Click the Up - Click the Up - Click the Co - Click th	Cart  - Enter a number in the Qty. box to chang - Click Empty Cart to delete ALL items fror - Click the Remove box to delete an item - Click the Update Cart button to view mox - Click the Complete Order button to comp cens cens cetex Business Cards EA Per BX Edit	Cart  Click Empty Cart to delete ALL items from your Cart. Click Empty Cart to delete ALL items from your Cart. Click the Remove box to delete an item from your Ca Click the Update Cart button to view most recent chan Click the Complete Order button to complete your ord Cens Cens Cetex Business Cards EA Per BX

For this example, we want to add another business card with different imprint information. Click the Continue Shopping button to take you back to the business card item and click the Order button again.

This time, enter the following: First Name: George Last Name: Hutchison E-Mail: george@xebra.com Extension: 123456

E E EX	Please Enter Your Imprint Information:
7:1:1	First Name: George
ADVANTAGE	Last Name: Hutchison
ur complete ftware solution!	E-Mail: george@xebra.com 💌
n our stripes every day.	Extension: 123456
ail: dave@xebra.com	Review Proof
I. PA 19609	Z

Note that the extension, 123456, is not George's real extension. Enter this longer number to see how the horizontal box movement group that you made in the Template Editor works. Click the Review Proof button.



Notice that the Fax number moves to the right to make room for the longer extension. In this example, the extension was so long that the fax number is now touching the X in the Xetex logo.

Click the Add To Cart button to add this item to the shopping cart. You should now have two business card orders in the shopping cart, one for Kathy and one for George.

On the Shopping Cart page click the Continue Shopping button so that you can add one more card.

Click the Order button on the business card item.

For this example, let's assume that Xetex wants to print some cards without anybody's name or telephone extension. These might be cards to hand out at a trade show where no specific sales rep needs to be the contact on the card.

Leave the First Name, Last Name, and Extension fields blank, but select sales@xebra.com for the E-Mail address.

Please Enter Your Imprint Information:
First Name:
Last Name:
E-Mail: sales@xebra.com 🔽
Extension:
Review Proof

Click the Review Proof button to view the Online Proof page.



Notice that the fax information did in fact move over to the left to fill the gap left by the missing extension information. The horizontal box movement group that you made in the Template Editor along with Link to box setting on the box containing the text, ext., made the handling of the blank extension number work out to perfection.

Click the Add To Cart button on the Online Proof page. You should now have three business card orders in the cart: one for Kathy, one for George, and one generic sales card.

## Shopping Cart

- Enter a number in the Qty. box to change the number of items you'd like to order.
  Click Empty Cart to delete ALL items from your Cart.
  Click the Remove box to delete an item from your Cart.
- Click the Update Cart button to view most recent changes.
- Click the Complete Order button to complete your order.

## Empty Cart

Imprint Items			
Item	-	Quantity	Remove
XETEX-BC - Xetex Business Cards Digital Print Packed: 500 EA Per BX More Detail	<u>Edit</u>	1 BX 39.99 💌	
XETEX-BC - Xetex Business Cards Digital Print Packed: 500 EA Per BX More Detail	Edit	1 BX 39.99 💌	
XETEX-BC - Xetex Business Cards Digital Print Packed: 500 EA Per BX More Detail	Edit	1 BX 39.99 💌	
	Subtotal: \$119.97 Update Cart Complete Order Save Cart Continue Shopping		

Click the Complete Order button to load the Checkout page.

You don't have to enter any additional information on the Checkout page. Just click the Continue button to complete the checkout process.

The Order Confirmation page will show the proof images for each card in the order along with quantity and pricing information.



Notice that in the image that shows the Order Confirmation page, Sales Tax was calculated as \$7.20. If the tax location code that you used for your demo XETEX customer was not configured the same, the Sales Tax and Total that you see may differ.

Now that you've placed the order on the web site, go back to your Xebra Client and go to the main E-Commerce window.

Actions Co Help		
Veb Site Address: 172.21.26.108		
Refresh	Web Site	
Use alterna	te refresh method	
- Unprocessed Activity From Web Site		
Warehouse Releases: 0	Process Warehouse Releases	
Stock Sales: 0	Process Stock Orders	
Stationery: 0	Process Stationery Orders	
Office Supplies: 0	Process Office Supply Orders	
Find E-Commerce Transactions	Approval Order Audit	

Learning By Example

Notice that the Unprocessed Activity From Web Site is still showing zero orders for each type. (If you don't see zero orders on your Xebra E-Commerce window, you must have Real Time processing already setup.)

Unless you have Real Time processing enabled, you have to click the Refresh Web Site button to receive orders from your web server into your Xebra database. For now, just click the Refresh Web Site button to receive the order. After the refresh completes, the Stationery total order count will change to 3 and the Process Stationery Orders button will become enabled.

Chprocessed Activity From Web Site	
Warehouse Releases: 0	Process Warehouse Releases
Stock Sales: 0	Process Stock Orders
Stationery: 3	Process Stationery Orders
Office Supplies: 0	Process Office Supply Orders
ennee e appliee. [-	

When a web user places an order with Stationery items, the order is split into a separate request for each stationery item in the shopping cart. In this example, there is one request for the card for Kathy, one request for the card for George, and one request for the generic sales card.

Click the Process Stationery Orders button to open the Process Stationery Request window.

