StoreFlow

Training Guide

For XMPie uStore version 8.0

one to one in one™

A xerox Company

Notices

U.S. Patents 6948115, 7406194, 7548338, 7757169 and pending patents.
JP Patent 4406364B and pending patents.

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Getting started

Course description

Course description	This course offers an introduction to uStore main workflows. It will provide you the required knowledge to successfully run your online stores. In this course you will learn how to: • Set up online stores • Add products to the stores • Manage product orders • Generate reports
Target audience	Store administrators
Product	uStore 8.0
Prerequisite	To successfully complete this course, you should have a basic knowledge of: • uCreate Print • uProduce • Variable data printing • Prepress workflows
Duration	One day

Course overview

The aim of this course is to provide you with the skills and knowledge necessary to run your StoreFlow solution successfully.

Overall goals

This course will help you get started with uStore. It provides the basic knowledge required to build online stores that offer static and dynamic products, so that your stores' visitors can start placing orders and you can start benefiting from the StoreFlow solution.

At the end of this training you will be able to perform administrator's basic tasks:

- Set up store and products
- Manage and maintain stores and products
- Manage orders from the moment they are placed in the storefront through to fulfillment
- Set up users and groups and manage their permissions
- Generate reports

Course structure

This course uses the Piece of Cake store as a reference. Most of the procedures and demonstrations are based on the Piece of Cake store created by XMPie for demos and other marketing purposes.

The Piece of Cake store includes several types of products. The course will cover only part of them. You will create new products and add them to the Piece of Cake store or new stores according to the course activities.

Document conventions

To help you use this guide more effectively, here is a description of what the icons used throughout the guide mean:

Symbol	Description
	Lesson learning objectives
	References
 and 	Important notes
	Tips

Module 1:

Introducing uStore

In this module, you will learn about uStore's main concepts and workflows. You will also learn how to open the uStore back office application to start setting up your online stores and products.

Lessons in this module

Lesson 1: Introducing the uStore environment

Lesson 2: Getting familiar with the storefront workflow

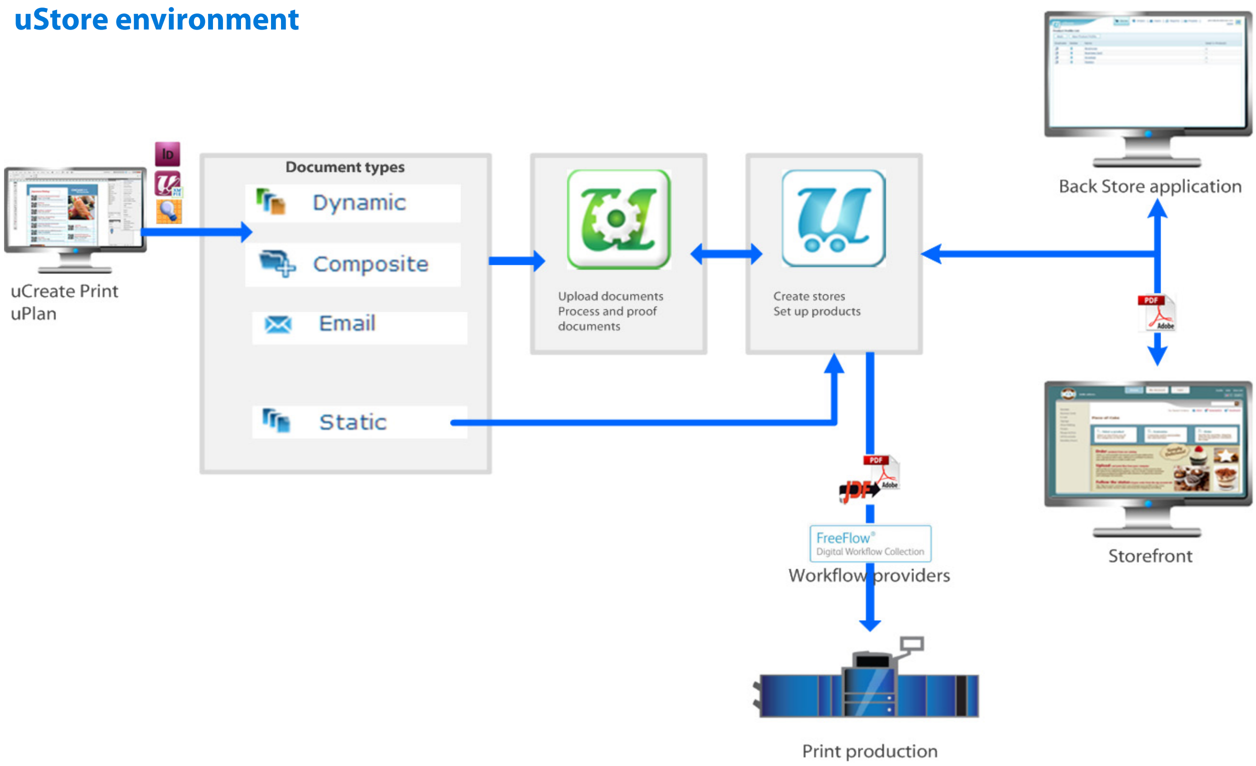
Lesson 3: Opening the uStore back office application

Lesson 1: Introducing the uStore environment

What will you learn?

In this lesson you will learn how uStore works with other XMPie system components.

The following diagram shows the XMPie components that play an important part in the uStore workflow.



uProduce: uStore works closely with uProduce. Email and dynamic documents need to be proofed and processed on uProduce before you can add them to an online store. uProduce also hosts all the assets (image files, fonts, among other files) used in the dynamic documents. In addition, after products are purchased in the storefront, they are sent to production on uProduce, which creates the PDF that is used to print the output file.

Learn more:

You will learn more about dynamic documents in the module Adding a dynamic product to your store on page 44.

uCreate Print: You create the dynamic document templates on uCreate Print, a plug-in for Adobe InDesign.

Learn more:

For more details on how to use uCreate Print, see the uDirect Studio tutorial.

uPlan: uPlan is not a requirement for creating dynamic documents, but you can build more complex rules for your dynamic content using uPlan. This course does not cover uPlan.

Xerox FreeFlow Core: Xerox FreeFlow Core is a prepress workflow provided with the StoreFlow package. uStore enables you to create JDF files that are compatible with the Xerox FreeFlow and HP SmartStream JDF conventions, as well as other 3rd party JDF-enabled print devices.

Learn more:

You will learn more about prepress workflow providers in the module Working with product profiles.

uStore: In the uStore back office, you set up online stores and add products to these stores. In the back office application, you manage uStore's production queues and generate reports to assess the success or your stores.

During this course, you will learn how to perform basic administrator's tasks.

Lesson 2: Getting familiar with the storefront workflow

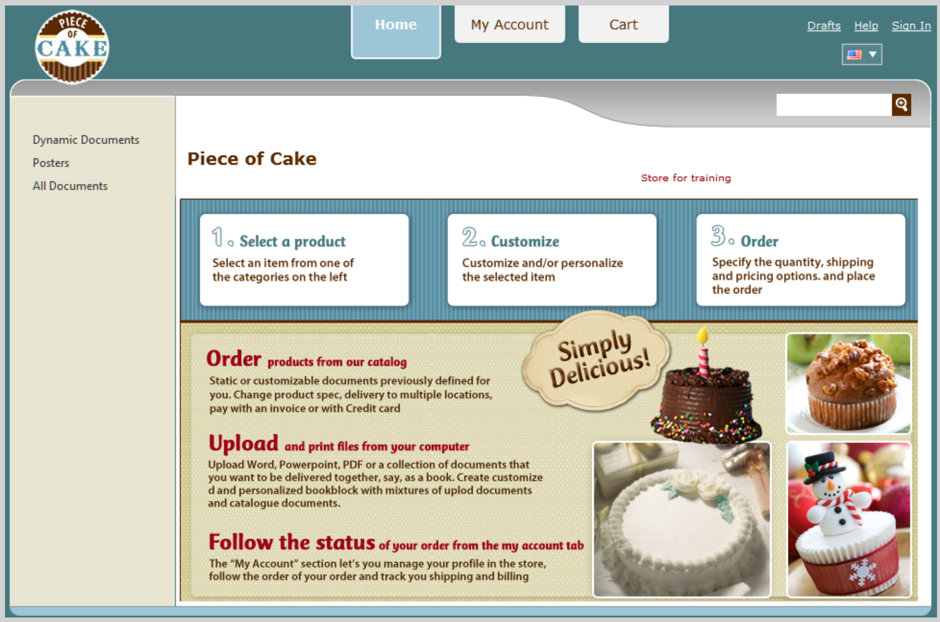
What will you learn?

In this lesson, you will explore the purchasing experience of your store visitors. Understanding how the storefront application works will help you understand how uStore works and how your settings affect your customers' experience.

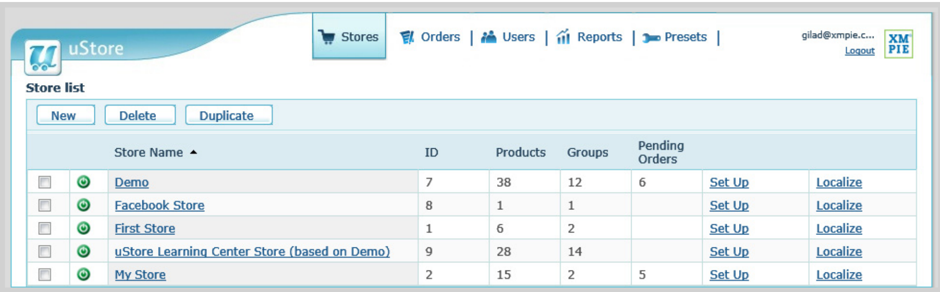
uStore is a web-to-print application that enables print providers, creative agencies, and corporate marketing departments to set up branded, ecommerce enabled, online stores.

uStore consists of two applications, one used by the store's customers and the other used by the store's administrators:

- **Storefront**: The online store where visitors order personalized and customized products, as well as upload their own files. Each store can be uniquely branded for multiple internal or external customers. The store features tailor-made pricing, preferences, permissions, design customization and print parameters to suit each customer.



- **Back Office**: Enables uStore administrators to set up and manage online stores and products and handle the orders received from the Storefront. The Back Office enables you to configure system presets such as language, currency, delivery and clearing methods, and prepress workflows, among other settings.



Storefront walkthrough

The following flow describes the main steps required for visitors to order products in the Storefront application depending on the type of store:

Business to business (B2B)

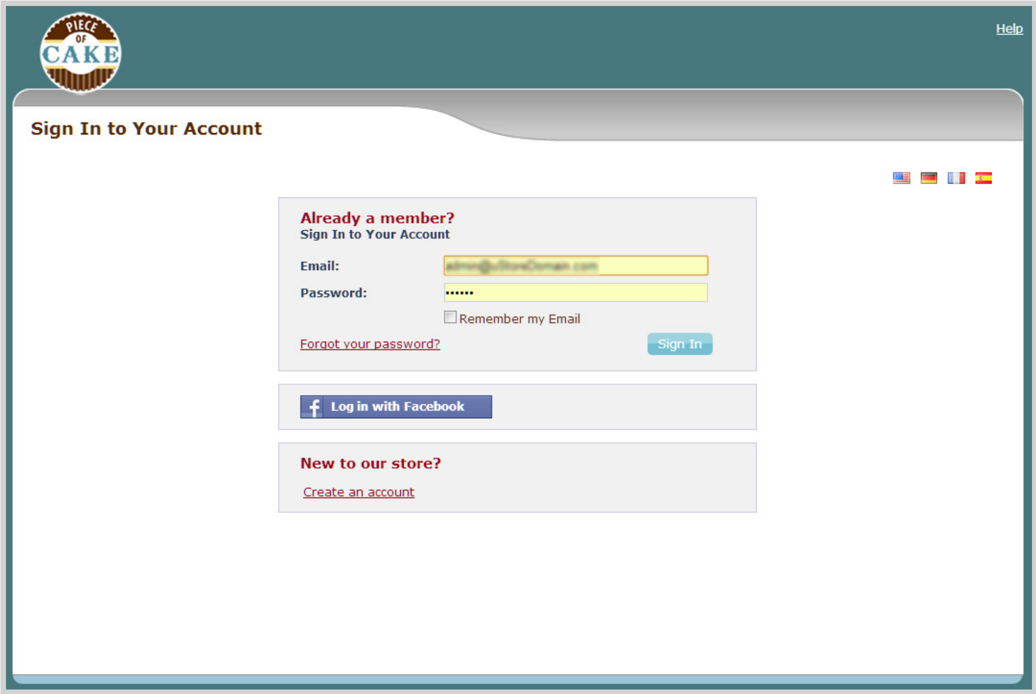
Register (or log in) → Select product → Add to cart → Check out

Business to consumer (B2C)

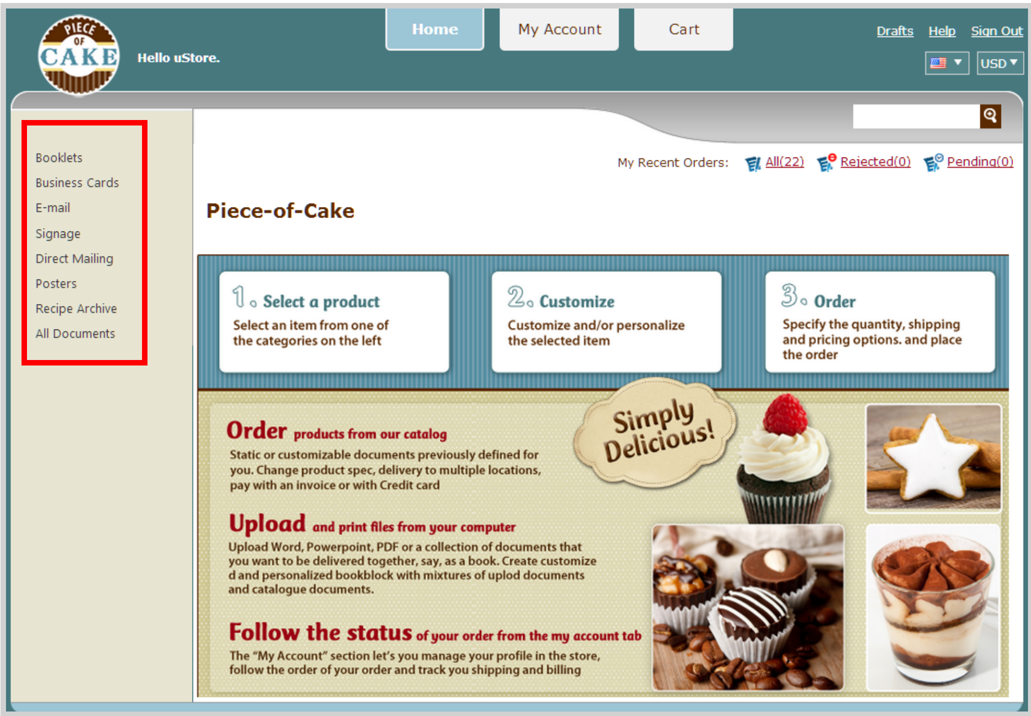
Select product → Add to cart → Register (or log in) → Check out

To order a product on uStore:

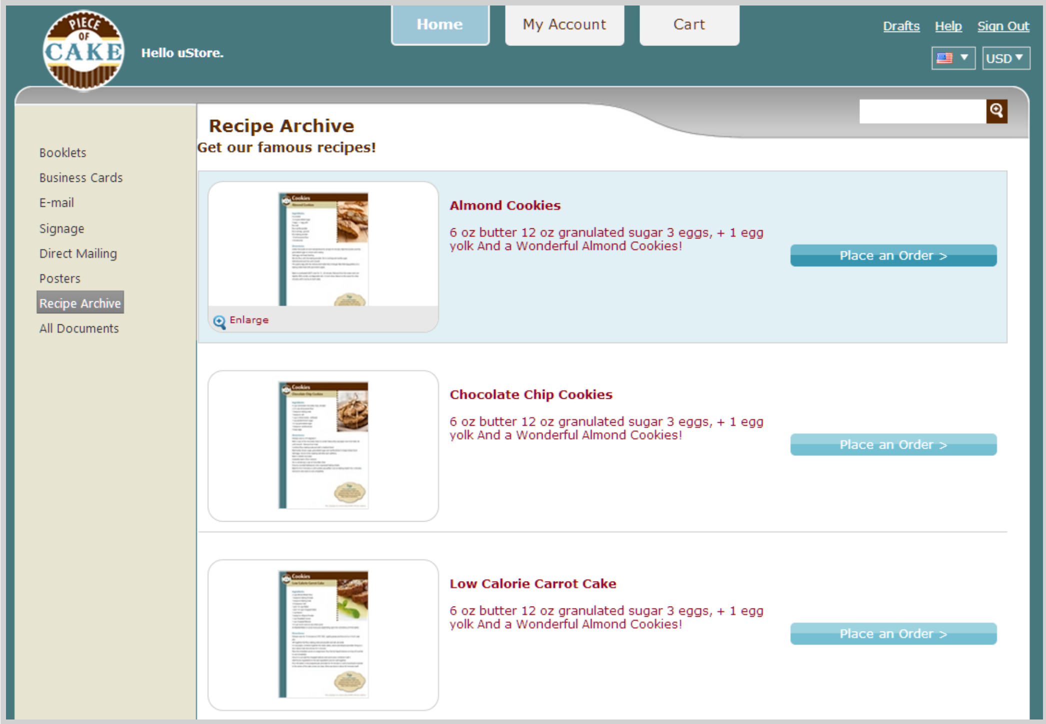
1. Log in to the store.
   Logging in to a store is optional. The administrator defines if registration is required before seeing products or at the check out stage.



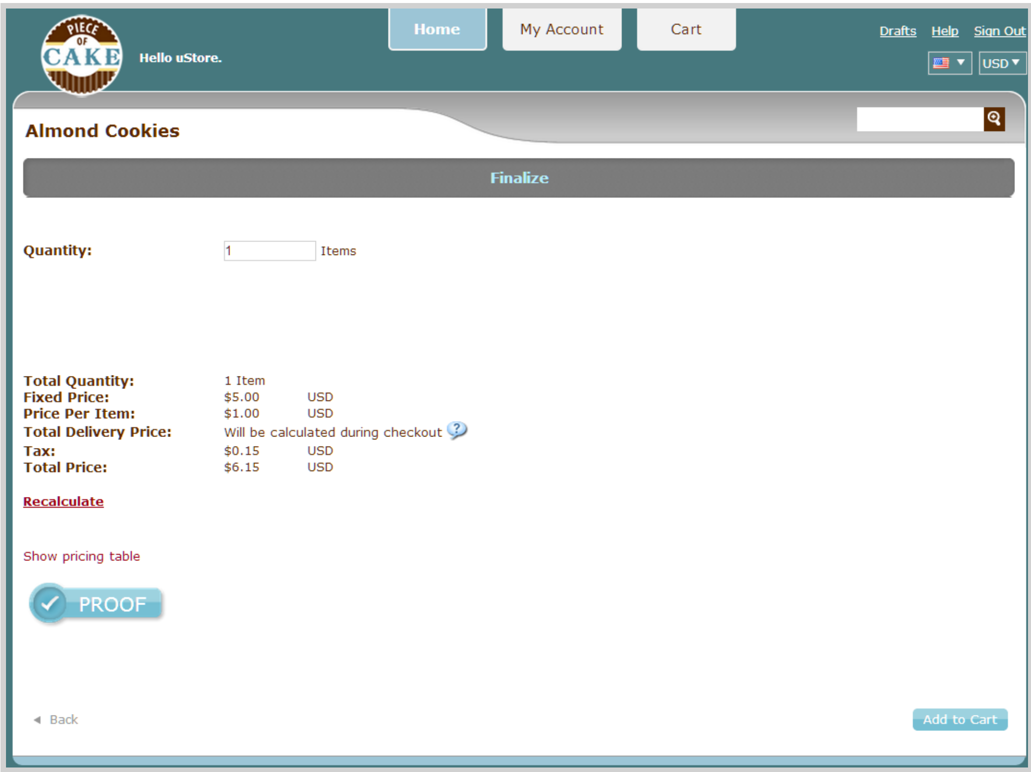
2. Select product category.



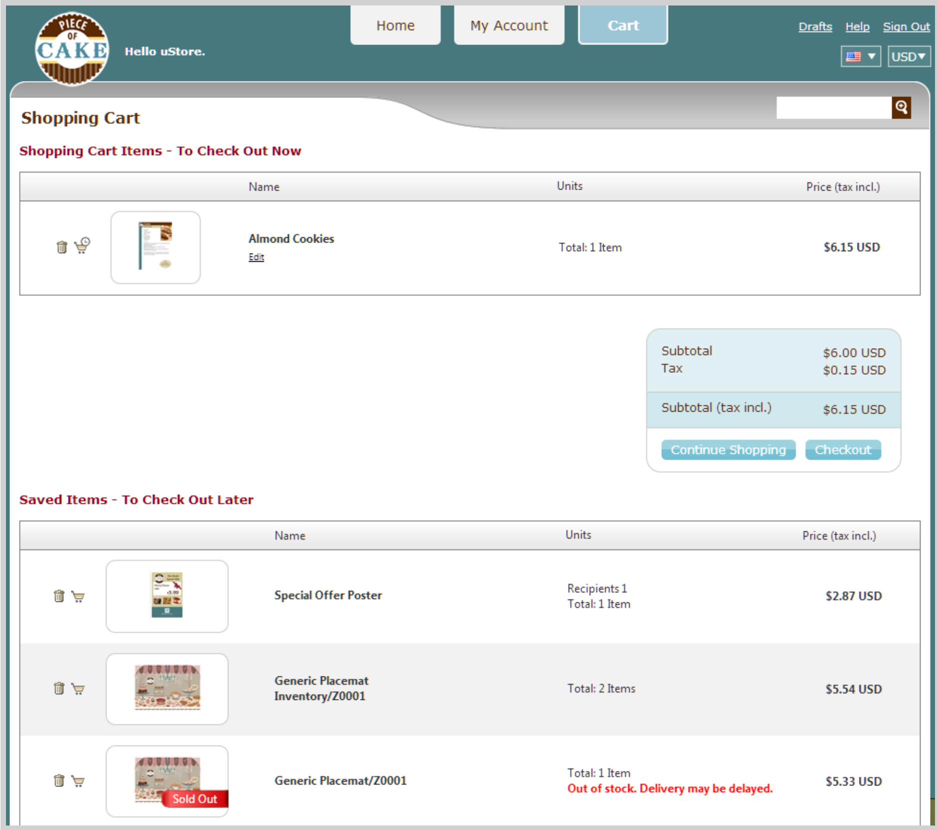
On the left panel, you have a list of product categories. To order a product, you first select a category.



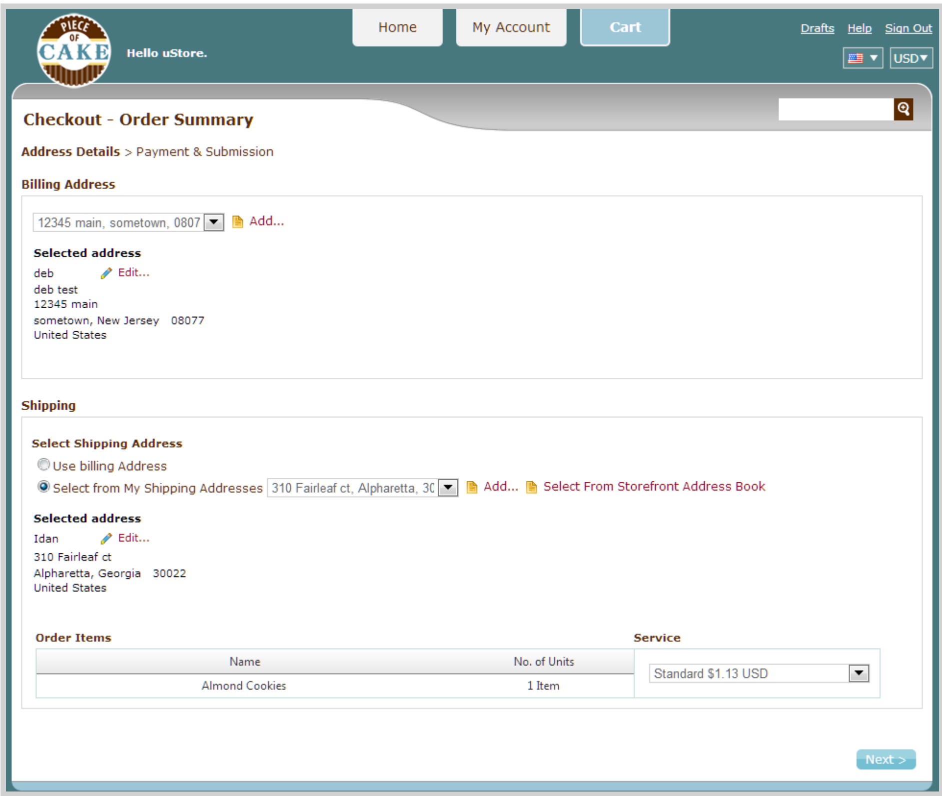
3. After you select a category, you see a list of the available products. Select the desired product and then click the **Place an Order** button.



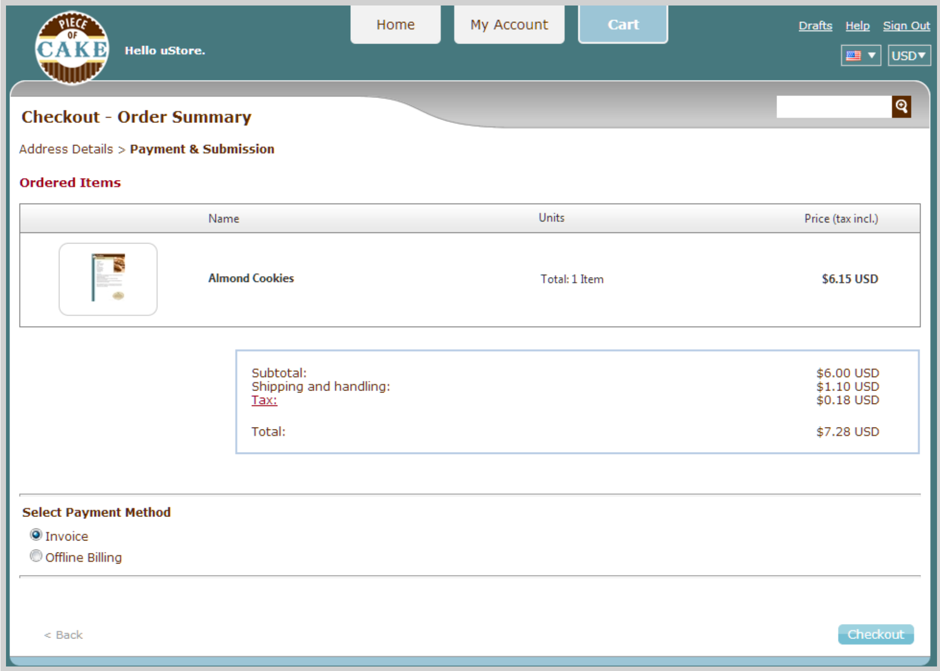
4. Add to cart.
   Depending you the product that you order, you will need to set the required product settings, such as customization settings, quantity, printing properties.
   When you are done, click **Add to Cart**.



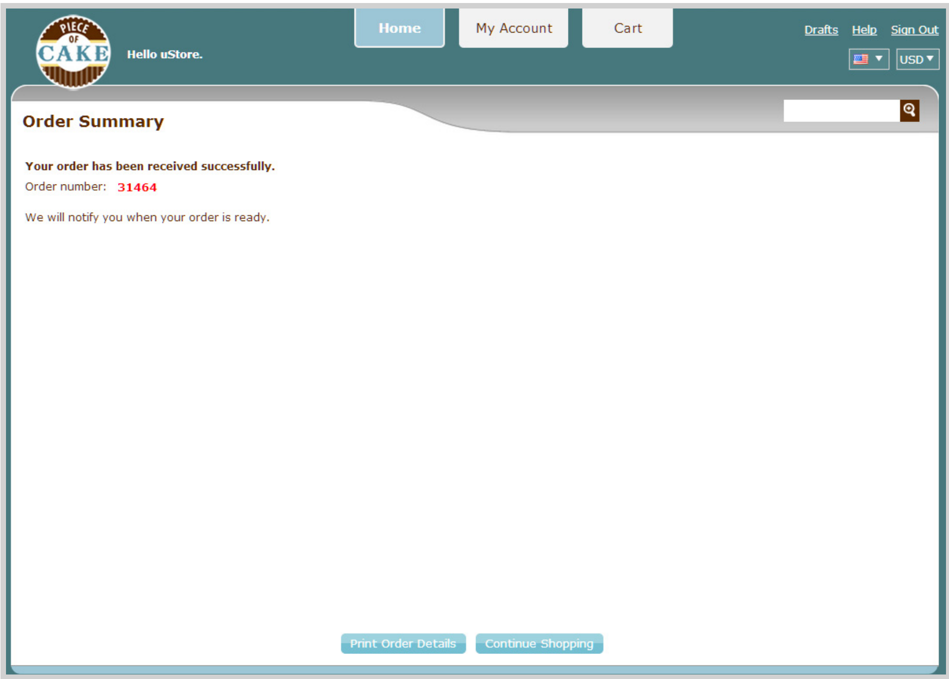
5. You get to the **Address Details** page in the **Checkout - Order Summary** stage, which displays a list of the the ordered products and the total order price. You can select products to be ordered later or check out all the products in the list at once.
   To continue, click **Next**.



6. On the Payment and Submission page, you select the required shipping and billing details.
   To continue, click **Next**.