Xebra E-Commerce

196

File Help						
Customer: XE1	TEX Xe	etex Business Syste 03 Booky Drive	ems, Inc.		<u>V</u> iew Image	
Ship To: 🗵	TEX Su	uite 103 Jost Lawn DA 199	200		View PDF	
Date: 10/	11/09	esclawn FA Too	003		View PDF (text only)	
Req. No.: 7			Confirmation No.:	7-1		
ATTN: Free	d Hickey				View Credit Card	
From Operator: Free	d Hickey					
Via: Bes	st Way					
Quantity and UOM: 1 B	×		Price:	39.99		
Item: XETEX-BC	Xete	x Business Cards		Cost Center:		
Special Instructions				Order Informa	tion	
Sales Tax: 7.20				First Name: Last Name: E-Mail: kat Extension:	Kathy Eck hy@xebra.com 17	×
File Attachments						
File Name			Size			
	P <u>r</u> oce	ess <u>P</u> rint	<u>S</u> kip <u>D</u> ele	ie <u>F</u> inished	1	<u>~</u>

The Process Stationery Request window shows the information that the web user submitted with the order on the web site. Notice that the Order Information section shows the text that was entered for the variable fields.

	Cost Center:
	Order Information
4	First Name: Kathy Last Name: Eck E-Mail: kathy@xebra.com Extension: 17
7	

If you want to review the artwork for this stationery request before you process the order, you can do so using the buttons at the top right of the Process Stationery Request window.



The View Image button displays the screen resolution proof. The View PDF button shows the artwork background as well as the variable text. The View PDF (text only) will open a PDF with only the text.

Click the Process button at the bottom of the Process Stationery Request window.

Process Print Skip Delete	<u>F</u> inished
N2	

This will open the Create Job - Stationery Request window.

🌾 Create Job - Stationery Request	
Customer Quantity and Unit Of Measure: 1 BX	
Quantity: 1 UOM: BX Price: 39.99	
Job Type: Standard Job	
Vendor for all line items: TESTDIGI	
Create Job Add To Job Cancel	

Notice that the Vendor for all line items has defaulted to TESTDIGI. This is because you entered Suggested Vendor 1 as TESTDIGI on the Item record.

You don't have to change anything on the Create Job - Stationery Request window. Click the Create Job button to open the Create Job Dialog.

<i></i>	Create Job D	)ialog	
	Job Numb	er: 1100000	<b>#</b>
	<u>L</u> oad Job	Continue E-Com	merce



If you are using automatic job numbers, the Job Number will default to the next available job number in your system. For this example, change the job number to TESTSTA instead so that it will be easier to find the job and delete it when you're done testing.

We want to put all three Stationery requests on the same job, so click the Continue E-Commerce button to move on to the next request with the imprint information for George.

🏀 Create Job Dialog	_ 🗆 🗙
Job Number: TESTSTA	<b>#</b>
Load Job	merce

The job will be created and you will be taken back to the Process Stationery Request information for George's card.

🖗 Process Stationery Request	
File Help	
Customer: XETEX Xetex Business Systems, Inc. View Image	
Ship To: XETEX Suite 103 View PDF	
Date: 10/11/09 View PDF (text o	nly)
Reg. No.: 7 Confirmation No.: 7-2	
ATTN: Fred Hickey View Credit Ca	ď
From Operator: Fred Hickey	
Via: Best Way	
Quantity and UOM: 1 BX Price: 39.99	
Item: XETEX-BC Xetex Business Cards Cost Center:	
Special Instructions Order Information	
Sales Tax: 7.20 First Name: George Last Name: Hutchison E-Mail: george@xebra.com Extension: 123456	*
File Attachments	
File Name Size	T
Process Print Skip Delete Einished	

Click the Process button.

On the Create Job - Stationery Request window, click the Add To Job button.

Customer Quantity and Unit Of Measure:	
1 BX	
Quantity: 1 UOM: BX Price: 39.99	
Job Type: Standard Job	
Job Status: Order in Process	
Vendor for all line items: TESTDIGI 🛛 🎽 Test Digital Printing Co.	

Learning By Example

199

In the Add To Job Dialog, enter the job number TESTSTA.

🏀 Add To Job Dialog	
Job Number: TESTSTA	# <b>4</b>
Load Job	

Click the Continue E-Commerce button to add the line item for George's card to the existing job and move on to the request for the generic sales card.

Xebra E-Commerce

200

File Help	
Customer: XETEX Xetex Business Systems, Inc.	⊻iew Image
Ship To: XETEX Suite 103 West Lawn PA 19609	View PDF
Date: 10/11/09	View PDF (text only)
Reg. No.: 7 Confirmation No.: 7-3	
ATTN: Fred Hickey	View Credit Card
From Operator: Fred Hickey	
Via: Best Way	
Quantity and UOM: 1 BX Price: 39.99	
Item: XETEX-BC Xetex Business Cards Cost	t Center:
Special Instructions Order	r Information
	aii. sales@xebra.com
File Attachments	
File Name Size	
Print Skip Delete	Einished

On the Process Stationery Request window, notice that E-Mail is the only field shown in Order Information because E-Mail was the only field that was not blank.

Click the Process button.

On the Create Job - Stationery Request window, click the Add To Job button.

On the Add To Job Dialog, enter the Job Number:

## TESTSTA

🏀 Add To Job D	ialog	
Job Number:	TESTSTA	<u>#4</u>
Load Job	<u>C</u> ontinue E-Co	mmerce

Since this is the last item to process for this job, click the Load Job button to view the job with all three

Learning By Example

201

ine items.							
🏀 Xebra Order Entry							
File View Commands	Actions Inquiry Go Help						
🋍 🗙 🙀 🛠	· 🔿 🐪						
Job: TESTSTA	-				🔲 Special Cor	mmission	
Alternate Address	File Attachments	Re	ep: QC	 Quota	Crusher		
Status: Order	r in Process 🔹 💌		· ,				
Customer: XETE	X 🙀 Xetex Busines	s Systems, Inc.		G	uote Date:		
Billing Customer: XETE	X 🙀 Xetex Busines	s Systems, Inc.		(	Drder Date: 10/1	1/09	
Contact: Fred I	Hickey				Due Date:		
Customer PO #: 7				Date I	Completed:		
Cost Center				Date	completed.		
			1		Invoice		
Job Type: Standard	Јор		]		Number:		
Date Note					Date:		
		<b>F</b> (***	-:-!!		Paid:		
		I <b>∨</b> spe	ciai instr	uctions			
						-	
Item	Description	Quantity	UOM	Status		Follow-up	
XETEX-BU	Xetex Business Cards	1	BX				
XETEX-BC	Xetex Business Cards	1	BX				
						<u> </u>	
							111

Notice that the line item Description is the same for each of these three cards, so it isn't very obvious which one is for Kathy, George, or sales. One easy way to fix this is to modify the line item descriptions to add something that uniquely pertains to that particular line item.

Double click the first line item in the list to open the Line Item window for that item.

Xebra E-Commerce

202



Quantity Ordered: 1 BX	Quantity Ordered: 1 BX
Quantity Shipped: 0	Quantity Shipped: 0
Unit Price: 39.99 % <u>M</u> argin: 62.49	Unit Cost: 15.00
Cost Center:	Vendor Order Date: 🔤 🗖 Acknowledged
Reorder Date: Ship By:	🔲 Date Due: 📰 Shipped: 📰
	Vendor Quote #:
Artwork included Alternate address	Vendor Job #:
Repeat for vendor     Consecutive numbering     Specifications     Security exception	AP Sequence:
Image: Specifications         Image: Specifications           Image: Specifications         Image: Specifications           Image: Specifications         Image: Specifications           Image: Specifications         Image: Specifications	

Notice that the Image check box is checked. Click the Image check box to view the picture of the business card for Kathy.



© 2009 Xetex Business Systems, Inc.

Learning By Example

203

Now that you know for sure that this is the line item for Kathy's business card, close the Image window append "-Kathy" to the end of the first line item description.

🌽 Line Item	
File View Commands Actions Help	
Job Number: TESTSTA Track	king: 🗾 Follow up: 🛄
Item: XETEX-BC	🚜 Xetex Business Cards - Kathy
	Digital Print

Also notice that on this Line Item, the File Attachments check box is checked.

🔽 Image	
Artwork included	🔲 Alternati
Repeat for vendor	🔲 Consect
Specifications	🔲 Sales ta
File Attachments	Product
3	

Click the File Attachments check box to view the file attachments for this line item.

🏀 File Attachments		<u> </u>
Add		
File Attachments		
File Name	Size	
Xetex Business Cards.pdf	1211586	
Xetex Business Cards.png	53571	
Xetex Business Cards_text_only.pdf	868124	
6		_

Notice the File Name for each attachment. The first part of the file name is based on the settings in the E-Commerce master catalog for this item. This is what these settings looked like.

🌽 Stationery (	atalog Item						_	
Item #: 🔀	TEX-BC		Xetex Busine	ess Car	ds			
	<u>V</u> iew Item		Digital Print					
Customer Ite	em #: XETEX-B	C						
Product Cate	gory:	<b>#</b>						
Small Image	Large Image	e Tem	plate		<u>A</u> dd (	Quantity	Restrictio	n
Packing De:	scription: 500 E	A Per BX			Quantity R	estriction	าร	
- Artwork Attachn	nent Default Opt	ions			Quantity	UOM	Price	
Default File N	ame: Xetex Bus	iness Cards		_	1	BX	39.99	-
Derdakt no fi	and provide a de				2	BX	74.99	
File Attachments	Fext-only PDF PDF with backgr s achments achment instruc	ound & text	uire file attach	ment				
Notes: BOXES OF 500 E 12PT. C-1-S GLO	BUSINESS CAR	DS IITE						
			<u>D</u> elete	<u>C</u> anc	el			V

**Xebra E-Commerce** 

204

The text, Xetex Business Cards, was specified as the Default File Name. The file attachment for the PDF with both the text and background is named simply by adding .pdf to the Default File Name. The file attachment for the screen resolution proof image is name by adding .png to the Default File Name. The file attachment that is a PDF with only text is named by adding _text_only.pdf to the Default File Name. Name.

Also, remember from the Stationery Catalog Item record for this item, attachments of the Screen resolution proof and PDF with background & text were set to be included with PO emails. If you double click the Xetex Business Cards.pdf entry in the File Attachments list, you will see that the Purchase Order check box is checked.

	Learning By Example 205
🖉 File Attachment	
File Name: Xetex Business Cards.pdf	
Size: 1211586	
Open Save To Disk Delete	
Attach to emails of the following document types:	
🔲 Zip 🔲 Vendor Quote Request	
🔲 Zip 🔲 Customer Quote	
🔲 Zip 🔲 Customer Acknowledgement	
🗖 Zip 🔽 Purchase Order 📐	
🗖 Zip 🗖 Invoice 😡	
🔲 Zip 🔲 Packing Slip	
🗖 Zip 🔲 CSI Release	
<u> </u>	

If you were to look at the File Attachment email settings for the Xetex Business Cards.png attachment, you would see that it is also flagged for inclusion on Purchase Order emails. If you were to look at the File Attachment email settings for the Xetex Business Cards_text_only.pdf attachment, you would see that this attachment is not set to be included on any emails.