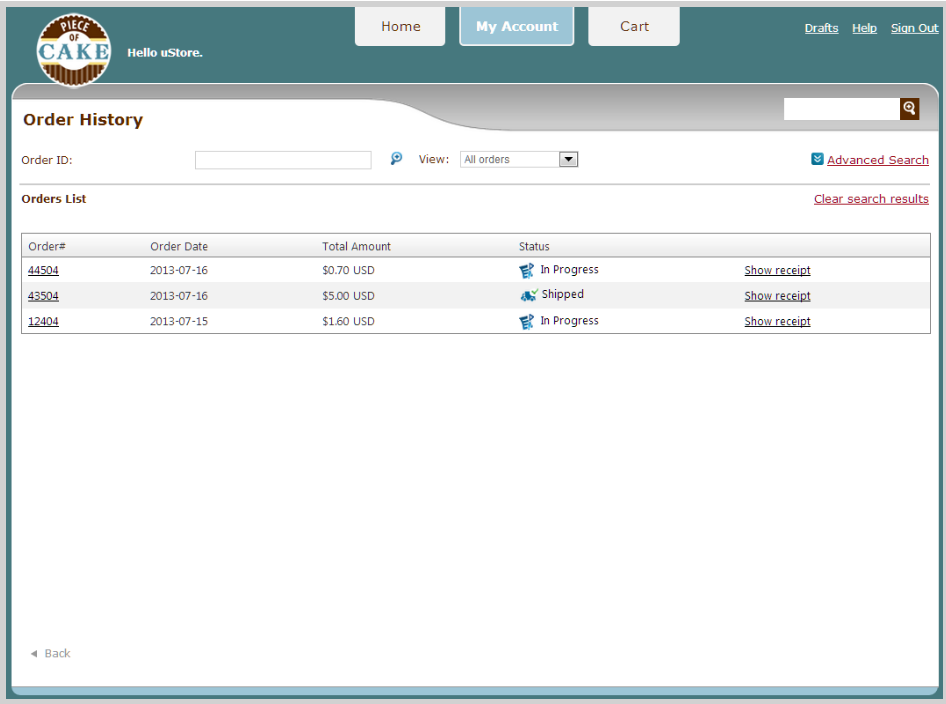
7. On the next page, review the **Ordered Items** list and the selected payment method. If all is correct, click **Checkout**.
8. You get the **Order Summary** page, which contains the **Order Number**.



Viewing orders

To view a list of all the checked out orders:

1. Click the **My Account** tab at the top of the page.
2. On the **My Account** page, click **Order History**.



3. To view the status of the order, in the **Status** column, click the order status (**In Progress** or **Shipped**, for example.)
4. In the **Delivery details** table, under **Status**, view the current order status.
5. To view the order receipt, click **Show receipt** link.

Main store types

uStore includes the following store types:

- **Restricted Store (B2B)**: This type of store requires visitors to log in and it is usually used for business to business stores.
- **Public Store (B2C)**: This type of store does not require visitors to log in to view the store, but they need to log in to check out products from the store. B2C stands for business to customer.
- **uStore Connect Store**: This is a special implementation of uStore that enables you to embed a store within a 3rd-party online store. This means that an existing online store can include dynamic or variable documents and emails from uStore, but keeps its own branding, user experience, order numbers, and payment system, among other things.

Business to business stores

A business to business store is a standard and secured online store. The customer must register/log in to be able to browse the products and proceed to check out. A common B2B workflow would be of a company orders print products on a regular basis from a print service provider (PSP).

For example, in a hospital context, it could be a nurse that logs in to the corporate portal and orders brochures about specific diseases and treatments or lab-test forms. The payment method would be through invoice.

Another example would be a manager that logs in to the store and approves business cards’ orders that were placed by members of his team.

Business to consumer stores

A business to consumer store is a public online store available to everyone. Store visitors who enter the store can browse through the products and get proofs, but must register to be able to check out products.

For example, a visitor, who is new to service provider and have not ordered products in the site yet. The visitor would be able to browse through the product catalog and preview a calendar with his children's pictures, but would need to register to check out and purchase the product.

Lesson 3: Opening the uStore back office application

What will you learn?

In this lesson, you will learn how to open the uStore back office application. The back office application is where you define and manage your stores, products, users and orders. In the back office application, you also handle the production queues and generate reports.

In uStore's Back Office, you define and manage the online stores, users, and orders. The Back Office application includes the following views:

- **Stores**: Where you define and manage the stores, including product categories, product definitions, pricing and delivery. From the Stores button, you can also access the Product Profiles page, where you set up properties to be shared among several products.
- **Orders**: Where you manage all the purchased orders and control their flow from production to delivery.
- **Users**: Where you manage uStore users. You can add and remove users from stores and user groups and define permissions for users and user groups.
- **Reports**: Where you generate reports on the stores and sales.
- **Presets**: Where you define settings that affect the entire uStore system. These settings include clearing methods, delivery providers, localization, prepress workflow providers among others. If you use Xerox FreeFlow Core as a workflow provider, the Presets menu will include a link to the FreeFlow Core application as well.
  Presets need to be configured ahead of time. Most presets are configured only once and will be available when you set up stores.

Note: This course does not cover uStore presets.

To access uStore Back Office:

1. Go to http://<ServerName or Domain>/ustoreadmin
2. Enter your **User Name** and **Password** and click **Log In**.

Note: In this training, use the credentials provided by the instructor.

Review activity: Ordering a product in the storefront

In this activity, you will review the uStore ordering process by checking out a product in the Piece of Cake store.

Your instructor will provide the required store URL.

Duration: Approximately 10 minutes

Activity procedure

1. Enter the **Piece of Cake** store and purchase 100 copies of the **Low Calorie Carrot Cake Recipe**.
2. Copy the **Order Number** (or write it down).
3. View the **Order History**.
4. Open your order's receipt.
5. Open the back office.
6. Go to the **Orders** page and search your order.

Review questions

Review the module and answer the following questions:

1. What is the main difference between B2B and B2C stores?
2. When will a B2C store visitor be required to log in?
3. What are the processes that take place on uProduce?
4. Do static documents need to be uploaded to uProduce before you can add them to a store? Explain why.
5. List the main components on the uStore environment and describe their function in the overall workflow. You can refer to the diagram (uStore environment on page 9) presented in lesson 1.

Module summary

You've reached the end of the Introducing uStore module. You should now be familiar with the storefront purchasing workflow and know how to open the uStore back office application.

In the next module, you will learn how to create new stores.

Module 2:

Setting up a store

In this module, you will learn how to set up a new store with basic functionality.

Creating a more complex store can take anywhere from a couple of weeks to a couple of months, depending on the required level of complexity and creative design. The actual time is a ratio between the required look-and-feel of the store and the skill-set of the people involved in the store creation.

Lesson in this module

Lesson 1: Describing the main steps to create a store

What will you learn?

This lesson provides an overview of the store creation process.

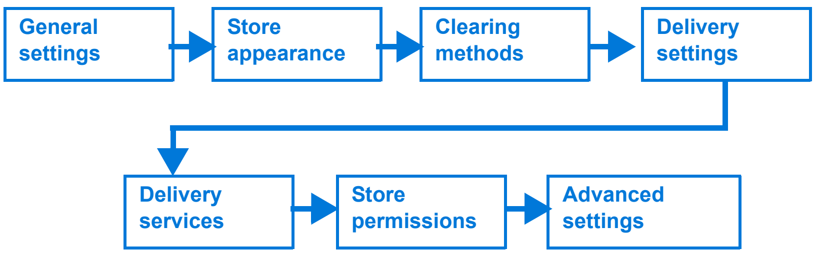
Setting up a store involves several steps. Among other parameters, you define the type of store, its appearance, delivery and payment methods. Many of the settings available when you set up a store, need to be configured ahead of time. Most of these presets are configured only once and will be available when you set up stores.

Note: This course does not cover uStore presets.

Learn more:

To learn more about uStore presets, see the Technote-0052: Configuring initial settings.

The flowchart shows the main settings required for creating a store.



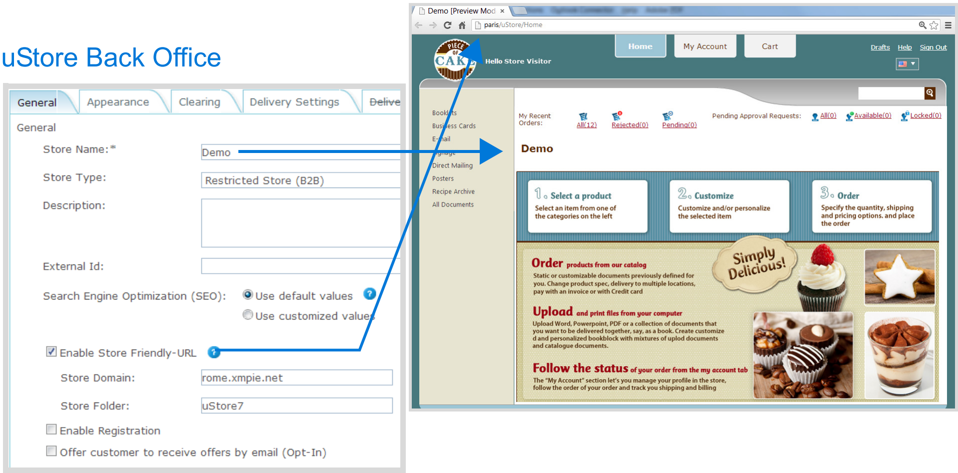
Following is a brief explanation of each step.

Defining general settings

In this step you define the store's name, type and URL. In addition, you set search optimization optimization (SEO) parameters. SEO parameters help increase the volume and quality of traffic to your online store. Here you also configure the connection between uProduce and the store. Only products that are available for the specific uProduce user can be added to the store.

Storefront

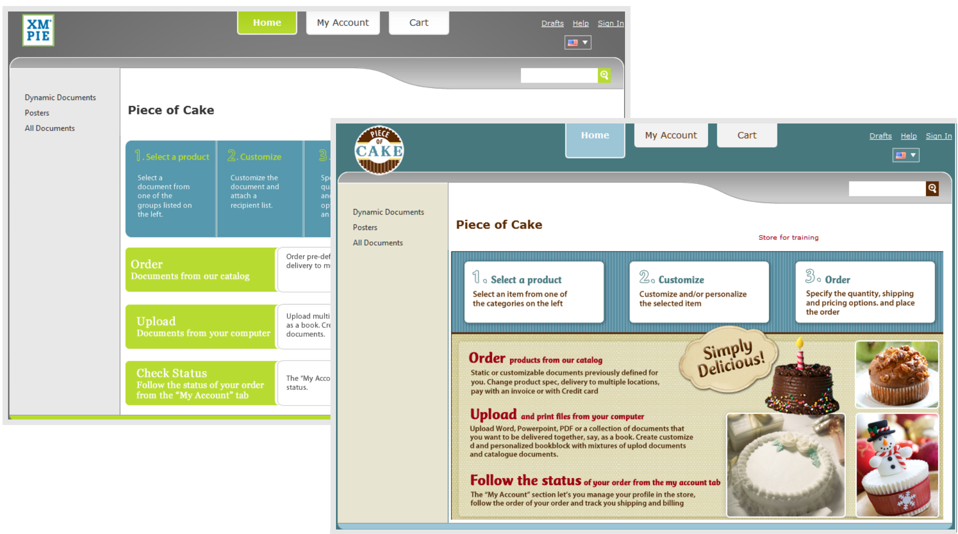
uStore Back Office



Defining store's appearance

In this step, you define what your store will look like. uStore provides several skins that you can select from to determine the store's look-and-fell. You can also create a new skin to best fit your organization's branding guidelines and add it to the list of available skins.

Examples of skins: Same store with different skins



In this step you also define localization settings, such as define the currencies and languages used in the store, limit locations for billing and shipping addresses and define the language that will be used for editing the store.

Defining clearing methods

When you set up a store, you must select at least one clearing method.

Clearing methods can be:

- Online clearing: Payment is done at the time of the ordering. Automatic clearing using a payment services, such as PayPal, Moneris, Ogone, MultiSafepay and Authorize.Net. These clearing providers enable you to automatically clear transactions using either PayPal Payflow Pro, PayPal Web Site Payment Standard, Moneris e-Select, Ogone Redirect, Authorize.Net and MultiSafepay clearing methods.
- Offline clearing: Payment takes time after the order is entered by the customer. You can choose not to submit transactions to automatic clearing services, but perform the clearing in-house using the customer's credit card details as provided at ordering time. You can also use an invoice method, with which customers are not asked to fill in their credit card details. Instead, credit card collection takes place by phone after ordering time.

Common clearing methods used are: invoice, credit card payment and 3rd-party web payment services, such as PayPal and Ogone.

Defining delivery settings

When you set up the store, you need to define how products will be shipped and delivered to customers. In the delivery settings, you define which of these services will be available in your store.

Note: If you use a 3rd party delivery provider, you need to set up an account with the delivery provider before you can use its services in uStore.

Fedex and UPS are common delivery providers in North America. If you don't use Fedex or UPS, you can use manual mailing or manual shipping to set up prices for your local courier and mailing services.

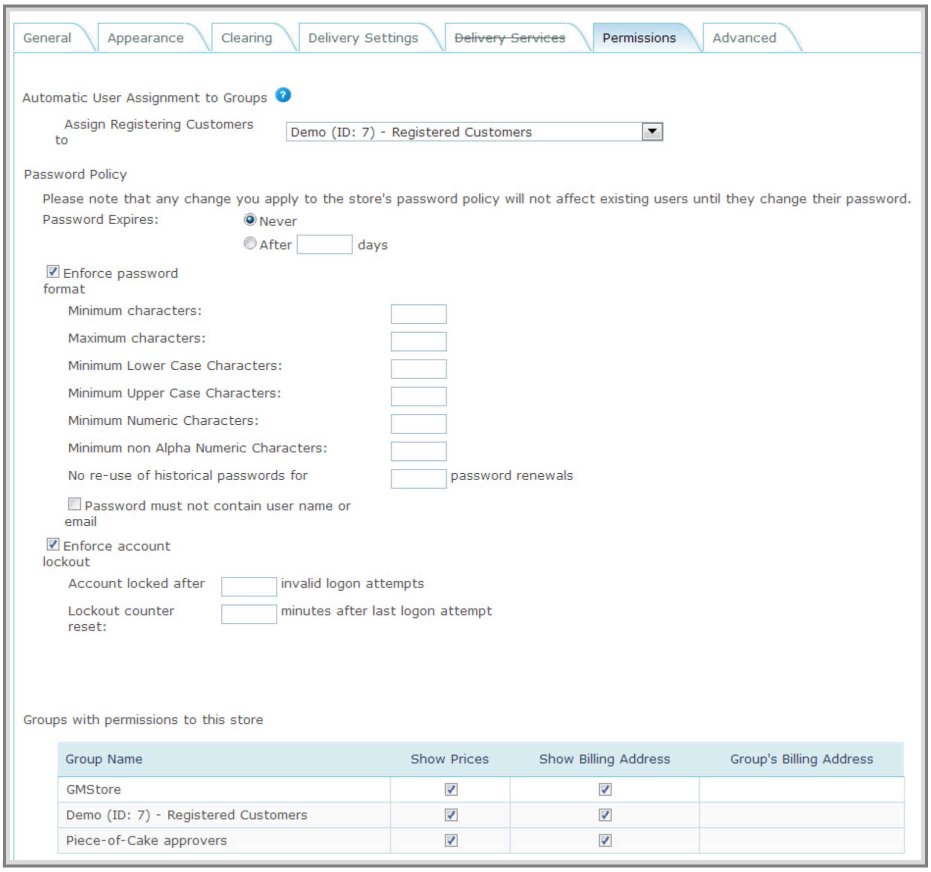
Defining delivery services

Here is where you determine the services that will be provided according to the settings you define on the **Delivery Settings** tab.

If you choose to disable delivery settings on the **Delivery Settings** tab, the **Delivery Services** tab is not available.

Defining permissions

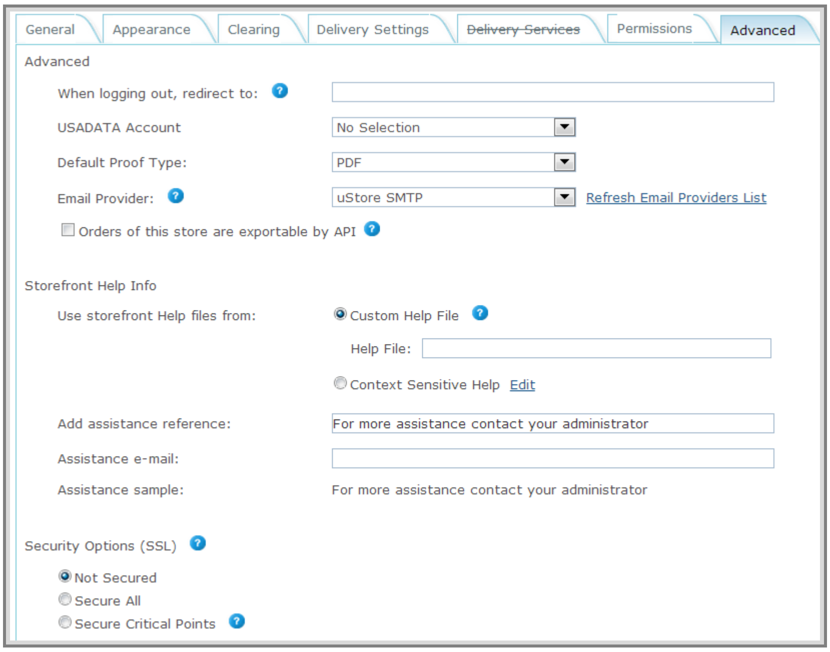
When you create a store, the system automatically creates a user groups for the store and assigns store customers to the group.



When you set up a store, you can define parameters in the following areas: automatically assign users to groups, define password settings, provides a list of the groups that have permissions to this store.

It is not mandatory to set permissions when you set up your store. You can keep the default settings.

Defining advanced settings



Among other things, uStore advanced settings enable you to redirect users that log out to a specific webpage, define an email provider, select security options.

The **Email Provider** list enables you to set the email provider for sending email messages from uStore. **uStore SMTP** is the default option. You can also select one of the email providers that were already defined on the uProduce server.

Lesson 2: Setting up the store

What will you learn?

This lesson, you will learn how to create an online store.

The following procedure demonstrates the basic settings required for creating an online store.

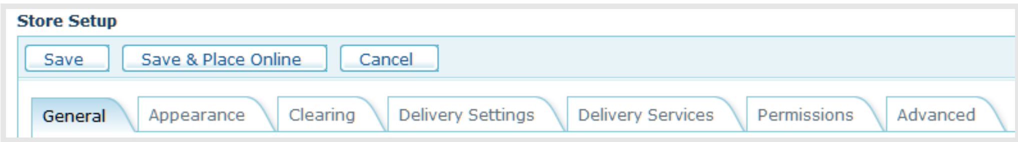
The following procedure assumes that all the required presets have already been defined.

Learn more:

To learn more about uStore first settings, see Technote-0052: Configuring initial settings.

To create a new store:

1. Click the **Stores** tab.
2. On the **Store List** page, click **New**.



To define general settings:

1. On the **General** tab, set the following parameters:
   a. In the **Store Name** text box, type a name for your store. In this example, name your store **My Store**.
   b. In the **Store Type** list, select the required store type. In this example, select **Restricted Store (B2B)**.
   c. **Enable Store Friendly URL**: Select this checkbox and then type the name of the Store Domain and the store's folder.
   During the course, the instructor will provide the required domain and folder names.
   d. **Enable Registration**: Select this option to enable only registered users to enter the store.
      i. **Registration Text**: When you required registration to enter a store, you must type in a text directing users to create an account to enter the store.

Note: You can enable store visitors to enter the store using their Facebook credentials. To be able to use this feature, you first need to create an application on Facebook. Refer to the uStore User Guide for more information on how to do this.

   e. **uProduce Connection**: Enter your uProduce user and password.

Note: Only products in the campaigns that are available for the uProduce user that you fill in here will be available for this store.

2. Click the **Appearance** tab.

To define the store's appearance:

1. On the **Appearance** tab, set the following parameters:
   a. In the list of skins, select a skin for the new store.
   b. In the **Header Title** box, enter the text that you want to display at the top of your store's homepage.
   c. To add search capability to your store, select the **Show Product Search Bar** checkbox.
   d. In the **Home Page** area, under **Welcome Text**, enter a text to welcome the store visitors.

Note: You can have a different homepage for each online store. The homepage can be a static image or HTML page or a dynamic page that displays personalized content for each store visitor.

   e. uStore enables you to display your store products as a list or in a grid.
   In the **Product List Display** area, select **List**.
   f. If you have a large amount of products in the same category, select the **Allow Paging in Product List** option and define the amount of products to be displayed on each page.
   g. Under **Localization**, in the Primary Currency list, select the store's **Primary Currency**.
   h. You can use more than one currency in the same store.
   To add other currencies to the store, in the table under **Secondary Currencies**, select the in the currencies that you want to add and type in the required exchange rate.
   i. In the **Supported Locations** list, select the languages that you want to make available for your store.
   j. In the culture table, select your store's **Setup Culture**. The **Setup Culture** is the language used to edit your store in the Back Office application. You must select a **Setup Culture**. In this example, select **English**.
2. Click the **Clearing** tab.

To define payment methods:

1. In the **Clearing** Configuration table, select the clearing method to be used in the store. In this example, select **Invoice**.

Note: Every store needs to have at least one clearing method.

2. To edit the name of the clearing method displayed in the storefront:
   a. Click the pencil icon.
   b. Under **Display Name**, type the new text. For example, type **<YourName> Invoice**.
   c. Click the green checkmark.
3. Click the **Delivery Settings** tab.

To define delivery settings:

1. On the **Delivery Settings** tab, make sure that **Enable Delivery** is selected.
2. Under **Mailing**, select **Manual Mailing**.
3. Under **Shipping**, select **Manual Shipping**.

Note: The selections you make on the Delivery Settings tab affect the options available on the Delivery Services tab.

4. Click the **Delivery Services** tab.

To define delivery services:

1. In the **Delivery Services** table, select the **Mail Drop**, **Standard**, and **Overnight** options.
2. For each service offered, you can set up its:
   a. **Display Name**: The name of the service as it appears in the store.
   b. **Markup**: The percentage of the delivery cost or a fixed sum of money in the store's currency that is added to the delivery cost to cover handling overhead expenses.

Note: When you create a store, uStore automatically creates a user group for the store and assigns store users to the group.

3. Click **Save**.

The store is added to the list of stores.

The **Store List** page provides and overview of all your stores. It includes each store's ID, the number of products available and the number of pending orders.

The gray circle  to the left of the store's name indicates that the store is offline. As you have not added any products to the store yet, it is recommended to keep it offline. A green circle  indicates a store that is online.

Besides creating new stores, on the **Store List** page, you can:

- Delete stores: Select the store(s) that you want to delete and click **Delete**.
- Duplicate stores: Select the store(s) that you want to duplicate and click **Duplicate**.

Note: By default, duplicated stores are offline. You need to manually make them online.

Previewing the store

You can preview every store listed on the **Store List** page. It is recommended that you preview the store before you make it online. When you preview a new store, you can easily find any issues or problems and fix them before store customers visit the store. For example, if you preview the store that was created previously, you will see that there aren't any products available for purchase yet.

Note: You can only preview stores that are online.

To preview a store:

1. On the **Store List** page, click the name of the store that you want to preview.

Note: If the store is not online, go to the **Store Setup** *page and place it online.*

2. On the Store's page, select either the desktop or mobile icon, then click the **Preview** button (
).
   A new browser window opens and displays the store either in a new browser window for desktop, or in a special frame to simulate the mobile device. You can browse through the store's pages and products as a regular store customer.

After you place your store online, the store will be available through the following URL or by the friendly URL that you defined when you set up the store:

`http://<ServerName or Domain>/ustore/login.aspx?StoreID=<IDNumber>`

Learn more:

For more information on how to set up a store, see the chapter *Setting Up a Store* in the *uStore User Guide*.

For a quick tutorial on how to activate friendly URLs, go to http://www.box.net/shared/static/jdbhik4l9gjxa4o0ht5w.swf

This tutorial is relevant if you have a separate proxy server. If the uStore server is a public domain, you can simply enter the domain name in the back office application.

Activity: Create a new store

In this exercise, you will create a store that provides print products for a line of fine bakery products. These products include, among others, posters, brochures, special discounts, invitations to special events.

Feel free to ask the instructor if you have any questions or you need any help.

At the end of the practice, one participant will show the store to the rest of the class and point out how he/she implemented the requirements.

Duration: About 30 min

Activity procedure

Ask the instructor for the required uProduce credentials.

Store requirements (note that the requirements are not necessarily in the order that they appear in the back office application):

Note: The requirements are not listed in the order that they appear in the back office application. Some of the requirements were not described during the lesson. You will need to explore the options on the Store Setup page tabs to find them.

- Provide a descriptive name for the store.
- Enable store registration.
- Use the Piece of Cake skin (if available).
- Add the Search capability.
- Add a Welcome text.
- Set English as the Setup culture.
- Set Dollar as the Primary currency.
- Set Euro as the Secondary currency.
- Set Invoice as the clearing method.
- Disable Delivery settings.
- Use on the uProduce email delivery provider.
- Set passwords to expire every 3 months.
- Enable store visitors to see product prices.
- Redirect store visitors that log out to www.cnn.com.

- Set PDF as the proof format.
- Add your email as the store's assistance email address.
- Secure all the storefront pages that contain passwords, personal information or payment details.
- Save the store and place it online.
- Preview the store using its external URL.

Module summary

You've reached the end of the Setting up a store module. You should now know how to create new uStore users and set up an online store.

In the next module, you will learn how to add a static product to your store.

Module 3:

Adding a static product to your store

In this module, you will learn how to add static documents to your store. Static documents consist of a product with fixed content, that is, they don't include dynamic objects. Static documents cannot be altered by your customers, nor adapted to a recipient data source. All recipients of a static document get identical instances of the product.

You can track Static Documents using an inventory, but inventory settings are not covered in this course.

Lessons in this module

Lesson 1: Uploading static documents to a store

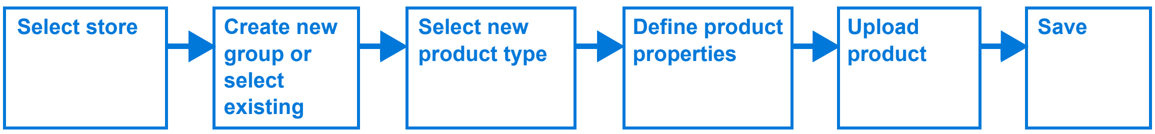
What will you learn?

In this lesson you will learn how to add a static product to your store. You will define the product properties, pricing settings and delivery options.

A static document is a file that does not include dynamic content. Static documents cannot be personalized or customized because they do not include ADORs (variables or dials). ADORs will be covered later in this course.

You can upload a static document to uStore from any computer. When you upload the document, uStore requires you to load a proofing file and a thumbnail image.

The following diagram describes the main steps for adding a static document to your store:



Creating a storefront group

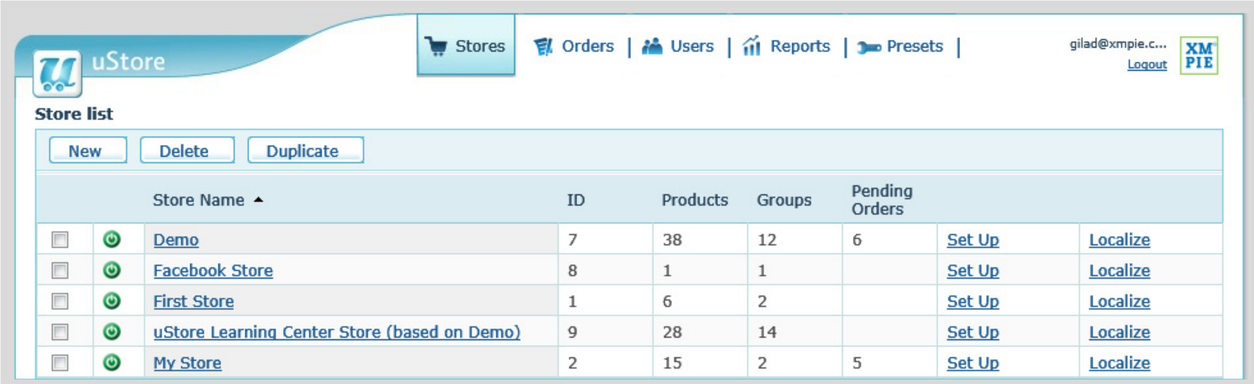
Your online store is organized by categories, which are called "groups" in uStore. Groups function as product categories and help you organize the products in your store. For example, an online store may offer a few types of products, such as "business cards", "posters", and "calendars". In such a store, you would create three product groups, one for each type of product.

When you create a store, a default group, “group 1” is created for you.

It is recommended that you change the name of this group to a more descriptive name and add more groups as required, depending on the nature of your store.

To create a product group:

1. In the uStore back office application, from the main menu, click **Stores**.



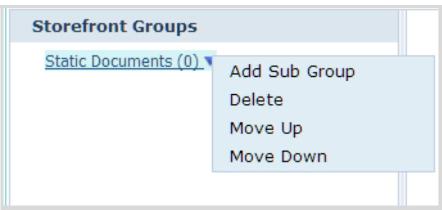
2. In the **Store List** page, click the store to which you want to add the static document.
3. On the store’s page, under **Storefront Groups**, click the **Manage Groups** link.
4. By default, when you create a store, a default group is created and named Group1. You can modify this group’s name and set it up or click the A**dd Root Group** button to define a new group. In this example, you will modify the default group as follows:
   - **Group Name**: Type **Static Documents**.
     Give the group a meaningful name. This name is displayed in the storefront. For example, if you have a batch of posters that will be available in your store, name the group Posters.

Note: The names of groups or sub-groups of the same hierarchy must be unique.

5. Click **Save**.

Learn more:

For more information, see the chapter *Setting Up Products* in the uStore User Guide.



Note:
*In the **Manage Groups** screen, you can click the arrow next to the group’s name to add a subgroup, delete the group or rearrange the order of groups of the same level.*

Activity

- Create a second group and name it: **Dynamic Documents**.

Later in this course, you will add a dynamic product to this group.

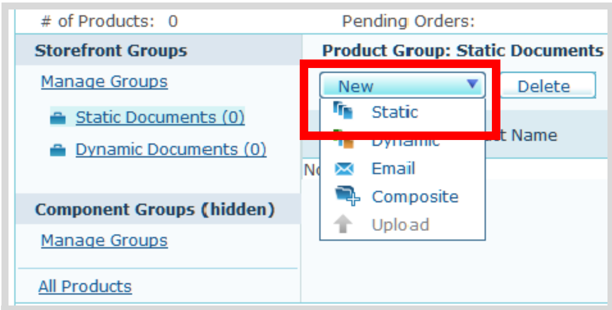
Adding a static document to the group

After you create your store's groups, you can start adding the documents that will be available in each group.

In this lesson, you will upload the uStore User Guide as your static document and set up its basic parameters.

To add a static document a group:

1. On the store page, select the group that you want to add the product to. In this example, select the **Static Documents** groups.
2. To add a static document, click **New>Static**.



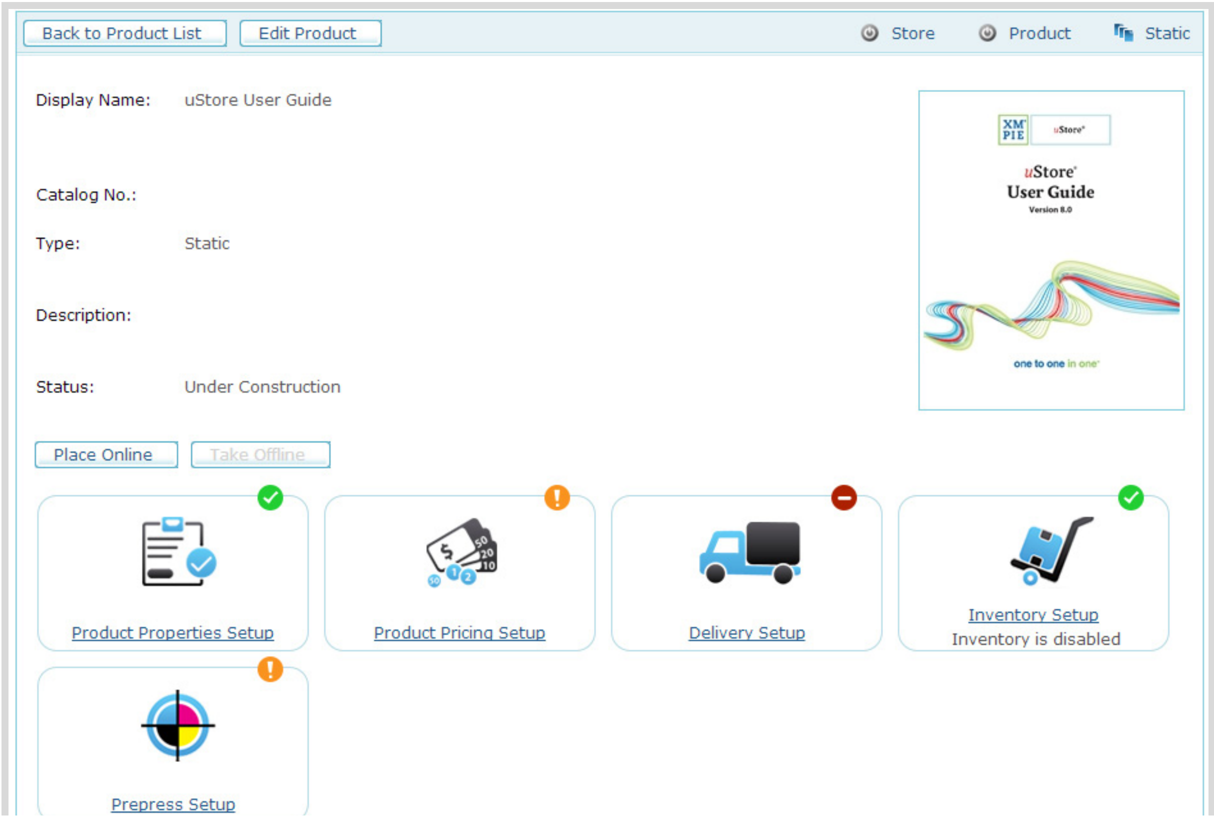
   The **Product Setup** page includes several sections: **General**, **Proof**, **Product Groups**, **Pricing & Tax**, and **More**.

3. Fill in the following parameters:
   a. **Product Name**: Type a name for the product.
   This is the name that will be displayed in the storefront. In this example, you will upload the uStore User Guide, so type **uStore User Guide**.
   b. In the **Document** section:
      i. **Document File**: Locate the file that you want to upload.
      During the classroom training, the instructor will provide the path to the document.
      ii. **Proof File**: Locate the file that will be used to preview the document. The proof file is usually a light, low-res file that store customers can preview before purchasing a product. For training purposes, you can select the same file that you selected in the Document File as the Proof File.
      iii. **Thumbnail Image**: Locate the image file that will be displayed as a thumbnail or the product on the product list page.
      During the classroom training, the instructor will provide the path to the document.
4. Click **Proof**.
5. To make sure that the store visitors approves the product before finalizing its order, select **Enable Proof Approval**.
6. Click **Save**.
   The Product Setup page opens. It displays a summary of the product setup and its thumbnail.

*Note: To go back and edit these product settings, click the **Edit Product** button.*

Setting up product properties

After you add the product to a group and save it, you can start setting up the product properties.



Before you place the product online, you can define several types of settings:

- **Product Properties Setup**: define printing properties such as binding, color and paper stock.
- **Product Pricing Setup**: define product price and cost as well as price and cost steps. Price steps enable you to set up ranges of minimum and maximum number of copies of a product that the store visitor can purchase.
- **Delivery Setup**: if the product supports shipping pricing and delivery was enabled in the store setup, you need to define shipping pricing ranges. Each range consists of a minimum and maximum number of copies a customer may ship per order and the price for each shipping option.
- **Inventory Setup**: keep track of the product's inventory levels, set safety inventory levels and define inventory display policies in the storefront. -- Not covered in this course.
- **Prepress Setup**: select the prepress workflow required for printing the product. Set up printing workflows for a seamless integration with JDF-enabled printers.

Note the status icons on the top of each of the settings icons. These icons indicate if the product is ready to be placed online, that is, made available to store visitors.

Icon	Description
	Setup is completed.
	Some settings are missing.
	Mandatory settings are missing. You need to complete the setup before placing the product online.

Before you place the uStore User Guide online, you need to define its delivery settings.

To set up product delivery options:

1. Click the **Delivery Setup** link.
   The product delivery setup enables administrators to select which options, from the ones selected in the store setup, is applicable to the specific product.
2. On the **General** tab, select the **Shipping** option.
3. Click the **Pricing** tab.
   Let's say that from an order of 1-10, the standard shipping cost is US$ 2 and overnight shipping is US$ 3. Orders above 10 units will cost respectively US$ 1.5 and US$ 2.
   a. Under **Manual Shipping**, click **Add New Item**.
   b. In the **From Quantity** column, type **1**.
   c. In the **Standard** column, type **2**.
   d. In the **Overnight** column, type **3**.
   e. Click the green checkmark icon.
   f. Click **Add New Item**.
   g. In the From **Quantity** column, type **10**.
   h. In the **Standard** column, type **1.5**.
   i. In the **Overnight** column, type **2**.
   j. Click the green checkmark icon.
4. Click **Save**.

   On the **Product Setup** page, note that a appears next to the **Delivery Setup** section. Now you can place the static document online to make it available in the storefront.
5. Click **Place Online**.

Lesson 2: Previewing the static product in the storefront

What will you learn?

In this lesson you will preview the product that you just defined in the store to:

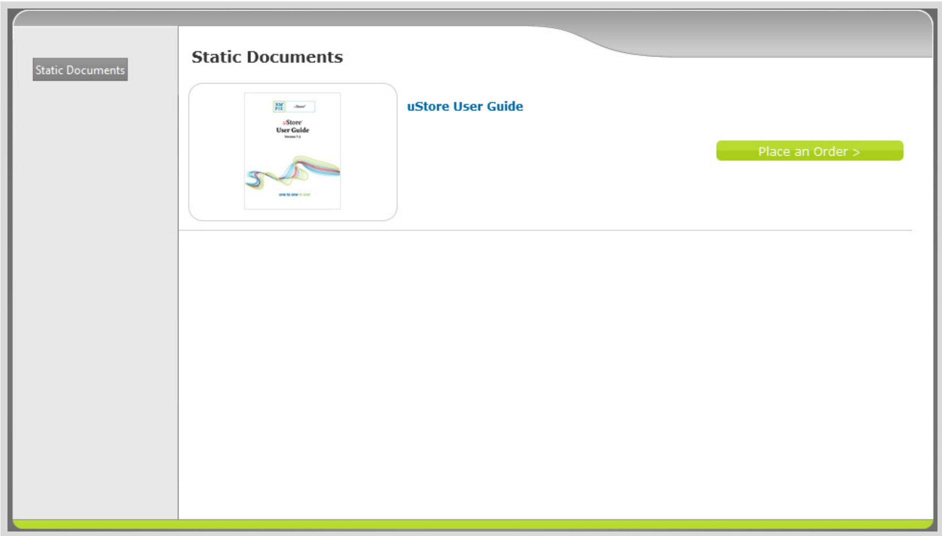
- Learn more about how static products are purchased in the storefront.
- See how your definitions affect the online product.
- Ensure that you have set up the required product definitions.
- Feel the store visitors experience and decide if you need to change or improve anything.

After you set the all mandatory definitions, you can place the product online to make it available to store visitors.

In the following procedure, you will place the product online and preview it in the store to see how your definitions affect the online product.

To preview the product online:

1. On the **Product Setup** page, click **Place Online**.
   A message is displayed indicating that the product is now online.
2. Click **Back to Product List**.
   The Store page appears.
3. Click **Preview**.
   A preview of the store is displayed.
4. On the left panel, click **Static Documents**.
   This is the group that you created previously and to which you added the static product.



Simulating the purchasing workflow

In this procedure, you simulate the product's purchasing workflow.

Going through the purchasing workflow helps you understand your store's visitor's experience. In the next lessons, you will learn how to add properties to your product to provide store visitors with more options when they purchase the product.

To simulate the product's purchasing workflow:

1. Click **Place an Order**.
2. In the **Quantity** box, type **11**.

Note: Note that we did not define a price for this product, so the Total Price item displays a US$ 0 cost.

3. Select the **Proof is approved** checkbox.
   This options appears as mandatory because you selected the **Enable Proof Approval** option on the **Product Setup** page.
4. Click **Add to Cart**.

Note: Note that in order to purchase the product, the store visitor needs to sign in or create an account.

5. Click the **Create an Account link**.

Note: Because you set the store as ***B2B*** *(business to business), store visitors must register before they enter the store. In* ***B2C*** *(business to customer) stores, store visitors can enter the store without registration, but need to register to order a product.*

6. Fill in all the mandatory items.
7. Click **Sign Up**.
8. On the **Thank you for joining our store** page, click **Continue Shopping**.
   You are taken back to the store's homepage.
9. Select **Static Documents>uStore User guide**.
10. Repeat steps 1-4 above.
11. Click **Checkout**.
    On the **Checkout - Order Summary** page, note that in the **Shipping** area, under **Service**, there is a pull-down list with the shipping prices that were set for standard shipping and overnight shipping.
12. A billing address must be added. Click the **Set billing address** link and fill in all the mandatory items. When you are done, click **Submit**.
13. The store visitor must set a shipping address as well. In this example, select the **Use billing address** option.
14. Click **Next**.
15. Click **Checkout**.
    The **Order Summary** page provides the an order number, which the visitor can use to follow up during the order's delivery process.

Note: To edit product properties, you must take it offline before making any changes. If you edit product properties before making it offline, you will not be able to save your changes.

Lesson 3: Setting up product properties

What will you learn?

In this lesson, you will duplicate an existing static product, edit its properties and set its price.

Let's say that you need to add another static product to the store. The new product will include binding options. The binding options affect the product price and you need to determine the price for each binding option that will be available.

To make it simple, in this training you will duplicate the existing static product that you added previously to the store and then edit the following settings:

- On the **Product Properties Setup** page, you will add the following binding options to the document:
  - Binder
  - Comb-Binding
  - Perfect Bind
  - Saddle Stitch
  - Spiral
  - Stapling
- On the **Product Pricing Setup** page, you will set up a price for each binding option.

Setting up binding options

Let's say that you want store visitors to be able to select a binding method for printing the uStore User Guide product.

First you will duplicate the existing static product. In this way, it will be easier for you to compare between the two and see how the new settings affect the new product.

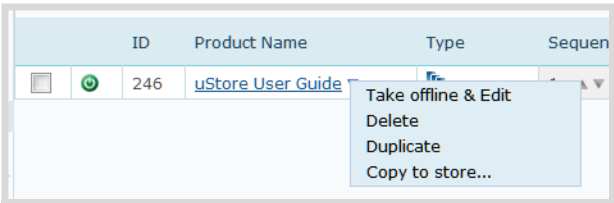
Afterwards, you will add a new property to the duplicated product: Binding Type.

Duplicating an existing product

In this section, instead of editing the static product that you have already defined, you will duplicate it and edit its properties. In this way, it will be easier for you to compare between the two and understand how the new settings have affected the new product.

To duplicate an existing product:

1. On the **Store List** page, click the required store.
2. On the store page, click the arrow next to the product that you want to duplicate.



3. Click **Duplicate**.
   A new product is added below the original product. The new product is named **copy[1]<productName>**.
4. To edit the new product properties, click it.
   The Product Setup page is displayed.
5. Click **Edit Product**.
6. Rename the product. In this training, name it **uStore User Guide 2**.
7. Let's say that we don't want to force the store visitor to approve a proof of the product prior to completing its purchase.
   To change the product's proofing settings, scroll down the page and click **Proof**.
8. Clear the **Let the User Generate a Proof** option.
9. Click **Save**.

Editing product properties

uStore provides great flexibility for setting product properties. You can set global properties that will be available to all products or properties that are specific to one product only.

Learn more:

To learn more about Product Properties, see the *Setting Up Global Product Properties* section and the *Setting Up Product Properties* in the uStore user guide.

In addition, uStore enables you to create Product Profiles, which contain a set of product properties that you can apply to several products by linking the product to the product profile.

Working with Global properties and Product Profiles will expedite product setup.

You will learn more about Product Profiles later in this course.

In this step, you will add binding method options to the product that you have duplicated. Adding binding options to the product will enable store visitors to select a binding method for printing their product.

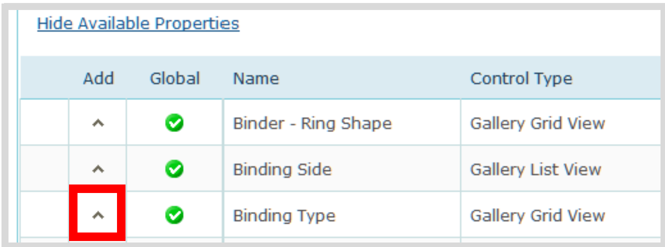
To edit product properties:

1. On the **Product Setup** page, click **Product Properties Setup**.
   Every product has a mandatory Base property that cannot be edited here.

2. To add a new property from the list of available properties, click **Show Available Properties**.
   A table with all the available product properties is displayed.

Note: The list of available properties include properties that were defined previously on the **Presets>Global Product Properties Setup** *page.*

3. Locate the **Binding Type** property and click the add arrow.


Hide Available Properties

Add	Global	Name	Control Type
^	✓	Binder - Ring Shape	Gallery Grid View
^	✓	Binding Side	Gallery List View
^	✓	Binding Type	Gallery Grid View

   The **Binding Type** property is added to the upper table.

4. Click **Back**.
   The **Binding Type** property will now be available for the product.

Editing product pricing settings

uStore provides two methods for setting up pricing parameters:

- Pricing Calculator Engine
- Excel Pricing Engine

This course covers only basic price settings using the Pricing Calculator Engine.

Learn more:

For more information on how to set up pricing for your products, see the *Setting Up Product Pricing Parameters* section in the uStore User Guide.

You define the price for a single item or a pack that includes a number of single items. uStore then calculates the order value by multiplying that price by the number of items ordered by the storefront customer. Depending on your settings, uStore will also calculate any additional costs such as shipping, mailing and tax rates and add all the required costs to the order's total price.

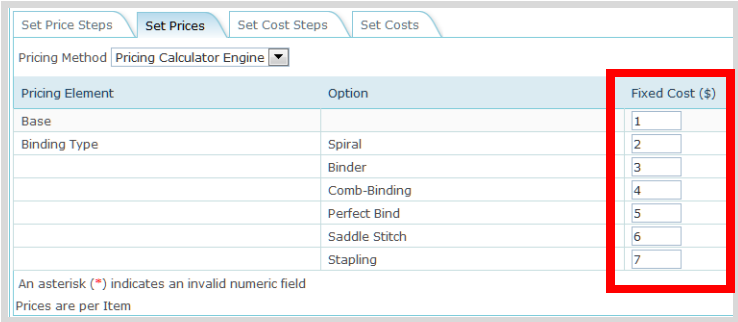
You can also set up prices for specific product properties. For example, you can add color as a product property and set a price for black and white printing and a higher price for color printing.

As you edited the product to provide binding options to the store visitor, in this section you will adjust the product's pricing settings to make sure that they cover the costs of the print binding options.

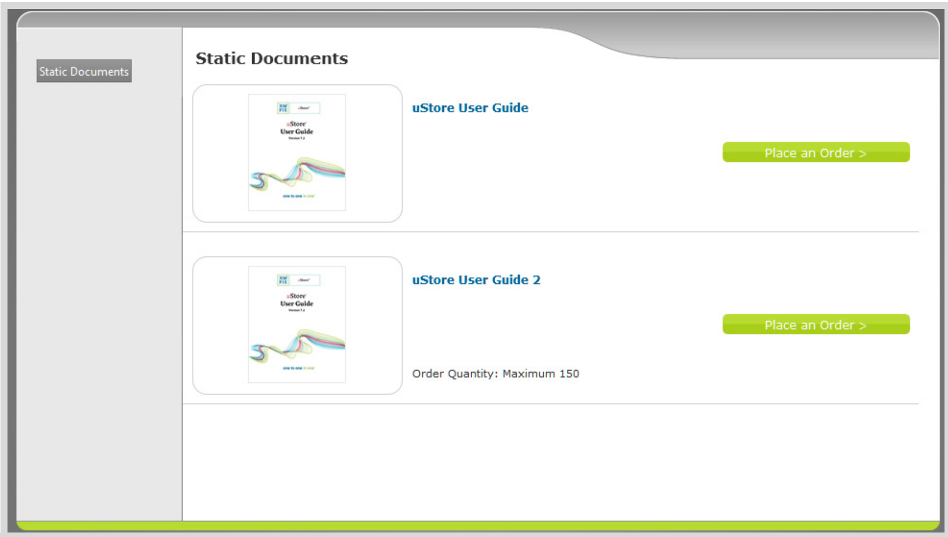
To set pricing settings to the product:

1. On the **Product Setup** page, click **Product Pricing Setup**.
2. On the **Set Price Steps** tab, in the **Order quantity** area, set a maximum order quantity of **150**.
3. Click the **Set Prices** tab.

4. Enter a price for each pricing element. In this example, for training purposes, set the prices as shown in the screenshot below:



5. Click **Save**.
6. Click **Place Online**.
7. Click **Back to Product List**.
8. Preview the new static product.



Review questions

Preview the static product that you added to the store and answer the following questions:

1. How much will the product cost if a visitor selects the spiral binding type?
2. How much will the product cost if a visitor selects stapling?
3. What will be the checkout price of the product with stapling binding? Explain the price items.
4. How much will the visitor pay for 20 copies of the product using stapling binding? Explain.

Lesson 4: Adding subproperties

What will you learn?

In this lesson you will learn how you can add subproperties to your product's properties.

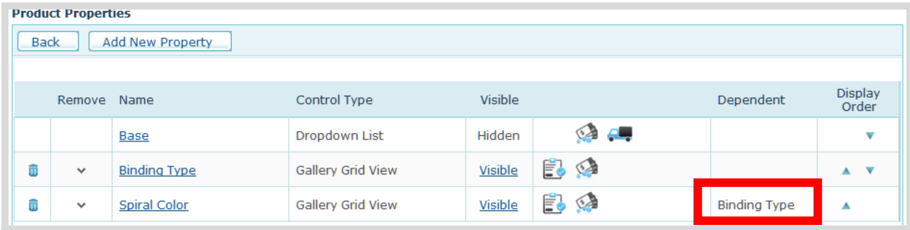
When you set up product properties, you can define a property to be a sub-property of another property. In uStore, this means that you create a dependency between two properties.

Let's say that you want to offer store visitors the option to bind the product with different color spirals. To do that, you need to add a sub-property to the Spiral binding type.

There are a couple of ways that you can add a sub-property to your product. You can create the property:

- In advance as a global property. Then simply add it as a sub-property when you set up product properties.
- As a new property when you set up product properties and define it as a sub-property.
- As a new property when you set up a product profile.
  You will learn about product profiles later in this course.

On the **Product Properties** page, you identify the properties that are defined as sub-properties by looking at the **Dependent** column. Sub-properties display the name of their main property in this column. In the screenshot below, the **Spiral Color** property is a sub-property of the **Binding Type** property.



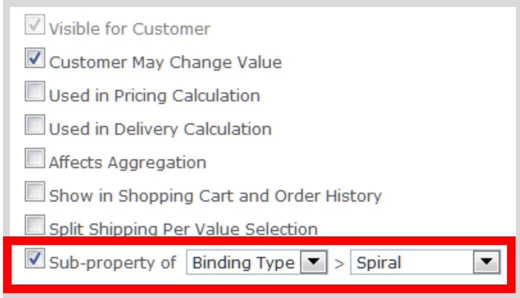
In the following procedure, you will add spiral color as a sub-property of the Spiral binding type. Assume that the **Spiral Color** property was created in advance as a global property.

To make Spiral Color a sub-property of the Spiral Binding Type property:

1. On the **Product Setup** page, to remove the product from the store, click **Take Offline**.
   You cannot save changes that you make to products that are online.
2. Click **Product Properties Setup**.
3. Click **Show Available Properties**.
   A table with all the available product properties is displayed.

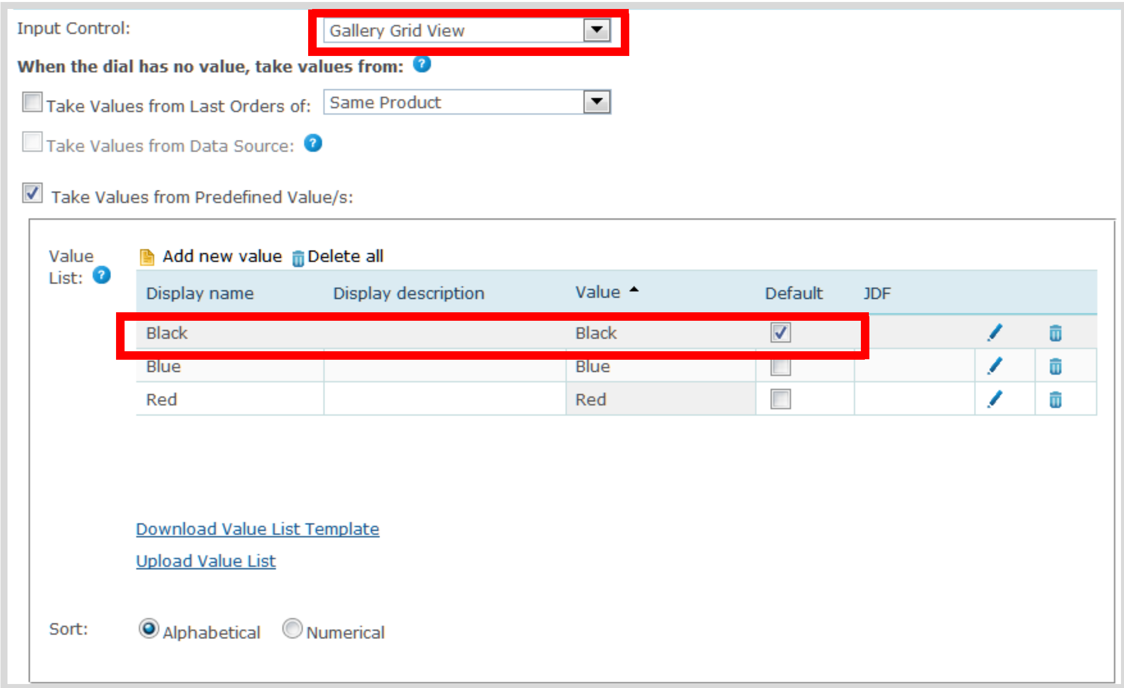
Note: The Spiral Color property was created in advance as a global property.

4. Locate the **Spiral Color** property and click the add arrow.
   The Spiral Color property is added to the upper table.
5. To make **Spiral Color** a sub-property of B**inding Type**, click the **Spiral Color** link.
6. Select the **Sub-property of** checkbox.
7. Because **Binding Type** is the only other property available for this product, the **Sub-Property of** list includes only the **Binding Type** option.
   In the drop-down list next to **Binding Type**, select **Spiral**.

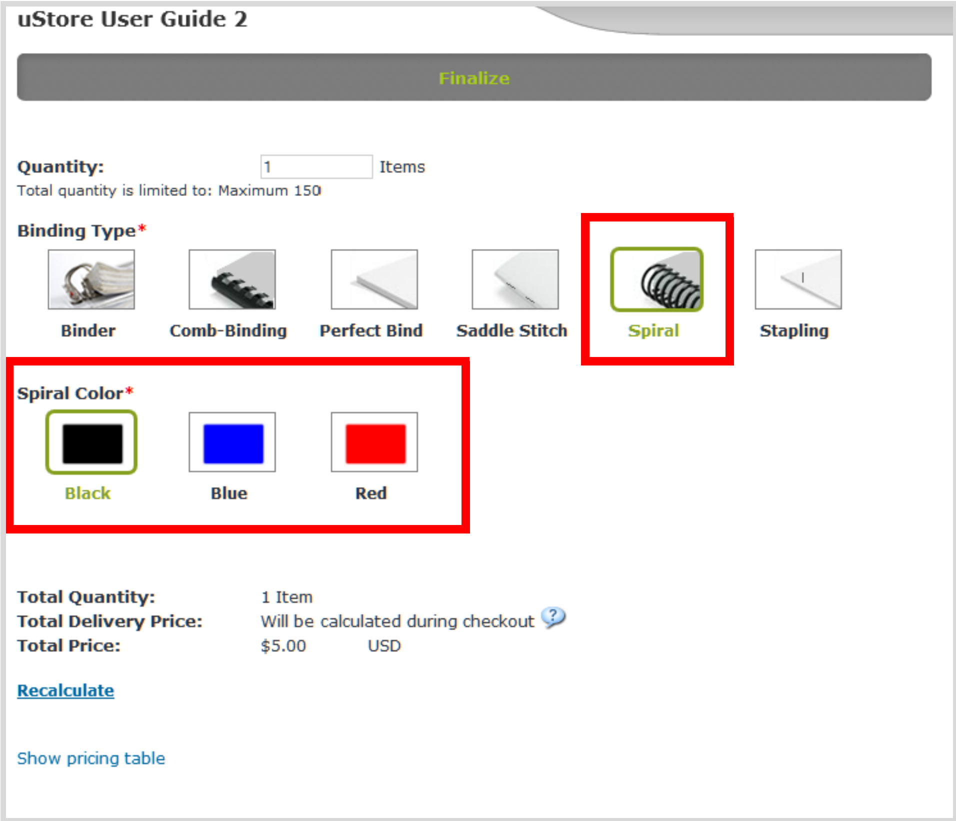


Take a look at the **Input Control** area. Note that this property will be displayed to store visitors in a **Gallery Grid View**. To be able to set a property as a sub-property, it needs to be displayed in the storefront in a list format (drop-down, radio button, checkbox, or gallery list) or in gallery grid view.

In addition, note that the **Spiral Color** property includes three values: Black (default), blue and red. If a store visitor does not select a specific color, the final product is bound with a black spiral.



8. Click **Save**.
   Spiral Color is now a sub-property that is dependent of the **Binding Type** property. The spiral color property will be displayed when the visitor orders this product with spiral binding.
9. To return to the **Product Setup** page, click **Back**.
10. Click **Place Online**.
    The product is added back to the store and the new properties are available from now on.
11. To preview your changes, click **Back to Product List**.
12. On the Store page, click **Preview** and then select the **uStore User Guide 2** product.
13. On the **Finalize** page, select the **Spiral**.
    The **Spiral Color** sub-property is displayed.



Lesson 5: Setting up shipping to multiple addresses

What will you learn?

In this lesson you will learn how to enable the product order to be shipped to different locations.

When you set up the store earlier in this course, you did not define specific shipping options. For store visitors to be able to ship ordered products to different locations, you need to enable shipping to multiple addresses during store setup.

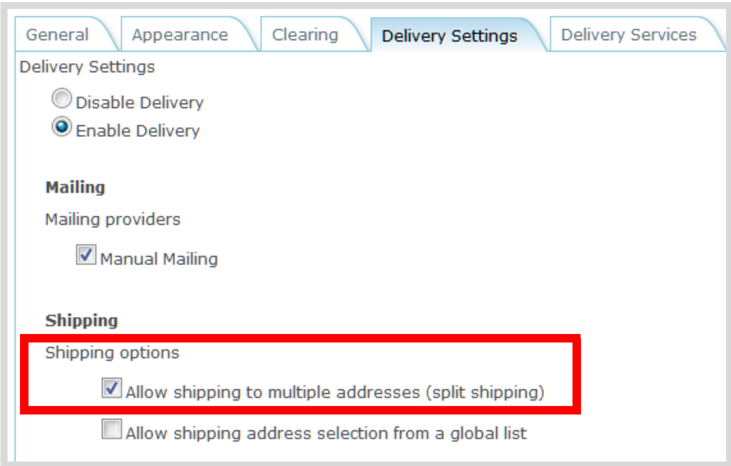
Enabling shipping to multiple addresses

There are several scenarios in which split shipping would be useful for you store visitors, when ordering:

- Static products, such as letter heads: The office administrator wants to order a large quantity of letter heads to get volume discount, but wants to split the delivery to multiple offices around the country.
- Dynamic products, such as newsletters: The Marketing Manager can add newsletter text and images to the template, and then order a large quantity to get the discount price and ship the newsletters to different offices around the globe.

To enable shipping to multiple addresses:

1. On the top menu, click **Stores**.
2. On the **Store List** page, select the store that you have been working with in the training.
3. On the store page, in the **Store Setting** list, select **Set Up Store**.
4. To make the store unavailable while you edit its settings, click **Take Offline**.
5. Click the **Delivery Settings** tab.
6. Make sure that **Enable Delivery** is selected.
7. Under **Shipping options**, select the checkbox **Allow shipping to multiple addresses (split shipping)**.



8. Click **Save & Place Online**.
   The store is back online with all its online products. Now store visitors can purchase products and define several shipping destinations.