Close the file File Attachments window to return to the Line Item window, then, click the Next arrow on the toolbar to load the next line item on the job.

🏀 L	ine Ite	m			
File	View	Commands	Actions	Help	
1	×	₽िई 🥻			
J	ob Num	ber: TESTST	A	Tracking:	•
	Item: 🖂	ETEX-BC		<b>#</b>	Xetex Business C
					Digital Print

Click the File Attachments check box to load the File Attachments window for this line item.

🏀 File Attachments		. 🗆 🗡
Add		
File Attachments		
File Name	Size	
Xetex Business Cards.pdf	1211586	1
Xetex Business Cards.png	53571	
Xetex Business Cards_text_only.pdf	868124	
3		

Notice that the names of the file attachments for this line item are exactly the same as the names for the previous line item. This is due to the fact that each line item is based on the same master Item record and the same Stationery Catalog Item record. They are both named based on the same Default File Name. This could present a problem on the purchase order email because it would be



difficult to differentiate between the attachments for each line item because they would have the same names. One solution would be to double click on the attachment in the File Attachments list and modify the File Name for the attachment to be more specific. For this example, don't change the file names so that you can see what happens if multiple file attachments have the same name when you generate the Purchase Order email.

If you view any of the pdf or png file attachments for this line item, you will see that this is the line item for George's card. On the Line Item window, append the text "-George" to the first line item description.

Click the Next button on the toolbar to load the 3rd line item and add the text "-Sales" to the first line item description.

Close the Line Item window to return to the Xebra Order Entry window. It should now be easy to see which line item is which.

Item	Description	Quantity	UOM	Status	Follow-up	-
XETEX-BC	Xetex Business Cards - Kathy	1	BX			
XETEX-BC	Xetex Business Cards - George	1	BX			
XETEX-BC	Xetex Business Cards - Sales	1	BX			
2						

Before you make the purchase order for this job, there is a simple modification you can make to the Purchase Order document configuration that will enable the PO document to list the file attachments for each item. This could be helpful to the vendor so that they can see clearly which file attachments belong to which line item on the PO document.

If you aren't the person that manages document configurations for your system, then you might not want to make any changes to the document configuration at this time. Even if you are the person in charge of document configurations, you might want to wait to make any changes until you are sure that other people aren't going to be confused by the changes. You can just read through the instructions so that you understand how it would work and if you like the modification, you can make the changes for real later or ask the person in charge to make the changes for you.



🏀 Xebra Order Entry	
File View Commands Actions Inquiry	Go Help
12 × 14 × 14	Order Entry
Job	Accounting
Alternate Address	Reports V
Status:	Utilities
Customer:	Customer Specific Inventory
Billing Customer:	Prospecting
	General Inventory Reports

From the Xebra Setup menu, select Printing > Document Setup.



On the Document Types window, double click Purchase Order in the Select a document type list.

🖗 Document Types 📃 🗖	×
Select a document type	
Name	•
AP Check	
CSI Release	
CSI Status & Reorder Report	
Carton Labels	
Customer Acknowledgement	
Customer Quote	
EC Office Supply Request	
EC Stationery Request	
EC Stock Request	
EC Warehouse Request	
Invoice	
Kit Work Order	
Mailing Label	
Misc. Job Document	-
Packing Slip	
Production Work Order	
Purchase Order	-1
Ouote Request 1	<u> </u>
<u>V</u> iew <u>C</u> lose	

Prevent update after in inventory

This will open the Document Configurations window for the Purchase Order document type.

	ditional Par	ne Templates
Enabled	Default	
X	X	
	Enabled	Additional Pay



Your Configurations list for the Purchase Order document might be different than the one shown if you have already modified your configurations. If you want to make changes to your main configuration for the purchase order, double click the configuration that has both Enabled and Default checked. This will open the Document Configuration Editor window for your configuration.

<i>6</i>	ocument Configuration Edi	tor			Ű			
File	Edit Commands Insert He	elp						
			<u></u>					
	l emplate for pages of purchase	orders that don't show	v specifications.					
					D			
					Number		Date	
		ebra De	mo ( <del>_</del> rapł	nics	JOB_NUN	MBER]	[PO_DATE]	
	1103 Rocky Drive • We	est Lawn PA 19609 • Pho	ne: 610-898-1551 • Fax: 610-8	398-1564		[	_PAGE_NUMBER] of [	
	Your Quote Number	Ship Date	Our Account Number	Contact		Customer	Customer Order No.	í II
	See Below	ITEM_DATE_	VENDOR_ACCO	PRODUCTION_COM	NTACT]	SHIP_TO_0	CUSTOMER_PO_N	
	TO: VE	NDOR_ORD_CO	NTACT]		Ship Via:	NO1		
		NDOR_ORD_CO	MPANY_NAME] DRESS 11		[SHIPPI	ING]		
	VE		DRESS_2]	STATEL NENDOR			L	
	.vc		I [VENDOR_ORD]	STATEJ [VENDOR_	0			
	vendor into.: Phone:		PHONEJ Fax: [VEN	DUR_URD_FAXI Em	all:			
	Ship To:	P TO CONTACT						
	SHIF	P_TO_COMPANY	_NAME]					
	[SHIF	TO_ADDRESS	2]					
		P_TO_CITY] [SHI	P_TO_STATE] [SHI	P_TO_POSTA				,
	Quantity JM	tem pe	scription			Unit Cost		
		IT <u>IIIEM_NU</u>	EM_DESC_1] EM_DESC_2]		II IIEM	UNIL_COST	_EXTENDED_COST	
		Ш Ш	EM_REMARKS]					
		UT	EM_GUARANTEED					<b>9</b>
			EM_REPEAT] EM_PROOF_REQU	IIREDI				
		Yc	our Quote Number: [l	TEM VENDOR QUO			21 UTEM ADT ENOL	
		Er [IT	EM_RETURN_ARTV	VORK]		ENCLOSURE	_2], [ITEM_ART_ENCL	
		Sp	ecial Instructions: [l		RUCTIONS]			
				5				
•	-							
								11.