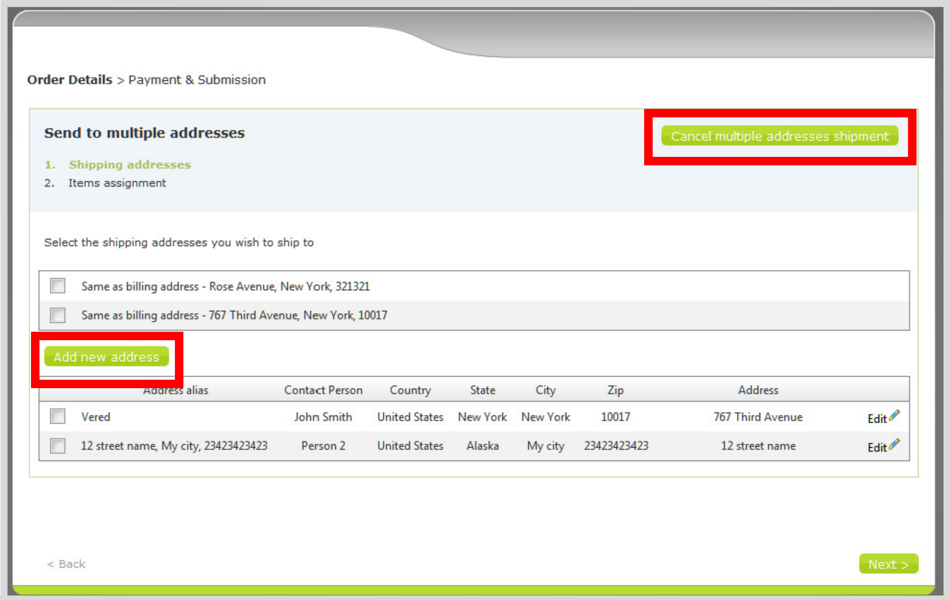
Previewing a store with multiple shipping addresses enabled

To preview a store that enables shipping to multiple addresses:

1. Open the store page and click the **Preview** button.
2. Select a product and then click **Place an Order**.
3. Click **Add to Cart**.
4. Click **Checkout**.

   Note the new button that appears in the **Shipping** details area.

5. Click **Send to multiple addresses**.



Note that the **Order Details>Payment & Submission** page also includes new buttons that enable store visitors to add shipping addresses or cancel the multiple addresses option.

Review activity

In this activity, you will review most of the procedures covered until now.

Activity procedure:

Make sure that you have the required uProduce credentials.

1. Create a store with the following requirements:

   General:

   - Name: <YourName>'s Store
   - B2B
   - Password protected with SSL
   - Appearance: XMPie Green Skin
   - Setup culture: English
   - Storefront language: English
   - Preview: PDF
   - Proof approval
   - Contact person: Support@<StoreName>.com

   Store Registration:

   - Enable self-registration

   Pricing requirements:

   - Storefront currency: Dollar
   - Clearing method: Invoice
   - Show minimum price

Shipping:

- Shipping with multiple addresses enabled

2. Place the store online.
3. Add one static document to the store.

   Requirements:

   - Create a new product group. Name it <YourName>'s Products
   - Duplicate existing product
   - Add an additional product property
   - Define a maximum order quantity.
   - Define prices for the following quantities: 1-10 items, 11-50, and 51-100.
   - Set up prices according to product quantities and properties.
   - Set Shipping as its delivery setup.
4. Place product online.
5. Preview the store.
6. Order the product.

   Requirements:

   - Order 90 items
   - Add billing address
   - Add two shipping addresses
7. Enter here the Order Number: _______________

Module summary

You've reached the end of the Adding a static product to your store module. You should now know how to add a static product to your online store.

In the next module, you will learn how to add a dynamic product to your store.

Module 4:

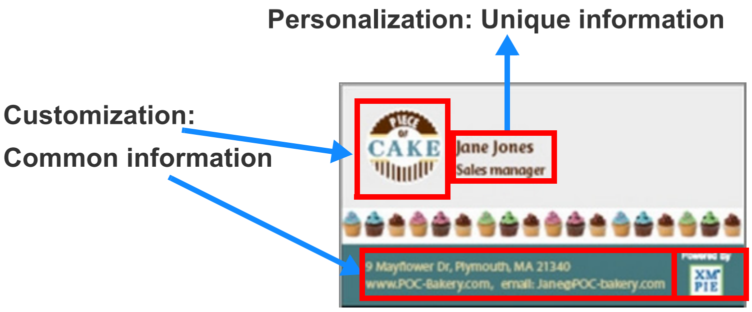
Adding a dynamic product to your store

In this module, you will learn how to add dynamic documents to your store. Dynamic Documents contain dynamic objects called Dials, which can be customized or personalized for specific customer needs or different recipient lists.

Dynamic documents can only be loaded to uStore from the uProduce Server.

Lessons in this module

Understanding the terminology



To be able to work with dynamic documents, it is important that you understand a few terms:

Customization

Customization reflects the customer's input. You customize content objects called dials. You can enable store visitors to specify fixed values for these dials. These values appear in all instances of the output document. For example, if a store visitor specifies a logo and company contact details for a dynamic business card, all copies of the business card display the same logo and company contact details, regardless of the recipients.

Personalization

Personalization reflects the recipient's data. You can personalize your document by populating the document's dials with recipient-specific values. In this case each instance of the document will be unique and include values that are specific to a recipient. For example, if a store visitor personalizes a dynamic business card document, each card will include a different first and last name and position. You can personalize values for all fields of the plan's recipient schema, except the ones that have been overridden by customization settings or defined as Dials (see below).

ADOR

ADOR stands for Automatic Dynamic Object Replacement. XMPie's technology that enables you do create variable data printing (VDP) documents using database and rule-driven objects. For example, you can define first name as an ADOR object. When you insert this ADOR into a document, you can generate a separate instance of the document for each customer. Within the XMPie environment, ADOR Objects are sometimes referred to as Content Objects.

Dial

ADORs and variables can also be marked as Campaign Dials. In the customization step, you can only select ADORs or variables that have been marked as Campaign Dials. This provides control for the person creating the plan file to determine which objects can be customized when adding the product to uStore.

Lesson 1: Understanding the dynamic product workflow

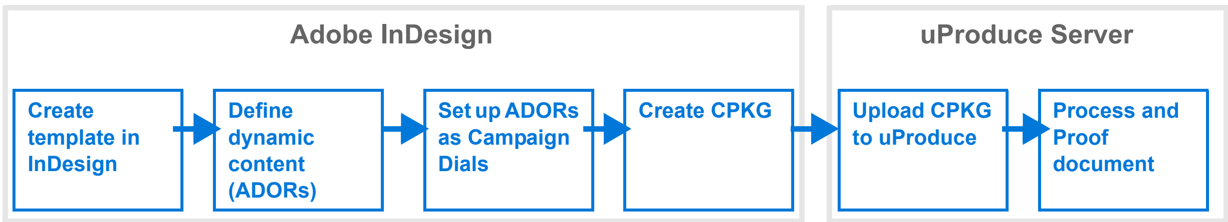
What will you learn?

In this lesson, you briefly recap how to set up content objects in Adobe InDesign, using XMPie uCreate Print and how to upload, proof and process documents on the uProduce server.

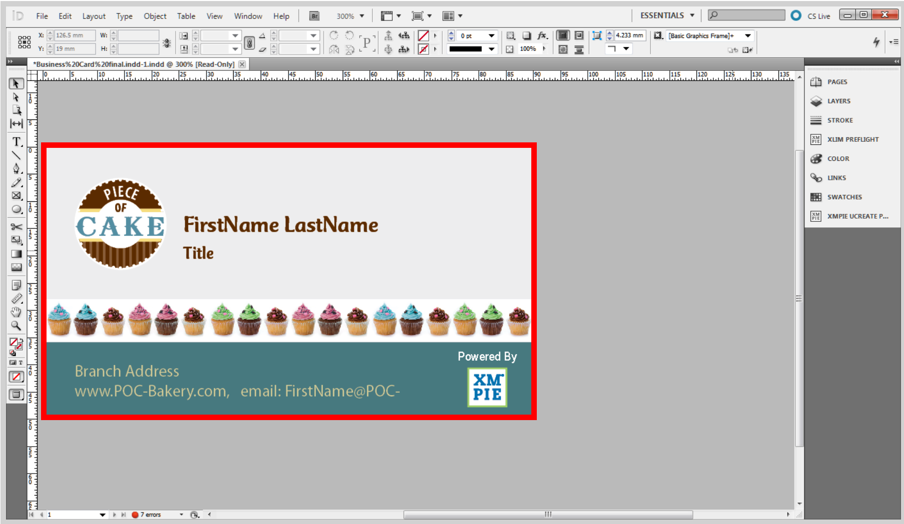
These procedures are thoroughly covered in the PersonalEffect training course, which is usually delivered prior to uStore training.

Unlike static products, dynamic products require some preliminary preparations before you can make them available in a store.

The following flowchart describes the main steps that you need to perform before you set up the dynamic document in your store:

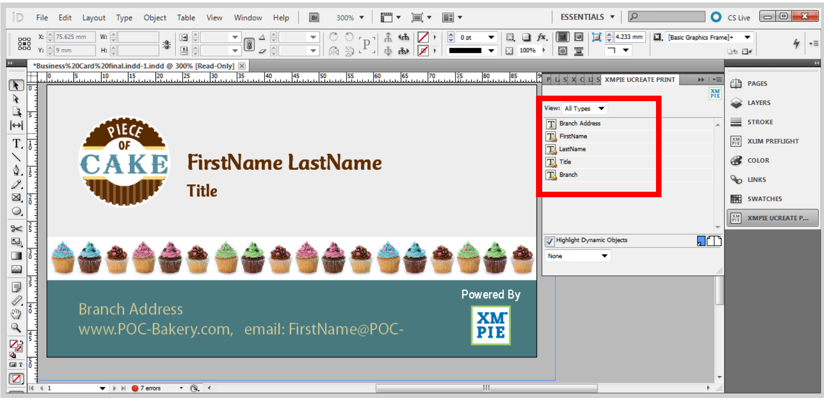


Creating a template in InDesign



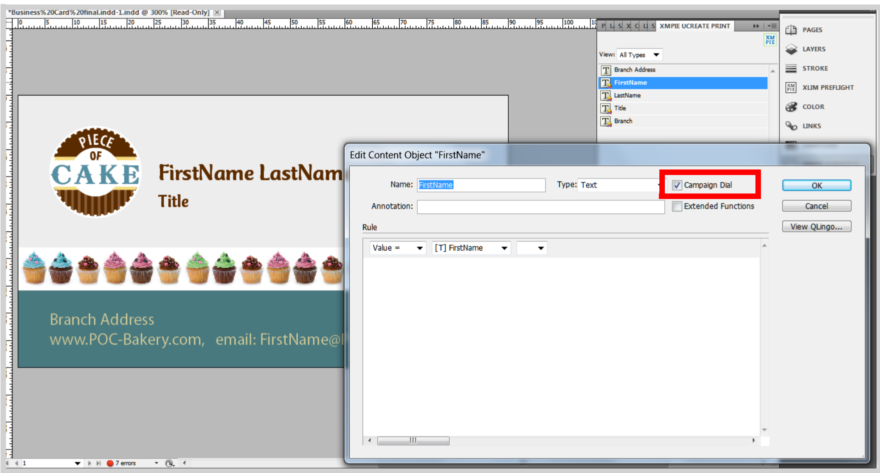
In Adobe InDesign, graphic designers create the art for the dynamic document.

Defining dynamic content objects (ADORs)



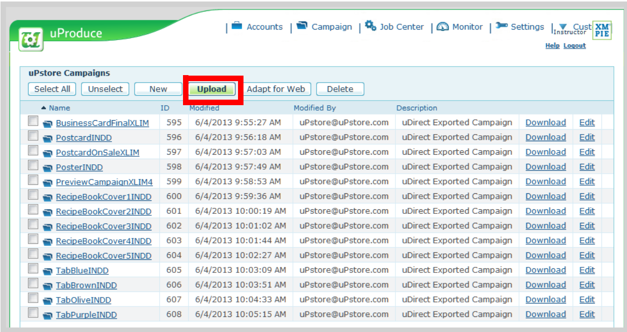
In Adobe InDesign, the designer defines the variable content objects and edits rules for each content object. If more complex rules are required, a data scheme can be created in uPlan and assigned to the document.

Setting up ADORs as Campaign Dials



To enable customization in uStore, the ADOR must be marked as a Campaign Dial. Only dials are available in the uStore Customization Wizard.

Uploading the CPKG to uProduce



After the design is ready and all content objects have been defined and marked as dials, you export the document as an InDesign campaign package or XLIM campaign package.

Note: The StoreFlow package does not include the InDesign engine. When using StoreFlow, you export the dynamic document to XLIM format only.
StoreFlow Pro customers can export documents as InDesign or XLIM campaign packages.

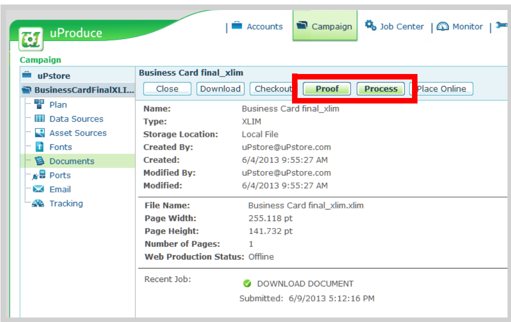
On uProduce, you need to create a new account and upload the campaign package (CPKG) file as a new campaign.

It is recommended that you preflight the file before you extract it, to make sure that there aren't any errors and warnings and the file includes all the required assets.

The uProduce server URL looks like this:

```
http://<ServerName or Domain>/xmpiedashboard
```

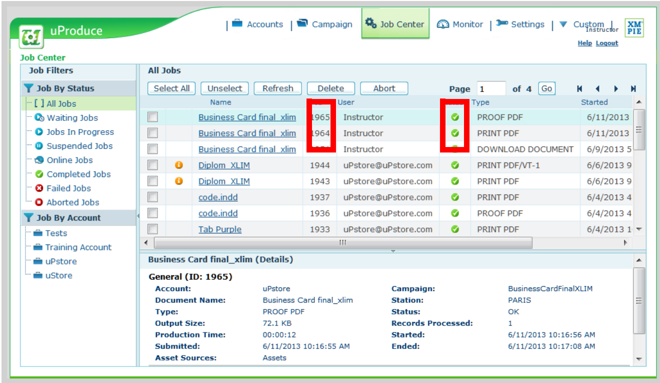
Processing and proofing the document



After uploading the CPKG file, you need to perform at least one proof job and one process (production) job, each consisting of at least one record.

The settings that you select when you proof the document on uProduce are used by uStore as the product proof and the settings that you select for processing are used when the product is sent to process from uStore.

After you generate the proof and process jobs on uProduce, go to the **Job Center**, and make sure that the **Status** column displays a green checkmark.



When you set up a dynamic product in uStore, you need the job's Proof ID and Process ID numbers. You also need the Account, Campaign and Document names.

Lesson 2: Setting up dynamic products in the store

What will you learn?

In this lesson, you will learn how to add a dynamic document to your store.

You can add two types of dynamic products to your store: InDesign (.indd) and XLIM (XMPie Less Is More) files. XLIM documents provide advanced editing tools to store visitors.

In this lesson, you will learn how to add a business card to the store. The business card includes four dynamic content objects: First name and last name, position and branch.

Creating a new dynamic product

Let's say that the dynamic product that you want to add to the store is a business card. In the first part of this lesson, you will learn how to customize the business cards document. Later in this module, you will learn how to personalize a product.

In the following procedure you will set up the general settings for the business card product.

Prerequisites:

To set up the dynamic document, you need:

- uProduce Account and Campaign names

Note: Remember that you need to connect with a user that has access to the required uProduce account.

- Name of the dynamic document that was uploaded to uProduce. In this exercise, use **Business Card final_xlim**

During the training event, your instructor will provide the required details.

Requirements:

Settings	Outcome in the storefront	
Product group	Dynamic Documents	☐
Product name	Business Card 1	☐
Short description	Company business card template	☐
Product Details step	Don't show in storefront	☐
Proof type	JPG	☐
Dials	LastName, FirstName, Title, Branch	☐
Customization steps	Two steps: • General Information (LastName, FirstName, Position) • Office Location (Branch)	☐
Branch's Input control	Dropdown list (New York, Atlanta, San Francisco)	☐

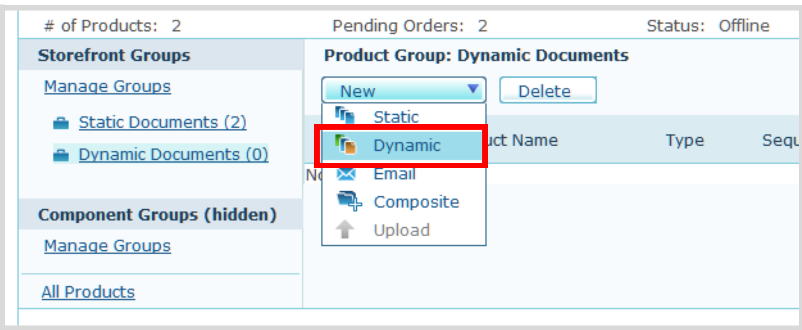
You can use this table as a checklist when you preview the online product in the store.

To create a new dynamic product:

1. In the uStore back office application, from the main menu, click **Stores**.
2. Select your store.
3. On the store page, under **Storefront Groups**, select the **Dynamic Documents** group.

Note: In this procedure, we are assuming that you have already created the group where the new dynamic product will be stored. To learn how to create groups, review Uploading static documents to a store.

4. To add a dynamic document, click **New>Dynamic**.



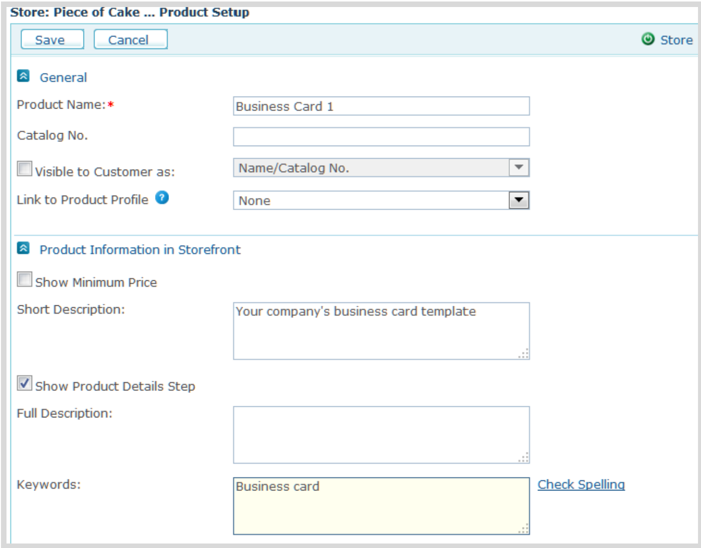
The Product Setup page is displayed.
The **Product Setup** page includes several sections: **General**, **Product Information in Storefront, Document Template, Proof**, **Product Groups**, **Pricing & Tax**, and **More**.

5. Fill in the following parameters:

   a. **Product Name**: Type a name for the product.
   This is the name that will be displayed in the storefront. In this example, type **Business Card 1**.

   b. In the **Product Information in Storefront** section, type a short description and add a couple of keywords.

   c. To skip the **Product Details** step in the ordering process in the storefront, clear the **Show Product Details Step** option.

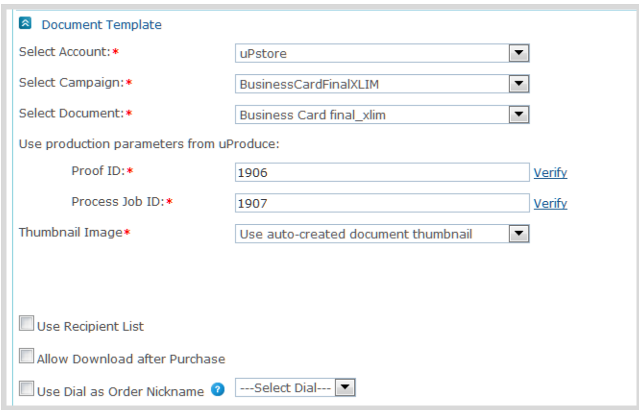


   d. In the **Document Template** section, select the relevant uProduce **Account**, **Campaign** and **Document** that was uploaded to uProduce.

   e. In the **Proof ID** box, type the Proof ID that was generated on uProduce.

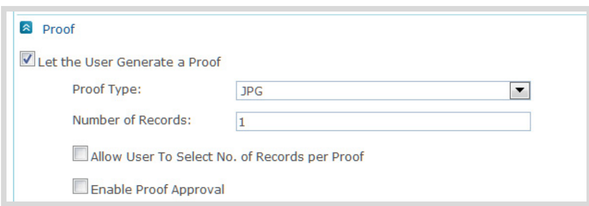
   f. In the **Process Job ID** box, type the Process ID that was generated on uProduce.

   g. Clear the **Use Recipient List** option.



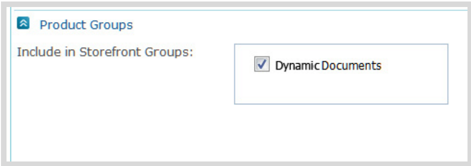
   h. Click **Proof**.

   i. Make sure that the selected **Proof Type** is **JPG**.



j. Click **Product Groups**.

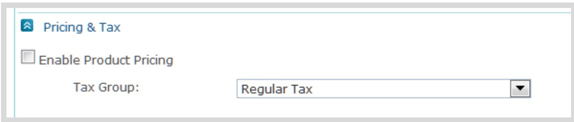
k. Make sure that the product is assigned to the **Dynamic Documents** group.



l. Click **Pricing & Tax**.

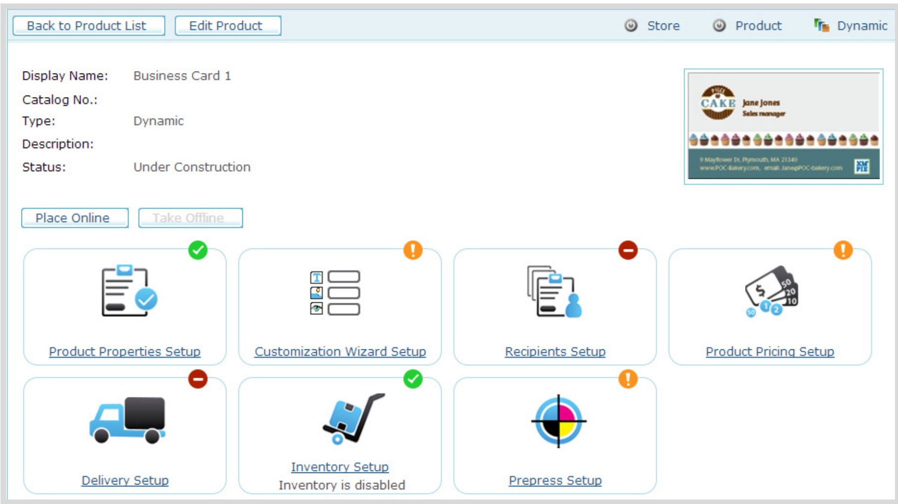
m. Clear the **Enable Product Pricing** checkbox.

Note: You cannot change the **Product Pricing** *setting after the product has been ordered.*



6. Click **Save**.
   The **Product Setup** page opens. It displays a summary of the product setup and its thumbnail.

Note: To go back and edit these product settings, click the **Edit Product** *button.*



Setting up the dynamic product

Setting up product properties , pricing and delivery is the same as you have already learned in the module Adding a static product to your store.

The following settings are available only for dynamic products:

- Customization Wizard Setup
- uEdit Setup
- Recipients Setup (You will learn how to set up recipients later in this module.)

Note: Composite and Email products also require Recipients Setup. This training course does not include Email products. At the end of the guide, you can find a list of references to online tutorials that cover how to set up Composite products.

Setting up customization options

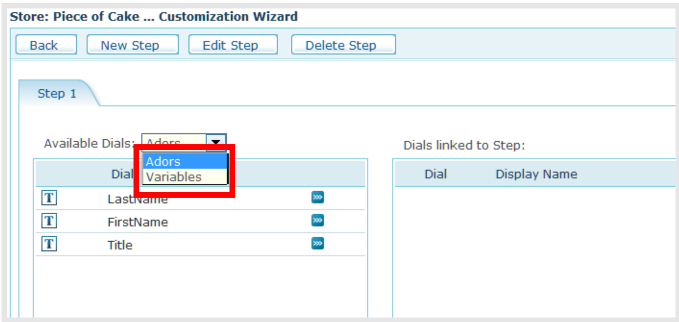
The Customization Wizard enables you to define the values that will be used in the document's dynamic fields.

What can be customized?

There are two types of objects that can be customized:

- ADORs -- dynamic text or images that are included in the document
- Variables -- dynamic content that is not directly included, but are part of a uPlan file that includes the data scheme for populating the dynamic content of the document.

To be able to customize ADORs and variables, they must be set as Campaign Dials in uPlan or the uCreate Print Rule Editor.



The business card that you are adding to the store includes 4 dials -- four content objects that you can customize:

- **FirstName** and **LastName**: The name of the business card's owner
- **Title**: The person's position in the company
- **Branch**: The name or location of the company's branch

Learn more:

To learn more about how to use variables in uStore, see this video tutorial.

Setting up the Customization Wizard

In the **Customization Wizard**, you decide which of these dials will be enabled for customization by store visitors and how visitors will do this, for example, if they will select from a drop-down list, checkboxes, among other options.

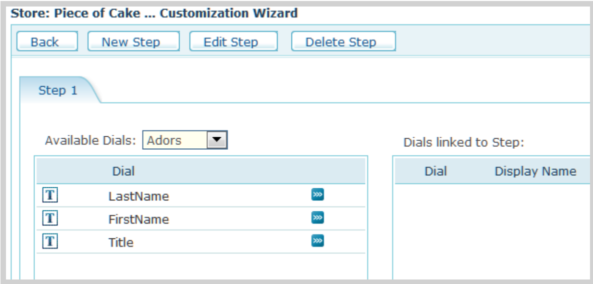
In the following procedure, you will define:

- The dials can be customized when ordering the product
- The customization steps available
- Dial properties

Making dials available for customization

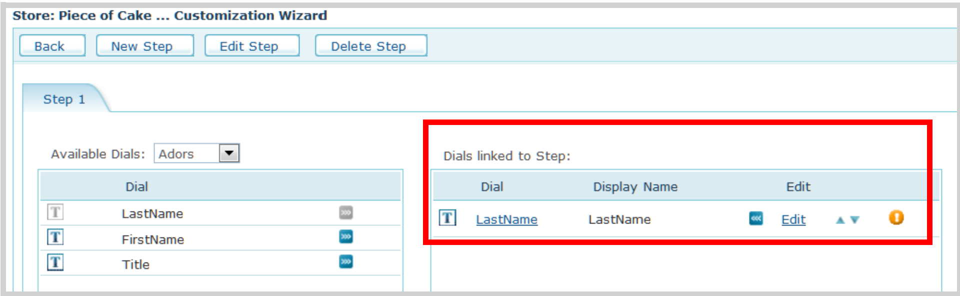
To define the dials that will be available for customization:

1. On the **Product Setup** page, click **Customization Wizard Setup**.



The **Customization Wizard** page opens. The list of Dials defined in the document is displayed.
Use the **Available Dials** list to toggle between ADORs and Variables.
A default step is already defined for yo. Its default name is **Step 1**.

2. To make an ADOR available in this step, click the next to it.
The ADOR appears in the **Dials linked to Step** area.



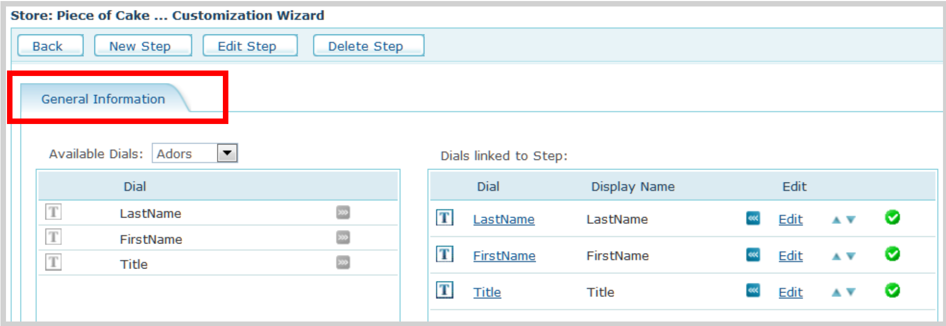
The orange icon with the exclamation mark means that the dial needs to be edited.

3. Click **Edit**.
The **Dial Details** page opens.
4. In the **Input Control** list, make sure that **Text Input** is selected.

Instructor notes

Explain the main properties that can be edited on this page, such as Visible to Customer, Input Control, Default values and Validation settings.

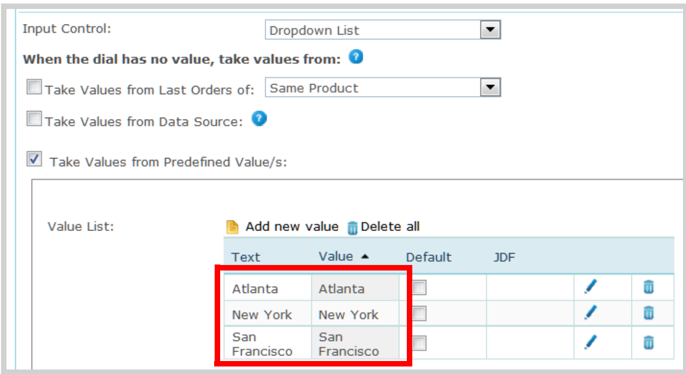
5. Leave all other settings as is and click **Save**.
A green checkmark appears next to the dial.
6. Move the remaining dials.
7. To rename the customization step, click **Edit Step**.
8. In the **Step Name** box, type **General Information**, and then click **Save**.
The Customization Wizard page should now look like the following screenshot:



Adding customization steps

To add a new customization step:

1. Click the **New Step** button.
2. Name it **Office Location** and then click **Save**.
3. Add the **Branch** variable to this step.
4. On the **Dial Details** page, set the **Input Control** to **Dropdown List**.
5. Let's say that this company has offices in New York, San Francisco and Atlanta. In the **Value List** area, add three values for these locations:
    a. Click **Add new value**.
    b. In the **Text** cell, type **New York**.
    c. Click the green checkmark.
    d. Repeat steps a-c for the San Francisco and Atlanta offices.



6. To save the dial settings, click **Save**.
7. On the **Customization Wizard** page, click **Back**.
   Your settings are saved and you return to the **Product Setup** page.
8. To make the product available in your store, click **Place Online**.
   The product is now available in the store and can be ordered by store visitors.

You will preview this product in the storefront in the next lesson.

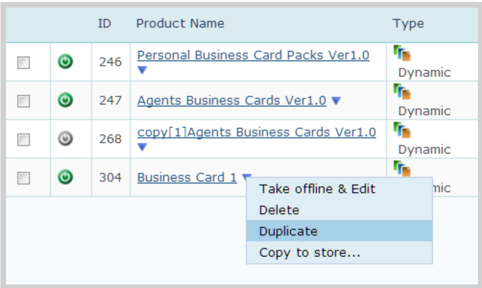
Adding personalized business cards

Now, let's say that you want to make the same business cards document available in your store, but enable users to print them according to a recipient list.

In this section, you will duplicate the business card product and set it to use the recipient list that was uploaded to uProduce (data source).

To duplicate the dynamic product and change its settings:

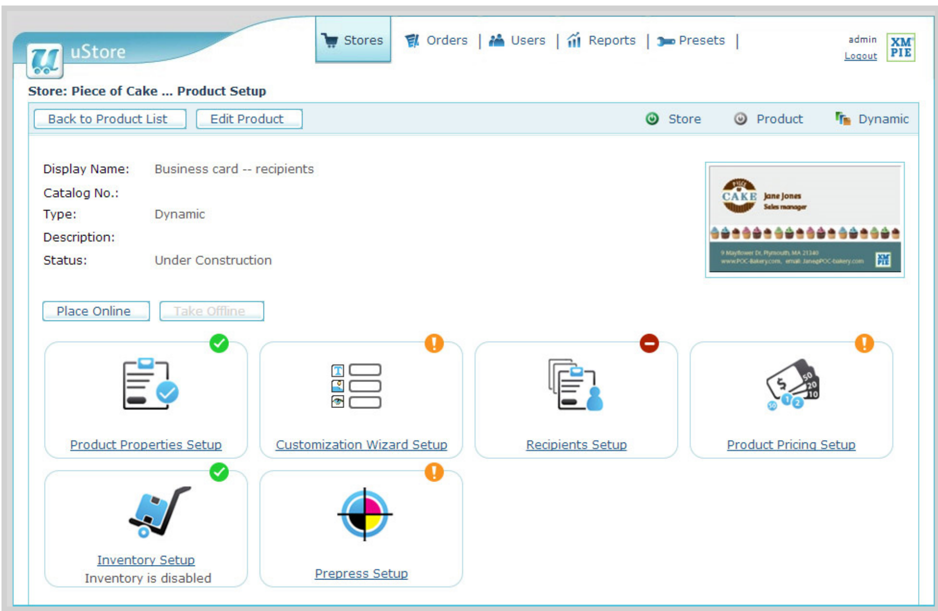
1. On the store page, in the **Dynamic Documents** group, click the blue arrow next to the **Business Card 1** product.



2. Click **Duplicate**.
3. Click the **copy[1]Business Card 1** link.
4. Click the **Edit Product** button.
   a. **Product Name**: Rename the product.
   In this example, type **Business Card -- recipients**.
   b. In the **Product Information in Storefront** section, in the **Short Description** box, add a note that mentions that this product uses a recipient list.
   c. Select the **Use Recipient List** option.
   Using a recipient list enables store visitors to assign a recipient list to the document production to personalize it.

Note: You cannot change the **Use Recipient List** *setting after the product has been ordered.*

5. Click **Save**.
   The **Product Setup** page opens. It displays a summary of the product setup and its thumbnail.



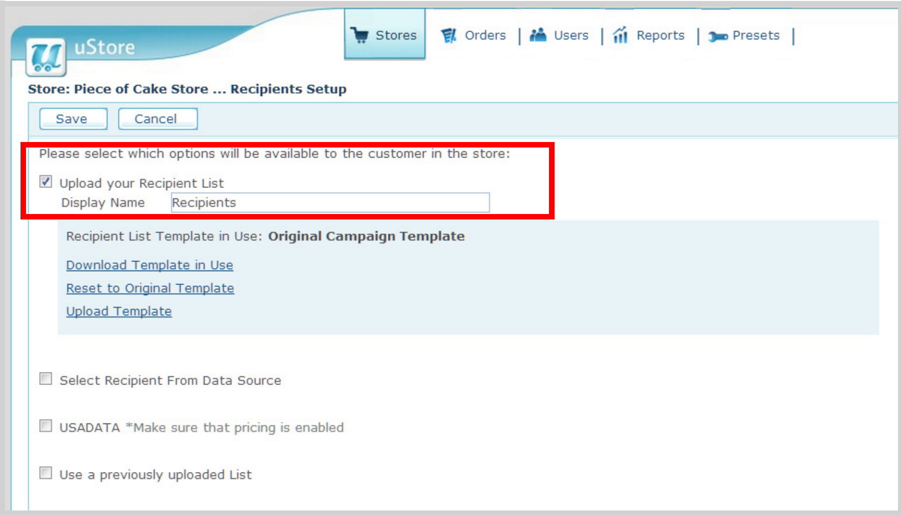
Setting up recipients

On the **Product Setup** page, there is a red “X” icon to the right of the **Recipients Setup** row.

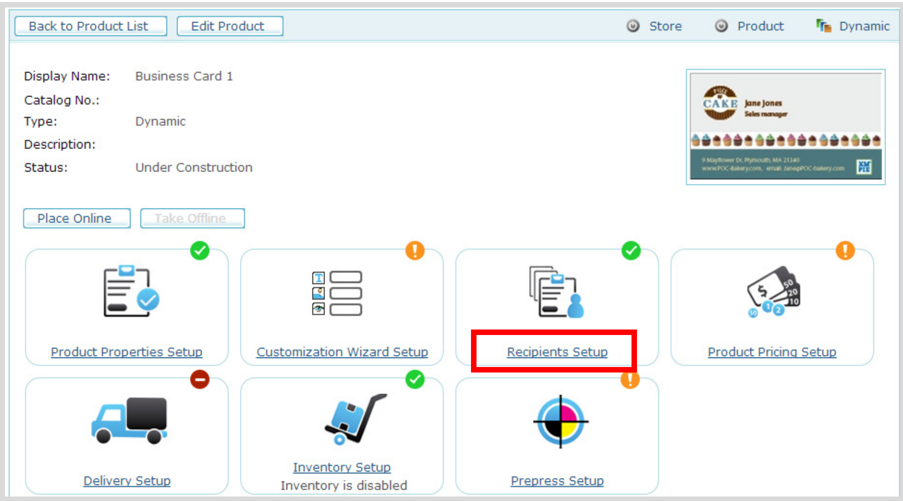
You can place a product online only after you set up all its mandatory settings. In this example, you still need to define the **Recipients Setup**.

To define Recipients Setup:

1. On the **Product Setup** page, click **Recipients Setup**.
2. In this exercise, you will enable users to upload their own recipient list when ordering this product. For example, a sales manager orders business cards for his or her team and uploads an up-to-date recipient list of all team members during the ordering process.
   On the **Recipients Setup** page, select **Upload your Recipient List**.
3. In the **Display Name** box, type **Recipients**.



4. Click **Save**.
   A green checkmark appears instead of the red “X”.



5. In the **Customization Wizard Setup**, remove all the customization settings that you have defined previously:
   a. Unlink Adors.
   b. Delete the **Office Location** step.
   c. Edit the **General Information** step and rename it to **Reset**.

d. Click **Back**.

e. To make the product available in your store, click **Place Online**.
The product is now available in the store and can be ordered by store visitors.

Lesson 3: Previewing the dynamic product in the storefront

What will you learn?

In this lesson you will preview the product that you have just defined.

You will:

- Check the customization steps to understand how your settings affect the store visitor's experience.
- Check the recipient list step in the ordering process to understand how you settings affect the way store visitors personalize the product.

After you set up the dynamic product and make it available in the store, you can preview it to make sure that the online product fits the requirements or if you need to take it offline and make any adjustments.

In the following procedure, you will simulate the store visitor's experience when ordering the dynamic product that you have set up.

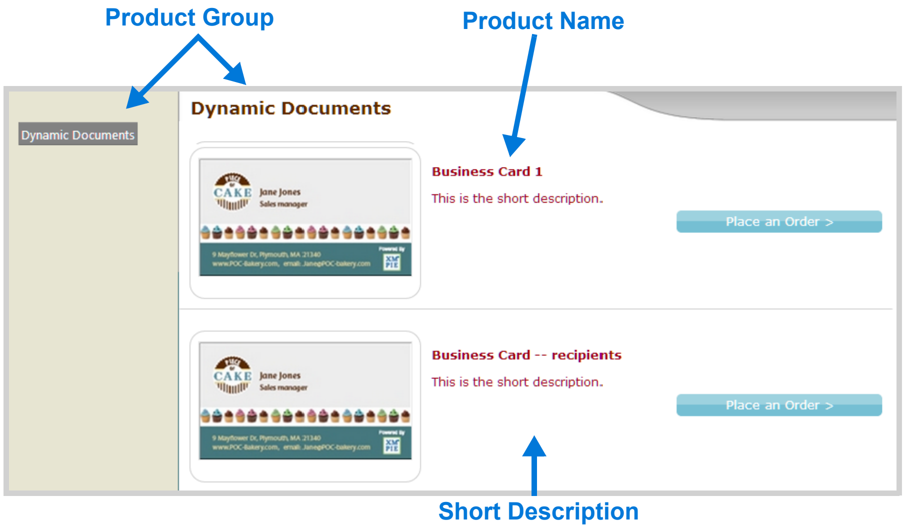
You can use the requirements table (see page 49) provided in the previous lesson as a checklist to make sure that you have defined all the required settings.

Previewing general product settings

In this section, you will check that the product appears under the product group that you selected and displays the name and description that you provided.

To preview the dynamic product:

1. On the **Product Setup** page, click **Back to Product List.**
2. On the store page, click **Preview**.
3. On the store's homepage, click **Dynamic Documents** -- the group you created and to which you added the dynamic product.
4. On the **Dynamic Documents** page, examine the two business card products that you added to the store: **Business Card 1** and **Business Card -- recipients**: name, short description and thumbnail.



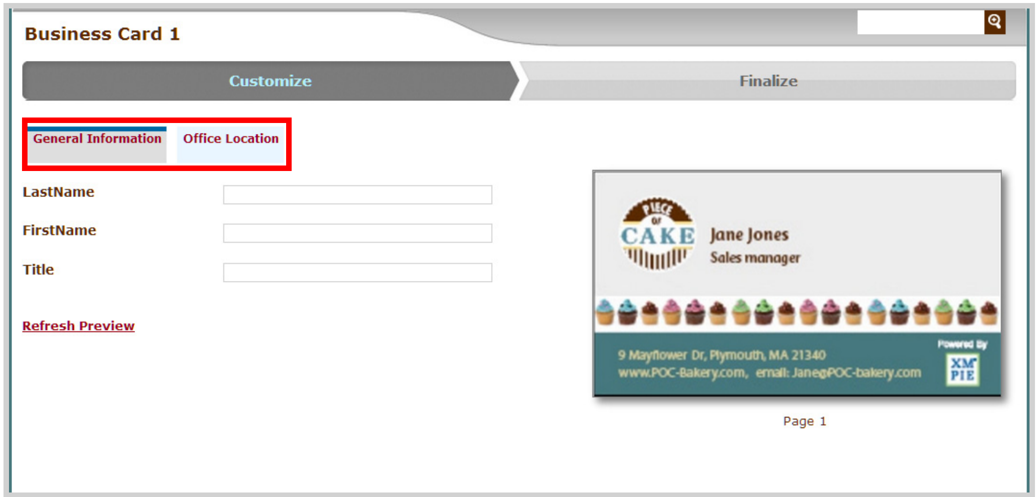
5. Select the **Business Card 1** product and click **Place an Order**.

Previewing customization settings

In this section, you will preview how the settings you defined in the **Customization Wizard** affect the customization options that are available in the storefront.

To preview customization settings:

1. On the **Customize** page, check if the customization steps are displayed as you defined: **General Information** and **Office Location**.



2. In the **General Information** step, type:
   - **Last Name**: Smith
   - **First Name**: John
   - **Title**: Manager
3. Click **Refresh Preview**.
   The thumbnail displays the values you typed.

Note: You can click the thumbnail to open a preview of the product on a new window.

4. Click **Office Location**.
   The **Branch** selection is done with a dropdown list, as you defined in the **Dial Details** page.

5. In the **Branch** list, select **San Francisco**.
6. Click **Next**.

Previewing recipients settings

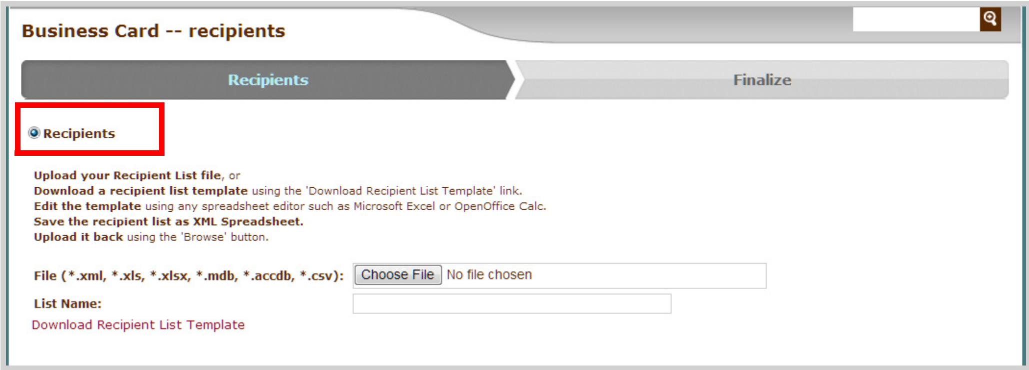
Now, preview the business card product that uses a recipient list.

To preview the Business Card -- recipients product:

1. Go back to the **Dynamic Documents** page and locate the **Business Card -- recipients** product.
2. Click **Place an Order**.

Because you have only selected the **Upload your Recipient List** option in the back office, this is the only option displayed for store visitors who order this product.

In addition, because you defined the display name as **Recipients**, this is the text displayed in the storefront.



Note: Store visitors can download a recipient list template, fill it up and then upload it again before they finalize the ordering process.

Review activity

In this activity, you will set up the dynamic content of a postcard for distribution to the members of the “Piece of Cake Loyalty Club.”

Objective

Practice the concepts and procedures learned in this module and recap the content of the course up to this point.

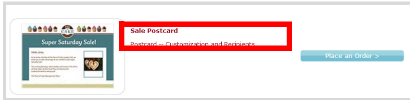
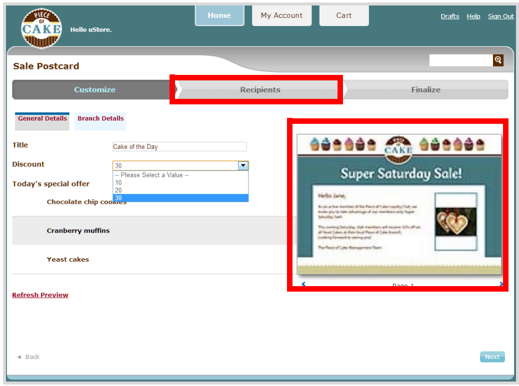
Dynamic content requirements

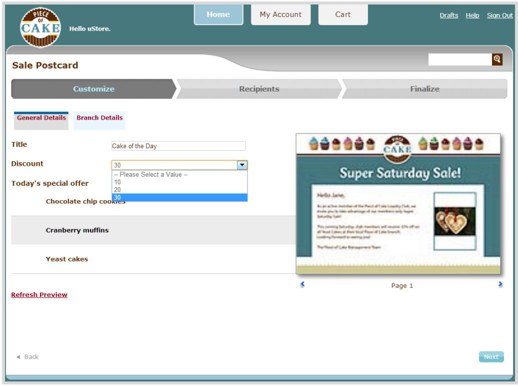
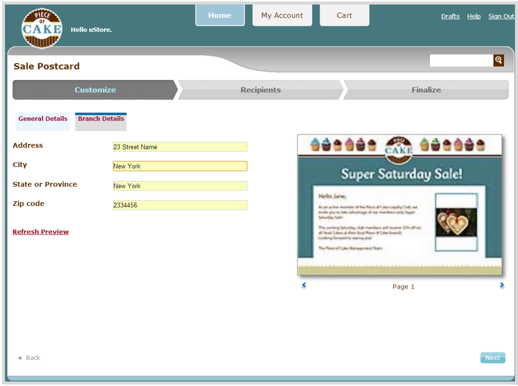
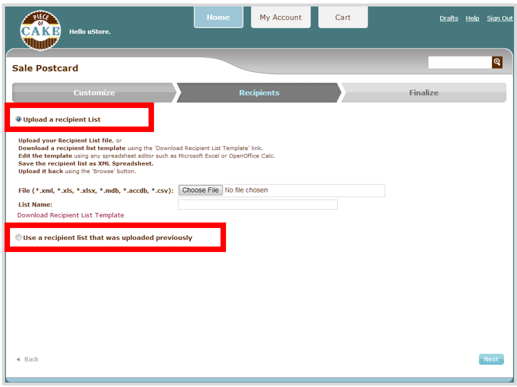
The postcard includes two pages with the following dynamic content elements (dials).

You need to enable store visitors to change the following content:

1. Title of the postcard
2. Recipient (first name)
3. Discount rate
4. Type of cake on sale
5. Branch address (several components)

Product setup requirements

Settings	Requirement	Outcome in the storefront
General	• Product Name: **Sale Postcard** • Skip the Product Details step	
Document Template	*Your instructor will provide you this information.* • uProduce Account: **uPstore** • uProduce Campaign: **PostcardOnSaleXLIM** • Document Name: **TrainingPostcard.xlim** • Use Recipient List	
Other	• Proof: **JPG** • Product Groups: **Dynamic Documents**	Store visitor can see a proof of the document Product is added under the Dynamic Documents group
Product Properties Setup	Set lamination options: • **Glossy** • **Matte** • **No lamination**	

Settings	Requirement	Outcome in the storefront
Customization Wizard Setup	Set two steps. Step one name: **Sale details** Customization options: • Sale Title: text input • Discount: dropdown list Options: 10, 20, 30 • InSale: gallery list view • Step two name: Branch address Customization options: • BranchAddress: Text input Display text: Address • BranchCity: Text input Display: City • AnyState: Text input Display: Zip code	
Recipients Setup	Enable two options and customize their display: • Upload your recipient list Display: **Upload a recipient list** • Use a previously uploaded list Display: **Use a recipient list that was uploaded previously**	
Product Pricing Setup	Set prices for each lamination option: • Glossy: $ 0.90 • Matte: $ 0.70 • no lamination: $ 0	

Activity procedure

1. Set up the product according to the table above.
2. Place the product online.
3. Preview the product in the storefront.
4. Customize the product:

a. Title: **Cake of the Day**

b. Discount: **10**

c. Today's special offer: **Cranberry muffins**

d. Branch address: **23 Street Name**, **New York**, **New York**, **2334456**

5. Set a recipient list:

   a. Select **Upload a recipient list**

   b. Select: **Sheet1**

Note: Use the Excel file provided with the training package or download the data source from uProduce.

6. Order one item per recipient.
7. Select **Gloss** lamination.
8. Checkout the product.
9. Enter the **Order Number**: _______________

The ordered product should look like this:

Review questions

Preview the dynamic product that you added to the store and answer the following questions:

1. What do you need to do before you can set up a dynamic product in a store?

2. What is the difference between customization and personalization? Provide examples of products that would need one or the other.

3. What is the difference between static documents and dynamic documents? List a few real-life examples.
4. What are ADORs?
5. What is the difference between ADORs and Variables?
6. What is a dial?

Module summary

You've reached the end of the Adding a dynamic product to your store module. You should know how to set up a dynamic product and make it available in your store.

In the next module, you will learn how to set up workflow providers.

Module 5:

Setting up workflow providers

To be able to add prepress workflows, such as imposition methods, to the uStore print production process, you first need to establish the connection between uStore and the prepress workflow provider.

In this module, you will learn how to set up prepress workflow providers.

The content of this module is relevant only if you use Xerox FreeFlow Core, Xerox Process Manager, HP SmartStream or other workflow providers.

Lesson in this module

Lesson 1: Creating prepress workflow providers

What will you learn?

In this lesson you will understand how uStore works with 3rd party prepress workflow providers and learn how to create a prepress workflow provider.

You can associate the profile with one or several prepress workflows. Prepress workflows determine how the product will be printed after it is ordered in the storefront.

uStore provides two types of prepress workflows:

- Seamless integration with Xerox FreeFlow automation modules and HP SmartStream systems. You can define multi-step workflows that automate imposition, the addition of crop marks, color bars, watermarks, among other prepress processes on your Xerox FreeFlow Core or HP SmartStream systems and these workflows will be available in the back office.
- Manual workflows: You can create hot folders for sending purchased products to production on 3rd-party print servers.

Before you assign prepress workflows to products, you need to create workflow providers in the **Presets>System Setup** page.

1. First, you create prepress workflow providers.

Note: This is a one-time setting. Xerox FreeFlow Core is already set up as a workflow provider by default.

2. Then you assign prepress workflows to specific products or product profiles.

Learn more:

You learn how to assign workflows to a product profile in the module Working with product profiles.

Creating prepress workflow providers

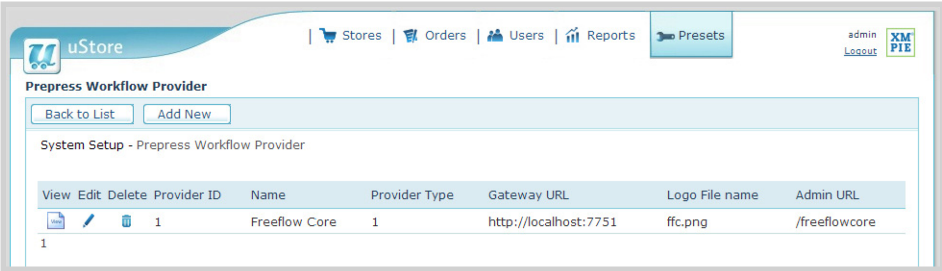
XMPie StoreFlow includes FreeFlow Core product from Xerox, so the FreeFlow Core Prepress Workflow Provider is setup by default in your uStore.

The following procedure describes how to connect uStore to a prepress workflow server:

Note: This procedure is only needed if you have a separate prepress workflow server such as FreeFlow Process Manager, HP SmartStream or another 3rd party prepress workflow application.

To create a prepress workflow provider:

1. Click the **Presets** tab.
2. Select **System Setup>Prepress Workflow Provider**.



The **Prepress Workflow Provider** page displays a list of all the prepress providers that have been already defined.

3. Click **Add New**.
4. In the **Name** field, enter a name for the provider.
5. In the **Provider Type** list, select the relevant option for your workflow server.
6. In the **Gateway URL**, enter the required port as follows:
   - To connect to a Xerox Process Manager, type `http://[ServerName] or [IP_Address]: 7779`
   - To connect to Xerox FreeFlow Core, type `http://[ServerName] or [IP_Address]:7751`

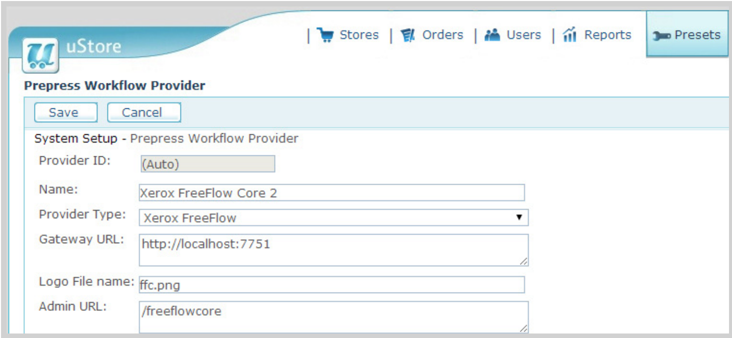
Note: Xerox FreeFlow Core should already be configured in your uStore system.

   - To connect to an HP SmartStream system, type `http://[IP_Address]:8080/dpp/jmf/dfe`

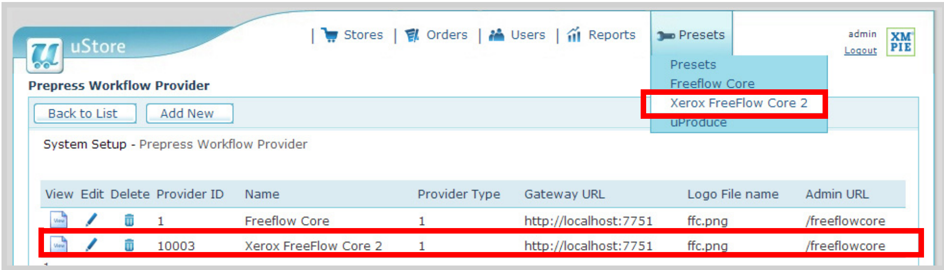
7. (Optional) In the **Logo File Name** box, enter the path to the logo of the workflow provider:

`\\[ServerName]\XMPie\uStore\App\AdminApp\Images\Prepress\[LogoFileName].`
If you do not provide the path to a file, uStore displays the name of the provider instead.

8. If the prepress provider has a web application for creating and editing workflows, you can add a link to the application directly from the **Presets** menu.
In the **Admin URL** box, enter its path.
   - If the prepress workflow provider is installed on the same server as uStore, enter its relative path. For example, type `/[workflow_provider_url].`
   - If the prepress workflow provider is installed on a remote server, enter its full path. For example, type: `http://[ServerName] or [IP_Address]/[workflow_provider_url].`



9. Click **Save**.
   The new prepress workflow provider is added to the list of prepress workflow providers.



Learn more:

To learn how to set up a manual prepress workflow provider, see the *Setting Up Prepress Workflow Providers* and *Creating Prepress Workflows* sections in the *uStore User Guide*.

After you set up the connection to your prepress workflow providers, uStore will display all the workflows that are defined on the provider. You can now define which workflows you want to apply to the products or product profiles.

Activity: Create a new prepress workflow provider

1. Name the new provider **FreeFlow Core 3**.
2. Add its link to the **Presets** menu.
3. Open the FreeFlow Core application from the **Presets** menu.

Module summary

You've reached the end of the Setting up workflow providers module. You should know how to create new workflow providers in your uStore system.

In the next module, you will learn how to create product profiles and link products to product profiles. You will also learn how to apply prepress workflows to products or product profiles.

Module 6:

Working with product profiles

In this module, you will learn how to set up product profiles and link them to products. In addition, you will learn how to apply prepress workflows to products or profiles.

Lessons in this module

Lesson 1: Creating product profiles

What will you learn?

In this lesson, you understand when working with profiles is useful and you will learn how to create profiles.

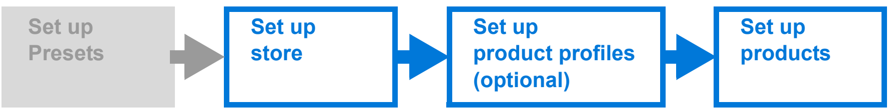
Understanding product profiles

To simplify maintenance and management of products, uStore enables you to create product profiles. product profiles contain a set of product properties that you can apply to several products. When you link products to product profiles, you can easily edit product properties and make global changes without the need to open each product separately. All your changes are automatically applied to the products that are linked to the product profile.

Product profiles are useful if you need to update products' properties often or if you have groups of products that share the same set of properties.

For example, if you create a product profile for business cards, you can link all the available business-card products in your store to that profile and ensure that all business cards have the same parameters, such as stock type, order quantities, and pricing, among others.

When you work with product profiles, it is recommended that you first set up the product profiles before you set up the products themselves.



Product profiles enable you to define product properties, pricing and prepress setup.

When you work with product profiles you still need to create products separately and link them to the relevant profile which has the properties and pricing for that type of product.

Note that the product profile feature helps you maintain and update products in an efficient and fast manner, but you can still set up products without creating product profiles, as you have done in the modules Adding a static product to your store and the Adding a dynamic product to your store.

Creating product profiles

Let's say that all the posters in your store have similar paper stock options and price structure. In such case, you do not need to open every poster product and set up its paper stock and pricing parameters separately. You can create a product profile called Posters and link each poster to this profile. After you link the poster to the product profile, you can update or modify the settings in the profile and all posters that are linked to this profile are automatically updated.

To create a product profile:

1. In the **Stores** tab, click **Product Profiles**.

2. In the **Product Profile** List page, click **New Product Profile**.
   The **Product Profile Setup** page opens.

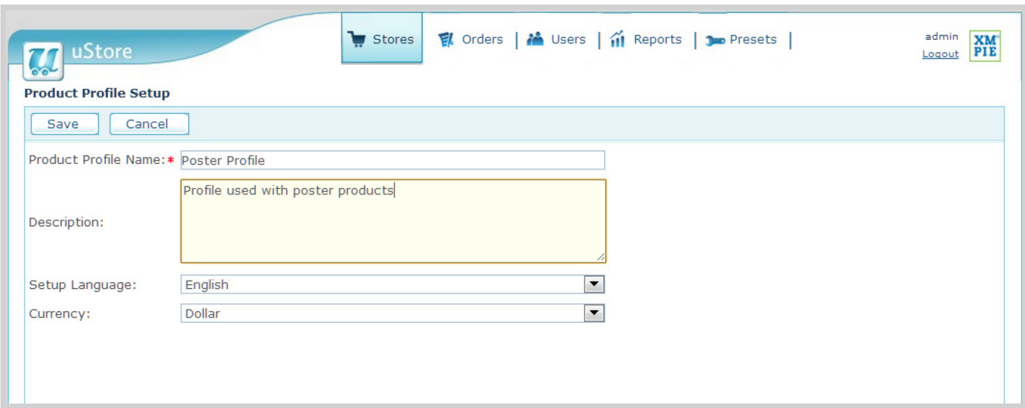
3. In the **Product Profile Name** box, enter a name for your profile.
   For example, if you are creating this profile to be used for posters, name it **Poster Profile**.

4. In the **Description** box, enter a meaningful description for the product profile.
   In this training, type Profile used with poster products.