You should see a box in the line item detail section of the configuration that contains the field [ITEM_VENDOR_INSTRUCTIONS].

m Pescription		Unit Cost	Extension
EM_NU [ITEM_DESC_1]	[ITEM	UNIT_COST]	_EXTENDED_COST]
[ITEM_DESC_2]			
[ITEM_REMARKS]			
[ITEM_CONSECUTIVE_NUMBERING]			
[ITEM_GUARANTEED_NUMBERING]			
[ITEM_REPEAT]			
[ITEM_PROOF_REQUIRED]			
Your Quote Number: [ITEM_VENDOR_	QUOTE_NUMBEF	2]	
Enclosures: [ITEM_ART_ENCLOSURE]	_1], [ITEM_ART_E	NCLOSURE_2	2], [ITEM_ART_ENCL
[ITEM_RETURN_ARTWORK]			
Special Instructions: [ITEM_VENDOR_I	INSTRUCTIONS]		

Learning By Example

209

Double click this box to open the Data Field Properties window.

🔅 Data Field Propertie:	5			_	
C Size & Positioning	Hide on	In Print Preview enable	Data Field Format Options	For Type	
Left: 2.5	Printed document	🔲 Edit and delete	DOLLARSIGN_COMMA_SEP_THOUSANDS	NUMBER	-
7 0.007	Fax	Move and resize	COMMA_SEP_THOUSANDS	NUMBER	-
1 op:   6.667	Email/PDF		DOLLAR_AMOUNT_SPELLED_OUT	NUMBER	
Right: 8.125		]	BLANK_WHEN_ZER0	NUMBER	
D-W 6 922	Bar Code		ROUND,0,0	NUMBER	
Bottom: [0.033	Color	word Wrap			
📔 🗖 Disable mouse moves			Available Data Fields	Data Type	
– Horizontal Alignment – –	Vertical Alignment	Fit Options	JOB_NUMBER	TEXT	
Freizenkar-nightiterk	<ul> <li>Top</li> </ul>	Evpand boy to fit text	JOB_SPECIAL_INSTRUCTIONS	TEXT	
C Center	C Contex	C Clip have to 6t how	PO_DATE	DATE	
O Lenter			CURRENT_PAGE_NUMBER	NUMBER	
C Right	C Bottom	Shrink text to fit box	TOTAL_PAGES	NUMBER	
□ Hide on first page □	Hide on middle pages	Hide on last page	VENDOR_ACCOUNT_NUMBER	TEXT	
I mue on miscipage I	ride officiale pages	i inde on last page	PRODUCTION_CONTACT	TEXT	
Text/Data:			CUSTOMER_PO_NUM	TEXT	
Special Instructions: IITEM	VENDOB INSTRUCTION	S1	JOB_REP_CODE	TEXT	
		01	JOB_REP_NAME	TEXT	
			JOB_REP_PHONE	TEXT	
			JOB_REP_FAX	TEXT	
			JOB_REP_EMAIL	TEXT	
			CUSTOMER_REP_CODE	TEXT	
	OK Cancel	1	CUSTOMER_REP_NAME	TEXT	
		]	CUSTOMER REP PHONE	TEXT	

In the Text/Data field, add a new line with the text:

File Attachments:

Text/Data:							
Special Instructions: [ITEM_VENDOR_INSTRUCTIONS] File Attachments:							
<u>D</u> K <u>C</u> ancel							

With the cursor blinking after the new "File Attachments:" text, scroll through the Available Data Fields lists until you find the field, ITEM_EMAIL_ATTACHMENTS. Double click on this available field in the



## list to add it to your Text/Data field.

Disable mouse moves	Font Mord wrap	Available Data Fields	Data Type	
- Horizontal Alignment	- Fit Options	ITEM_RETURN_ARTWORK	TEXT	
	C. Even and here to G have	ITEM_DATE_DUE	TEXT	
	Expand box to fit text	ITEM_DATE_SHIP_BY	DATE	
C L'enter	C Clip text to ht box	ITEM_BUY_QUANTITY_ORDERED	NUMBER	
C Right C Bottom	Shrink text to fit box	ITEM_BUY_UOM	TEXT	
		ITEM_UNIT_COST	NUMBER	
I Hide on first page I Hide on middle pages	I Hide on last page	ITEM_EXTENDED_COST	NUMBER	
Text/Data:		ITEM_IMAGE	IMAGE	
Special Instructions: [ITEM_VENDOB_INSTRUCT]		ITEM_LONG_DESCRIPTION	TEXT	
File Attachments: [ITEM_EMAIL_ATTACHMENTS]	ITEM_VENDOR_INSTRUCTIONS	TEXT		
		ITEM_WAREHOUSE_INSTRUCTIONS	TEXT	
		ITEM_EMAIL_ATTACHMENTS	TEXT	
		PO_TOTAL_COST	NUMBER	
		OPERATOR_CODE	TEXT	
	OPERATOR_NAME	TEXT		
				_

Click the OK button on the Data Field Properties window to save the changes and return to the Document Configuration Editor window. Purchase Order documents configurations have multiple page types. The first page type will be used for line items that don't have specifications. Click the Next button in the toolbar to load the next page type.

🌽 Document Configuration Editor
File Edit Commands Insert Help
Template for pages of purchase orders that don't show specifications.

The 2nd page type of the Purchase Order configuration is for line items that do have specifications.

Lea	rnin	g By	/ Exan	nple
-----	------	------	--------	------

2	1	1	

<i>6</i> (	Document Configuration Editor	
File	Edit Commands Insert Help	
	Image: Image: Second	
		<u> </u>
	PURCHASE ORDER	
	Number Dama Comandiaca	
	January Drive • West Lawn PA 19609 • Phone: 610-898-1551 • Fax: 610-898-1564	
	Your Guote Number Ship Date Our Account Number Contact Customer Customer Customer Order No.	
	[VENDOR_ORD_COMPANY_NAME] [VENDOR_ORD_ADDRESS_1]	
	[ITEM_ART_ENCLOSURE_1]	
	[ITEM_ART_ENCLOSURE_2]	
	Vendor Into.: Phone: [VENDUR_ORD_PHONE] Fax: [VENDUR_ORD_FAX] Email: [ITEM_RETURN_ARTWORK]	
	Ship To: Special Instructions:	
	[SHIP_TO_ADDRESS_1] [SHIP_TO_ADDRESS_2]	
	Quantity JM tem Description Unit Cost Extension	
	TITY_ORDERED] [ITEM] [ITEM_NU  [ITEM_DESC_1] [ITEM_UNIT_COST]   EXTENDED_COST]	
		0
	[ITEM_REPEAT]	
	Specifications:	
•		

To be sure to show email file attachments for all line items on a purchase order document, you would have to add the [ITEM_EMAIL_ATTACHMENTS] field somewhere on this page type.

Note: The Xebra Document Configuration Editor allows for a lot of flexibility in how your documents will look. The preceding example only shows one way of adding the ITEM_EMAIL_ATTACHMENTS field to the Xebra Standard document configuration for the Purchase Order. There are lots of ways that you could do this and it is up to you to decide how your documents should look.

After you make the changes to your document configuration, you can close the Document Configuration Editor window and save the changes. Close the other open windows until you get back to the Xebra Setup window and then use the Go menu to return to Xebra Order Entry.

From the Xebra Order Entry File menu, select TESTSTA - XETEX from the recent jobs list to re-load the TESTSTA job.



With the TESTSTA job loaded, from the Xebra Order Entry Actions menu, choose Prepare Vendor Purchase Order.

🏀 Xebra Order Entry		
File View Commands	Actions Inquiry Go Help	
	Prepare Customer Quote Record Customer Order	-
Alternate Address	Customer Acknowledgement	Rep: QC Quota Cru
Status: Urder Customer: XETE	Receive Vendor Invoice ; In	c. Quot
Billing Customer: XETE	Invoice Customer ; In	c. Orde
Contact: Fred H	Print Shipping Label	Du
Customer PO #: 7	Print Misc. Job Document	Date Con
Cost Center	Sales Tax Reversal	

From the Prepare Vendor Purchase Order window, click the Create Purchase Order button in the toolbar.

Learnin	g By	Exam	ple
---------	------	------	-----

213		21	3
-----	--	----	---

🌾 Prepare ¥endor Purchase Order					
File Commands Help					
<u> </u>					
Create Purchase Order 🗨 🏄 Test Digital Printing Co.		Ship	oing Informatio	n	
P.O. Date: 10/12/09		Carr	ier: Best Way		<b>_</b>
Production Contact: Quota Crusher		Γ	Inside deliv	ery required	
Existing purchase orders for the selected vendor on this job					
P.O. Number Date Item Descrip	tion				
Select items for the purchase order.					
Item Description	Quantity	UOM	Unit Cost	Extension	
X XETEX-BC Xetex Business Cards - Kathy	1	ΒX	15.00	15.00	
X XETEX-BC Xetex Business Cards - George	1	ВХ	15.00	15.00	
X   XETEX-BC   Xetex Business Cards - Sales	1	ВХ	15.00	15.00	
Purchase order date.					1.

This will open the Purchase Order Editor window.