5. In the **Setup Language** list, select a language.
   In this training, select **English**.

Note: The product profile will be available only for products in stores that use the language that you select here.

6. In the **Currency** list, select the currency that will be used for the products linked to this profile.
   In this training, select **Dollar**.

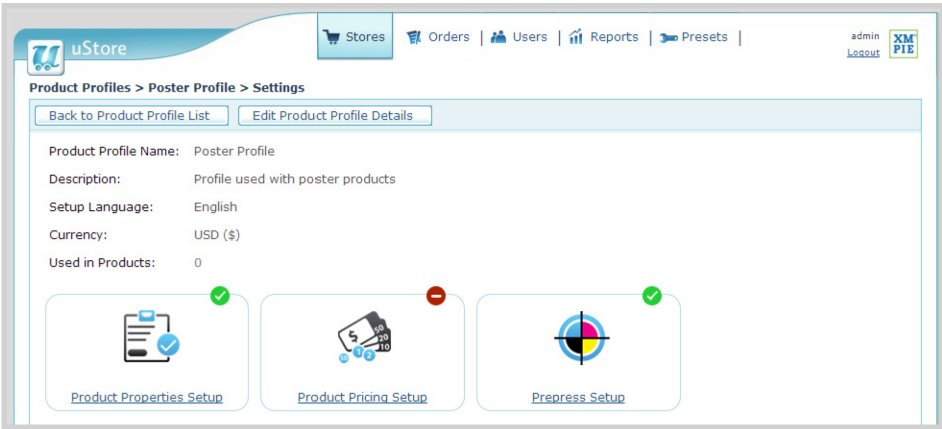


Note:
The product profile will be available only for products in stores that use the currency that you select here.

After setup, you cannot change the language of a product profile, but you can change its currency, as long as the product profile is not linked to a product.

After the product profile is linked to a product, you cannot change its currency anymore.

7. Click **Save**.
   The **Product Profiles** > **Poster Profile** > **Settings** page opens.



After you create a product profile, you can start setting up the relevant product properties for the product profile.

Note: Setting up product properties for a product profile is similar to setting up product properties for an individual product.

In the **Product Profiles>[*ProfileName*]> Settings** page, you set up:

- **Product properties**: Define product properties such as binding, color and paper stock.
- **Product pricing**: Configure the product price and cost as well as price and cost steps.

  Setting up product properties for product profiles is similar to setting up product properties for a single product.

Learn more:

To recap how to set up product properties and product pricing, review the modules Adding a static product to your store *and* Adding a dynamic product to your store.

- **Prepress workflows**: select the workflow required for printing the product.
  In the next lesson, you will learn how to set up prepress workflows.

Activity: Making the new product profile available

Note: Note the status icons to the right of the **Product Profiles>Poster Profile> Settings** *page. These icons indicate if the profile is ready to be used or if mandatory settings are missing.*

The product profile can be linked to products only after you define all its mandatory settings.

In the following procedure, you will set up the pricing to complete the creation of the new product profile.

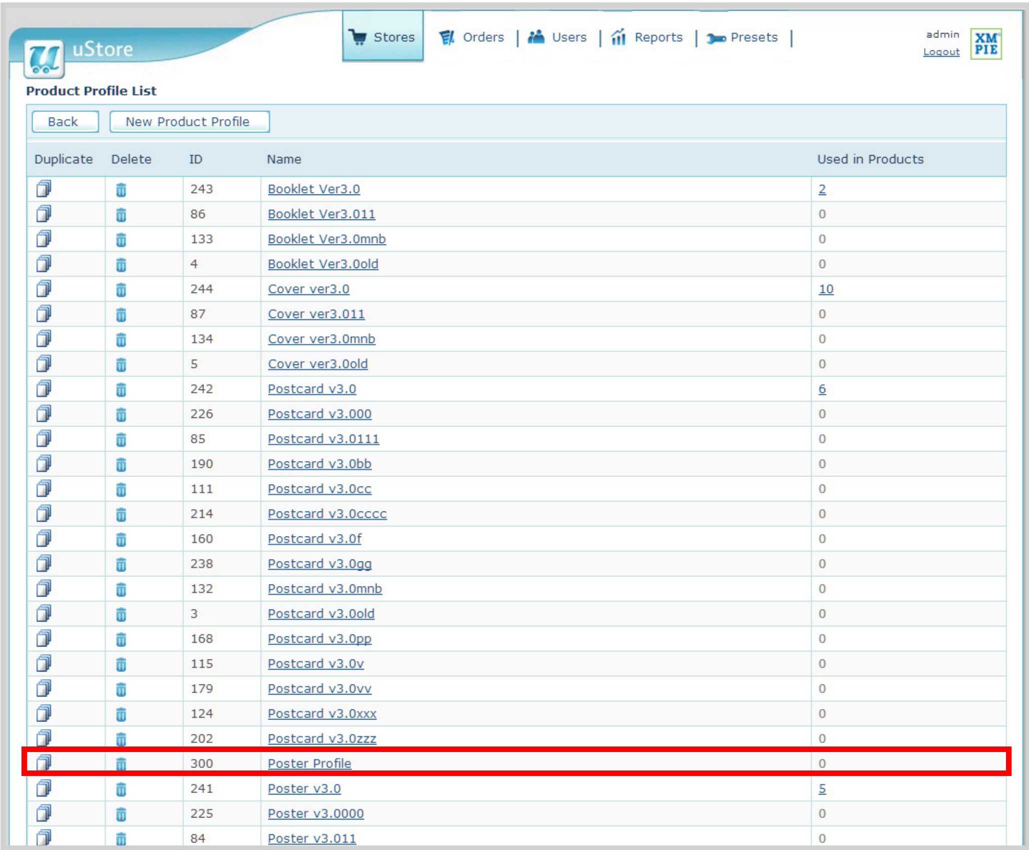
Procedure:

1. Set the **Base** property fixed cost to **US$ 5** and save.

Learn more:

If you need to recap, go to Editing product pricing settings in the Adding a static product to your store module.

2. Go to the **Product Profile List** and locate the **Poster Profile** that you created.



3. Look in the **Used in Products** column.
   This column shows the number of products that are linked to the profile. If the profile is linked to at least one product, you can click the number to see the product(s) linked to the profile organized by store.

Activity: Create a new profile for business card products

In this activity you will create a profile to be used for a set of business card products.

Requirements:

- **Name**: Business Cards Profile
- **Product Properties**: Color, lamination and paper type
- Set pricing for the product properties:
  - **Color**: black and white and color
  - **Lamination**: no lamination, matte and glossy

- **Paper type**: Thick, premium and recycled

Lesson 2: Applying prepress workflows

What will you learn?

In this lesson you will learn how to apply prepress workflows to a product profile.

In the module Setting up workflow providers, you learned how to set up the connection to your prepress workflow providers, uStore will display all the workflows that are defined on the provider. You can now define which workflows you want to apply to the product profile.

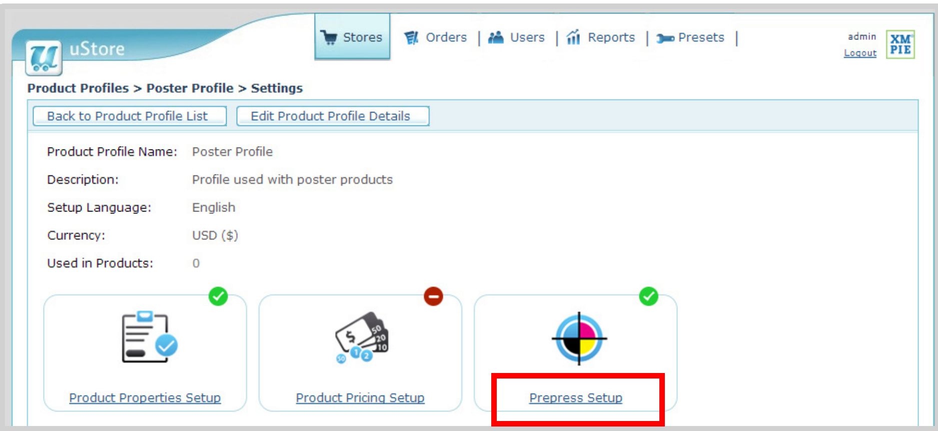
Note: In the following procedure, we assume that a few workflows have been already defined in the FreeFlow Core application.

Learn more:

To learn more about how to set up prepress workflows in the FreeFlow Core application, see the Xerox FreeFlow Core Tutorial.

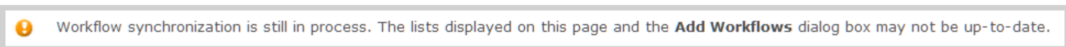
To set up prepress workflows:

1. On the **Product Profiles>Poster Profile>Settings** page, click the **Prepress Setup** link.

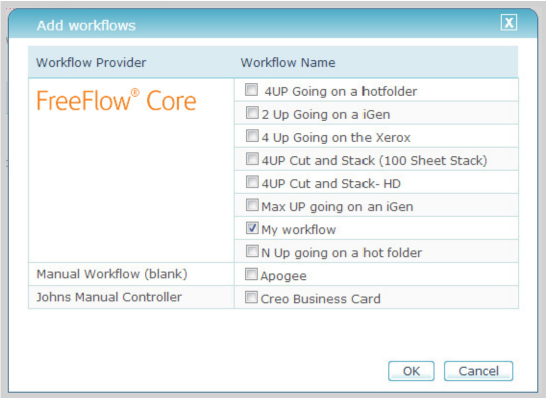


2. On the **Prepress Setup** page, click **Add workflows**.

Note: It takes some time for uStore to synchronize with prepress workflow providers. To be able to see all the workflows available in the prepress workflow provider, wait until synchronization is complete.



The **Add workflows** dialog box lists all the workflow providers and their respective workflows.



The above image is only for illustration. The available workflows shown will depend on the workflows setup in your FreeFlow Core application.

3. In the **Add workflows** dialog box, select the workflows that you want to make available for the product profile.
   You can select more than one workflow for a product profile.
4. Click **OK**.
   The selected workflows are added to the Prepress Setup page.
5. To define which of the workflows in the list is the default workflow, select the **Default** checkbox.
6. If the list includes only one workflow, you can select the **Auto-run to prepress production**.
   The **Auto-run to prepress production** feature automates the job's production. If you select this option, the product linked to this profile skips the **Ready for Prepress** queue and goes directly to the **Prepress in Progress** queue.

Learn more:

You will learn more about uStore's production queues in the module Handling orders.

Activity: Add prepress workflows to a profile

In this activity, you will edit the profile that you have created in the Activity: Create a new profile for business card products and define its prepress setup.

Procedure

1. Open the product profile that you created in the previous lesson: **Business Cards Profile**
2. Open the **Prepress Setup** page.
3. Add one prepress workflow to the profile.
4. Save the profile.

Lesson 3: Linking products to product profiles

What will you learn?

In this lesson you will learn how to link products to product profiles. You will also learn how to override some of the product profile's settings for an individual product.

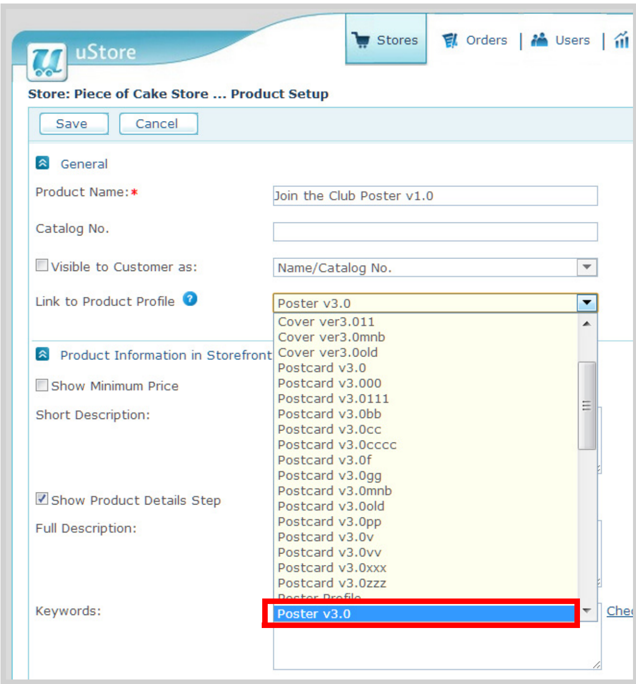
After you finish setting up your product profile, you can start linking products to the profile.

To link new products to a product profile, you select the required product profile during product setup.

The following procedure describes how to link existing products to a product profile.

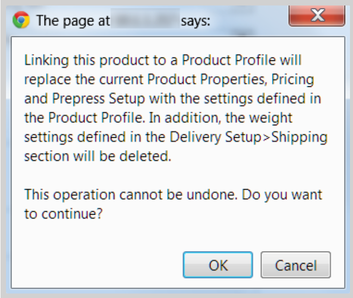
To link an existing product to a profile:

1. On the **Store List** page, select the store that includes the product that you want to link to the product profile.
   In this training, select the **Piece of Cake Store**.
2. On the **Store: Piece of Cake Store** page, under **Storefront Groups**, select **Posters**.
3. On the right pane, click the **Join the Club Poster** product.
4. On the **Product Setup** page, if the product is online, click **Take Offline**.
5. Click **Edit Product**.
6. In the **General** area, in the **Link to Product Profile** list, select the **Poster Profile**.



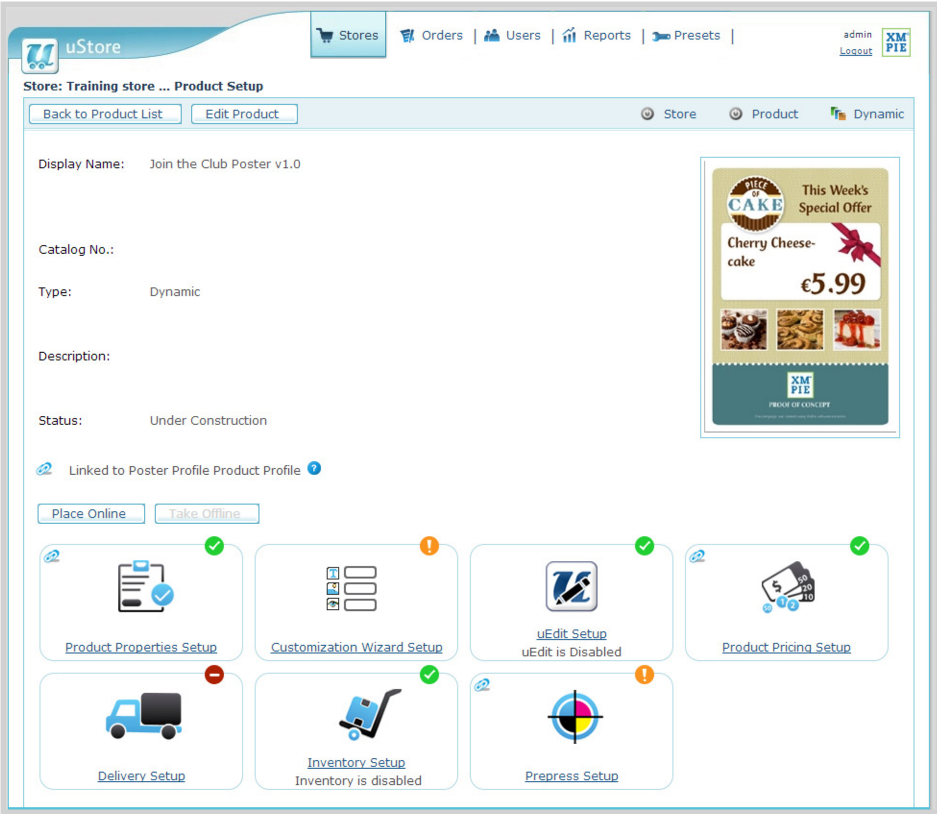
The list displays only the product profiles that have the same language and currency as the store that hosts the product.

7. Click **Save**.
   A message appears warning that the current product properties will be replaced with the properties defined in the product profile.



8. To link the product to the product profile, click **OK**.
   The product is now linked to a product profile. All product properties, pricing and prepress parameters for this product can be managed via the product profile.

Note: On the **Product Setup** *page, a link icon appears next to the properties and setups that are inherited from a product profile.*



9. Place the product back online.

You can easily unlink the product, by selecting **None** in the **Link to Product Profile** list.

Overriding product profile settings

After you link a product to a profile, you can override some of the settings defined in the Product Profile. For example, if according to the Product Profile, saddle stitch is the default type of binding, you can select perfect binding as the default option for a specific product. In addition, you can deactivate a property in a product, so that it will not be available when a storefront customer purchases the product, even though the property is active in the Product Profile.

Differentiating between hidden and deactivated properties

It is important to understand the behavior of the properties that you deactivate or hide.

When you *deactivate a property*, it does not exist for the specific product. After you deactivate a property, the property is not available for editing in the back office and it is not considered during the product's pricing calculation.

When you *hide* a property, the property is still part of the product setup and is available for editing in the back office. After you hide a property, it is not displayed in the storefront for store customer's selection, but the property is considered during pricing calculation.

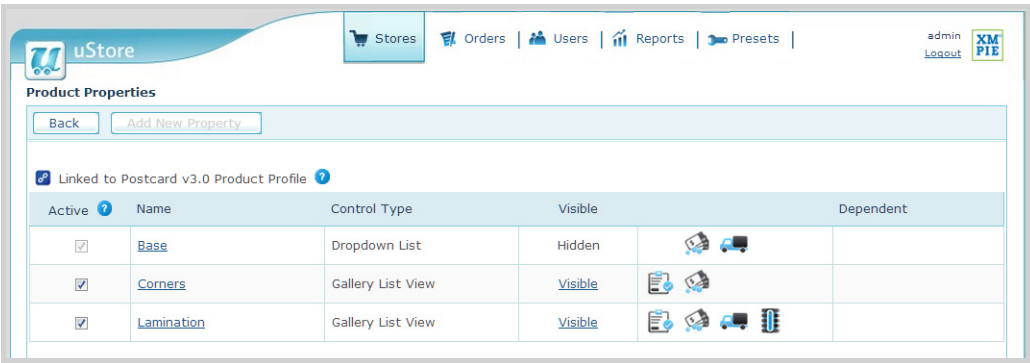
Procedure description

Let's say that you want to link a product to a profile, but you don't want the product to inherit all the properties defined in the product profile.

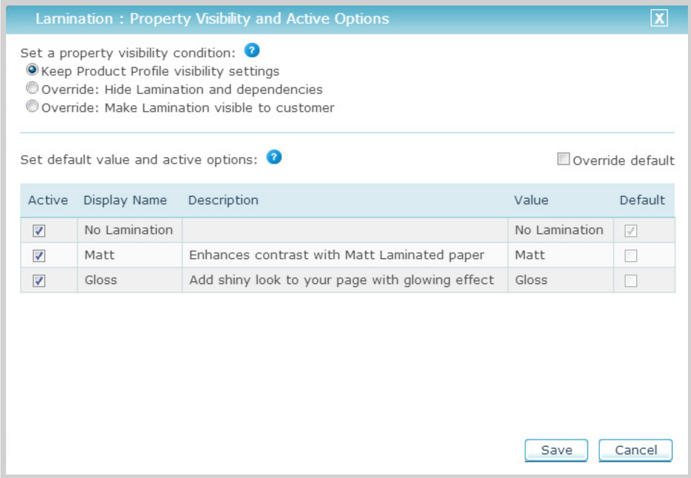
For training purposes, in the procedure below, you will first duplicate a static product: Almond Cookies Recipe, then link it to an existing profile that includes two properties: Corners and Lamination. You will then deactivate the Corners property and modify the Lamination property default visibility settings.

To override product profile settings:

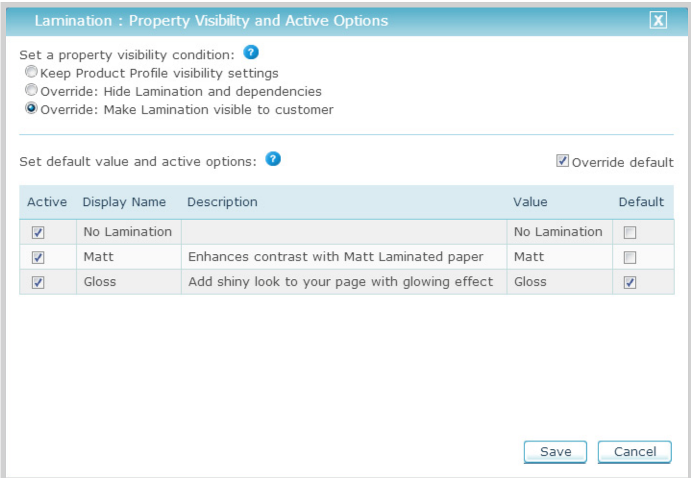
1. On the **Store List** page, select the store that includes the product that you want to link to the product profile. nd then select the product.
   In this training, select the **Piece of Cake Store**.
2. On the **Store: Piece of Cake Store** page, under **Storefront Groups**, select **Recipe Archive**.
3. On the right pane, click the blue arrow next to the **Almond Cookies Recipe** product.
4. In the menu that opens, click **Duplicate**.
5. At the bottom of the list, locate the **copy[1] Almond Cookies Recipe** product.
6. On the **Product Setup** page, click **Edit Product**.
7. In the **Link to Product Profile** list, select **Postcard v3.0**.
8. Click **Save**.
9. On the **Product Setup** page, click the **Product Properties Setup** link.



10. To deactivate the **Corners** property, clear the **Active** checkbox next to the property name.
    This property will not be available for this product.
11. To modify property visibility and default options, click the **Visible** link next to the **Lamination** property.



12. In the **Property Visibility and Active Options** dialog box, select **Override: Make Lamination visible to customer**.
13. To set a different default option for the lamination property, select the **Override default** checkbox.
14. Let's say that you want Gloss to be the default lamination option for this product.
    Select the **Default** checkbox next to the **Gloss** option.



15. Click **Save**.
    The copy of the **Almond Cookies Recipe** product is linked to the Postcard product profile, but some of its properties are now different from the ones set in the product profile.

Activity: Link products and check how product profile settings affect products

In this activity, you will practice how to link products to profiles and experiment how profile settings affect products and how you can override profile settings for specific products.

Procedure

1. Preview the the business card product created in module Adding a dynamic product to your store in the storefront. Note which properties are available.
2. Go back to the back office and link the business card product to the **Business Card Profile** created in the previous activity.

3. Deactivate one property.
4. Change the default option of another property.
5. Preview the product in the store. Check if the available product properties have changed as you defined.

Tip: Remember to take the product offline to make changes and place it back online after you have made all the required changes.

6. Link another product to the product profile.
7. Modify the product profile settings.
8. In the storefront, preview the products that are linked to the profile that you modified and check if all products have been automatically updated with the changes.

Managing product profiles

uStore provides several tools that help you manage and maintain your product profiles.

On the **Product Profiles List** page you can perform the following actions:

- Duplicate a profile.
- Delete a profile.
- Edit profile settings.
- View a list of the products that are linked to a profile.

Profile updates take effect immediately. You do not need to take a product offline for the change to take effect.

Learn more:

To learn how to perform these actions, see the *Managing and Maintaining Product Profiles* section in the *Working with Product Profiles* chapter in the *uStore User Guide*.

Module summary

You've reached the end of the Working with product profiles module. You should know how to create product profiles and link products to a profile. You should now know how to apply prepress workflows to products and product profiles.

In the next module, you will learn how to handle product orders .

Module 7:

Handling orders

In this module, you will learn how to handle orders from the moment a store visitor checks out a product in the online store through to its delivery and order archive.

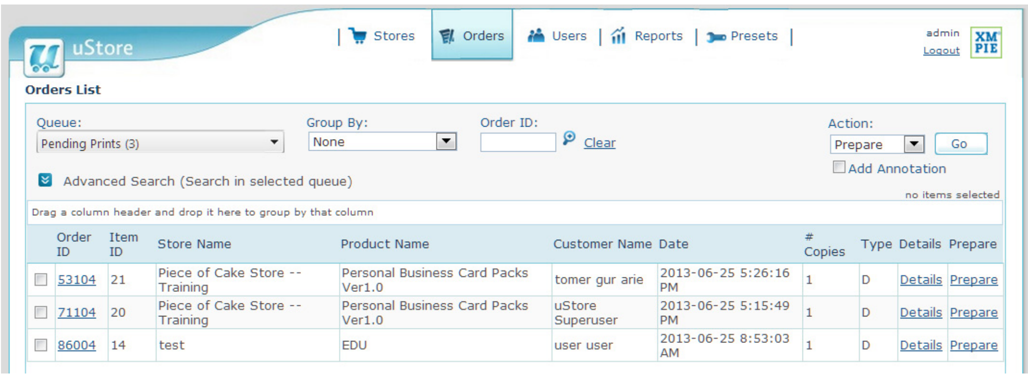
Lessons in this module

Lesson 1: Understanding the production workflow

What will you learn?

In this lesson, you will understand the flow of an order made by a store visitor in the storefront through to its production and delivery stages.

When a store visitor orders a product, the ordered item is added to the list of all uStore orders, which you can see on the **Orders List** page.



Print products are sent to the **Pending Prints** queue. Email products are sent to the **Pending Emails** queue.

Note: This course does not cover email products. For more information on email product queues, see the uStore User Guide.

The flow of a print order depends on the type of product ordered --static or dynamic-- and its settings -- with or without a prepress workflow, for example.

You can select the **Revert** action to send the order back to the **Pending** queue or the **Resubmit** action to send the order back to the **Ready to Produce** queue.

Describing the main print queues

In uStore's out-of-the-box solution, you need to move jobs manually between the queues, but uStore provides a powerful trigger mechanism that you can use to automatically move orders between queues.

This course does not cover uStore's trigger mechanism.

Learn more:

To learn about triggers, see the uStore User Guide.

Additional training videos about queues and triggers:

- https://xmpie.box.com/s/mv0mku0ei13bsvqbj6e5
- https://xmpie.box.com/s/s9y0752vgzu7nojr7zey

Following are the main queues that a print orders goes though:

- Blue queues are waiting queues, in which the orders wait for the administrator's intervention.
- Grayed out queues are processing queues, which don't require manual interaction.

- **Pending Prints**: includes items that been ordered in the storefront and are waiting to be processed or items that have been moved back to this queue from other queues for many reasons: the job was postponed, canceled or failed.
- **Ready to Produce**: includes items intended for processing. In this queue, you can select the following actions:
  - Dynamic and static documents:

    Process (1 Copy): sends dynamic documents to the uProduce server for processing or opens static documents for printing.
    When you select this option for dynamic documents, the output is one copy of the job only.
  - Dynamic documents and aggregated print jobs:

    Process (all copies): sends dynamic documents to the uProduce server for processing or opens static documents for printing, but when you select this queue, the output job consists of multiplications of the content of the source document per number of copies. For example, 100 copies of a single-page document will result in a 100-page document.
- **Producing File in Progress**: Production takes place on the uProduce server. This queue includes items that were sent to the uProduce server. After the items are successfully produced on uProduce, they are automatically sent to the next queue:
  - Items that are associated with a prepress workflow, go to the Ready for Prepress queue.
  - Items that are not associated to a prepress workflow go to the Ready for Delivery.
- **Ready for Prepress**: includes items that have a defined prepress workflow. In this queue, you can select the following actions:
  - **Run**: Sends the item to its prepress workflow.
  - **Select Workflow**: Enables you to modify the workflow defined for an item.
  - **Prepare for Delivery**: Skips the prepress stage and moves the item to the Ready for Delivery queue.

Note: If the ***Auto-run to prepress production*** *option is selected during the product's Prepress Setup, then the print job runs directly from the* ***Producing File in Progress*** *queue to the* ***Prepress in Progress*** *queue.*

- **Prepress in Progress**: includes items that are in the prepress stage. Items will automatically move to the next queue when a notification is received from the prepress workflow provider. Items that fail or items that wait in this queue for longer than one hour are automatically moved to the **Failed Jobs** queue.
- **Ready for Delivery**: includes jobs that are ready to be delivered. You can group the product list by their delivery provider and addressee, provided that all products are from the same store.

  Until the order reaches this queue, it is managed per **Item ID**. That means that the same order may include several Item IDs.

  - Split Shipping: After the order reaches the **Ready for Delivery** queue, it is managed per Shipping item. So, if the order requires split shipping, the **Orders List** page will display records with the same **Order ID** and **Item ID** but with different shipping parameters.
- **Delivering**: indicates the fulfillment stage of the delivery. In the **Delivering** queue, items are grouped by delivery service, store and address.
  If the store uses an online carrier service, such as FedEx or UPS, a fulfillment request is sent to the respective carrier. When the product is delivered, the order automatically moves to the **Delivered** queue.
  If the store uses **Manual Mailing** or **Manual Shipping**, you need to manually move the order to the **Delivered** queue.
- **Delivered**: includes items that have already been delivered.
- **Archived**: includes items that have been prepared and delivered to customers.

Additional optional queues:

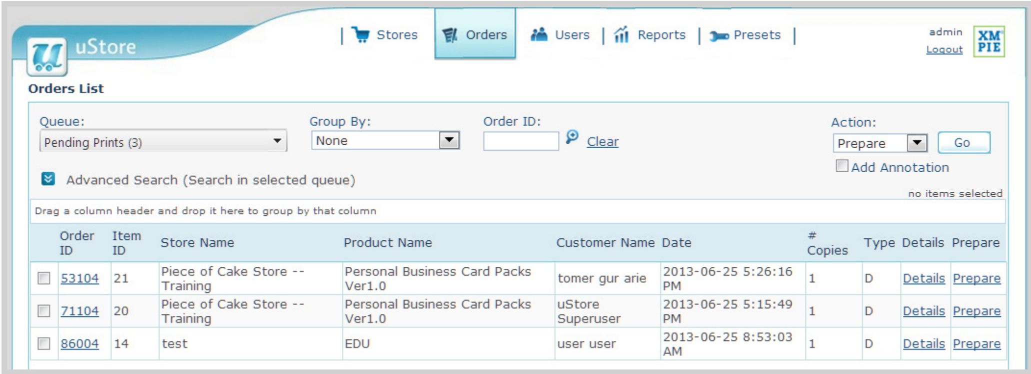
- **Pending Recipient List**: Documents that use a mailing list service such as USADATA, reside in this queue until the recipient lists are retrieved from the mailing list service.
- **Aggregating**: This queue enables you to group together selected items. Aggregating items enables you to reduce mailing costs and and increase efficiencies when printing the job.