Image: Purchase or point of the point o	R
Image: Ship Date       Our Account Number       Contact       Customer       Custom	R
PURCHASE ORDE         Number       Date         TESTSTA       Date         1103 Rocky Drive • West Lawn PA 19609 • Phone: 610-898-1564       Date         TESTSTA       Date         Your Quote Number       Ship Date         Our Account Number       Contact         Customer         XETEX       Z	R
PURCHASE ORDE         Number       Date         TESTSTA       10/12/09         Page 1         Your Guote Number       Ship Date         See Below       A S A P         Our Account Number       Contact         Customer       Zester         Zester       Teststan	iR
PURCHASE ORDE         Number       Date         TESTSTA       10/12/09         Page 1       Page 1         Your Guote Number       Ship Date         See Below       S & P	R
PURCHASE ORDE         Number         Contact       Contact       Customer	R
Your Guote Number     Ship Date     Our Account Number     Contact     Customer     Customer       Your Guote Number     Ship Date     Our Account Number     Contact     Customer     Customer	
Your Quote Number     Ship Date       Your Quote Number     Ship Date       Our Account Number     Contact       Customer     Customer       See Below     A S A P	
Your Quote Number Ship Date Our Account Number Contact Customer Customer C See Below A S A P Quote Crusher XETEX 7	1 of 1
See Below A S A P Quota Crusher XETEX 7	Order No.
TO: Test Digital Printing Co.	
123 Main Street Best Way	
Ship To:	
Fred Hickey Xatax Business Systems Inc.	
1103 Rocky Drive	
L SUITE 113	
West Lawn PA 19609	Extensi
West Lawn PA 19609           Quantity UM         Item         Description         Unit Cost	15.0
Guantity         UM         Item         Description         Unit Cost           1         BX         XETEX-BC         Xetex         Business         Cards - Kathy         15.00	
Quantity         UM         Item         Description         Unit Cost           1         BX         XETEX-BC         Xetex         Special Print         15.00           Digital         Print         Special Instructions:         BOXES OF 500 BUSINESS CARDS         1400	
Quantity         UM         Item         Description         Unit Cost           1         BX         XETEX-BC         Xetex         Business         Cards - Kathy         15.00           0         Digital         Print         Special         Special         Instructions:         BOXES         CARDS           12PT.         C-1-S         GLOSS         COVER         WHITE         File         Attachments:         Xetex         Business         Cards-1.png	
West Lawn PA 19609         Quantity UM       Item       Description       Unit Cost         1       BX       XETEX-BC Xetex Business Cards - Kathy       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE         File Attachments: Xetex Business Cards-1.pdf, Xetex Business Cards-1.png       1         1       BX       XETEX-BC Xetex Business Cards - George       15.00	15.0
West Lawn PA 19609         Quantity UM       tem       Description       Unit Cost         1       BX       XETEX-BC       Xetex Business Cards - Kathy       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE       File Attachments: Xetex Business Cards-1.pdf, Xetex Business Cards-1.png         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       15.00	15.0
West Lawn PA 19609         Quantity UM       tem       Description       Unit Cost         1       BX       XETEX-BC       Xetex Business Cards - Kathy       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE       File Attachments: Xetex Business Cards-1.pdf, Xetex Business Cards-1.png         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE	15.0
West Lawn PA 19609         Quantity UM       Item       Description       Unit Cost         1 BX       XETEX-BC Xetex Business Cards - Kathy Digital Print Special Instructions: BOXES OF 500 BUSINESS CARDS 12PT. C-1-S GLOSS COVER WHITE File Attachments: Xetex Business Cards-1.pdf, Xetex Business Cards-1.png         1 BX       XETEX-BC Xetex Business Cards - George Digital Print Special Instructions: BOXES OF 500 BUSINESS CARDS 12PT. C-1-S GLOSS COVER WHITE File Attachments: Xetex Business Cards-2.pdf, Xetex Business Cards-2.png	15.0
West Lawn PA 19609         Quantity UM       tem       Description       Unit Cost         1       BX       XETEX-BC       Xetex Business Cards - Kathy       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE       File Attachments: Xetex Business Cards-1.png         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         1       BX       XETEX-BC       Xetex Business Cards - George       15.00         Digital Print       Special Instructions: BOXES OF 500 BUSINESS CARDS       12PT. C-1-S GLOSS COVER WHITE       File Attachments: Xetex Business Cards-2.pdf, Xetex Business Cards-2.png         1       BX       XETEX-BC       Xetex Business Cards - Sales       15.00         1       BX       XETEX-BC       Xetex Business Cards - Sales       15.00	15.C 15.0

Notice that the names of the file attachments that will be included in the Purchase Order email are shown below the Special Instructions. Also note that the names of the file attachments are slightly different than what you saw on the Line Item File Attachments window. Since there were multiple file attachments flagged to be emailed with the same name, Xebra modified the names by adding a sequential number to each one that would have been duplicated.

		2/////	Learning By	Example	215
XETEX-BC Xetex Business Card	s - Kathy			15.00	
Digital Print					
Special Instructions:	BOXES OF 5	500 BUSINESS	S CARDS		
12PT. C-1-S GLOSS	COVER WH	ITE			
File Attachments: Xe	tex Business	<pre>Cards-1.pdf, &gt;</pre>	Ketex Business	Cards-1.png	
	_	1			
XETEX-BC Xetex Business Card	s - George	-0		15.00	
Digital Print					
Special Instructions:	BOXES OF 5	500 BUSINESS	S CARDS		
12PT. C-1-S GLOSS	COVER WH	ITE			
File Attachments: Xe	ex Business	Cards-2.pdf, >	Ketex Business	Cards-2.png	
XETEX-BC Xetex Business Card	e - Salae			15.00	
Digital Print	5 - Oales			13.00	
Snecial Instructions:		500 BUSINESS			
12PT_C-1-S_GLOSS	COVER WH	ITE			
File Attachments: Xe	tex Business	:Cards-3 ndf.>	Xetex Business	Cards-3 ppg	
The Attachments, Ae	ev Dasiliess	- Calus-J.pul, /	NELEX DUSITIESS	Calus-J.phy	

Click the Save button on the Purchase Order Editor toolbar to finalize the purchase order and open it in Xebra Print Preview.