Lesson 2: Handling print production queues

What will you learn?

In this lesson, you will understand the uStore orders system and learn how to manage the uStore print queues.

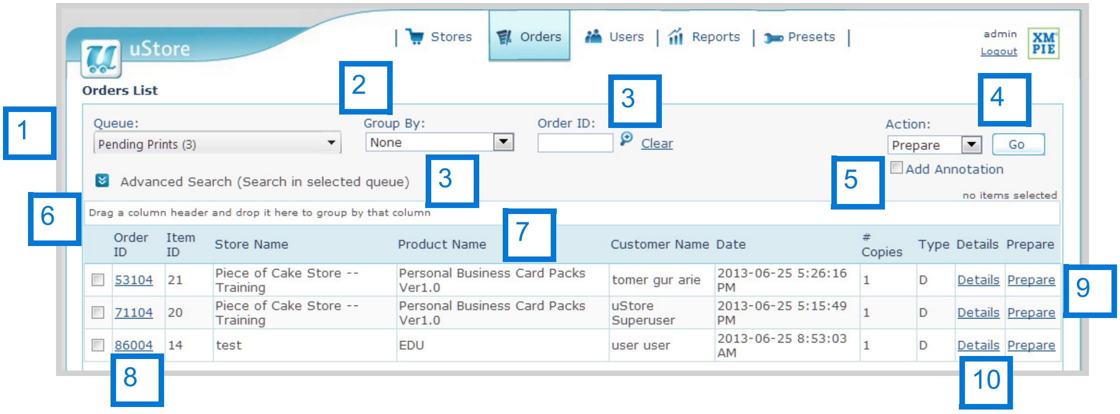
Viewing a list of all uStore orders



When you log in to the back office and open the **Orders List** page, uStore automatically filters the orders list according to your user credentials and displays only orders from stores that you have permission to access.

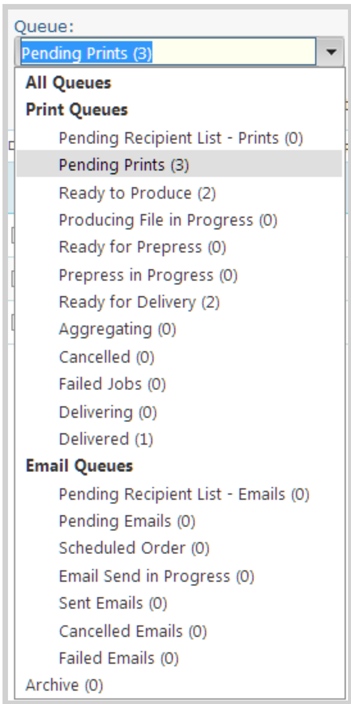
To open the Orders List page:

- Click the **Orders** tab.

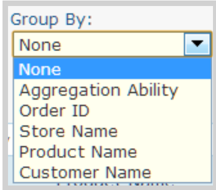


On the **Orders List** page, you can:

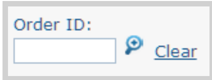
1. Select a queue to view.

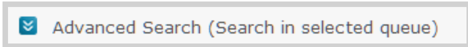


2. Group orders by **Order ID**, **Store Name**, **Product Name**, **Customer Name** or their ability to be aggregated.

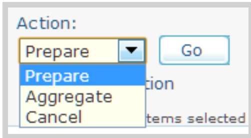


3. Search orders by order ID or open the **Advanced Search** options to help you refine your search settings.

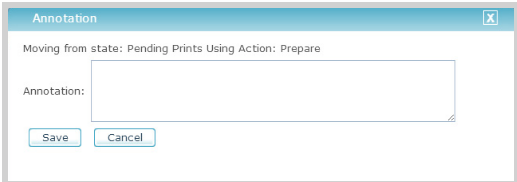




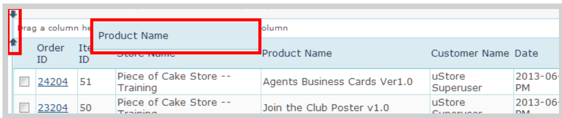
4. Run the same action on a number of selected orders. Different actions are available depending on the queue you view.



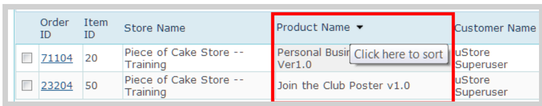
5. Add annotations to orders.
   You can see all the annotations in the order details page.



6. Group items according to a column name. For example, you can group all orders that belong to the same product by dragging the Product Name heading to the top of the list.

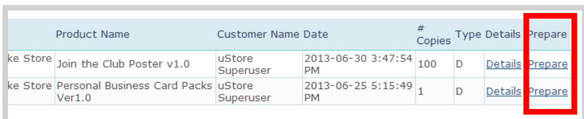


7. Rearrange the order of the items in the list by clicking a column header.

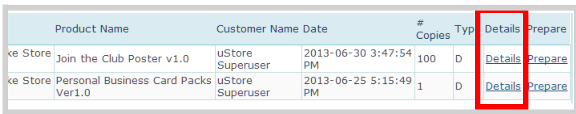


8. View an order's details by clicking the **Order ID** number.

9. Run a specific order by clicking the action link.



10. View ordered product's details by clicking the **Details** link.

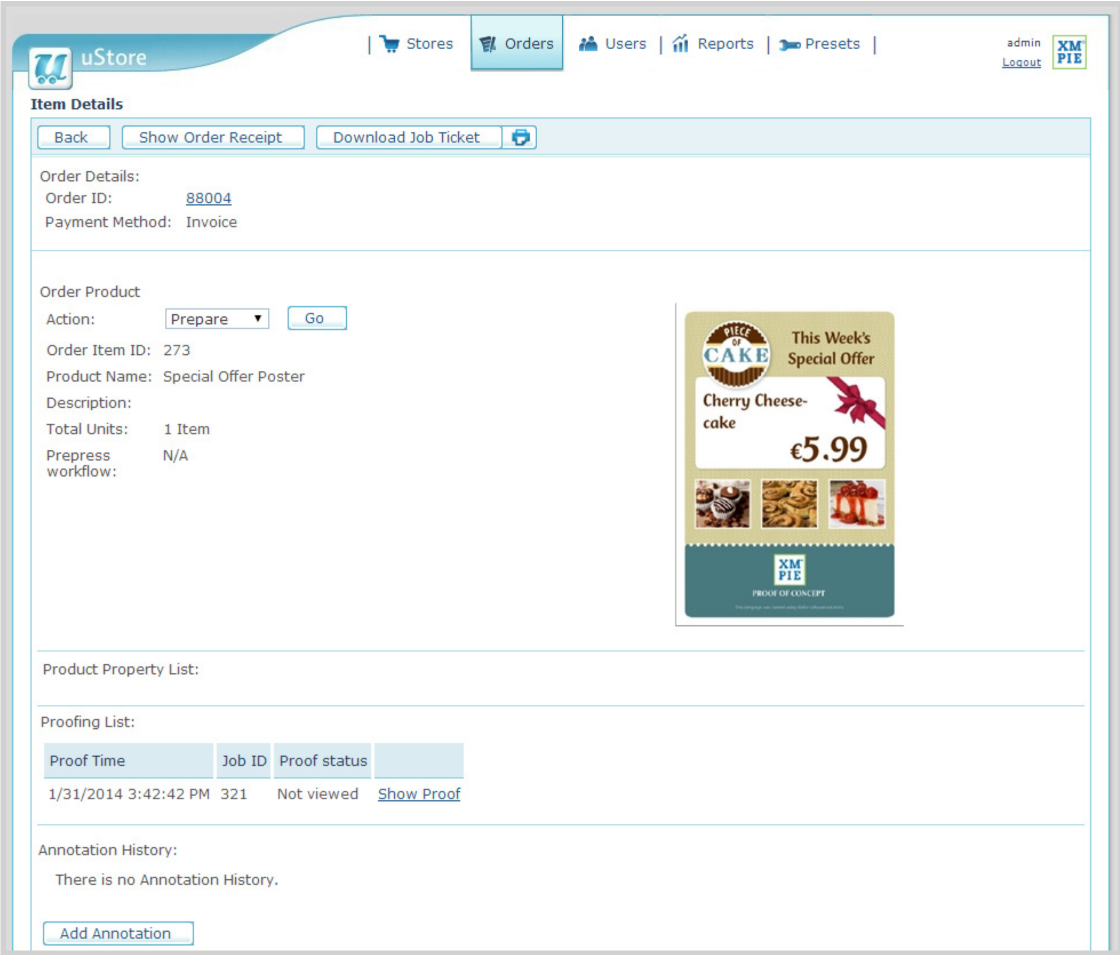


Viewing ordered product details

The Details link enables you to view a product's detailed information on any queue.

To view detailed information about an ordered item:

1. On the **Orders List** page, select one of the ordered products. During this training, select the **Join the Club Poster**.
2. Click the **Details** link.



This page provides a summary of all the information related to the order, including a copy of the receipt that was sent to the customer.

To view the order receipt:

1. Click the **Show Order Receipt** button.
   A new window opens with the order receipt.
2. After you see the receipt details, close the window.

Besides viewing product's details, this page also enables you to send the product to its next queue from this page.

The page includes the following sections:

- **Order Details**: In this section, you have the **Order ID** number, which is a link to the Order Details page. This section also shows the type of payment chosen for the product.
- **Order Product**: This section provides information about the order itself: product name, its description, number of items ordered and selected prepress workflow.
  After you examine the product details, you can immediately send the product to the next queue by selecting the required action and clicking **Go**.

- **Product Property List**: In this section, you can view a list of all the properties selected by the store visitor.
- **Proofing List**: This table enables you to know if the store visitor has seen a proof of the product as well as provides a link for you to open the product proof.
- **Annotation History**: Displays a table with the all the annotations that were made for this product.
  You can also add an annotation.

To add an annotation:

1. Click the **Add Annotation** button.
2. In the **Annotation** box, type **This job is ready for production**.

Printing or Downloading a Job Ticket

Download Job Ticket:

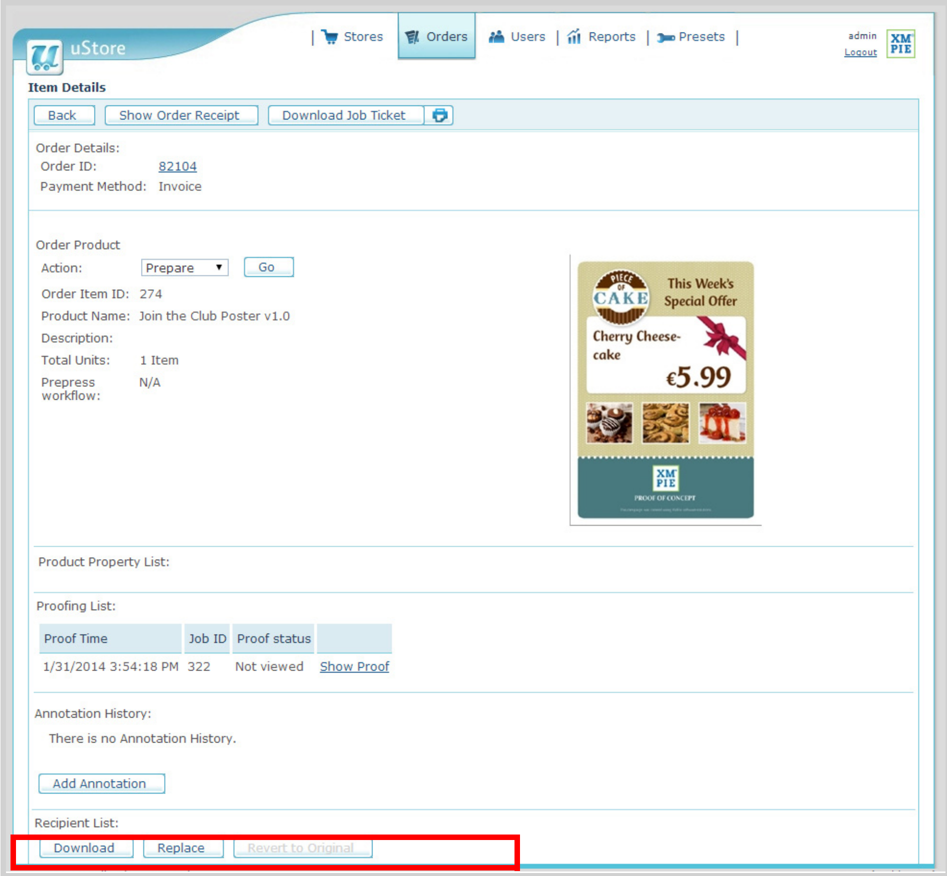
The **Download Job Ticket** button will download and open the job ticket details in Microsoft Word. This is particularly helpful if you would like to add additional notes to the job ticket and save or print the job ticket.

If you simply need to print the job ticket, you can click the printer icon next to the **Download Job Ticket** button.

Note: The job ticket is editable in the **Presets** > **System Setup** > **Message Templates** *area. Editing Message Templates is not covered in this guide, but may be discussed by your instructor.*

Handling recipient lists in the ordered product details page

When you are processing a job that includes a recipient list that was uploaded by the store visitor or when you are processing aggregated jobs, the details page displays an option to download the recipient list:



When you download the recipient list, you can add, remove or sort the list and replace the original before sending the document to production. Being able to handle the recipient list at the production stage is beneficial because it enables you to:

This enables several important functions which are important for customers doing mailing house work:

- Remove duplicate records or lists and reduce mailing costs.
- Clean or correct addresses for your customers.
- Add data to the list. You can add postal sorting or routing numbers to be used barcodes, for example, which reduce the mailing costs.
- Sort the list so that it is printed in a sequence preferred by the postal company to reduce the mailing costs.
- Add "test" recipients to the list to confirm delivery of the mailing.

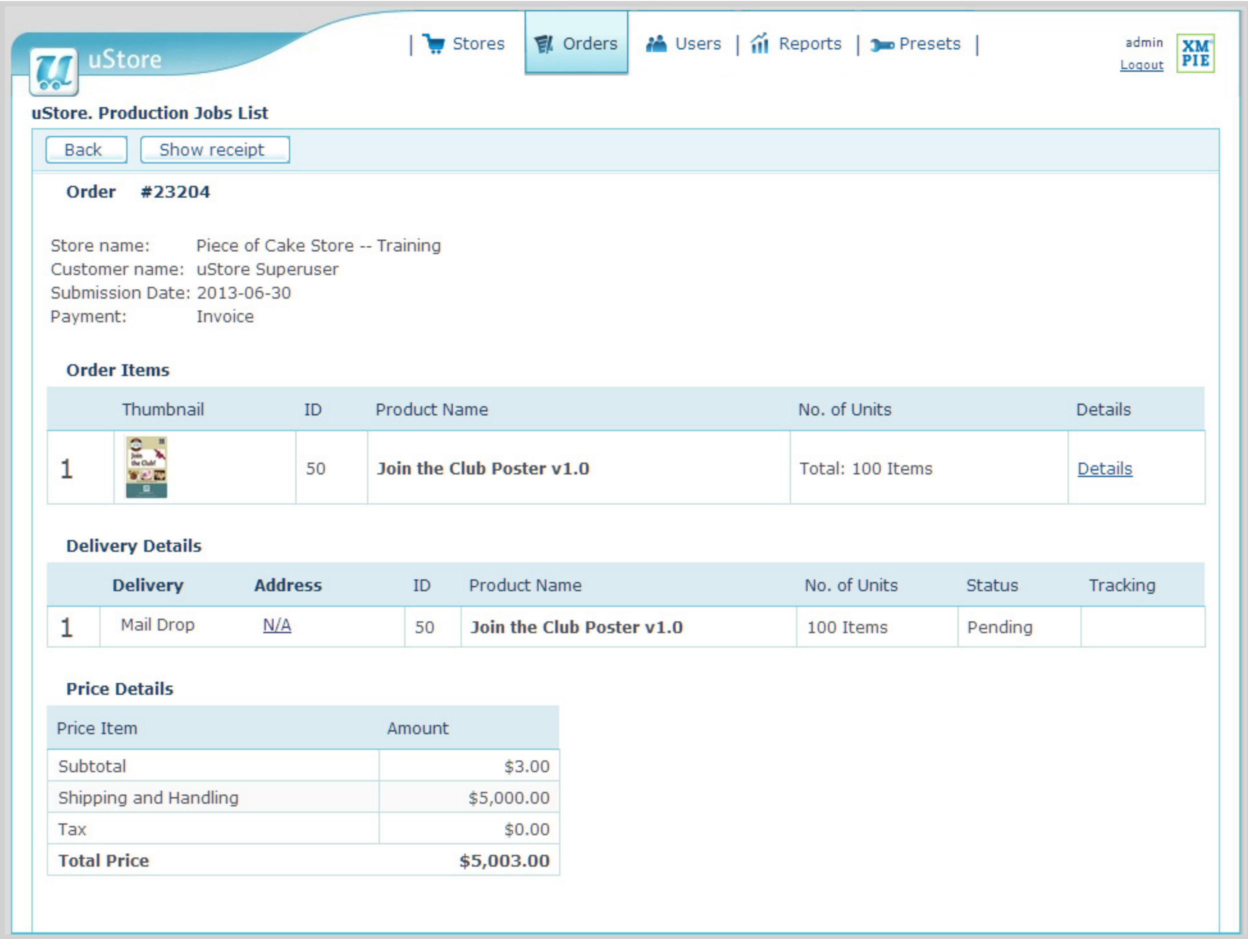
Note: Adding or removing recipients does not change the price of the quote.
Also, if the customer reorders the job, the original list they uploaded will be used for the new order.

Viewing order details

Now let’s see what information the **Order ID** page provides. You can jump directly from the product details page to the **Order ID** page.

To view the Order ID details:

1. On the product details page, click the **Order ID** number.



*Note: You can also access this page by clicking the **Order ID** number on the **Orders List** page.*

2. Examine the page.
   The page includes information that is relevant to the entire order:
   - On the top of the page you can see the name of the store and the name of the customer that has made this purchase, as well as the date of the purchase and the payment method.
   - The following tables provide the following information:
     > **Order Items**: List of items contained in this order. The **Join the Club Poster** order includes only one product, but some orders are made up of several items, such as a booklet. In such cases, the **Order Items** table lists all the products included in the order. This table also includes a **Details** link, which takes you to the product details page.

     > **Delivery Details**: Provides information about the delivery of each item contained in the same order.

     > **Price Details**: Provides the detailed amount charged for each price item.
3. You can also view the order receipt from this page. Click the **Show Receipt** button.
4. Close the receipt window.
5. To return to the product details page, click **Back**.
6. To return to the **Orders List** page, on the product details page, click **Back**.

Lesson 3: Sending jobs to production

What will you learn?

After an order is entered in the storefront, the print job is sent to the Pending Prints queue. Unless a trigger was defined, jobs will wait in this queue until an administrator starts the production cycle.

In this lesson, you will learn how to move print jobs from one queue to another.

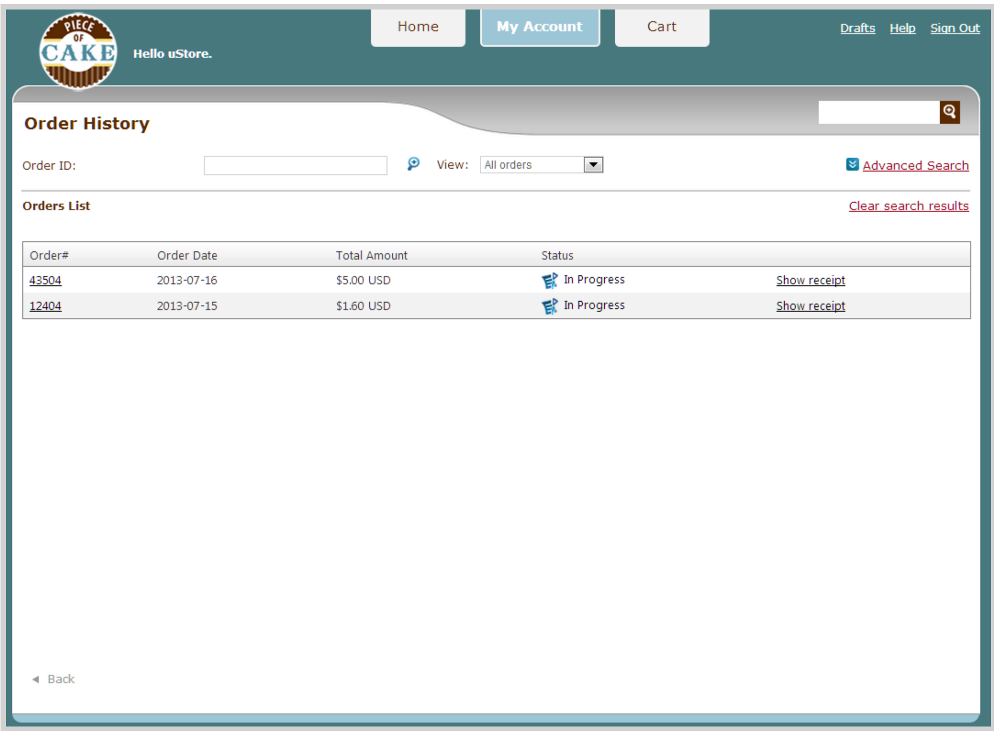
Now let's follow a print job order through to delivery.

Remember that the queues and actions available for each print job depend on the type of job being produced -- static, dynamic, composite or email -- and the product property settings that were selected for the job -- for example, an automated prepress workflow.

In this example, you will take the **Join the Club Poster** print job from the **Pending Prints** queue to the **Delivery** queue.

Viewing order history in the storefront

Before you start producing the print job, check out the **Order History** page in your store.



From the moment the store visitor checks out a product, it is added to the list of orders on the **Order History** page and its status is **In Progress**. After the product is delivered, its status changes to **Shipped**.

To open the Order History page:

1. Go to the **Store List** page and select your store.
2. Click **Preview**.
3. On the storefront homepage, click **My Account**.
4. On the **My Account** page, click **Order History**.

5. Locate the product that you want to check its status. In this example, locate the **Join the Club Poster** order. The **Status** column shows that the order is **In Progress**.
   You can click the status or the **Order ID** to open the **Order Details** page.

Producing the print job

The first step in the print production process is preparing the job for production. All dynamic print jobs are produced on the uProduce server. After uProduce processes the product's file(s), it outputs a PDF file, which is ready to be sent to print.

To send a print job to production:

1. On the **Orders List** page, select the **Join the Club Poster** order and click the **Prepare** link next to it.
   The order is sent to the **Ready to Produce** queue.

Note: If for any reason, you decide not to produce the print job, you can click the **Revert** *action. This action moves the job back to the* **Pending Prints** *queue.*

2. In the **Queue** list, select the **Ready to Produce** queue.
3. In the **Ready to Produce** queue, locate the **Join the Club Poster** order, select it and click the **Process (1 copy)** link.
   The order is sent to the **Producing File in Process** queue.

Viewing the produced file on uProduce

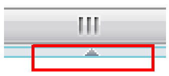
At this point, you can check the status of the file on uProduce.

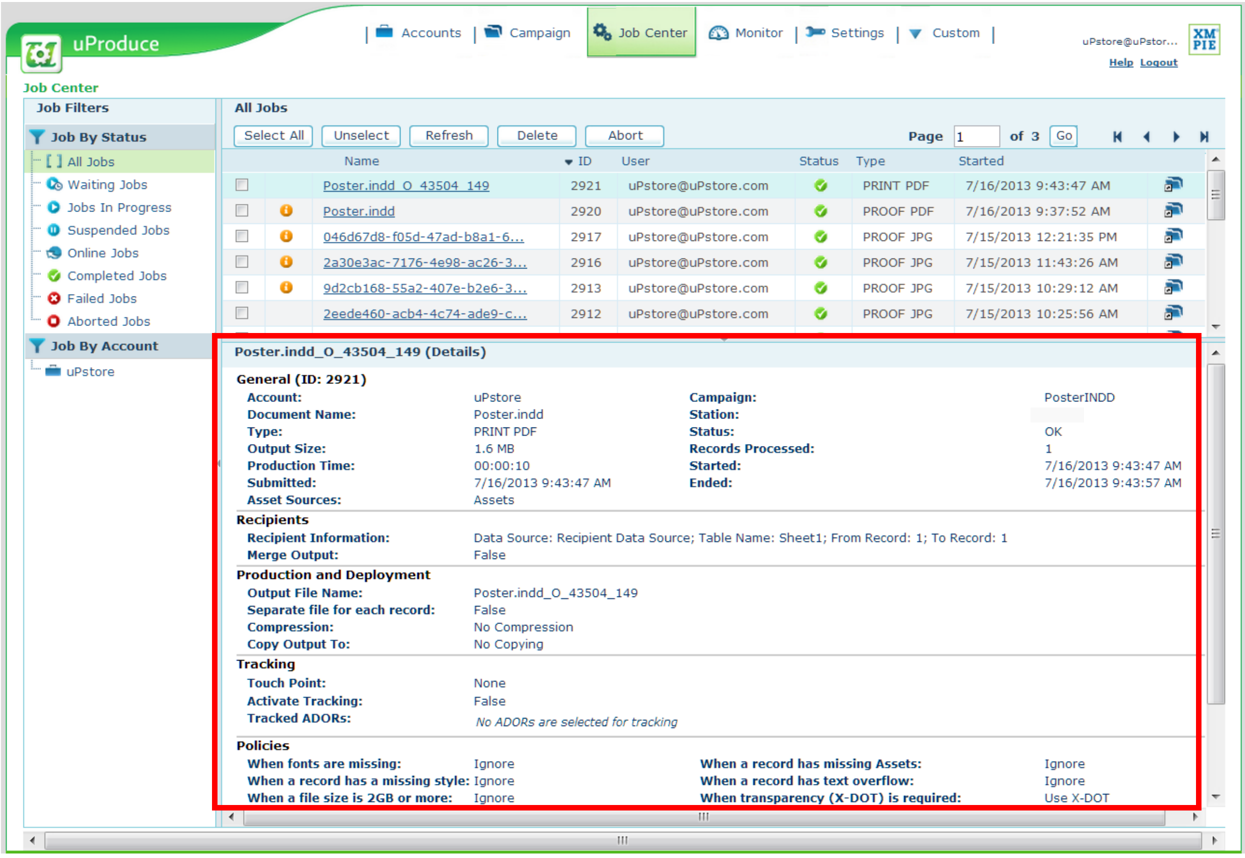
The instructor will provide the link to the uProduce server used during the training event.

To open the uProduce dashboard:

1. On your internet browser, open another tab.
2. To open uProduce's dashboard, type **<server_name>/xmpiedashboard**.
3. Log in to uProduce with the credentials that was used in the the store setup.
4. Click the **Job Center** tab at the top of the screen.
5. In the **All Jobs** area, locate the document used for the uStore product.
6. If you don't find the file, click the **Refresh** button.
7. Check the **Status** column. It should show a green checkmark, which means that the file was successfully processed.

Tip: You can click the green checkmark icon to download the output PDF file.

8. Examine the file details in the bottom pane.
   a. If the pane is not visible, click the  at the bottom of the page to open it.
9. Scroll down to see all the information provided by uProduce: **General**, **Recipients**, **Production and Deployment**, **Tracking**, **Policies**, **Copies** and **Advanced**.



Note: To make it easier for your to find the processed file, uProduce modifies the name of the output file:
<file name and extension>_O (for output)_<Order ID>_<Item ID>

You can click the status icon to download the output PDF file.

Sending the produced order to delivery

Because the **Join the Club Poster** does not include a prepress workflow, after production on uProduce, the print job is sent to the **Ready for Delivery** queue.

Note: Depending on the file size and complexity, it may take a few moments before you see the print job item in the **Ready for Delivery** *queue.*

Also, if there was an error in processing and you need to run the job again, you can locate the job in the **Ready for Delivery** queue and select **Resubmit** from the **Action** menu.

Products that have prepress workflow settings go to the **Ready for Prepress** queue and then to the **Prepress in Progress** queue before they arrive to the **Ready for Delivery** queue.

To follow up on the print job's production:

1. On uStore's back office, open the **Orders List** page.
2. In the **Queue** list, select the **Ready for Delivery** queue.
   By default, the items in the **Ready for Delivery** queue are grouped by **Delivery**.
3. Locate the **Join the Club Poster** job and select it.

Note: At the end of the order row, the main action is to download the output file and not send it to a next queue.

4. To send this job to delivery, select the checkbox next to the **Order ID**.
5. At the top of the page, in the **Action** list, select **Create New Delivery** and then click **Go**.
   The path between the queues depends on the delivery method selected for the job. If the delivery method is:
   - **Mailing**: The order is automatically moved to the **Delivered** queue.
   - **Manual Shipping**: A dialog box opens in which you need to select a shipping service and date.
     You can add a manual **Tracking Number** to help you keep track of this order during delivery. If delivery providers are set up, a tracking number that links to the provider's website for tracking is automatically added.
     In this exercise, we are assuming that the job has delivery settings.
6. As the Piece of Cake store does not include delivery settings, the job goes directly to the **Delivered** queue. To a group named **No Delivery**.
7. After the job is delivered, you can archive it. Click the **Archive** link.

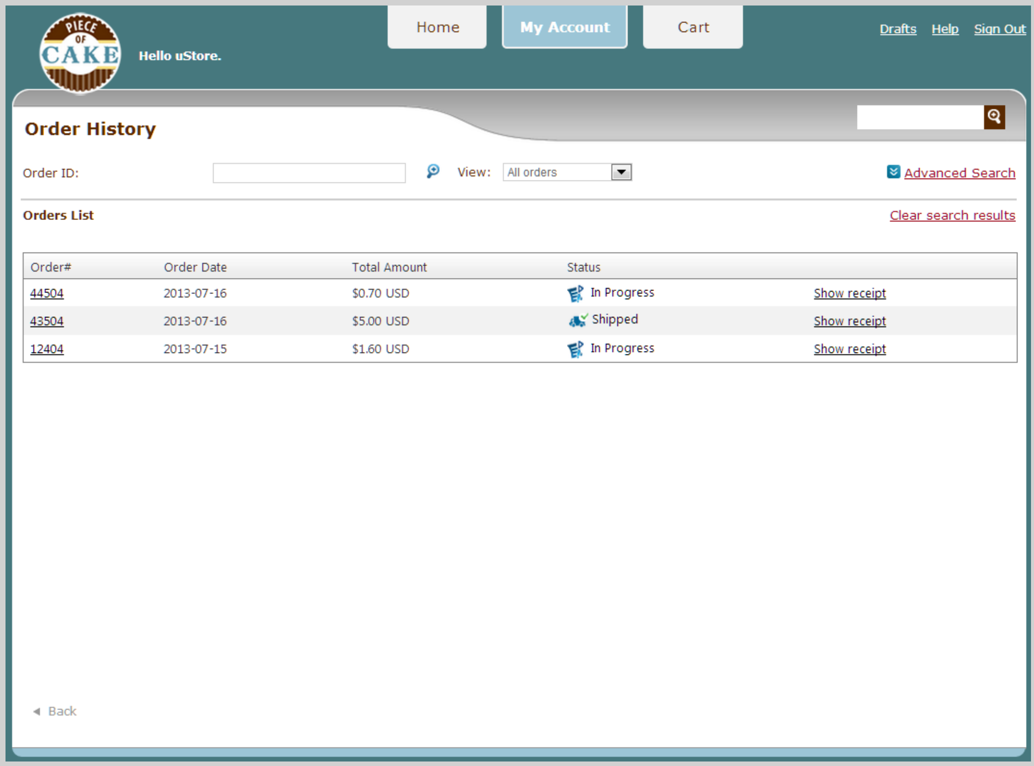
*Note: If there was an error in processing and you need to run the job again, you can locate the job in the **Ready for Delivery** queue and select **Resubmit** from the **Action** menu.*

Checking product status in the Order History page

Now that the product was delivered, let's check out its status in the **Order History** page in the storefront.

To open the Order History page:

1. Open the storefront homepage and click **My Account**.
2. On the **My Account** page, click **Order History**.
3. Locate the product that you want to check its status. In this example, locate the **Join the Club Poster** order. The **Status** column has changed to **Shipped**.



As you move jobs between queues in the back office, the job status is automatically updated in the storefront.

You can click the status icon -- **Shipped**, or the **Order#** to view the **Order Details** page and if the order includes tracking, you will also get its tracking number. If FedEx or UPS delivery services are used, the tracking number is a link to get the status of the order in the company's website.

Aggregating jobs

When there are several orders that have the same document template and printing requirements, aggregating these orders helps you save time and money. For example, if you have several individual orders of business cards that are based on the same InDesign or XLIM document template and use the same paper type and color, you can aggregate the business cards orders and produce them all together.

After the data is aggregated, the orders are sent to the **Ready to Produce** queue.

In the **Ready to Produce** queue, you can download the merged cvs file created by uProduce or replace it.

Only dynamic documents can be aggregated.

You can aggregate items only when all of the following conditions take place:

- The items are in the **Pending** queue.
- The items are based on the same document template.
- The items do not have product properties which "affect aggregation" is enabled (eg media type).

To aggregate items in the Pending queue:

1. In the **Group By** list, select **Aggregation Ability**.
   Items are grouped by their document and product properties.
2. Select the items that were grouped under the same same aggregation possibilities

3. In the **Action** list, select **Aggregate**.
4. Click **Go**.
   The selected items move to the **Aggregating** queue under a new aggregation group. After uProduce finishes aggregating the files, they are moved to the next queue in the flow, usually the **Ready to Produce** queue. From this queue on, aggregated files are treated as regular order jobs.

Benefits of aggregation

Production performance

Reusable parts of the job are cached and don't have to be processed each time. uStore combines all the variable data from each order and create one recipient list for all the orders. When the aggregated files are sent to the **Producing File in Progress** queue, production is faster than if each file was sent separately.

Production efficiencies

Combining aggregation with prepress workflows makes it possible to impose multiple jobs together onto the sheet, which improves paper usage, or to use larger or faster printers and finishing equipment with less overhead cost.

Reduced mailing costs

When you aggregate orders, you can download and sort recipient lists and change the sequence in which the orders are printed to comply to the postal company's requirements and qualify for cheaper postal rates, which increases your profit margin.

Review activity: Processing orders

Objective

Review the flow of an order from checkout in the storefront to delivery or archive in uStore.

Procedure

1. Duplicate one of the static products and one of the dynamic products available in your store.
2. Assign a prepress workflow to the dynamic product.
3. Order both products in the storefront.
4. In the back office, move the products from queue to queue.
5. The following diagram describes the flow of several types of jobs in the different queues. Look at the diagram below and mark the the tracks followed by the static product and the dynamic product accordingly.

Review activity: Aggregating jobs

Objective

Review how aggregated orders are handled in uStore.

Prerequisites

A few products that use the same product properties: paper size, paper type, for example and use recipient lists.

Tip: For the purpose of this activity, you can duplicate the business card job that you prepared previously.

Procedure

1. Purchase the products in separate orders.
2. Aggregate the orders.
3. Download the recipient list.
4. Check how the order data was combined.
5. Process the aggregated order and then download the output PDF.
6. Check the PDF file.

Review questions

1. List uStore's main printing queues and explain what happens to the job in each queue.
2. Explain when it is beneficial to aggregate.
3. How does aggregation save costs?
4. Why are aggregated orders processed faster?

Module summary

You've reached the end of the Handling orders module. You should know be able to handle uStore's printing queues.

In the next module, you will learn how to generate uStore reports.

Module 8:

Running Reports

uStore provides several reports to help you assess your stores' performance and help you find areas that need improvement. Most of uStore reports help you measure revenue by tracking order totals by store, by product, or by customer. Other reports track specific metrics such as inventory levels or how many customers have accepted to receive emails from a store.

In this module, you will get familiar with the reports that uStore provides out-of-the-box and learn how to run one of the reports.

The reports are accessible only from the uStore back office. The user groups and permissions control which users are able to access the back office. It is possible to create a user group that has permission to the back office, but only to view reports for specific stores. This is helpful when you want an administrator from your customer's organization to be able to view reports of the orders in their store.

Learn more:

For more information, see the the chapter *Setting Up Users and User Groups* in the uStore User Guide.

All the data is saved in the SQL database. Besides uStore's predefined reports, you can create new ones to track different data, by defining new report parameters. This course covers reports provided out-of-the-box only.

Learn more:

To learn more about reports, see the *uStore User Guide* sections: *Generating Reports* and *Setting Up the Report Table*

Lessons in this module

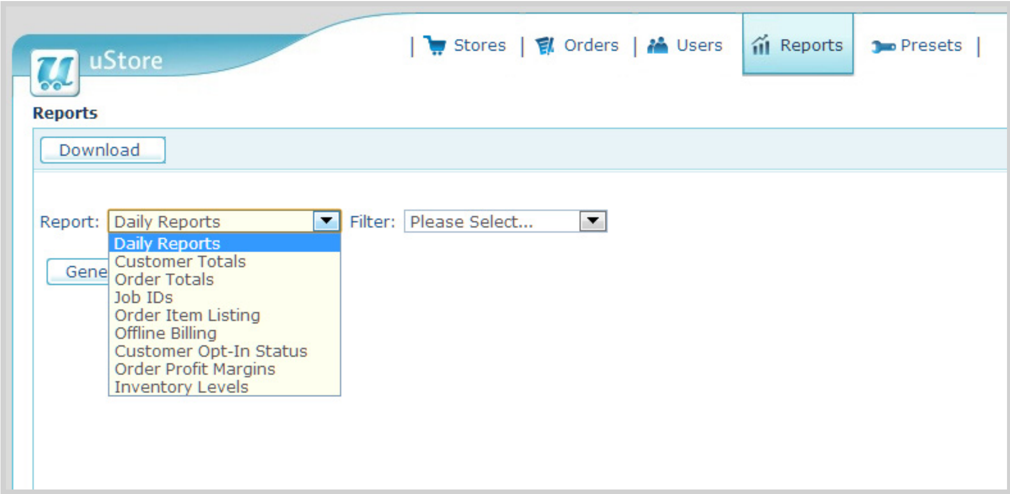
Lesson 1: Getting familiar with uStore reports

What will you learn?

In this lesson, you will understand which data the available uStore reports return.

Describing the available reports

You should run routine reports to make sure that your stores are performing successfully and that your are achieving your business KPIs (key performance indicators).



The following reports are available by default on uStore:

Report Name	**Description**	**Metrics/Retrieved data**
Daily Reports	This report is designed to help you track the success of your online stores. For example, it can be used to track how any marketing activity increases orders, revenue or customers over time. It provides a list of all stores' daily revenue. You can select to view data by store. You can set a specific period of time.	Date, Total Orders, Number of customers, Total Revenue
Customer Totals	This report shows each user in the store, when they first ordered, last ordered, and the total value of their purchases. This information can be used to promote special offers to your largest customers or to stimulate business where customers have not ordered for some time. It provides total billing amounts (order amount + shipping price) for each customer	Login (email used to log in), Customer name (last, first), Total billing (order amount plus shipping price), First Order (Date and time), Last Order (Date and time)
Order Totals	This report is designed to help when your payment method is invoice rather than online payment with credit cards. The report helps you gather the totals for each customer over a specific time. It provides total billing amounts (order amount + shipping price) by Order ID You can select to view data by store. You can select to view data by customer name.	Order ID, Store Name, Customer Name (first last), Order Created (date and time), Total billing (order amount plus shipping price)
Job IDs	Print jobs are sent to printers with the order item number as part of the file name. The Job ID report displays data that helps to identify the different jobs related to each order. It provides the Job ID for all uStore's orders.	Order ID, Item ID, Job Id, Store Name, Product Name, Customer Name (first last), Order Created (data and time)

Report Name	Description	Metrics/Retrieved data
Order Item Listing	The Order Item Listing report is designed to provide a lot of information, which you can filter to find something quickly on screen, or exported to do more interesting analysis of customers, orders, products, pricing and revenue in external systems like Microsoft Excel. It provides a list of all the ordered items with billing and delivery data. You can select to view data by store. You can set a specific period of time.	Item ID, Order ID, Product Name, Customer Name (first last), Subtotal Order Price, Total Order Price, Billing Details (address 1 and 2, address reference, city, company, email, fax, name, phone, zip, state, country), Product ID, Quantity per Recipient, Number of Recipients, Price per Recipient, Product Price Subtotal, Shipping Price Subtotal, Total Item Price, Date Added, Date Order Created, Delivery Method, Delivery Service, Recipient List Price, Approval Reject Notes, Item Cost, Item Tax Amount, Delivery Tentative ID, Delivery Item ID, Shipping details (address 1 and 2, address reference, city, company, fax, name, phone, state, country, zip)
Offline Billing	When your store takes credit card details, but processes them offline at a later time, this report pulls all the relevant information into one place to make it easier for you to handle offline billing. It lists all the orders that used offline billing. You can select to view data by store. You can select to view data by customer name.	Order ID, Issue Date, Billing Info, Last Name, First Name, Address, City, State, Zip Code, Country, Subtotal, Shipping Costs, Mailing Costs, Sales Tax, Total Price
Customer Opt-in Status	When customers register in uStore, you can allow them to opt-in to receive marketing information from you. This report pulls the customer information, and the opt-in status so that you can export the list to use in email marketing campaigns to promote new products, or drive business to your online store. It provides a list of all customers and their Opt-In status. You can select to view data by store. You can select to view only the list of customers who have opted in or only the ones who have opted out.	Email, First Name, Last Name, Opt-In Status, Status Date
Order Profit Margins	If you set up both prices and costs for your products, this report can provide you with profit margin information quickly and easily. You can select to view data by store. You can set a specific period of time.	Store Name, Order ID, Order Product ID, Product ID, Product Name, Price, Cost, Profit Margin

Report Name	Description	Metrics/Retrieved data
Inventory Levels	If you manage a warehouse of products using the inventory feature, then this report will help you understand what products you have where. This is important when you are running low on stock, and also to see where you have excess stock that you could use in some marketing campaigns. It provides the status of each product's inventory levels (on-shelf inventory, safety inventory and storefront inventory). You can select to view data by store.	Store Name, Product ID, Product Name, External ID, On-shelf Inventory, Comment, Safety Inventory, Storefront Inventory, Units of Measure

You can filter every column to narrow down the results using different criteria.

When the report is very long, you can select to view the results on one long page or on separate pages.

Lesson 2: Running the Daily Reports report

What will you learn?

In this lesson, you will learn how to run uStore reports.

Let's say that you started a sale campaign last week and you want to check how the new campaign is affecting the number of orders entered in your store. You can run the **Daily Reports** to compare your store's daily revenues to see if there was a positive impact.

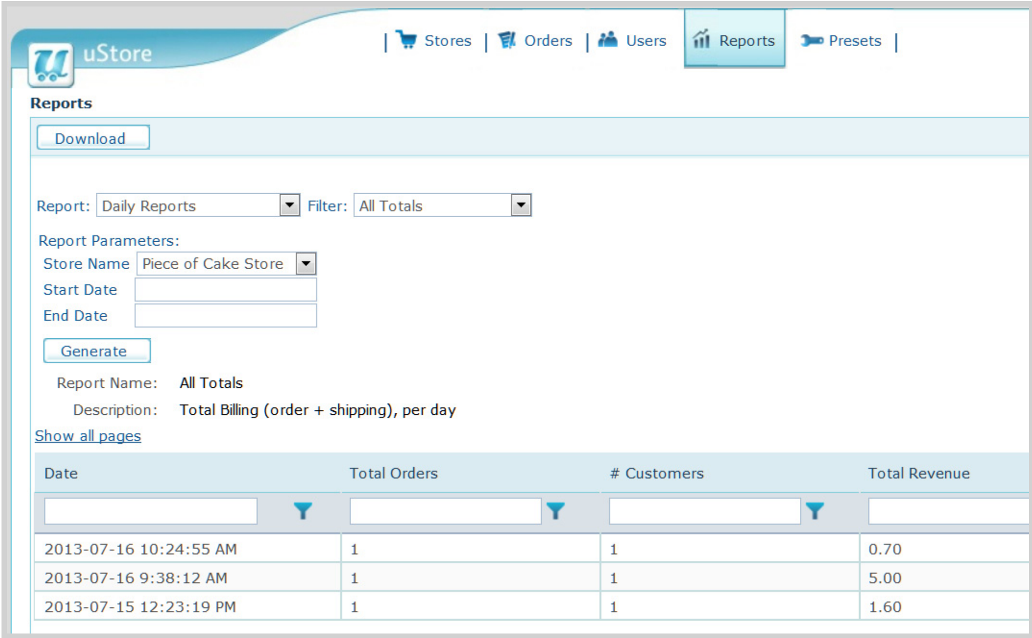
Running Daily Reports

The **Daily Reports** report is designed to help you track the success of your online stores.

Let's run this report and examine its results.

To run the Daily Reports report:

1. In the back office, click the **Reports** tab.
2. In the **Report** list, select **Daily Reports**.
3. In the **Filter** list, select **All Totals**.
4. Under **Report Parameters**, select the relevant store and enter the relevant date in the start and end date.
   In this training, select the Piece of Cake store and enter today's date (there should be a few orders already that were entered in previous activities).
5. Click **Generate**.
   The report results appear at lower part of the page.



6. Scroll to the right of the table and check the results in the **Total Revenue** column.
   As you are seeing the results for one day only, you will not be able to compare daily results, but in a real-life situation, you would see daily results.

Activity: Running the Customer Totals report

Let's say that you want to start a new campaign that offers loyal customers a special discount for a determined period of time in your online store.

In this activity, you will find out who are the most active customers in your store -- customers who have entered several orders or spent large amounts of money in your store, as well as customers who have not bought a lot of products or no products at all.

Procedure

1. Run the **Customer Totals** report.
2. Prepare two lists:
   - For the marketing department: Names of the customers who should be invited to the special discount sale (virtual) event.
   - For the customer care department: Names of the customers who have not ordered anything in a long time and need to be re-engaged.

If time allows, run a couple of other reports and examine their results.

Lesson 3: Manipulating the retrieved data

What will you learn?

In this lesson, you will learn how to download reports and manipulate results in Microsoft Excel.

After you run a report, you can download it to manipulate the retrieved data outside of the uStore system. The report is automatically downloaded in Microsoft Excel format (.xlsx).

In this lesson, you will first run the **Order Item Listing** report, which provides a lot of data about uStore orders, then you will download the report results to manipulate relevant data using Microsoft Excel.

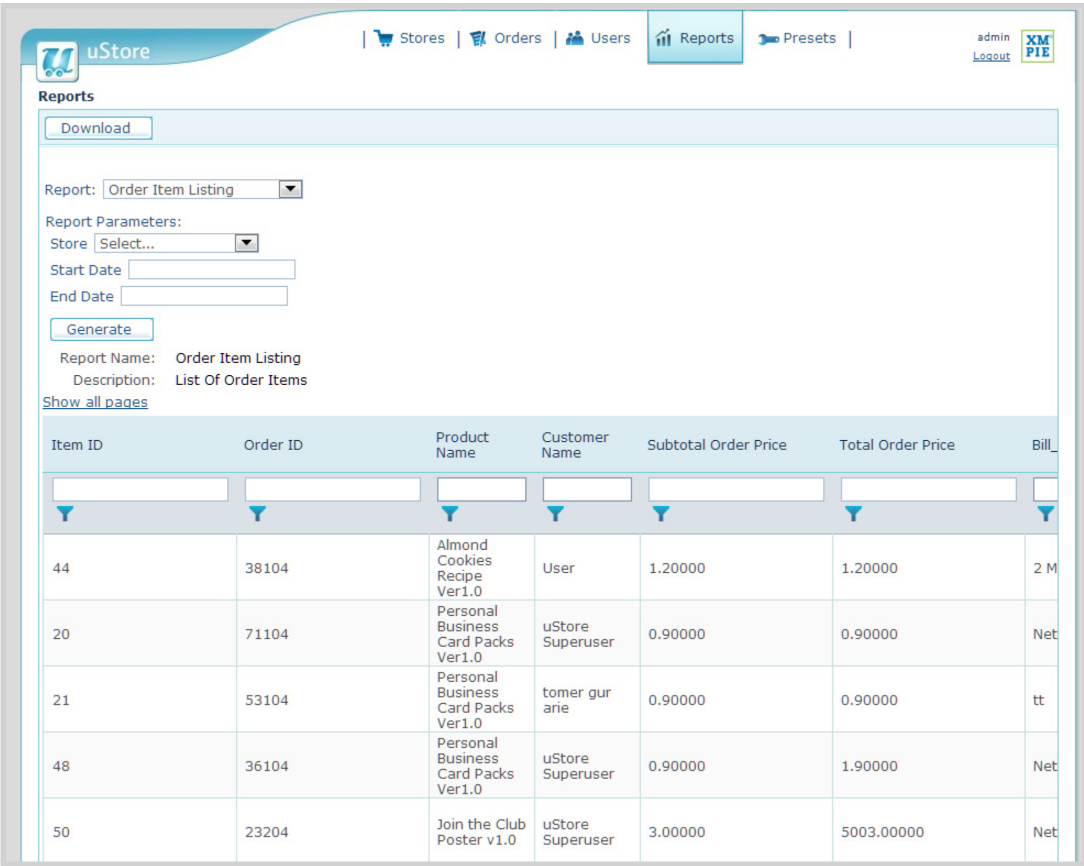
Running the Order Item Listing report

The **Order Item Listing** report provides a great amount of data about each order.

Let's run this report and download its results.

To run the Order Item Listing report:

1. Click the **Reports** tab.
2. In the **Report** list, select **Order Item Listing**.
3. Under **Report Parameters**, you can select a store and an start and end date. In this example, we will retrieve all the order items for all the stores. So leave these parameters empty.
4. Click **Generate**.
The report results appear at lower part of the page.



5. Scroll to the right and examine the data provided in each column.
As you did not select a a store and did not specify a period of time, the report shows results for all stores in your uStore system.
6. Filter the results by **Product Name**: **Join the Club Poster**.
   a. Copy the name of the **Join the Club Poster** product from one of the cells.
   b. Paste it in the blank box at the top of the **Product Name** column.

c. Click the filter icon and in the displayed menu, click **Contains**.

Only the records for the **Join the Club Poster** product are displayed.

7. Click the filter icon again and select **No Filter**.

   The report displays all the records again.

8. Filter the results by store:

   a. Under **Report Parameters**, in the **Store** list, select a store.
   At this point of the course, there should be a few stores with ordered products available.

   b. Click **Generate**.

9. Examine the results for the specific store.

Downloading a report to manipulate its data

After you run the report, you can download it and manipulate the data outside of the uStore system.

To download a report:

1. Generate the report.
   In this exercise, you have already generated the **Order Item Listing** report in the previous section.

2. Click the **Download** button.

3. Select a location for the downloaded report and name it.
   Give the Excel file a descriptive name. A name that will make it easy to locate it afterwards. For example, name it **<Report_Name>_<Date>**.

4. Open the downloaded report.

A1 | Item ID

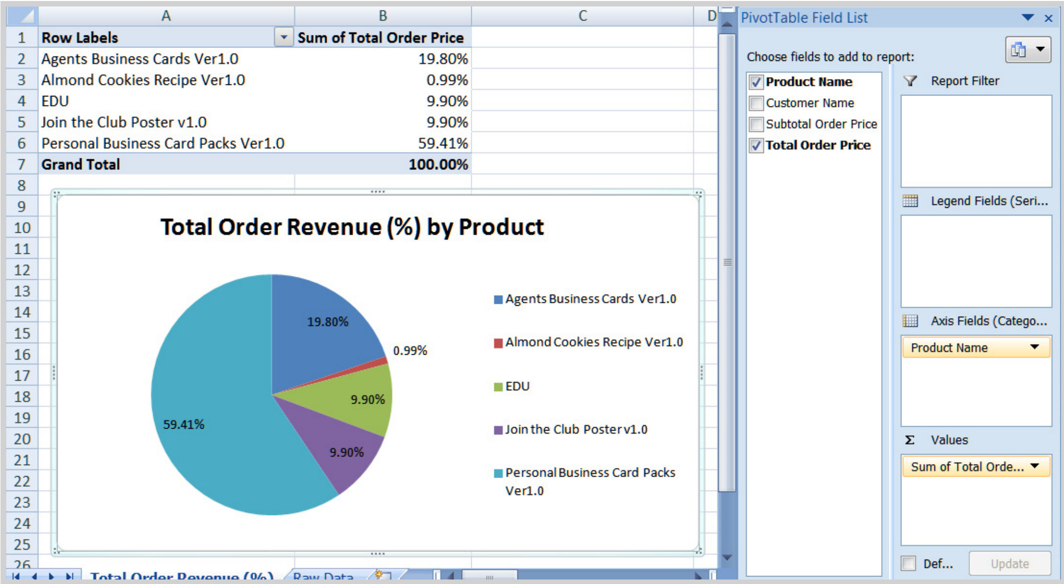
	A	B	C	D	E	F	G	H	I	J
1	Item ID	Order ID	Product Name	Customer Name	Subtot	Total Or	Bill_Add1	Bill_Add2	Bill_Add	Bill_City
2	44	38104	Almond Cookies Recipe Ve	User	1.2	1.2	2 My Street			My City
3	20	71104	Personal Business Card Pac	uStore Superuser	0.9	0.9	Netanya			Netanya
4	21	53104	Personal Business Card Pac	tomer gur arie	0.9	0.9	tt			tt
5	48	36104	Personal Business Card Pac	uStore Superuser	0.9	1.9	Netanya			Netanya
6	50	23204	Join the Club Poster v1.0	uStore Superuser	3	5003	Netanya			Netanya

In Excel, you can create pivot tables and charts to better present the data retrieved from the reports, apply formulas to the data, or add simple charts. You can then export the charts to create reports or presentations that show the success of your stores.

Creating a chart based on report results

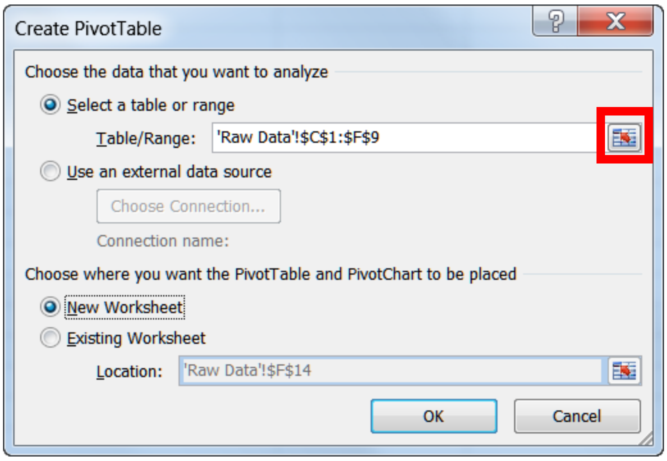
Let's say that you want to create a pie chart that shows the most profitable product based on the data retrieved in the **Order Item Listing** report (**Product Name** and **Total Order Price**).

The figure below shows a pivot chart created with selected data from the **Order Item Listing** report.



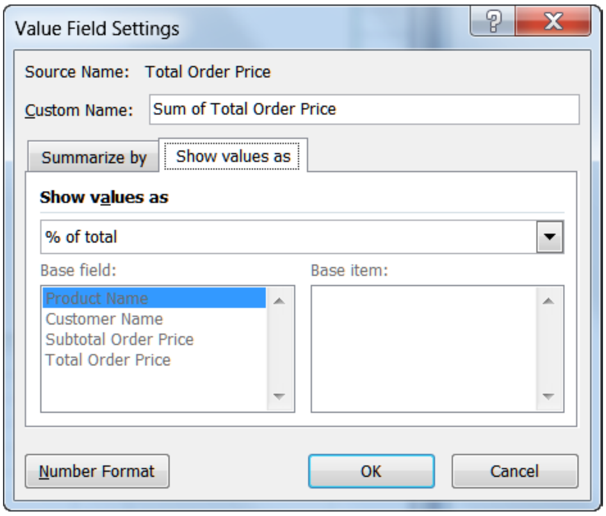
To create such a chart:

1. Download the **Order Item Listing** report.
2. In Microsoft Excel, in the **Insert** group, click **PivotTable>PivotChart**.
3. In the **PivotTable with PivotChart** dialog box:
   a. In the **Table/Range** box, type **RawDataRange**.
   Alternatively, you can click the **select a range** icon to select a specific range: columns **Product Name**, **Customer Name**, **Subtotal Order Price** and **Total Order Price**.
   b. Select the **New Worksheet** option.



   c. Click **OK**.
4. In the new spreadsheet, drag the parameters to the relevant chart sections, as follows:
   a. Drag **Product Name** to the **Axis Fields (Categories)** box.
   b. Drag **Total Order Price** to **Values** box.
   c. In the **Values** box, click the **Sum of Total Order Price** item and select **Value Field Settings**.
   d. In the **Value Field Settings** dialog box:
      i. Click the **Show values as** tab.

ii. The **Sum of Total Order Price** column shows prices.
To be able to see the contribution of each product as a percentage of the total revenue, in the **Show values as** list, select **% of total**.



e. Click **OK**.

f. Right-click the chart box and select **Change Chart Type**.

g. Double-click a pie chart format.

h. Right-click the pie chart and select **Add Data Labels**.

i. Click the chart title **Total**, and type a more descriptive title.
For example, type **Total Order Revenue by Product**.

5. Save the spreadsheet.

The above procedure is only an example of the kind of information that you can drill down to using the **Item Listing Report** and Microsoft Excel.

Learn more:

If you are new to Excel, or have difficulty creating charts and reports, there are many websites offering free and paid Excel training.

XMPie recommends http://www.lynda.com/Excel-training-tutorials/192-0.html

Updating a report table for repeated use

Viewing the Excel reports with graphs and pivot tables is very helpful and powerful feature. But you don't want to have to go through all those steps in Excel every time you want an updated report.

So, after you have added the charts to extra spreadsheets in the Excel file, XMPie enables you to update the default Excel report table that is downloaded.

To update the report table with the new Excel graphs and charts:

1. In the back office, click **Presets**.
2. Click **System Setup> Report**.
3. Select the report that you want to update.
4. The report that you downloaded and edited previously was the **Order Item Listing** report. Identify that the ID number of the **Order Item Listing** report is **16**.

5. Rename your Excel file **16.xlsx**.
6. Copy the excel file **16.xlsx** to this directory:
   `\\[[uStoreServerNameOrIP]]\uStoreShared\ReportTemplates`
7. Return to the back office, run and download the **Order Item Listing** report again.

Custom reports

All of the data relating to orders and products is available in the uStore database. So, in addition to the standard set of reports, you can create custom reports and add them to the list of available reports.

Creating custom reports is not covered in this training course.

Learn more:

For more information, see the *uStore User Guide*.

Review activity

1. Create a pivot chart that shows how much (total order price) each customer (customer name) has spent on each product (product name).
2. Which report would you run to identify the customers who are interested in receiving marketing and sales content from your store?
3. Which report helps you connect products to orders?

Module summary

You've reached the end of the Running Reports module. You should now understand what each uStore report provides and how to run and download a report.

This is the last module in this course. We hope that you enjoyed the basic steps to setting up your StoreFlow web-to-print portal.

Course wrap-up

You've reached the end of the StoreFlow basic skills course. We hope you enjoyed learning with XMPie training tools.

Here is a list of the modules covered in the course:

- Introducing uStore
- Setting up a store
- Adding a static product to your store
- Adding a dynamic product to your store
- Setting up workflow providers
- Working with product profiles
- Handling orders
- Running Reports

Feel free to ask your instructor to review a specific subject or procedure.

Additional training and documentation references

The following training modules and documentation will help enhance your knowledge on uStore:

Setting up uStore Presets

- Technote-0052: Configuring initial settings after uStore installation
- Technote-0051: Considerations when creating a new store

Setting up composite and upload products

- http://fx.xmpie.com/videos/uStoreUpload.aspx

Working with variables

- http://fx.xmpie.com/videos/Why_use_variables_for_uStore.aspx

Creating queues and creating triggers videos

- https://xmpie.box.com/s/mv0mku0ei13bsvqbj6e5
- https://xmpie.box.com/s/s9y0752vgzu7nojr7zey

Customizing uStore skin

- Technote-0043-Customize_uStore_7.0_skin

Upgrading uStore skins from version 7.0 to version 8.0

- Skin Migration Document

Adapting uStore skins for mobile devices

- Technote 0056 - Adapting uStore skins for mobile devices

FreeFlow Core Tutorial

- http://fx.xmpie.com/FreeFlowCoreTutorial_v2.pdf

Note: *Some of the references above have already been mentioned in relevant sections of this training guide.*