To email the purchase order to the vendor, click the email button from the Xebra Print Preview toolbar.



The email should open in the default email client for your computer. The following image shows the email in Windows Mail.

📑 Purcha	se Order		_
File Edi	: View Insert Format Tools Message Help		
📑 Send	🔏 🗈 🗊   🏖 🎔   🌒 👭 -   🖼 🖷	4	
From:	frh@xebra.com (mail.xebra.com)		
🔲 To:	Test Digital Printing Co. <orders@testdigitalprintingco.co< td=""><td>m&gt;;</td><td></td></orders@testdigitalprintingco.co<>	m>;	
🔲 Cc:			
🔲 Bcc:			
Subject:	Purchase Order		
Attach:	Xetex Business Cards-3.png (37.8 KB) Xetex Business Cards-2.pdf (887 KB) Job TESTSTA.pdf (21.0 KB)	Xetex Business Cards-3.pdf (798 KB) Xetex Business Cards-1.png (39.2 KB)	💽 Xetex Business Cards-2.png (39. 🛋 Xetex Business Cards-1.pdf (887

Notice that the artwork files are attached and named as they were shown on the purchase order document. The Job TESTSTA.pdf file is a PDF version of the purchase order document. From this point, you could alter the text of the email and you could send the email. Since Test Digital Printing Co. isn't real and this isn't a real order, don't try to send the email.

Close the email without sending.

Close the Xebra Print Preview window.

Close the Prepare Vendor Purchase Order window.

Since the TESTSTA job is just an example, it would be good to remove it from your live system. Click the red X on the Xebra Order Entry toolbar to remove the job.



NOTE: If the red X is disabled, you will need to find a Xebra operator in your company with the correct security privileges to delete the job.
## 3.2 Removing Test Data

If you followed along with the Learning By Example section, you may have left over test data in your system that you should remove. The following are instructions for making sure that the test data gets cleaned up. In some cases, your operator security settings may prevent you from deleting particular data. In these cases, you will have to find a person at your company who is authorized to delete the information.

Go > Xebra E-Commerce > Actions > Customer Setup Enter XETEX for the Master Customer.

In the Warehouse Release section, click the User button. Choose Commands > Next from the menu to load the first user catalog for XETEX. Choose Commands > Delete to delete the user catalog. Answer Yes to the warning message. Close the Warehouse Release User Catalog window. In the Warehouse Release section, click the Master button. Double click the XETEX-ENV-9W item to open the Warehouse Release Catalog Item window. Click the Delete button on the Warehouse Release Catalog Item window. Close the Warehouse Release Master Catalog window.

In the Stock Sales section, click the User button. Choose Commands > Next from the menu to load the first user catalog for XETEX. Choose Commands > Delete to delete the user catalog. Answer Yes to the warning message. Close the Stock Sales User Catalog window. In the Stock Sales section, click the Master button. Double click the XETEX-TSPC item to open the Stock Sales Catalog Item window. Click the Delete button on the Stock Sales Catalog Item window. Close the Stock Sales Master Catalog window.

In the Stationery section, click the User button. Choose Commands > Next from the menu to load the first user catalog for XETEX. Choose Commands > Delete to delete the user catalog. Answer Yes to the warning message. Close the Stationery User Catalog window. In the Stationery section, click the Master button. Double click the XETEX-BC item to open the Stationery Catalog Item window. Click the Delete button on the Stationery Catalog Item window. Close the Stationery Master Catalog window.

Click the Web Users button. Choose Commands > Next from the menu to load the first web user for XETEX. Choose Commands > Delete to delete the fhicky web user.

Close the Customer Setup window.

From the Go menu, choose Setup From the Xebra Setup > Options menu choose Delete Customer Specific Inventory Item Enter XETEX-ENV-9W for the Item code and click the OK button.

From the Go menu, choose Order Entry.

Choose Commands > Find Job from the menu. Enter TESTSS for the Job Number and click the Search button. If a record is found, load it and delete it.

Repeat this to delete job TESTSTA if it still exists.

From the Order Entry View Menu, choose Item Choose Commands > Find from the menu.



Enter XETEX-BC for the item code and load and delete the record. Repeat this to delete items: XETEX-TSPC and XETEX-ENV-9W If you created a POSTAGE item and you don't want to keep it, you can delete that record too.

From the Order Entry View Menu, choose Vendor > Remittance From the Vendor Remittance > Commands menu, choose Find. Enter TESTDIGI for the Code and load the record. Choose Commands > Delete from the menu to delete the TESTDIGI record.

From the Order Entry View Menu, choose Vendor > Ordering From the Vendor Ordering > Commands menu, choose Find. Enter TESTDIGI for the Code and load the record. Choose Commands > Delete from the menu to delete the TESTDIGI record.

From the Order Entry View Menu, choose Customer > Billing From the Customer Billing > Commands menu, choose Find. Enter XETEX for the Code and load the record. Choose Commands > Delete from the menu to delete the XETEX record.

From the Order Entry View Menu, choose Customer > Shipping From the Customer Shipping > Commands menu, choose Find. Enter XETEX for the Code and load the record. Choose Commands > Delete from the menu to delete the XETEX record.

If you entered a PST product category for postage and you don't want to keep it: From the Order Entry View Menu, choose Control Files > Product Category Choose Commands > Find from the menu Enter PST for the Product Category Code and load the record. Choose Commands > Delete to delete the PST record.



## 4 Advanced Setup Options



## 5 Xebra E-Commerce Reference